Comments on the presentation by A. López

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Roaming regulation by the European Commission until 2009, and proposed regulation: 2009-2012

<table>
<thead>
<tr>
<th>Year</th>
<th>Wholesale</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
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<tbody>
<tr>
<td></td>
<td>retail-originating</td>
<td>49</td>
<td>46</td>
<td>43</td>
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<td>retail-terminating</td>
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<td>22</td>
<td>19</td>
<td>16</td>
<td>13</td>
<td>10</td>
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</table>
Average revenue per minute for a roaming call (outgoing/ incoming) in the EU
After Roaming Regulation (June 2007):

1- all operators abide to big reduction in retail and wholesale charges (for outgoing and incoming calls)

2- same tariffs offered for prepayment and for contract (postpayment) segments, in the EU and in RoW

3- elimination of “preferred networks”, when calling to RoW countries: now all RoW countries are grouped in zone 1 and zone 2 (no price discrimination within zones)
Same tariffs offered for contract (postpaymt) and for prepayment segments, in the Eu and in RoW
-different strategies followed by each operator:

*while the nominal tariffs for incoming calls have increased (in terms of the bill paid)

*for outgoing traffic (calls made) not everyone has increased prices
Contract (postpayment) and prepayment evolution of nominal tariffs for outgoing calls,

(light blue, tariffs for RoW at January 2009)
Proportion of broadband lines in the market by type of operator

Telefónica de España
Operadores alternativos ADSL
Cable
Proporción de abonados a ofertas empaquetadas en la UE sobre población, 2008 (Fuente: Comisión Europea)
Empaquetamiento de servicios finales (Junio 08)

![Venn Diagram showing the overlap of Internet, Televisión, and Telefonía Fija services with numbers indicating the counts of each category.](image-url)
Grado de empaquetamiento de servicios, España junio 2008, (Fuente: CMT)
UMTS líneas and Datacards in Spain

Datacards

Líneas terminales UMTS
Audiovisual

Número de abonados a la TV de pago en España

<table>
<thead>
<tr>
<th>Año</th>
<th>Televisión satélite</th>
<th>TV Terrestre</th>
<th>Televisión por cable</th>
<th>TV-IP</th>
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</thead>
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<tr>
<td>2004</td>
<td>1.652.6</td>
<td>441.2</td>
<td>1.107.4</td>
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<td>2005</td>
<td>1.960.7</td>
<td>1.8</td>
<td>1.201.9</td>
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<td>2006</td>
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