

Comments on the presentation by A. López

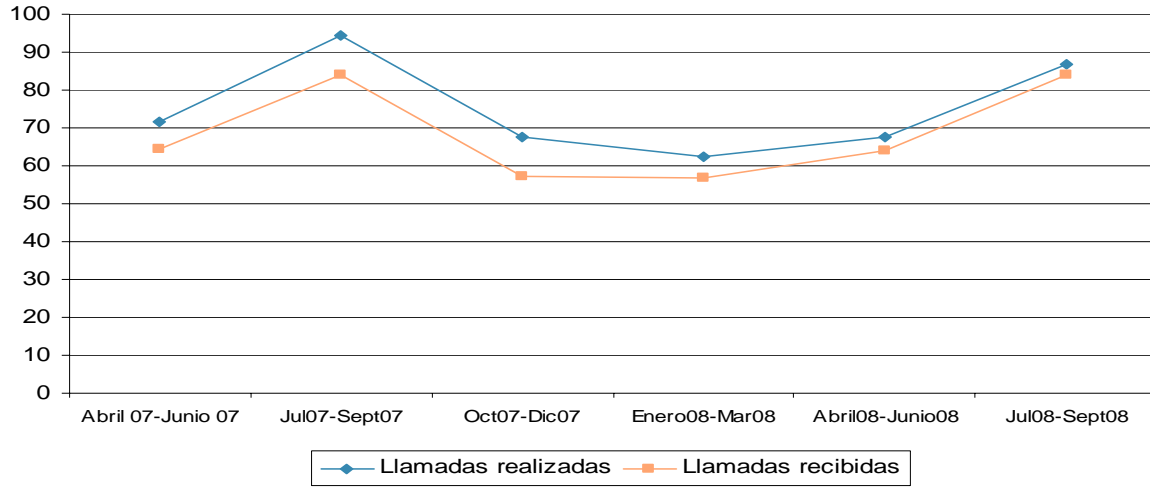
Iñigo Herguera

Comisión del Mercado de las Telecomunicaciones
CMT, Barcelona

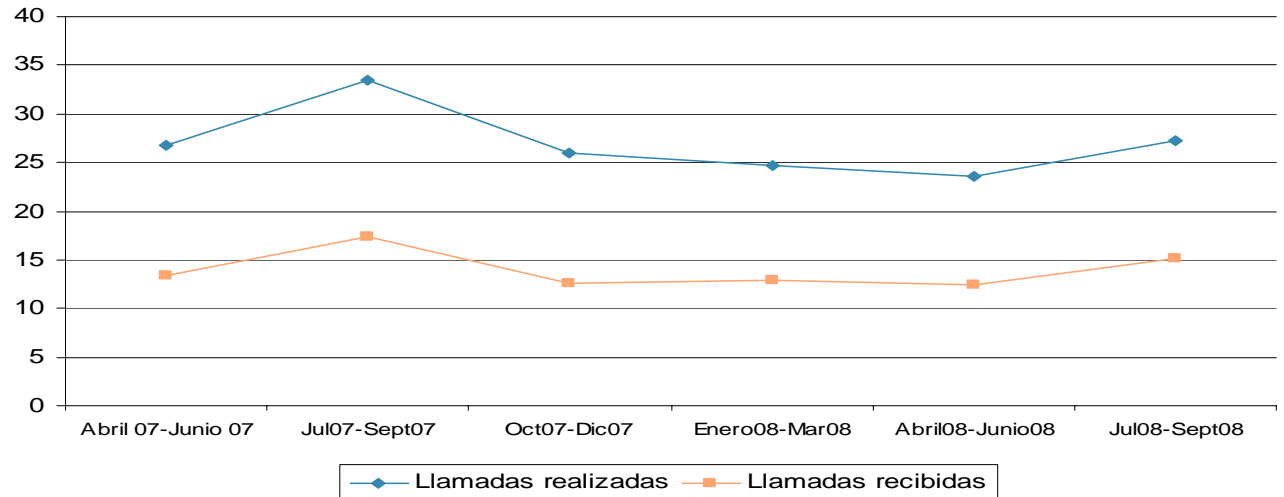
Roaming regulation by the European Commission until 2009, and proposed regulation: 2009- 2012

	2007	2008	2009	2010	2011	2012
wholesale	30	28	26	23	20	17
retail- originating	49	46	43	40	37	34
retail- terminating	24	22	19	16	13	10

Tráfico UE

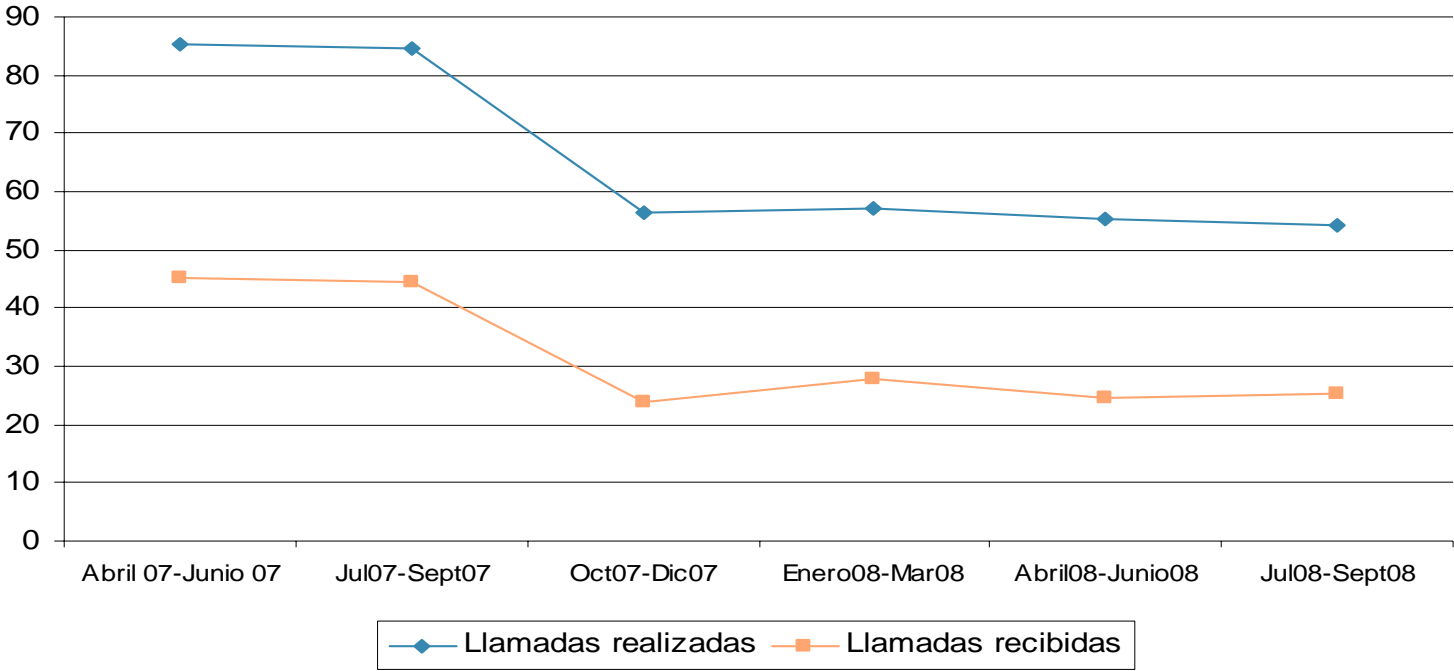


Tráfico NO UE



Average revenue per minute for a roaming call (outgoing/ incoming) in the EU

Llamadas UE



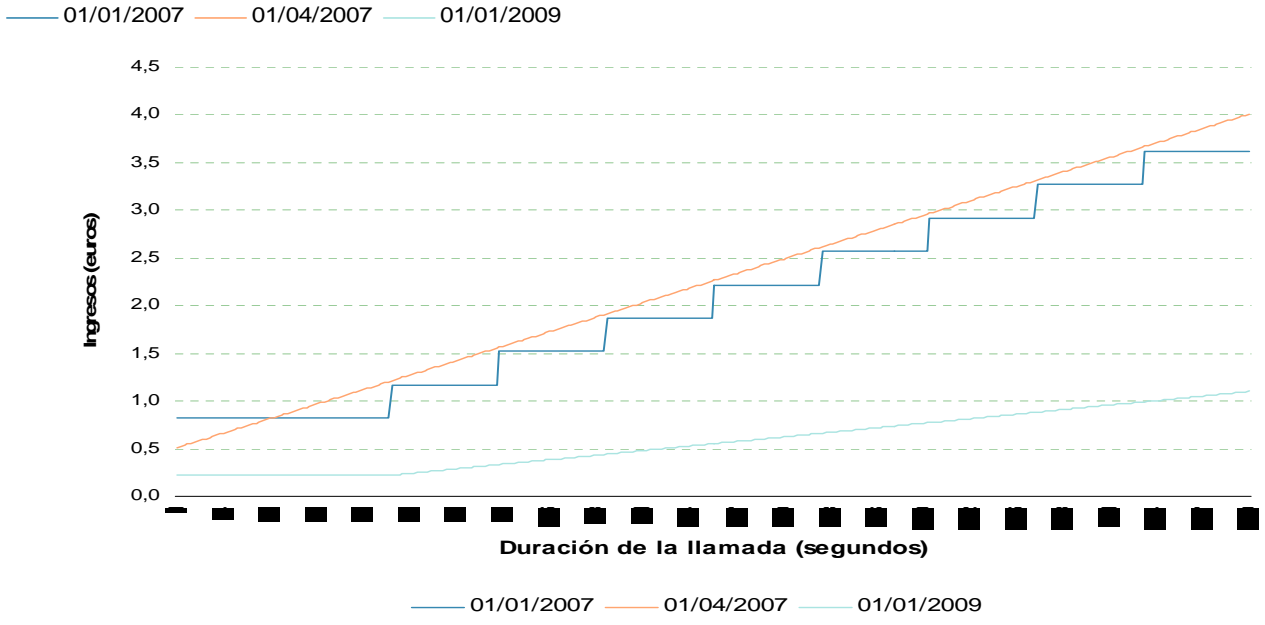
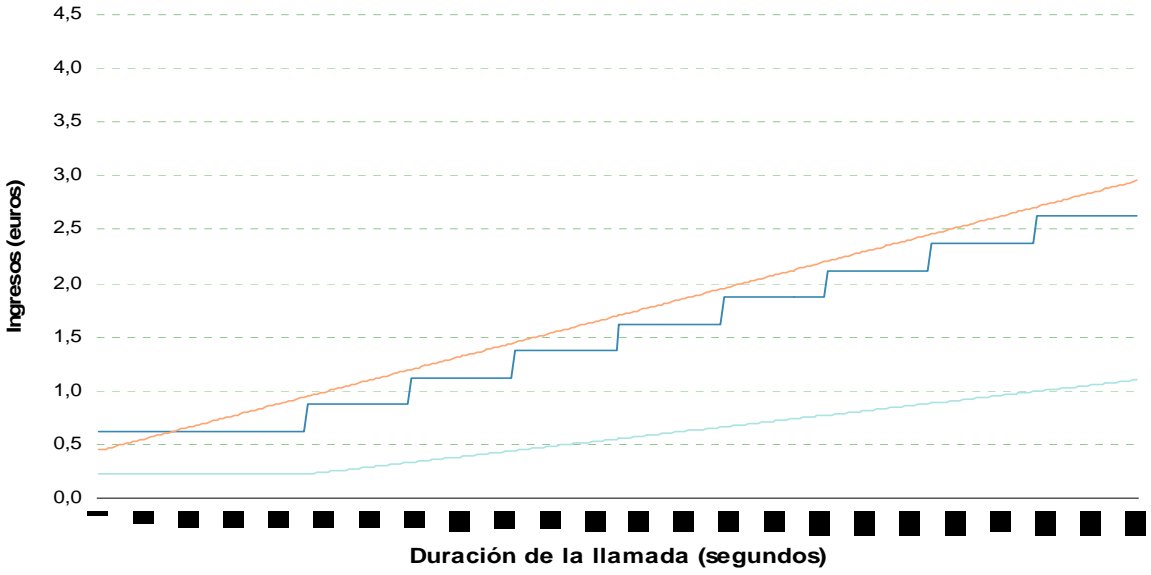
After Roaming Regulation (june 2007):

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

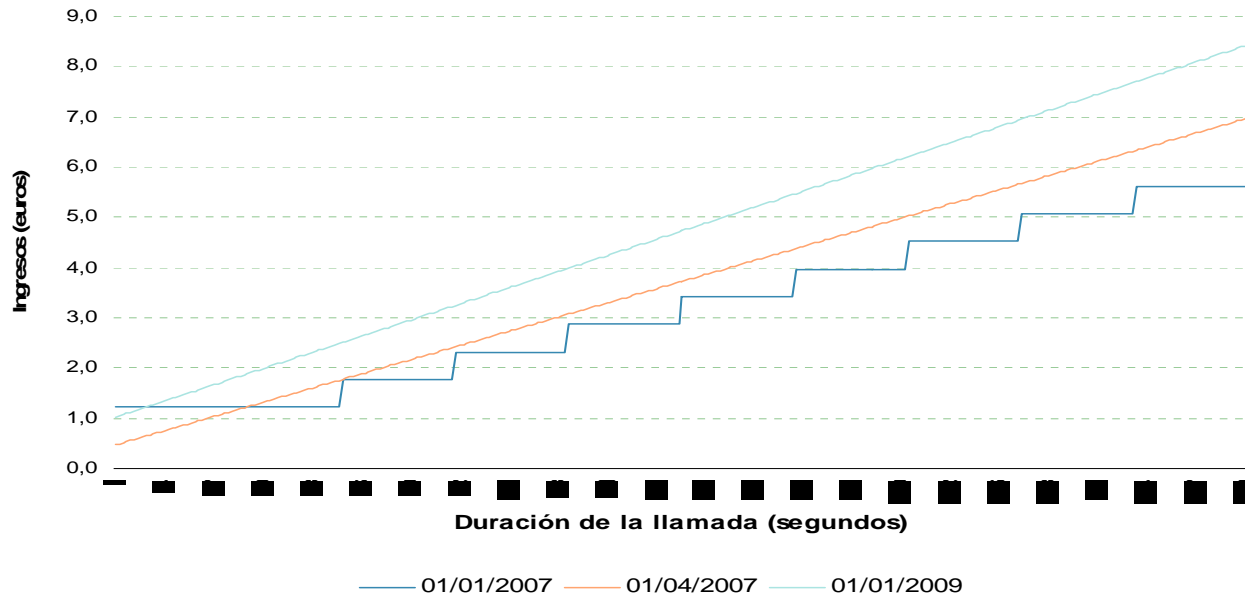
3- elimination of “preferred networks”, when calling to RoW countries: now all RoW countries are grouped in zone 1 and zone 2 (no price discrimination within zones)

Same tariffs offered for contract (postpaymt) and for prepayment segments, in the Eu and in RoW



-different strategies followed by each operator:

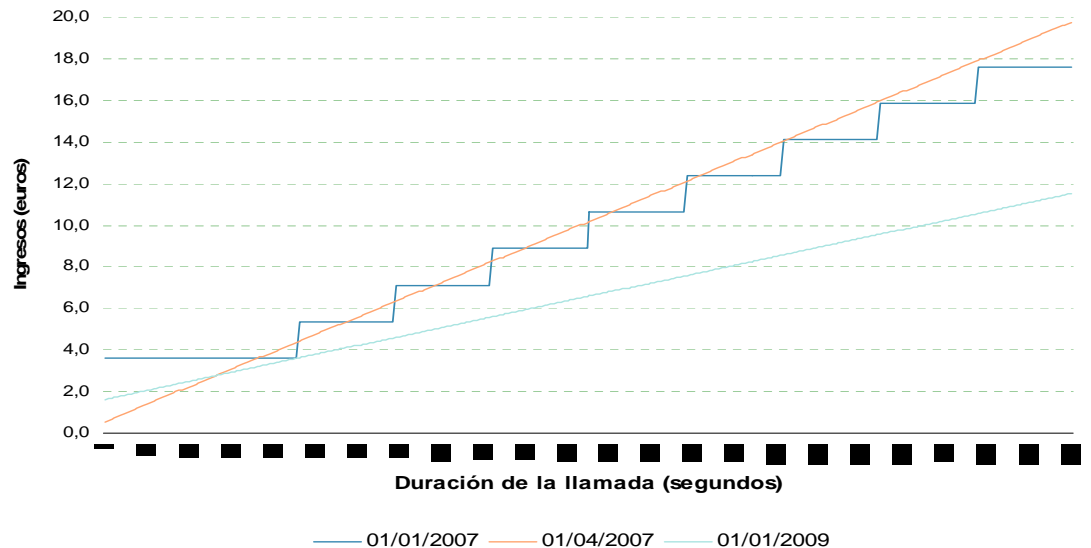
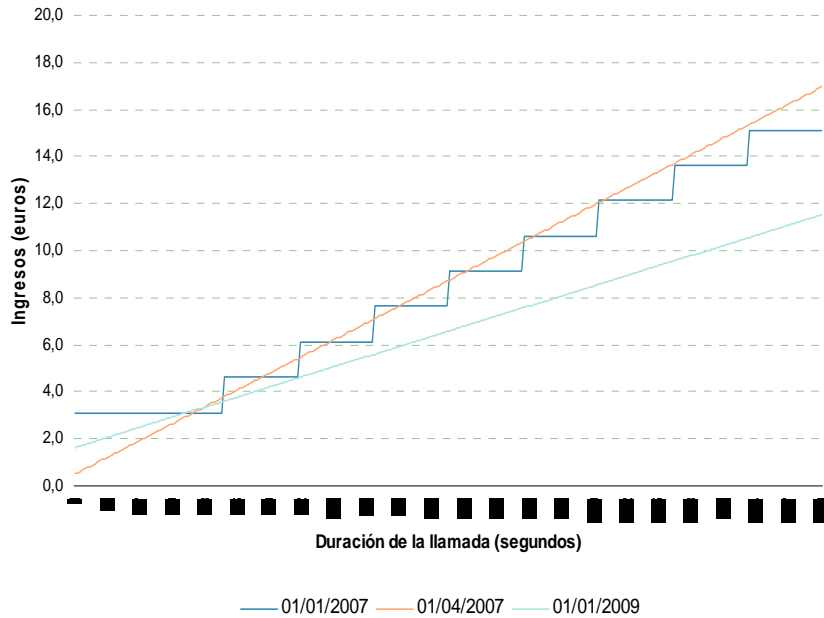
***while the nominal tariffs for incoming calls have increased (in terms of the bill paid)**



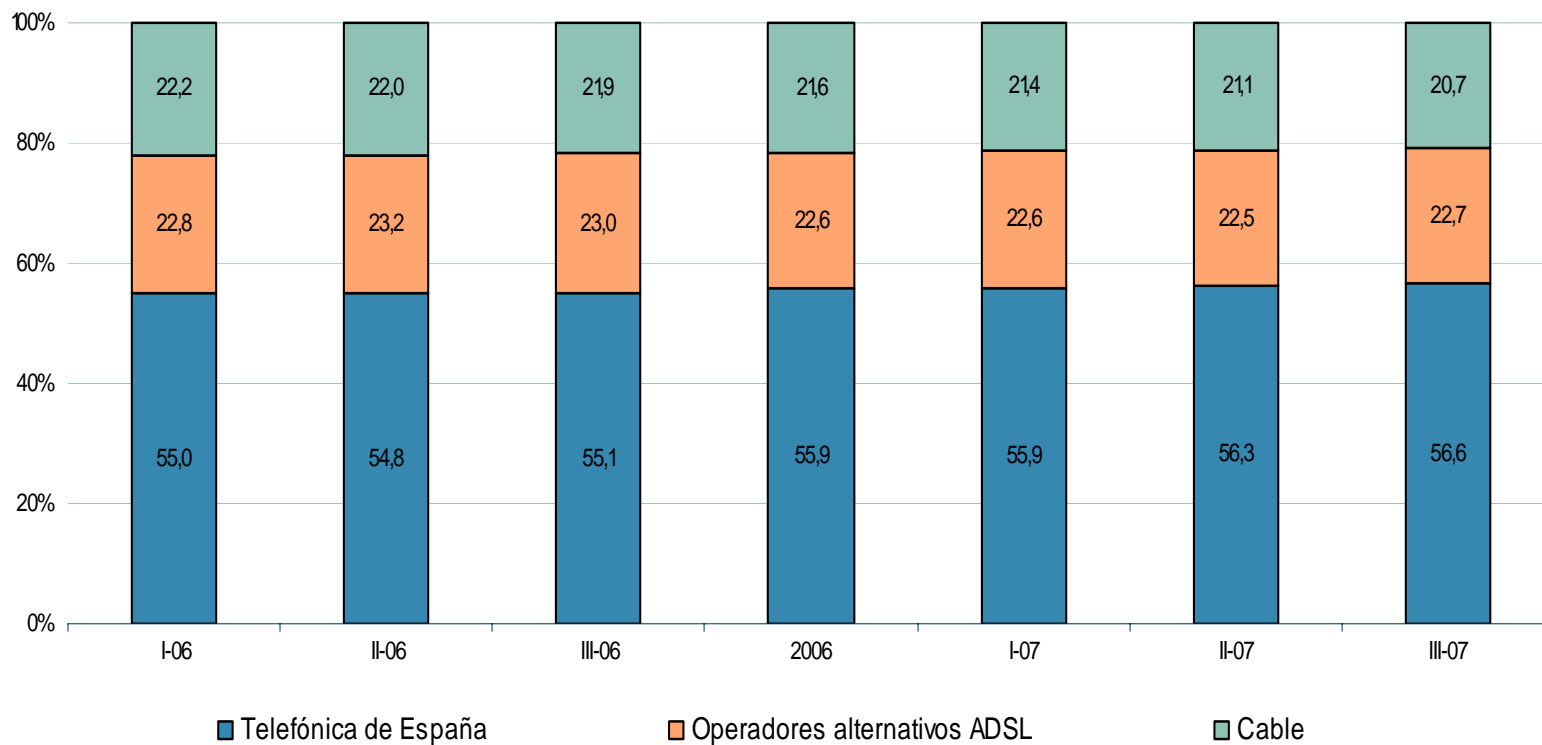
***for outgoing traffic (calls made) not everyone has increased prices**

Contract (postpayment) and prepayment evolution of nominal tariffs for outgoing calls,

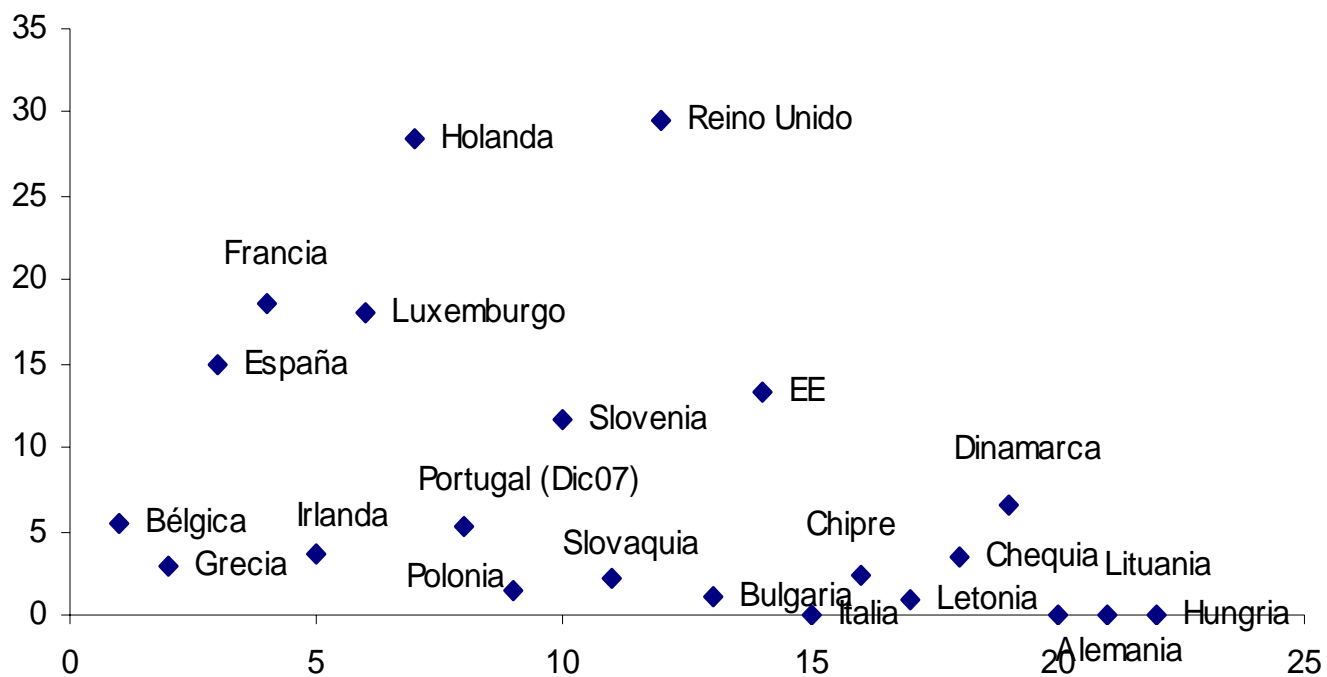
(light blue, tariffs for RoW at January 2009)



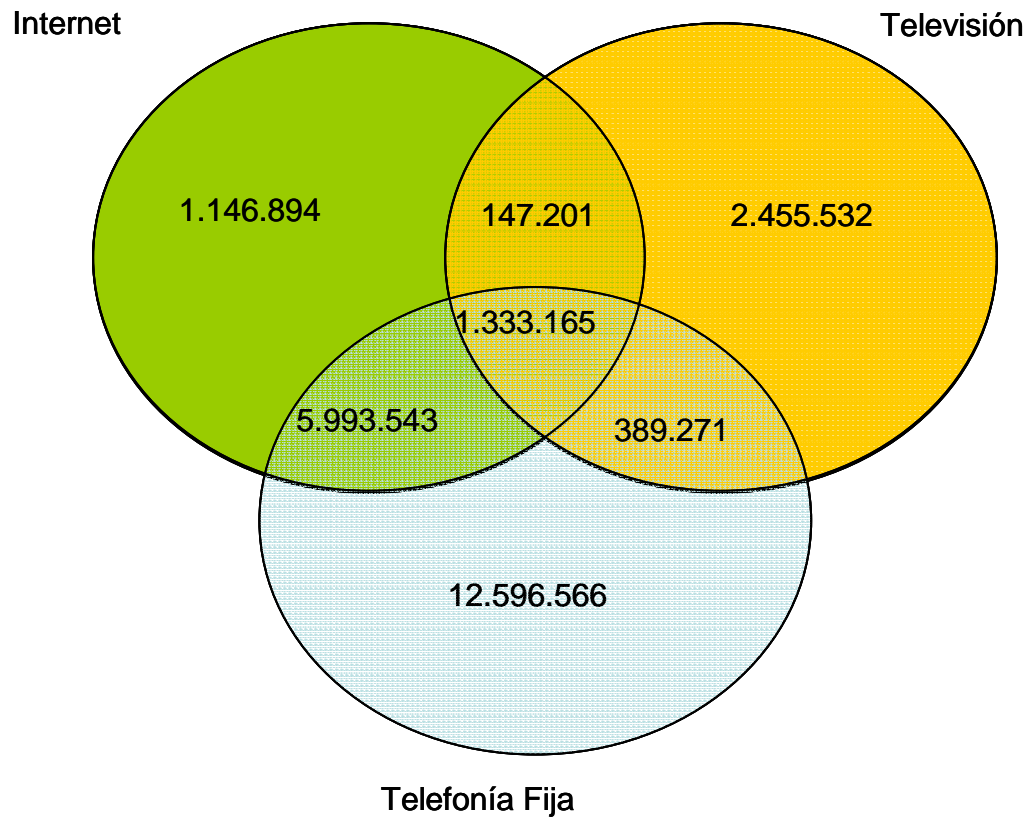
Proportion of broadband lines in the market by type of operator



Proporción de abonados a ofertas empaquetadas en la UE sobre población, 2008 (Fuente: Comisión Europea)

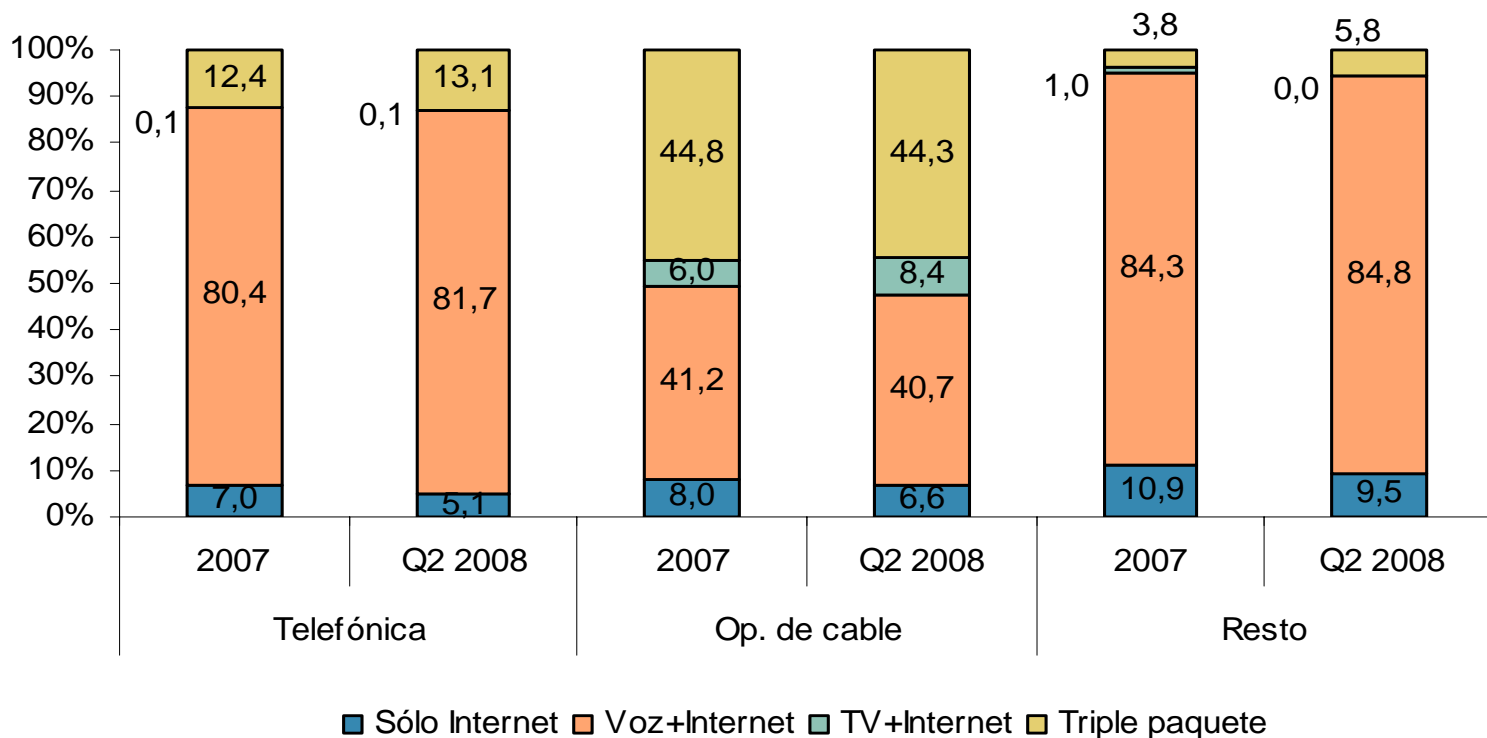


Empaquetamiento de servicios finales (Junio 08)

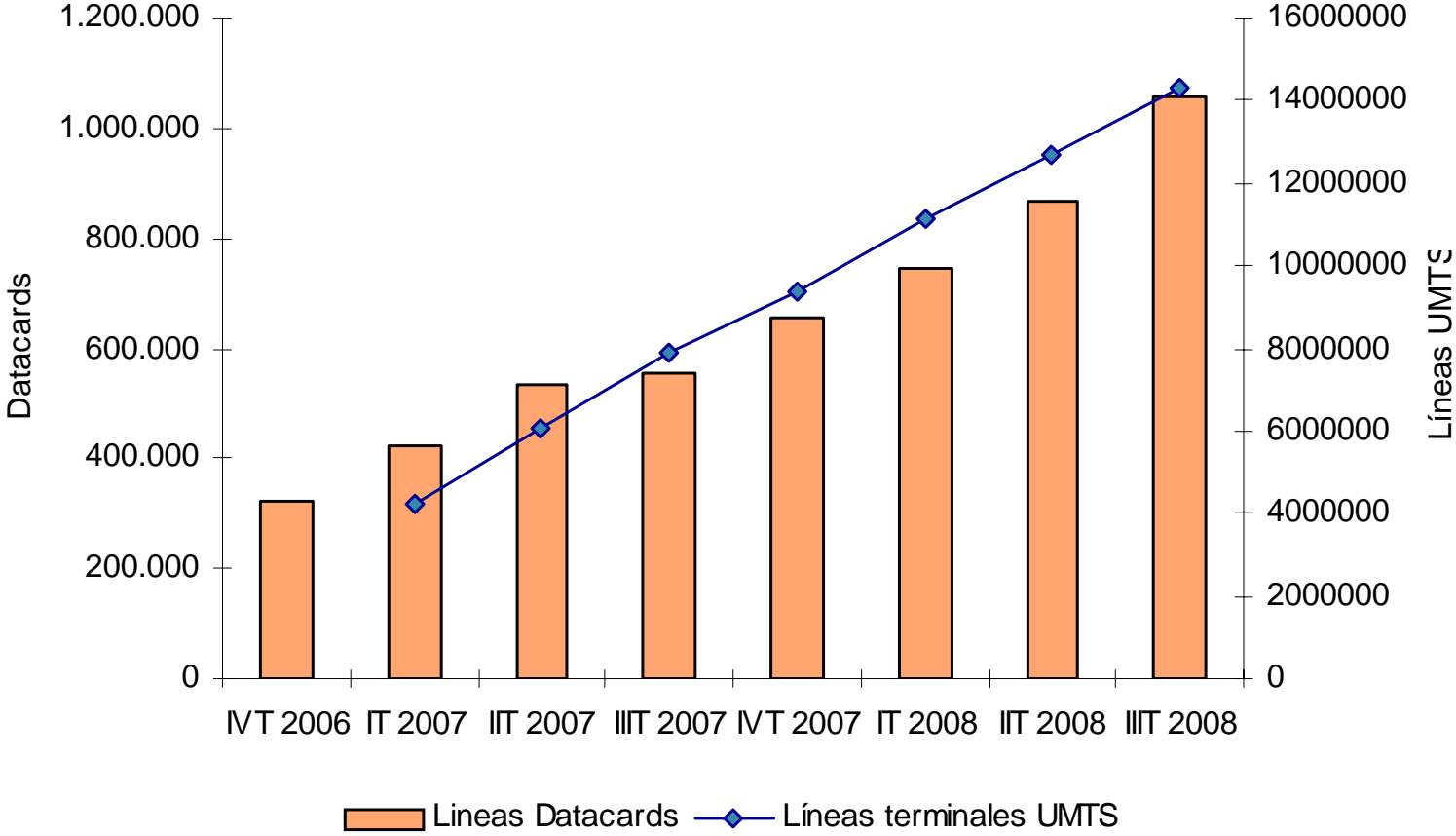


Grado de empaquetamiento de servicios, España junio 2008, (Fuente: CMT)

Grado de empaquetamiento por tipo de operador (en %)



UMTS lines and Datacards in Spain



Audiovisual

Número de abonados a la TV de pago en España

