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**ANNEX TO THE**

**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS**

**PROGRESS REPORT ON THE SINGLE EUROPEAN ELECTRONIC COMMUNICATIONS MARKET 2008 (14th REPORT)**

{COM(2009) 140 final}

# ANNEX 2

# MARKET OVERVIEW

## METHODOLOGICAL NOTE

The main sources for the data presented in this Annex are National Regulatory Authorities (NRAs), exceptions are noted. A validation meeting with representatives from NRAs took place in November 2008. Furthermore, draft versions of the charts in this annex (excluding data on tariffs) were distributed to the NRAs before this report was finalised for their comments.

The source for the population figures is Eurostat.

The source for the exchange rates is the European Central Bank. Prices are portrayed in euros in current prices. Purchase power parity methodology is, in principle, not used for the specific objective of this Report.

In each Report figures from previous years are revised, therefore the figure for a certain date may diverge from previous Reports.

Precisely:

Figures about the market in sections 1 (mobile interconnection, mobile operators, mobile number portability), 2 (fixed market, fixed number portability), 3 (prices for LLU), 4 (bundled offers), and 5 (broadcasting) were provided by the National Regulatory Authorities (NRAs) in response to a questionnaire on regulatory market data sent by the Commission in July 2008. Data on mobile subscribers (section 1) refer to October 2008 and come from the NRAs unless otherwise specified.

Data in section 3 on broadband access are provided by the NRAs and the national ministries through the Electronic Communications Committee (COCOM). Data have been collected from July 2002 to July 2007 three times a year, in January, June and October, whereas from July 2007 onwards they will be collected in January and July only. The latest figures in this report refer to 1 January 2009 unless otherwise specified.

Price information in sections 1 (mobile tariffs), 2 (PSTN tariffs) and 6 (retail leased lines prices) and partly in section 3 is taken from a study carried out for the Commission by Teligen, Strategy Analitics Ltd. These data are collected from primary sources (i.e. directly from the incumbent operators and new entrants) and checked by the NRAs.

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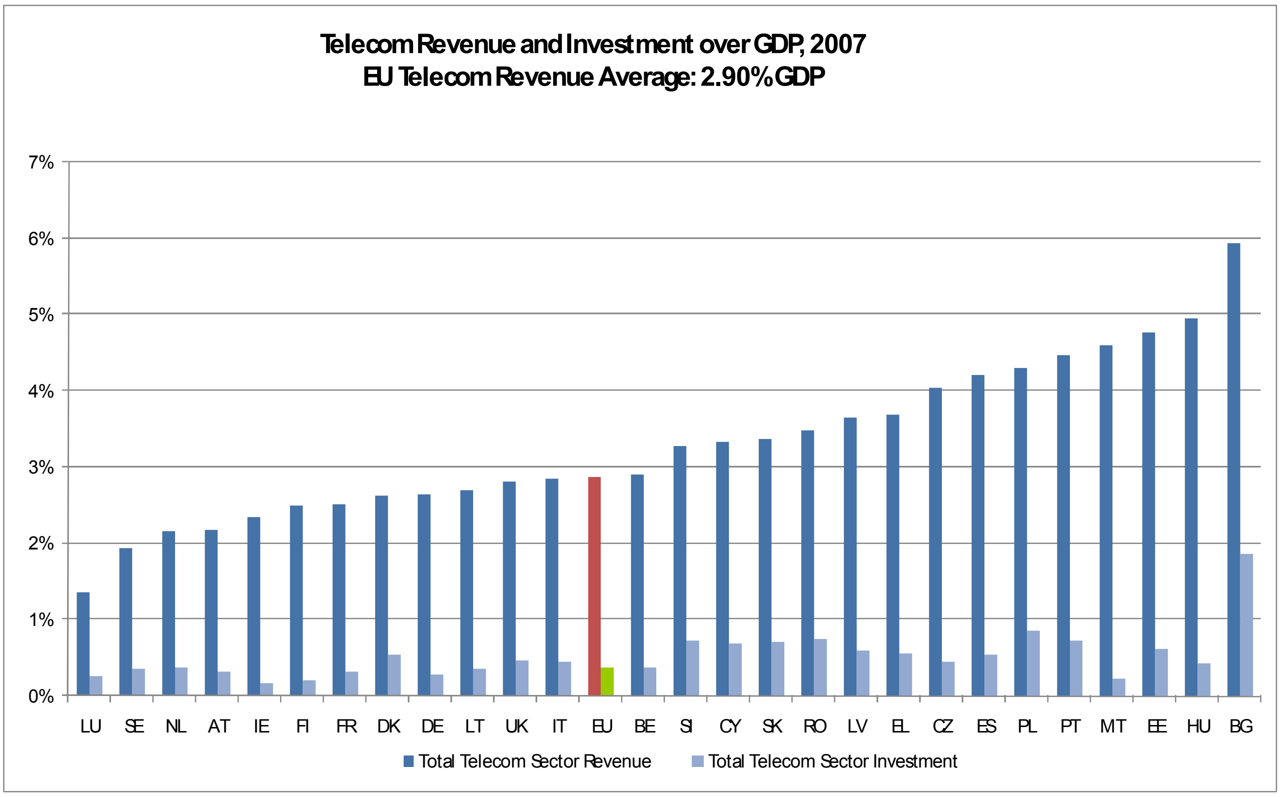
## INTRODUCTION: MARKET INDICATORS

In this introduction, for the first time some economic indicators in the market are presented.

The first graph is the telecom revenue and investment over GDP (constant prices) for 2007 in the EU. The total telecom sector revenue for 2007 represents 3% of the European GDP at constant prices for 2007. Investment in the telecom sector represents 14.74% of the revenues in the market. Alternative fixed operators are responsible of 45.78% of the investment in the fixed market. The fixed market accounts for 58% of the total investment in the sector while it accounts for 49% of the market in terms of revenues.

**Figure 1: Telecom Revenue and Investment over GDP, 2007**




Belgium: Change in revenues definition compared to last year: resellers are also included

Change in investment definition compared to last year: resellers are also included

Bulgaria: Total Revenue from Fixed market revenue from ADSL is not included

Investment by alternative operators Investments in payphones are included

Denmark: Total investment: Incumbent incl. Subsidiaries. Regarding investment by mobile operators, the companies undertaking tangible investments are involved in other activities than mobile communication and hence by our definition the investments cannot be confined to the market of mobile communication. Furthermore the provided figure comprises only TDC, Sonofon, Telia and Hi3G i.e. the companies who own a mobile network thereby excluding service providers.

Greece: 'Total revenue from fixed market' is defined as the total revenue (receipts and payments)

Investments: 'Total value of tangible investments in telecommunication networks' denotes the total gross investment

Ireland: The data that ComReg supplied was a limited sample as mentioned in the questionnaire and does not reflect total investment in the market.

Luxembourg: SEE Rapport stat. Annual 2007 at www.ilr.lu for definitions. Investment figures: provisional values.

The Netherlands: Total Revenue from Fixed market excluding all broadcast revenues (cable, satellite, terrestrial, IpTV together was 1.063). Investment: OECD estimates.

Austria: Total Revenue from Fixed market revenues from leased lines and interconnection services included. Total Revenue from Mobile market revenues from interconnection services and international roaming included

Investments in acquiring property (land and building) not included

Portugal: Investment figures for alternative and mobile operators are estimates. Total revenue from fixed market does not include leased lines services and internet services provision (ADSL, cable modem, etc.)

Poland: turnover in the telecommunications sector not available: only data concerning the total revenues from telecommunications activity.

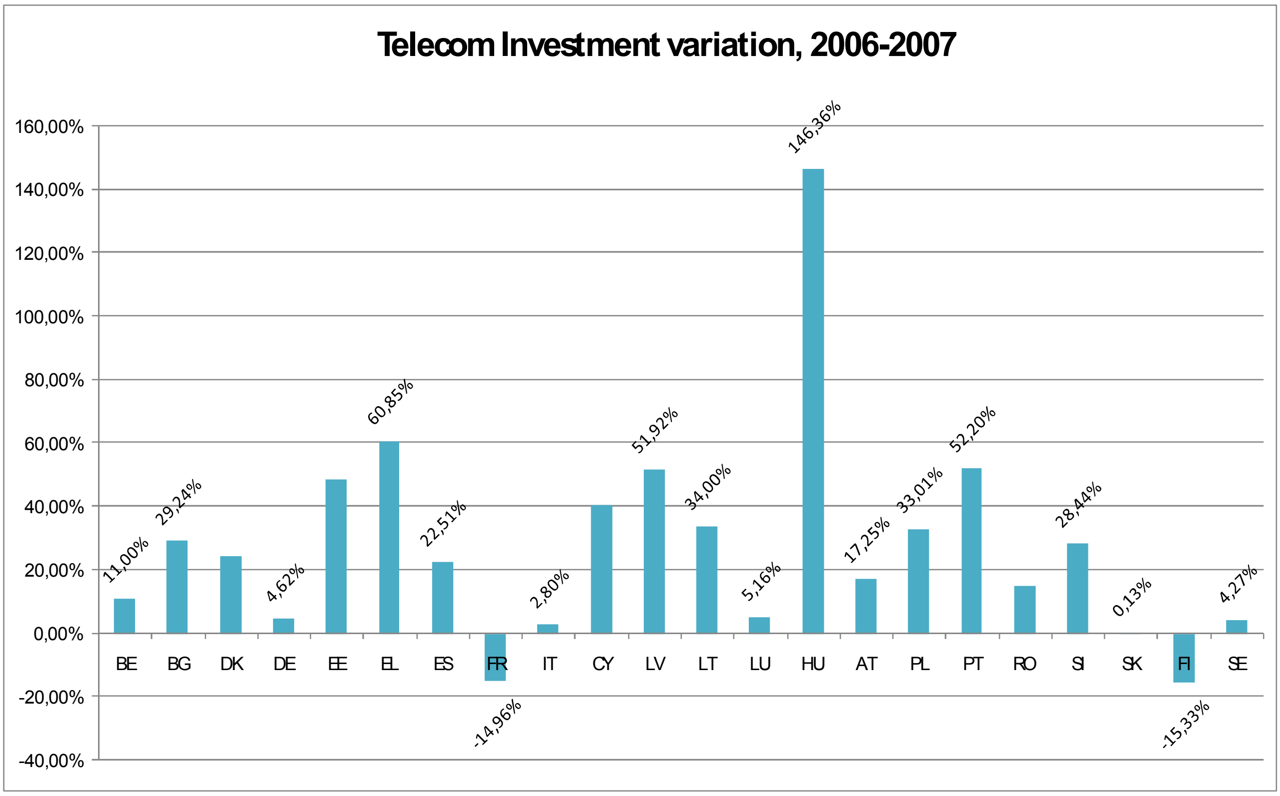
Finland Statistics Finland

Sweden: Turnover of the telecommunication sector includes revenues from end-users of fixed call services, mobile call services, Internet services, data communications services and mobile data traffic and MMS as well as revenues from interconnections in fixed and mobile networks and data communication services to operator. Revenues from TV-services are not included.

United Kingdom : Total Revenue from Fixed market: Revenues from services for which Ofcom collects data - includes retail and wholesale revenues; The Office for National Statistics estimates telecoms revenue at £61.5bn; data not comparable to that submitted previously as it no longer includes an estimate of non-regulated retail turnover (which contributed £10.0bn in the figures submitted for 2006); data are as appears in Ofcom's 2008 Uk Communications Market Report and is for the calendar year 2007.

Investments: OECD estimates

**Figure 2: Total Investment variation and revenues variation**




Belgium: Change in investment definition compared to last year: resellers are also included

Bulgaria: Investment by alternative operators Investments in payphones are included

Denmark: Total investment: Incumbent incl. Subsidiaries. Regarding investment by mobile operators, the companies undertaking tangible investments are involved in other activities than mobile communication and hence by our definition the investments cannot be confined to the market of mobile communication. Furthermore the provided figure comprises only TDC, Sonofon, Telia and Hi3G i.e. the companies who own a mobile network thereby excluding service providers.

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The Netherlands: OECD estimates.

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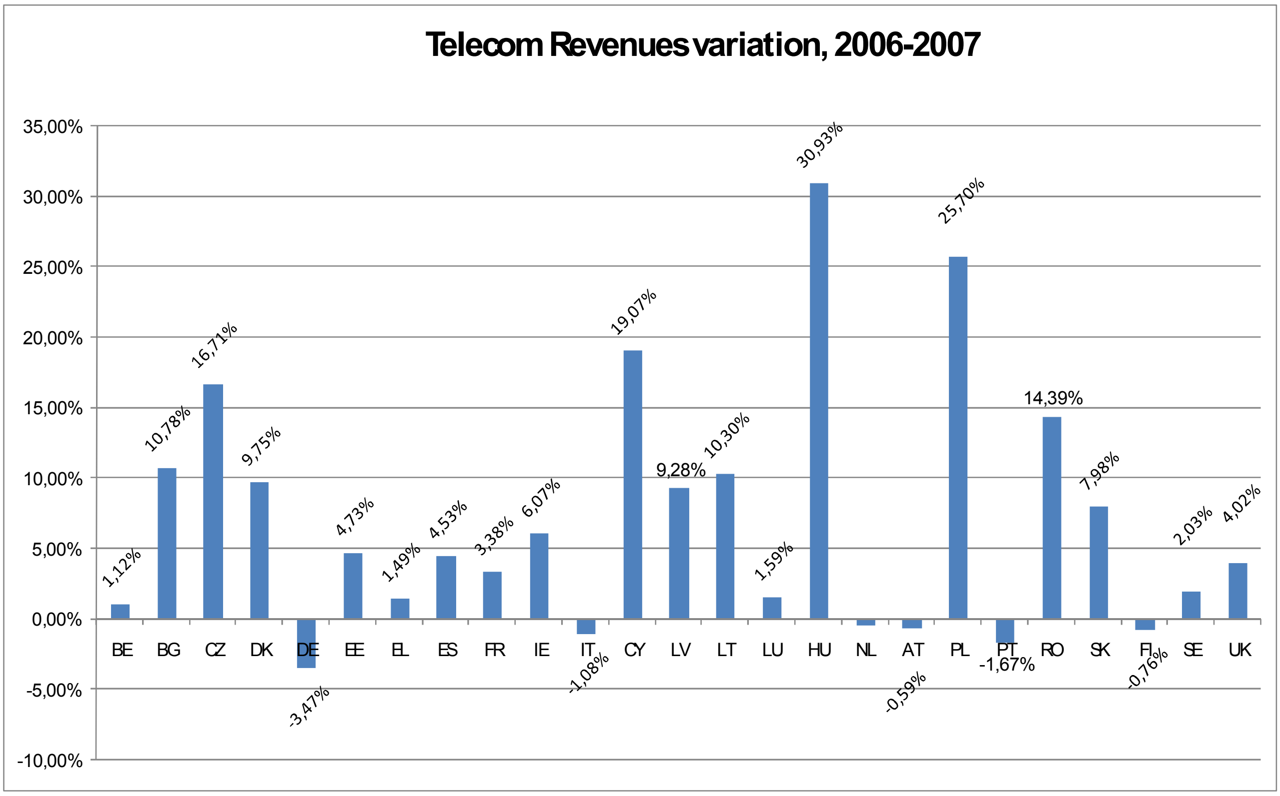
Portugal: Investment figures for alternative and mobile operators are estimates.

Finland Statistics Finland

United Kingdom : Investments: OECD estimates




Belgium: Change in revenues definition compared to last year: resellers are also included

Bulgaria: Total Revenue from Fixed market revenue from ADSL is not included

Denmark: Total investment: Incumbent incl. Subsidiaries. Regarding investment by mobile operators, the companies undertaking tangible investments are involved in other activities than mobile communication and hence by our definition the investments cannot be confined to the market of mobile communication. Furthermore the provided figure comprises only TDC, Sonofon, Telia and Hi3G i.e. the companies who own a mobile network thereby excluding service providers.

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Poland: turnover in the telecommunications sector not available: only data concerning the total revenues from telecommunications activity.

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# 1. MOBILE MARKET

This section provides information on the number of mobile subscribers and the penetration rate for mobile telephony services. It also shows the number of both mobile network operators and mobile service providers as well as the market share of the main players in each Member State.

## 1.1. MOBILE PENETRATION

This section provides information on the number of mobile subscribers and the penetration rate for mobile telephony services in each Member State. The growth in the penetration rate since October 2004 is also shown.

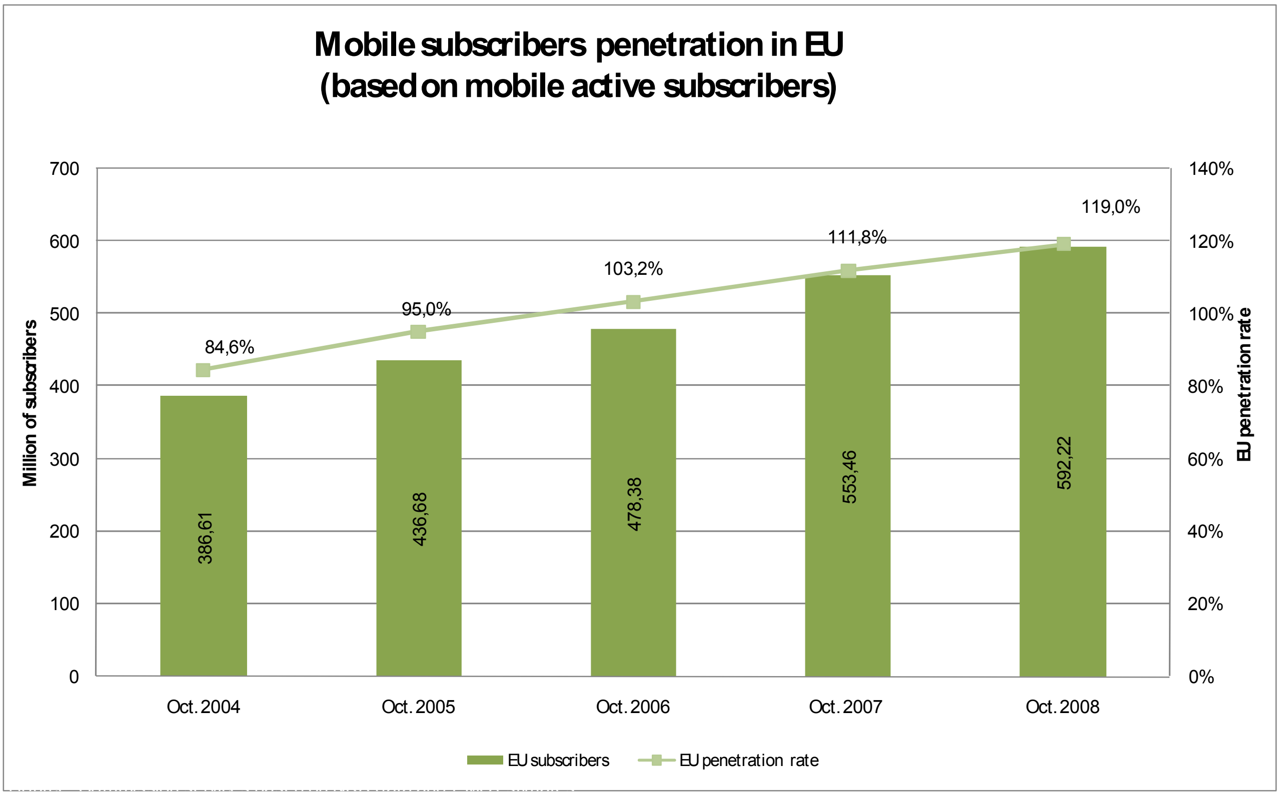
Where available, data have been provided by the National Regulatory Authorities (NRAs).

The EU average is a weighted average by the number of subscribers.

It should be noted that operators and regulators use different methods to count the number of subscribers. Some regulators distinguish between the overall number of mobile subscribers and the number of active subscribers. The table indicates where this information is available. Some operators consider the total number of users that have made or received a call or sent an SMS in the last 9 or 6 months, whereas others only consider the active users of the last 3 months. This has an impact on the penetration rate, especially in small countries

The chart below displays the number of mobile subscribers in the EU between 2004 and 2008. In October 2008 there were around 592.22 million mobile subscribers, with an increase of around 40 million since October 2007 (+15.69%). Penetration rate is 119% of EU population (+7.2 percentage points since last year).

**Figure 3: Mobile subscribers penetration in the EU**




Data include 2G and 3G mobile network operators' subscribers as well as mobile service providers' subscribers. Data are not comparable with previous reports (updated figures for previous years have been provided by some NRAs).

The following map shows the mobile penetration rate in the EU countries and the next chart shows the absolute number of mobile subscribers in each Member States (columns) and the penetration rate (dots), measured as the number of subscribers per 100 inhabitants. Where available figures include 2G and 3G subscribers for both mobile network operators and mobile service providers.

Penetration rate is above 100% in 23 Member States; Italy (152%), Lithuania (149%) and Latvia (142%) have the highest values.

**Figure 4: Mobile penetration by subscribers map 2008**

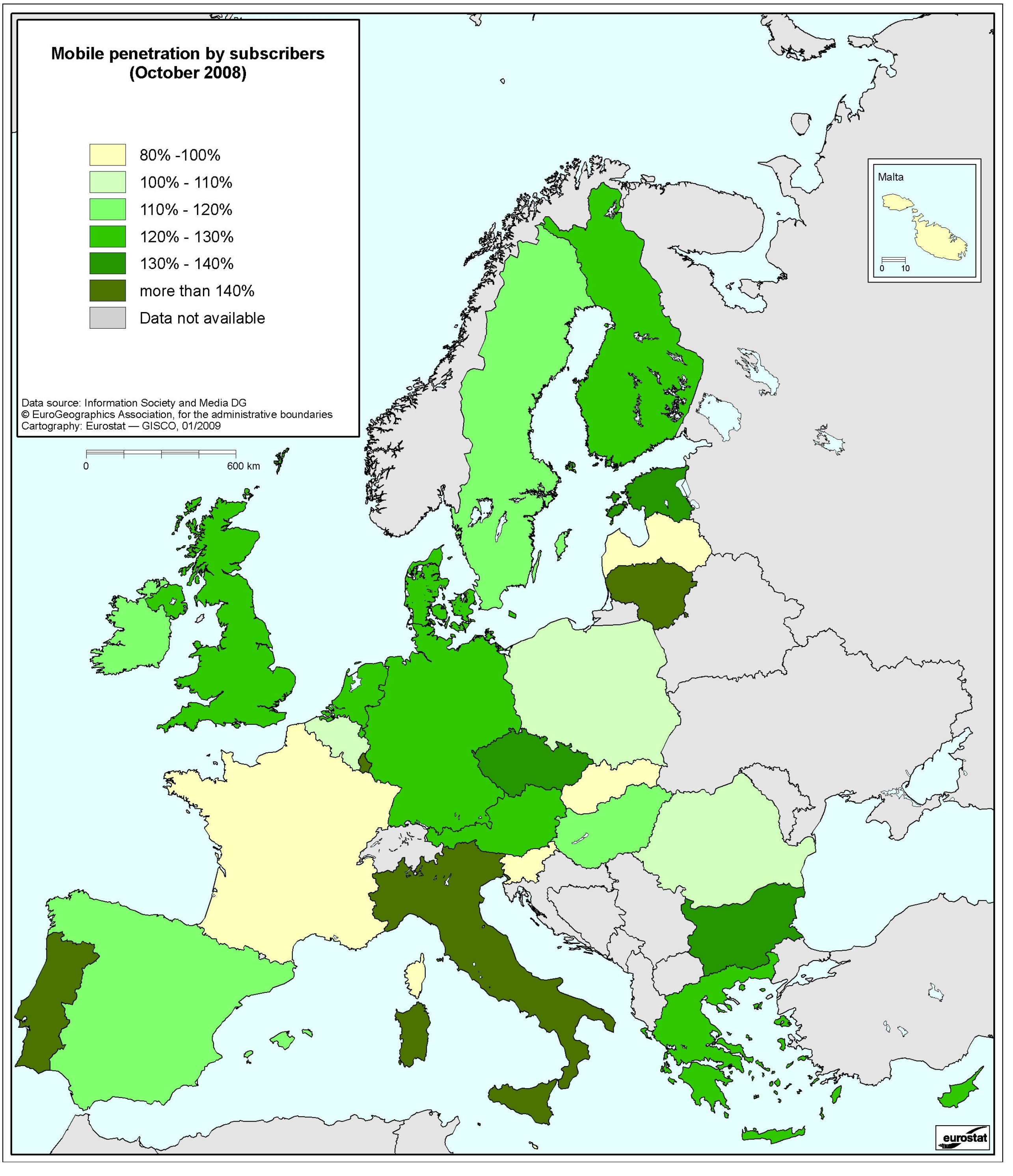
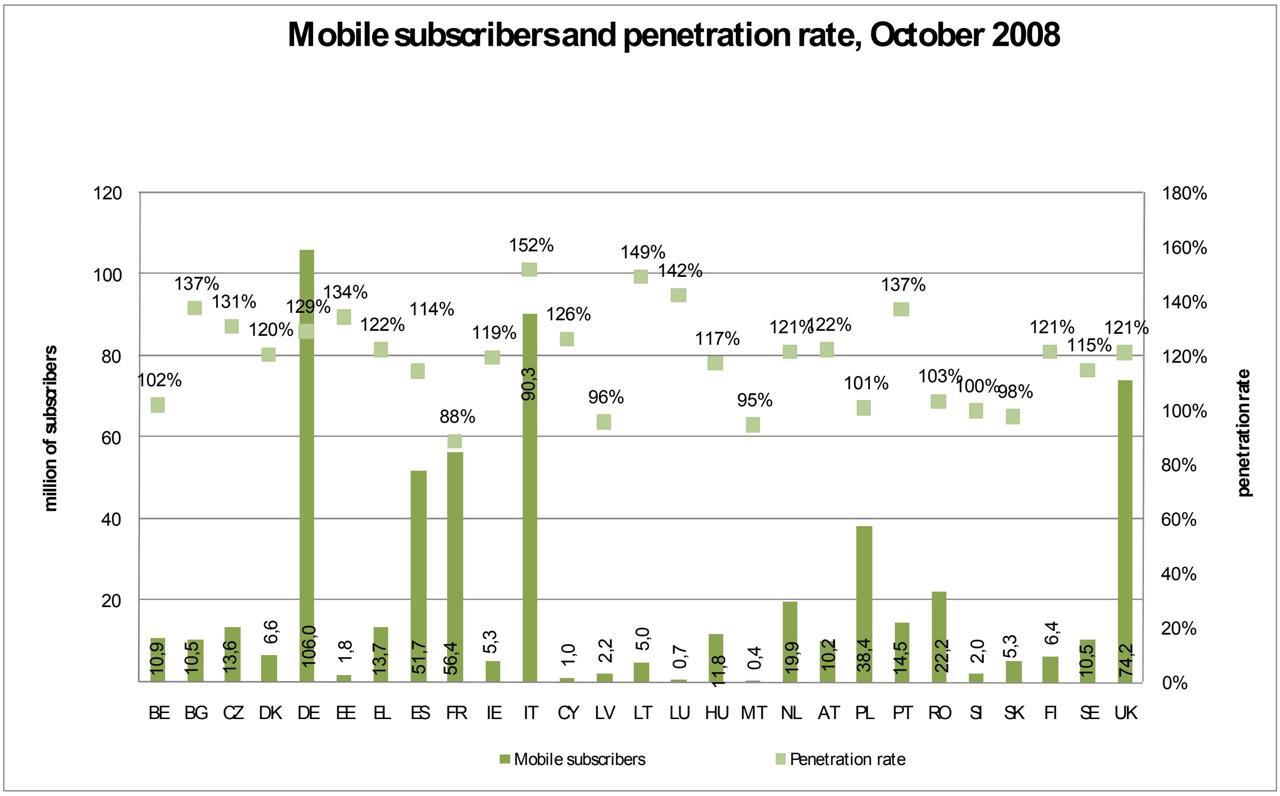


**Figure 5: Mobile subscribers and penetration rate 2008**



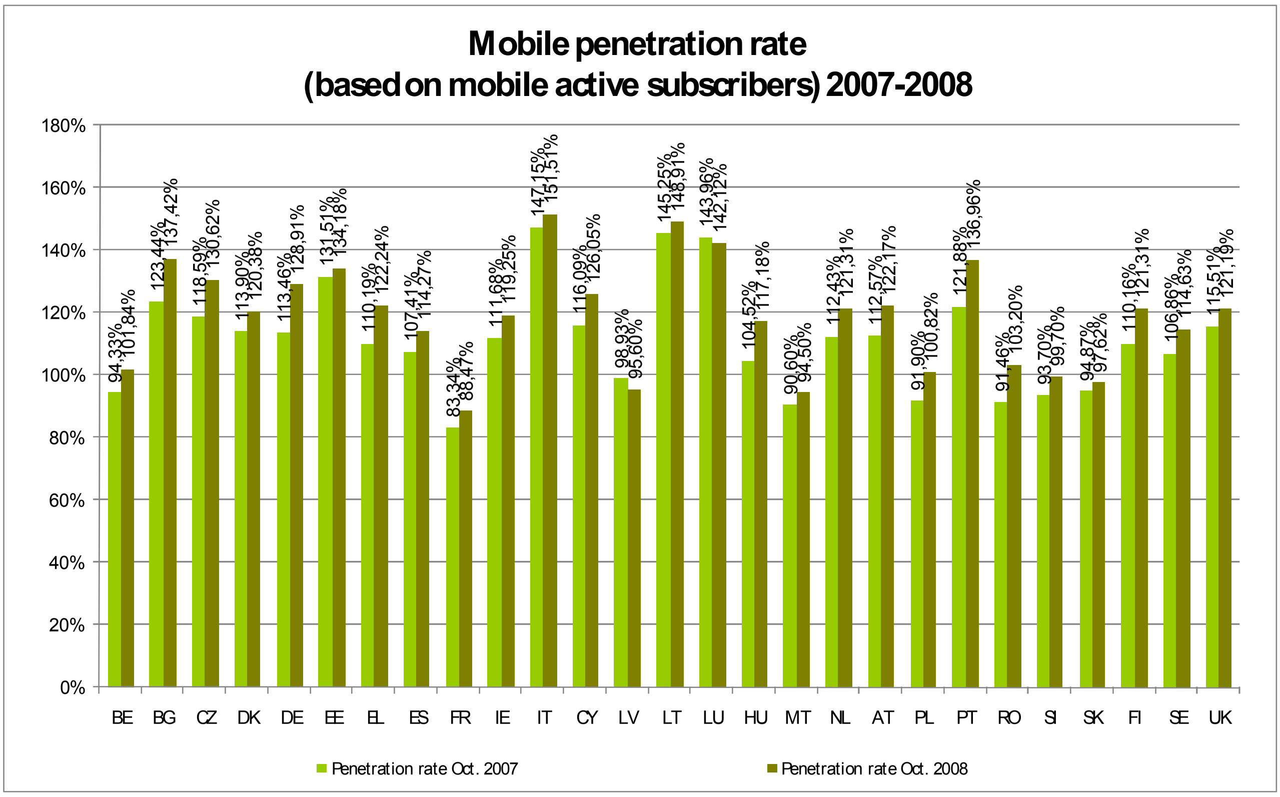

Austria: numbers as of 30.06.2008

Finland: amount of subscriptions on 30.6.2008

United Kingdom: Data as of July 2008

The following chart displays for each Member State the growth of the mobile penetration rate between October 2007 and October 2008, unless otherwise indicated. Penetration rate has grown significantly in Germany (+15 percentage points (p.p.)), Portugal (+15 percentage points (p.p.)), and Bulgaria (around +14 p.p.).

**Figure 6: Mobile penetration rate 2007-2008 by Member State**



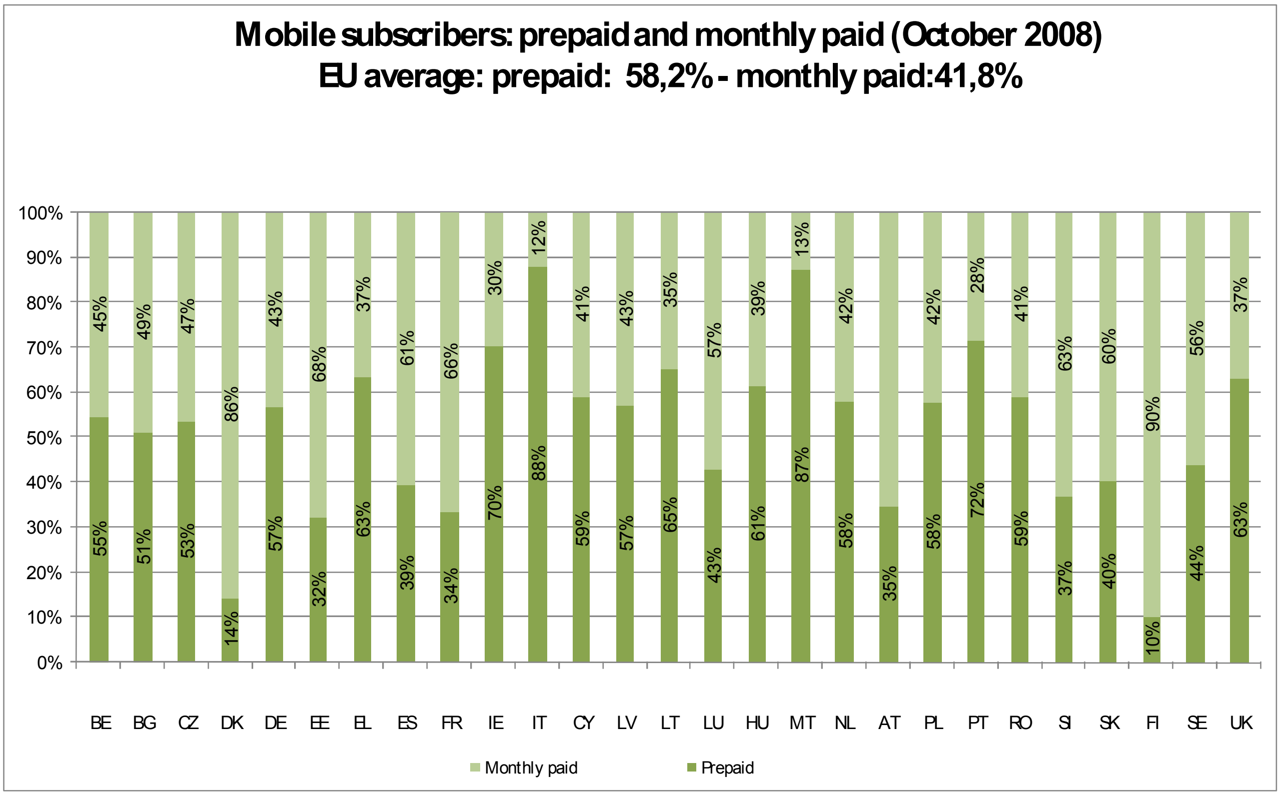

Austria: numbers as of 30.06.2008

Finland: amount of subscriptions on 30.6.2008

United Kingdom: Data as of July 2008

The following chart shows, for each Member State split between post-paid and pre-paid subscribers. At EU level, 58.2% of subscribers use a pre-paid system. In four countries pre-paid subscribers are more than 70% and in Italy and Malta they are above 85%.

**Figure 7: Mobile subscribers: prepaid and monthly paid split 2008**




Austria: numbers as of 30.06.2008

Finland: amount of subscriptions on 30.6.2008

United Kingdom: Data as of July 2008

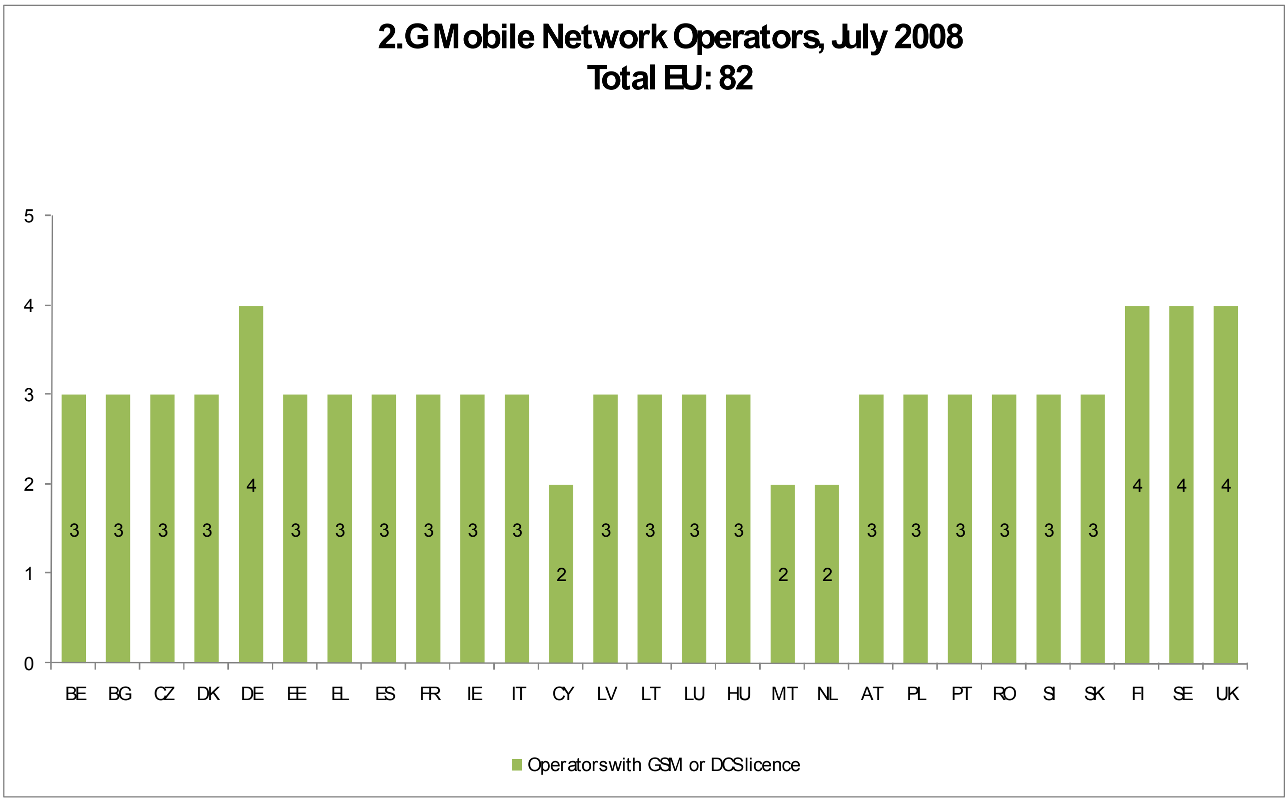
## 1.2. PLAYERS IN THE MOBILE MARKET

This section shows the number of mobile licenses granted in each Member State for the provision of mobile services (2G/3G mobile network operators and mobile service providers). License for analogue mobile service are not phased out in Poland (phasing out: 17-12-2016).

Data have been provided by the national regulatory authorities and refer to the situation in July 2008.

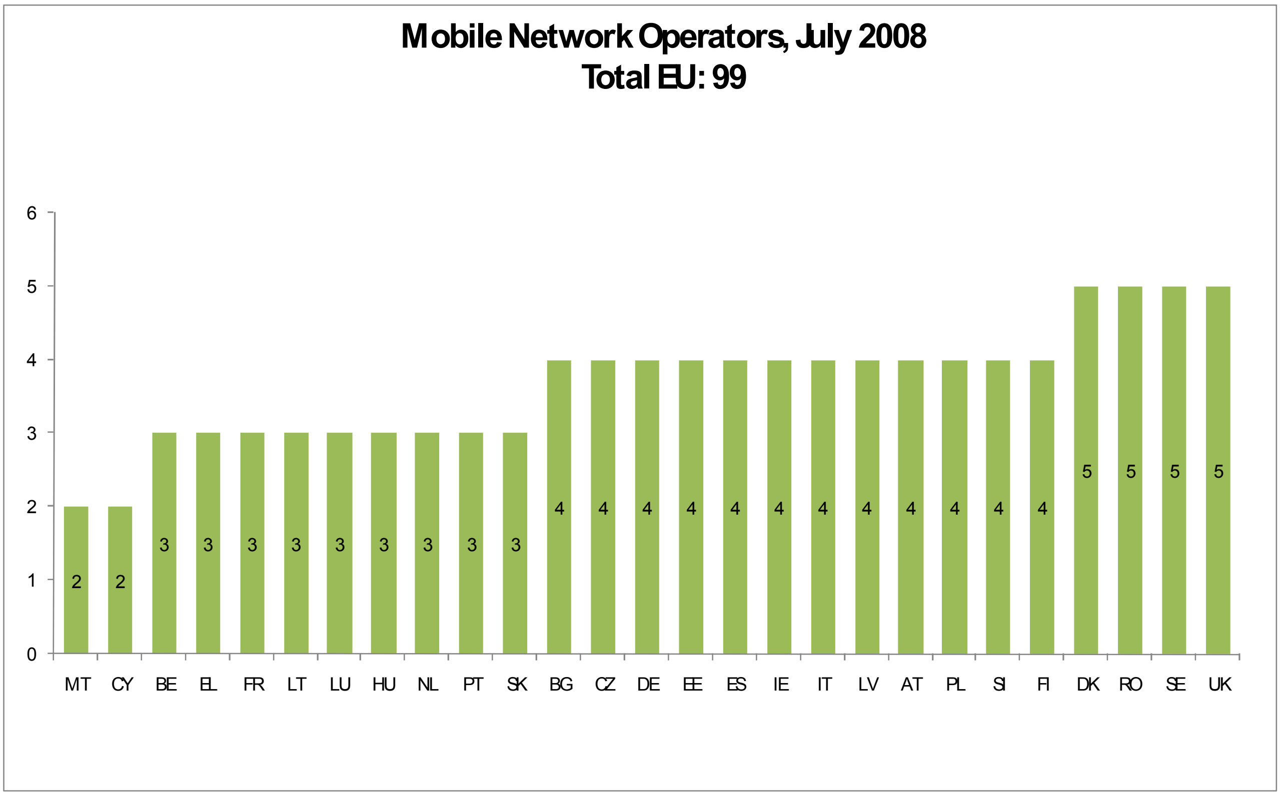
The following chart shows the number of mobile network operators licensed to provide digital mobile services (second-generation). The number of operators indicates the real magnitude of the choice of operators for customers of digital mobile services, since very often operators have licences for both GSM 900 and DCS 1800. Mobile network operators have been identified as having only GSM 900 or only DCS 1800 frequencies, or both (in which case they have usually been granted a GSM 900 licence which has subsequently been extended to the DCS 1800 band).

**Figure 8: 2.G Mobile Network Operators**




France: Mobile national operators for mainland France only. Overseas departments are excluded.

**Figure 9: Mobile network operators 2008**




The following two figures indicate the number of UMTS licenses granted in each Member State and the status of the launch of 3G services: trial (tests with a closed group of selected users) or commercial (fully commercial services open to any users at standard tariffs).

**Figure 10: UMTS licences, July 2008**

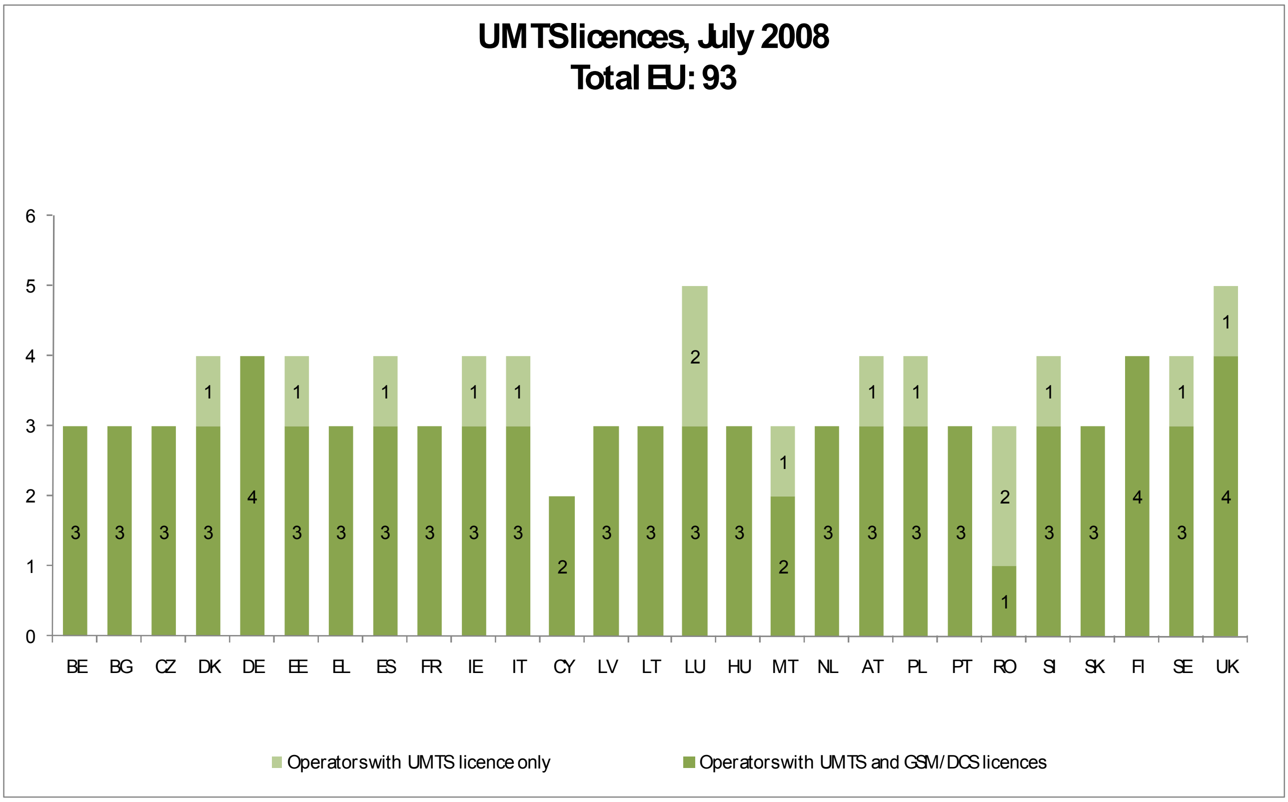
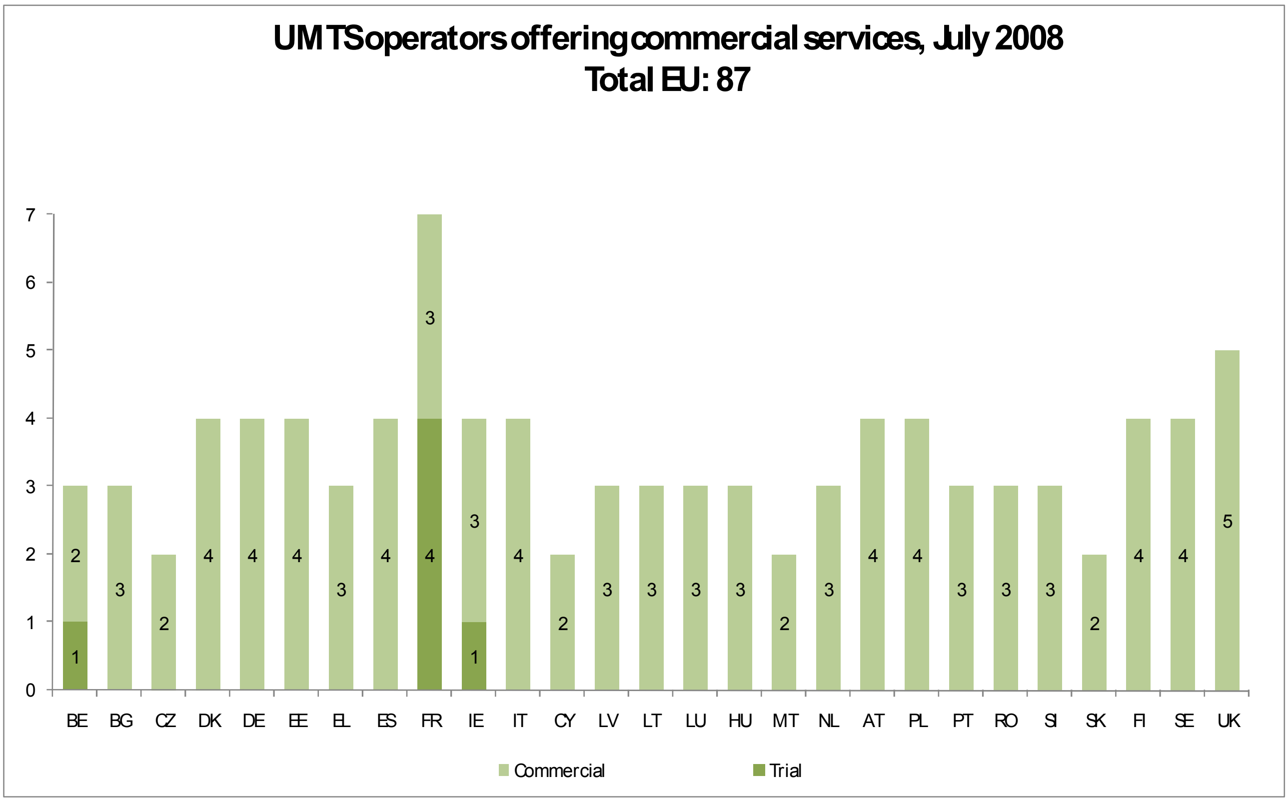

UMTS licences, July 2008
Total EU: 93
0
1
2
3
4
5
6
BE
BG
CZ
DK
DE
EE
EL
ES
FR
IE
IT
CY
LV
LT
LU
HU
MT
NL
AT
PL
PT
RO
SI
SK
FI
SE
UK
Operators with UMTS licence only
Operators with UMTS and GSM/DCS licences

**Figure 11: UMTS operators offering commercial services, July 2008**




## 1.3. MOBILE OPERATORS' MARKET SHARES

The following charts present the market shares, based on subscribers, of the leading operator, the main competitor and the other competitors in the mobile market. Operators' market shares have been calculated for the overall mobile market (including DCS 1800/GSM 900 and UMTS subscribers).

Data concerning market shares are based on the data supplied by the NRAs except for where they are confidential. Data for these countries are estimates from European Mobile Communications and refer to 3Q 2008.

In Cyprus one operator largely dominates the market with more than 85%. In Slovenia the leading operator retains more than 60% of the market. In 15 Member States the leading operators have between 40% and 55%. The lowest market share of the leading operator is in the United Kingdom, with 25%. EU average has been weighted using mobile subscribers for each country. At EU level, the market share of the leading operator and its competitors decreased on average compared to 2007.

**Figure 12**

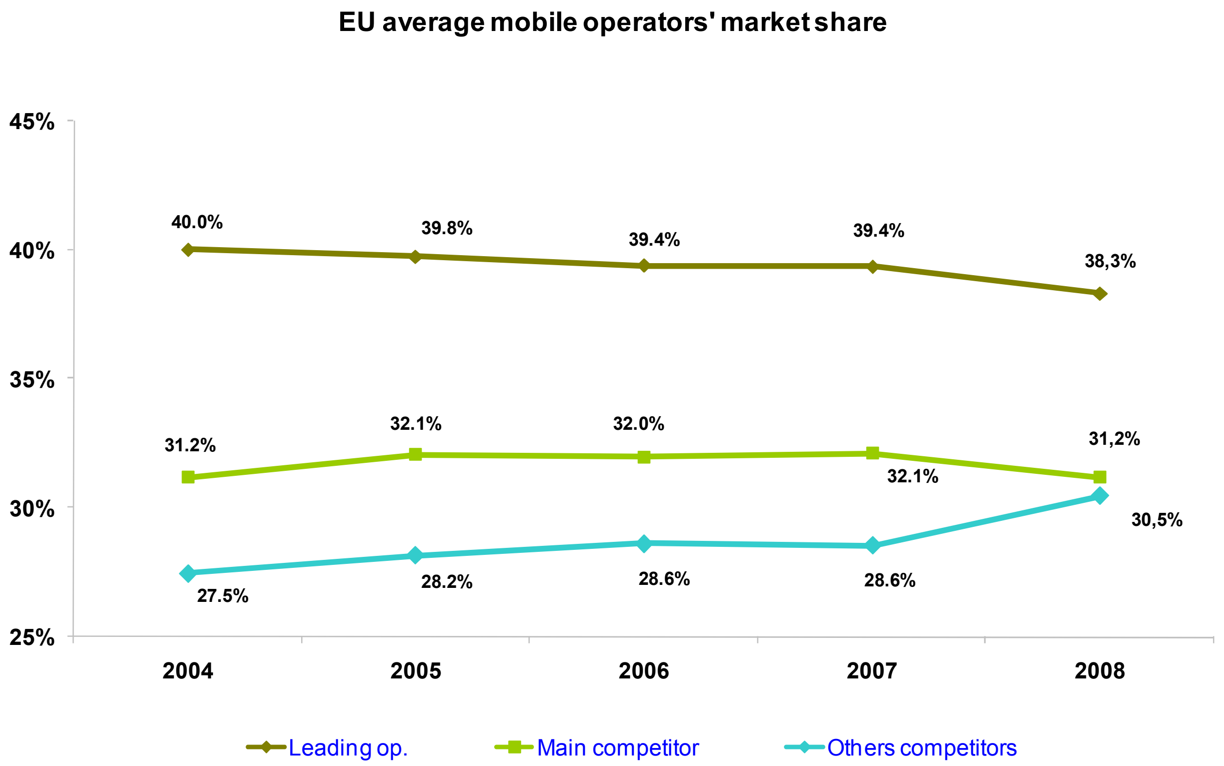

EU average mobile operators' market share
45%
40%
35%
30%
25%
40.0%
39.8%
39.4%
39.4%
38,3%
31.2%
32.1%
32.0%
32.1%
31,2%
30,5%
27.5%
28.2%
28.6%
28.6%
2004
2005
2006
2007
2008
Leading op.
Main competitor
Others competitors

**Figure 13: Market share of the leading operator in the market, October 2008**

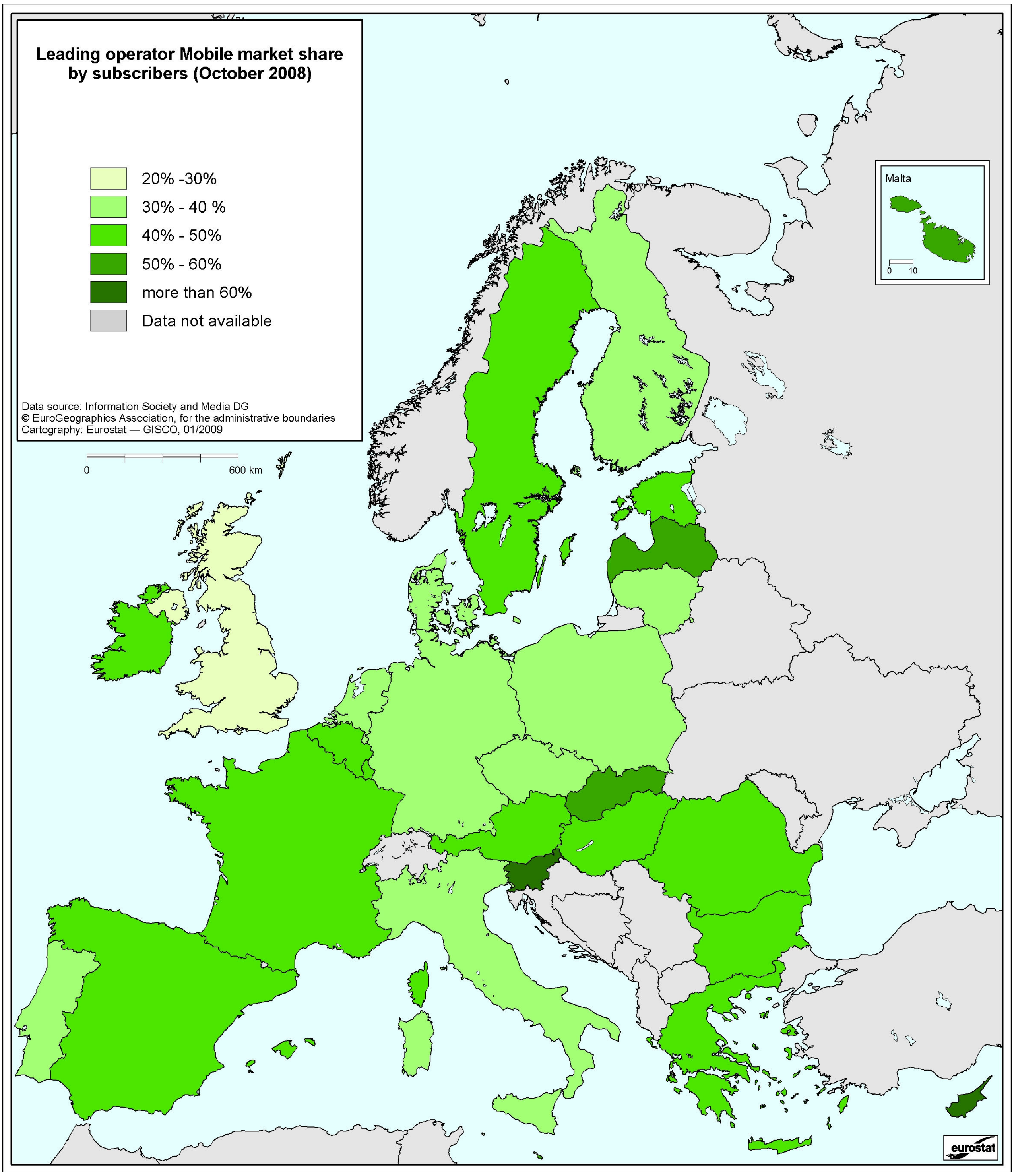
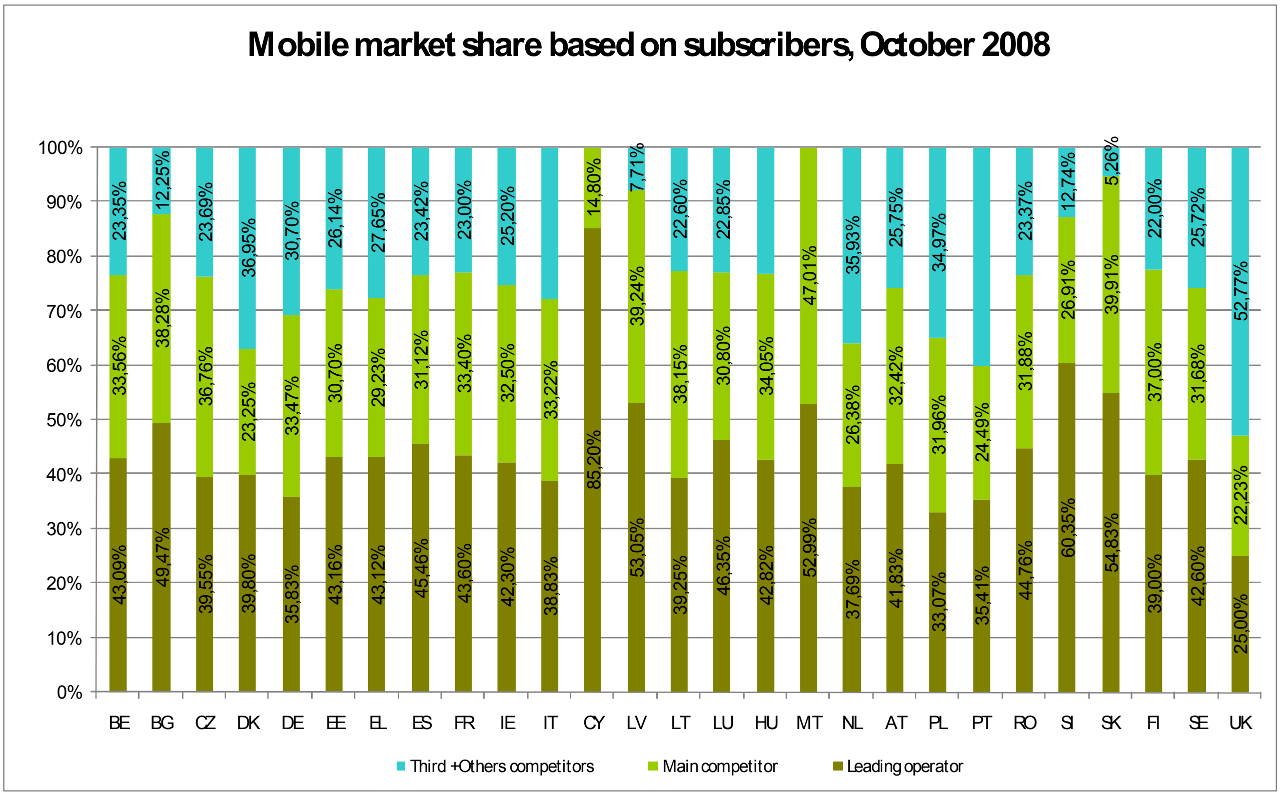


**Figure 14: Mobile market share based on subscribers, October 2008**




## 1.4. MOBILE NUMBER PORTABILITY

Mobile number portability enables mobile subscribers to retain their number when they move from one operator to another.

Figures refer to the number of transactions calculated up to 1st October each year, unless stated otherwise under each table.

According to the data at our disposal for 25 countries, the mobile ported numbers have increased during the past period (+14.1million) and as of October 2008 almost 60.7 million subscribers have ported their number since the introduction of this possibility

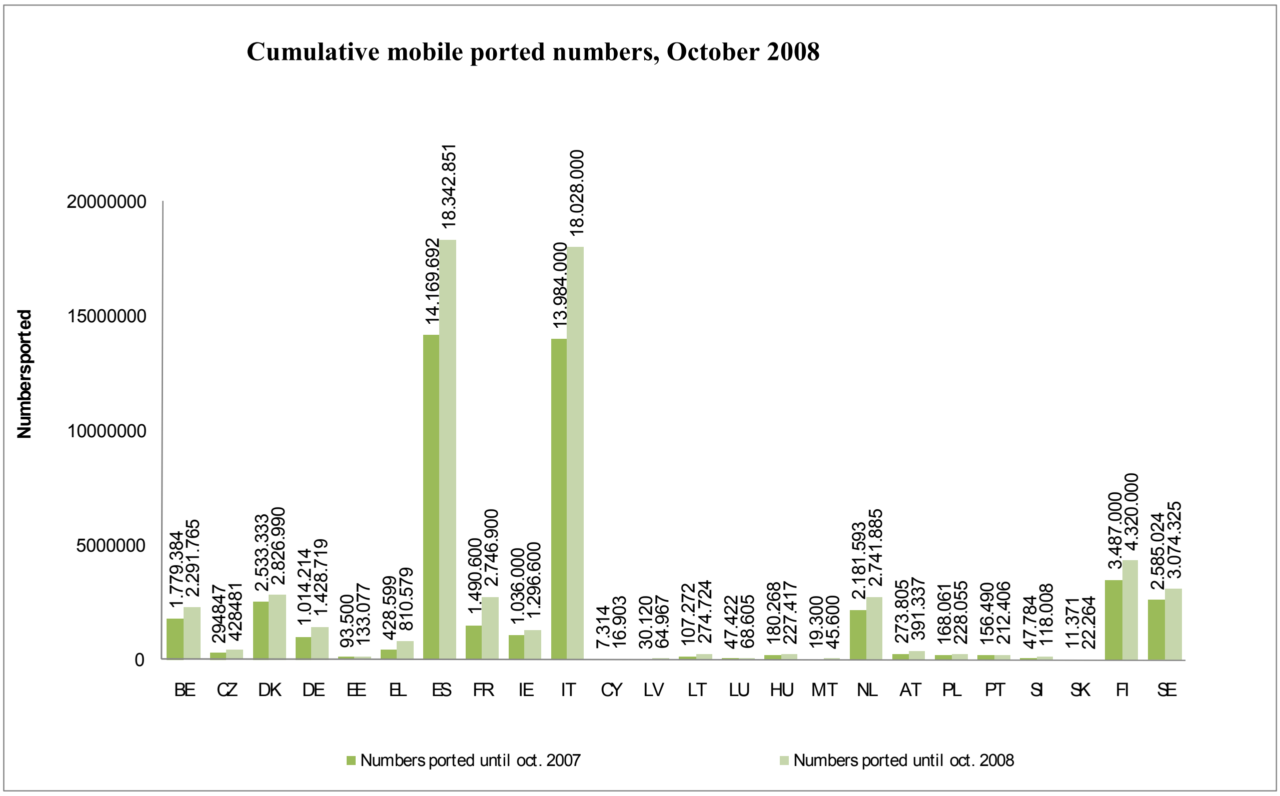
The percentage of ported numbers in the EU over the total mobile subscribers since the introduction of mobile number portability is now 9.3%.

Spain and Italy continues to lead in terms of the number of subscribers that have ported their numbers (around million).

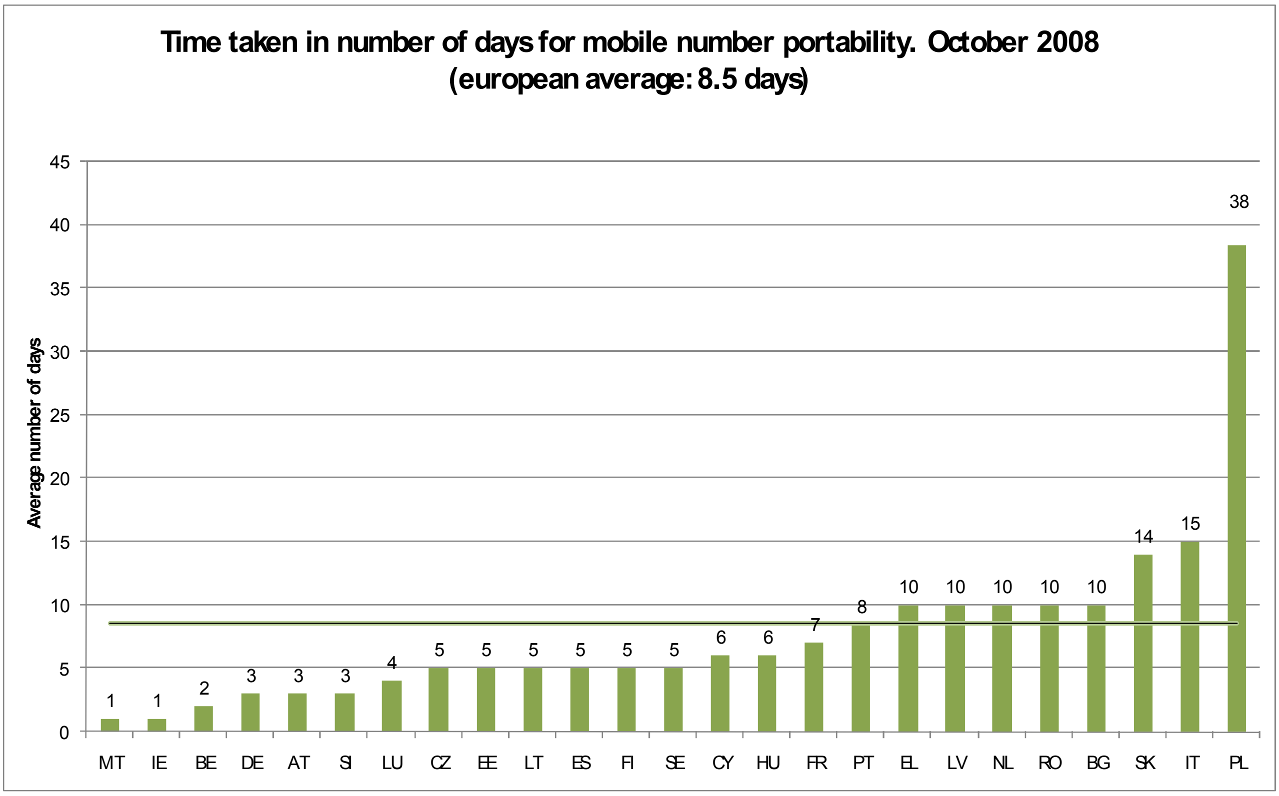
Finland has the highest percentage of ported numbers over the total of mobile subscribers (68%) followed by Denmark (42.06%) and then Spain (28.87%).

In Estonia, Spain, Lithuania and Malta there is no inter-operator charge for the porting of mobile numbers.

**Figure 15: Mobile ported numbers. Time taken for mobile portability, October 2008**

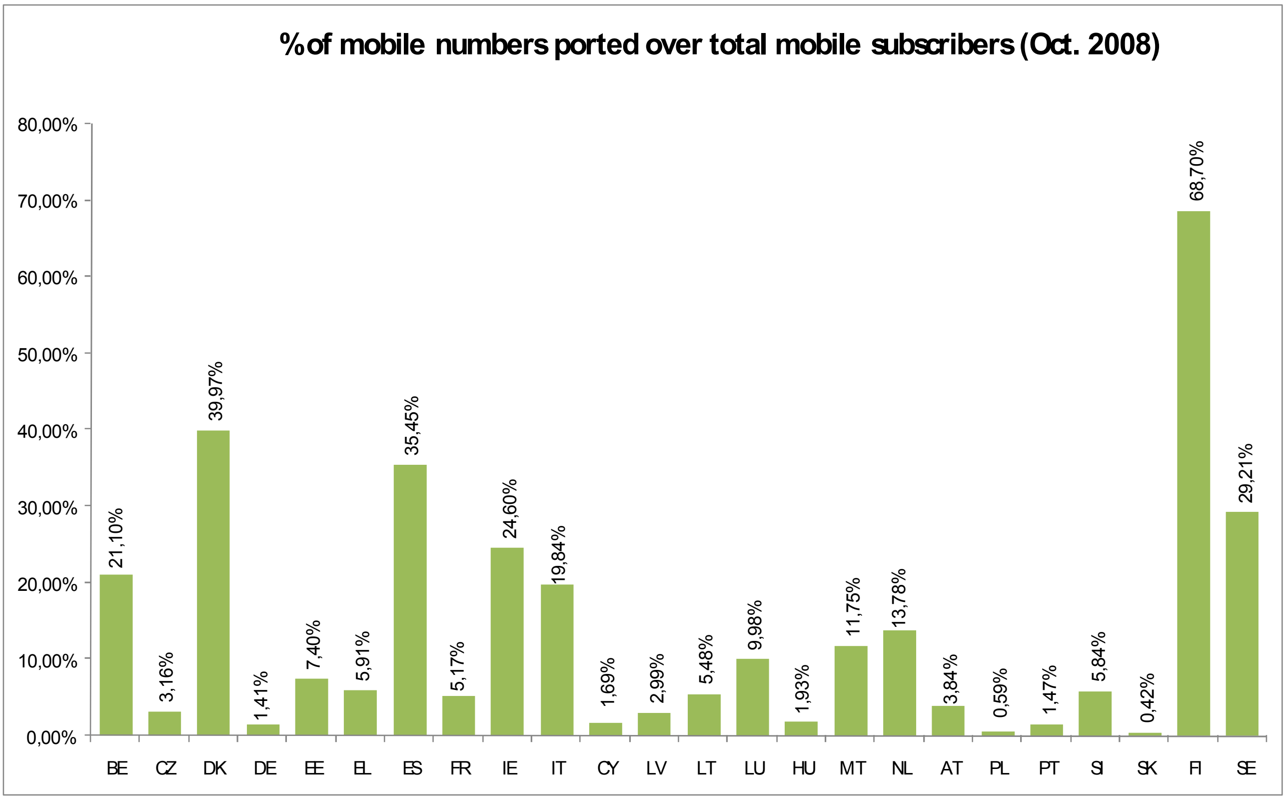



Romania: Mobile ported numbers not available yet; fixed & mobile number portability is operational starting with 21st October 2008; the maximum regulated tariff is 11Euro/mobile number ported




Romania: fixed & mobile number portability available starting with 21st October 2008; the maximum regulated number of days for fixed portability is 10

**Figure 16: Percentage of Mobile ported numbers over total mobile subscribers, October 2008**




**1.5. MOBILE TARIFFS**

1. The analysis of national (as opposed to roaming) mobile services is based on the OECD baskets for digital mobile services. OECD baskets have undergone a revision that resulted in a new set of baskets at the beginning of 2006, as opossed to old 2002 OECD baskets. Mobile baskets have been updated with current traffic weights and volumes. The changes are significant enough to prohibit the use of the new baskets with old data.

The baskets contain an SMS element, they include calls to several mobile networks, and they do not cover international calls. In addition, MMS element is included in the basket, while both MMS and SMS are separated for peak and off-peak times, and on-net and off-net destinations. Also, voicemail is included in the baskets, whereas off-net calls can be directed to several networks. There are 3 different baskets, based on low, medium and high usage levels. Packages analysed in this section are both Post-Paid and Pre-Paid packages. Some of the main properties of the "2006 OECD" baskets are:

Low usage basket with:
30 outgoing calls per month + 33 SMS messages
22% of calls are to fixed line phones, 70% to mobile phones, 8% to voicemail,

Medium usage basket with:
65 outgoing calls per month + 50 SMS messages
21% of calls are to fixed line phones, 72% to mobile phones, 7% to voicemail,

High usage basket with:
140 outgoing calls per month + 55 SMS messages
20% of calls are to fixed line phones, 73% to mobile phones, 7% to voicemail.

Each basket also has a unique definition of time of day distribution and call duration, and includes the monthly rental, and any registration charges distributed over 3 years.

The two most prominent operators in each country are covered, based on available subscriber numbers. All relevant packages from each operator are considered, but the final results presented here only show the cheapest package for each basket.

The asterisk (*) behind the package name means that the package name and/or its structure have changed between 2007 and 2008. The package chosen at any time is the cheapest package from that provider for the usage profile in question. This may give rise to significant price changes over time.

The balance of fixed and usage in the mobile baskets varies considerably between countries, as the preferred packages in some countries contain a lot of calling time included in the fixed charge.

A full description of the methodology can be found at the end of this report.

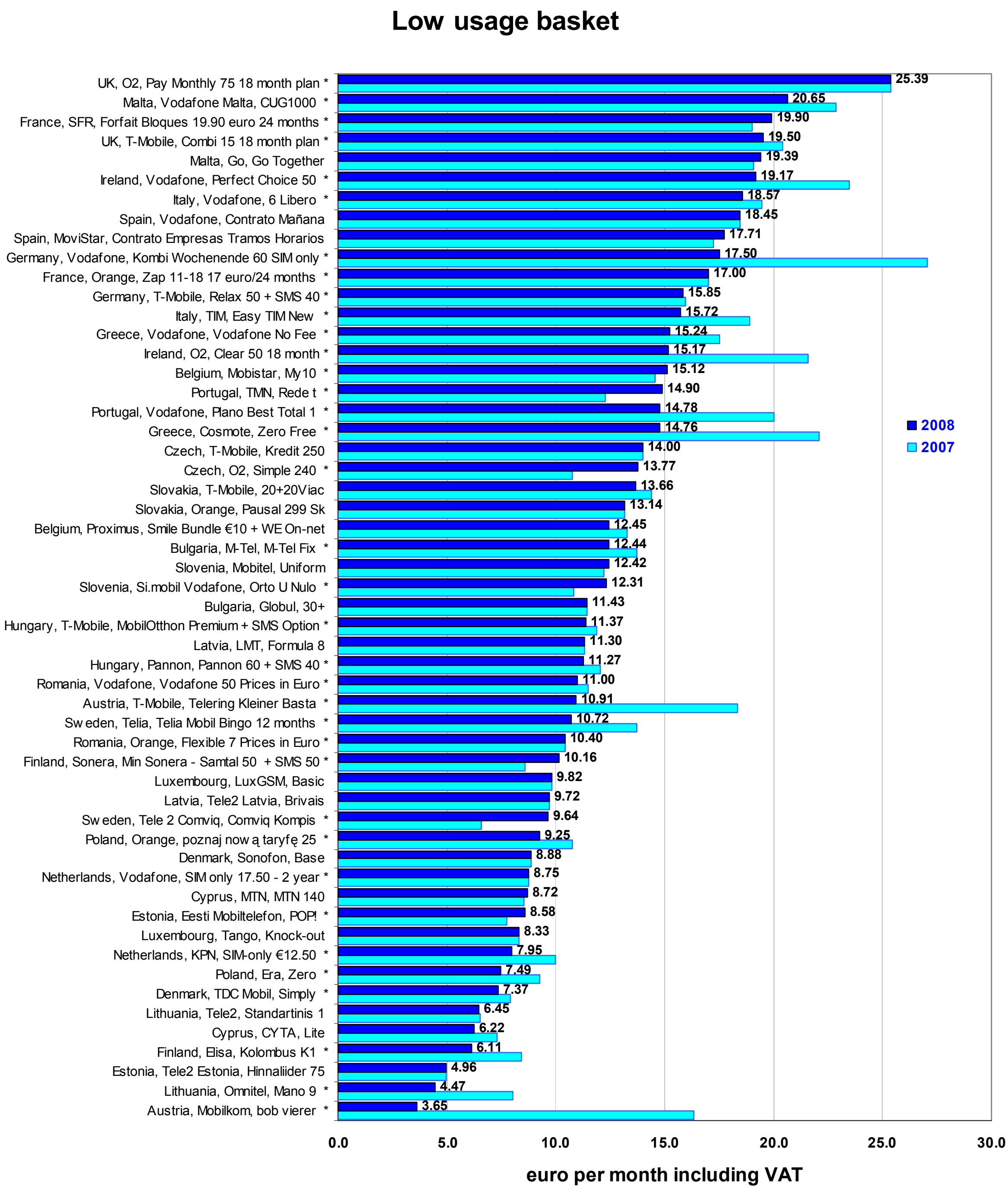
The names of the tariff packages used in the basket analysis are found in the table below.

2. In order to show a price trend, the "2006 OECD" baskets have been used. Mobile services from 2006 till 2008 are used. The graphs will show the average price developments for the EU countries, using a simple average across all member countries per year. The averages cover the cheapest package from the same mobile operators.

From 2007, Bulgaria and Romania are also included.

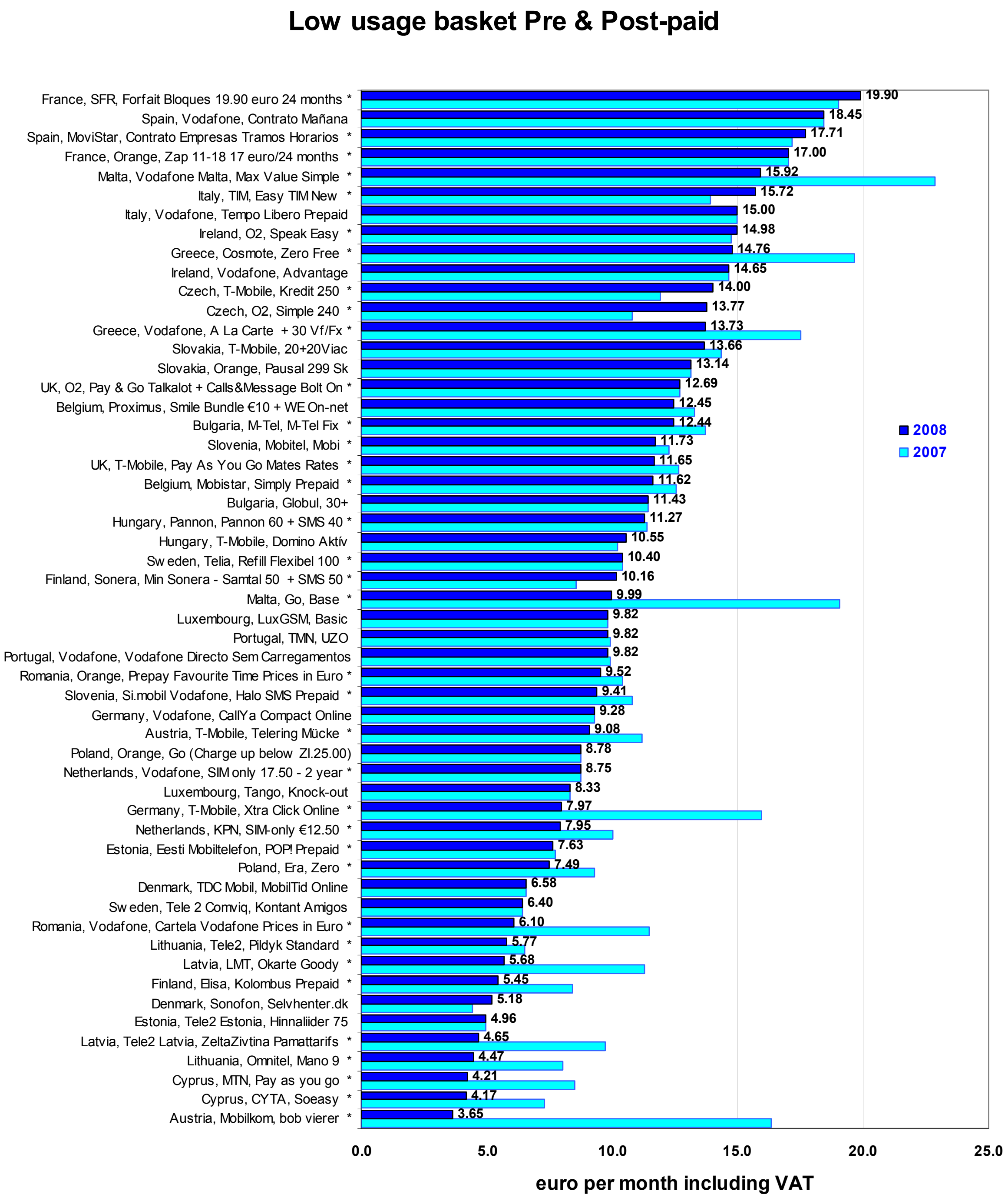
### 1.5.1. 2006 OECD baskets

**Figure 17: Low usage basket post-paid**



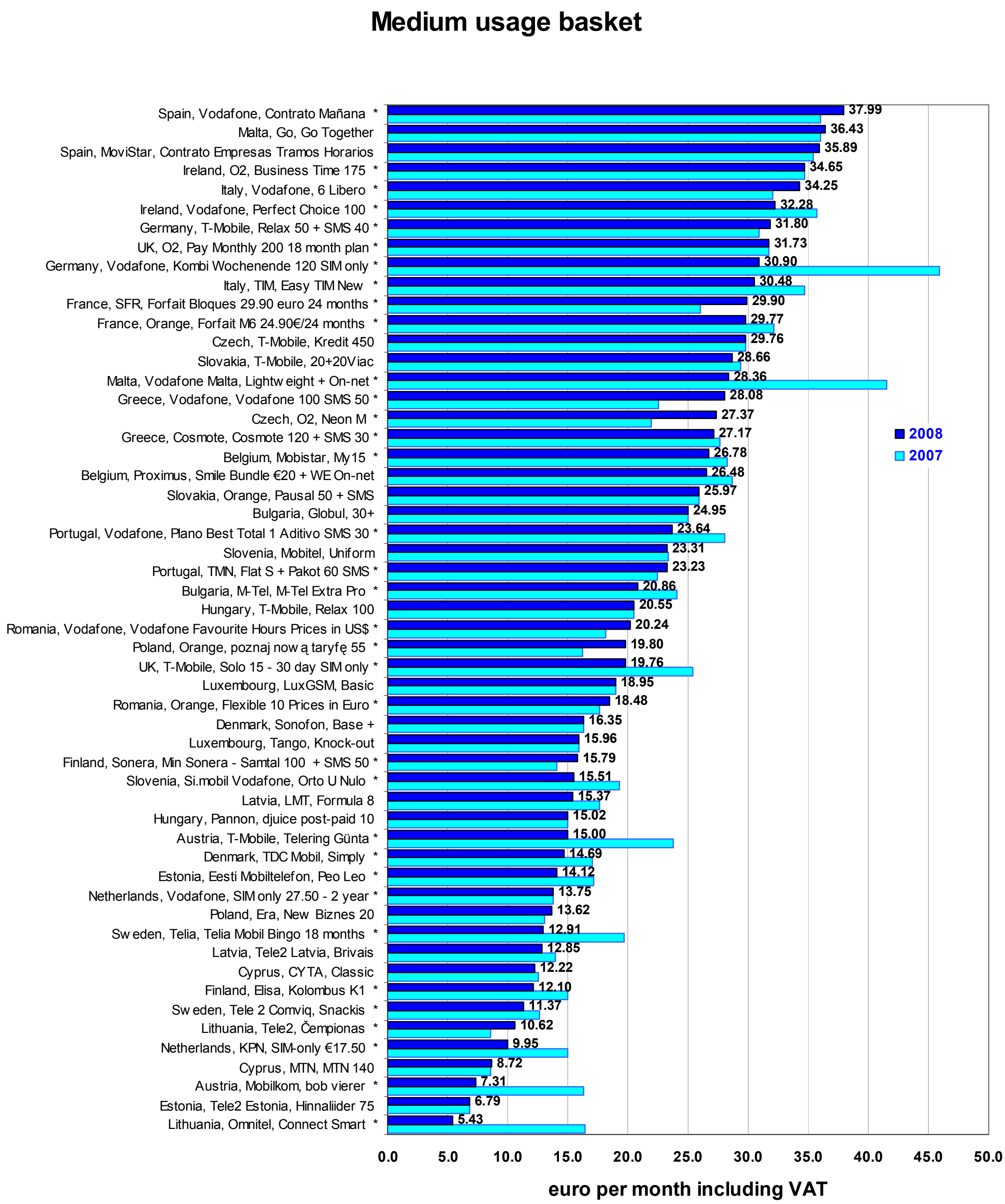

Entries with an asterisk (*) after the name have changed the package name and structure since last year.

**Figure 18: Low usage basket pre & post-paid**




Entries with an asterisk (*) after the name have changed the package name and structure since last year.

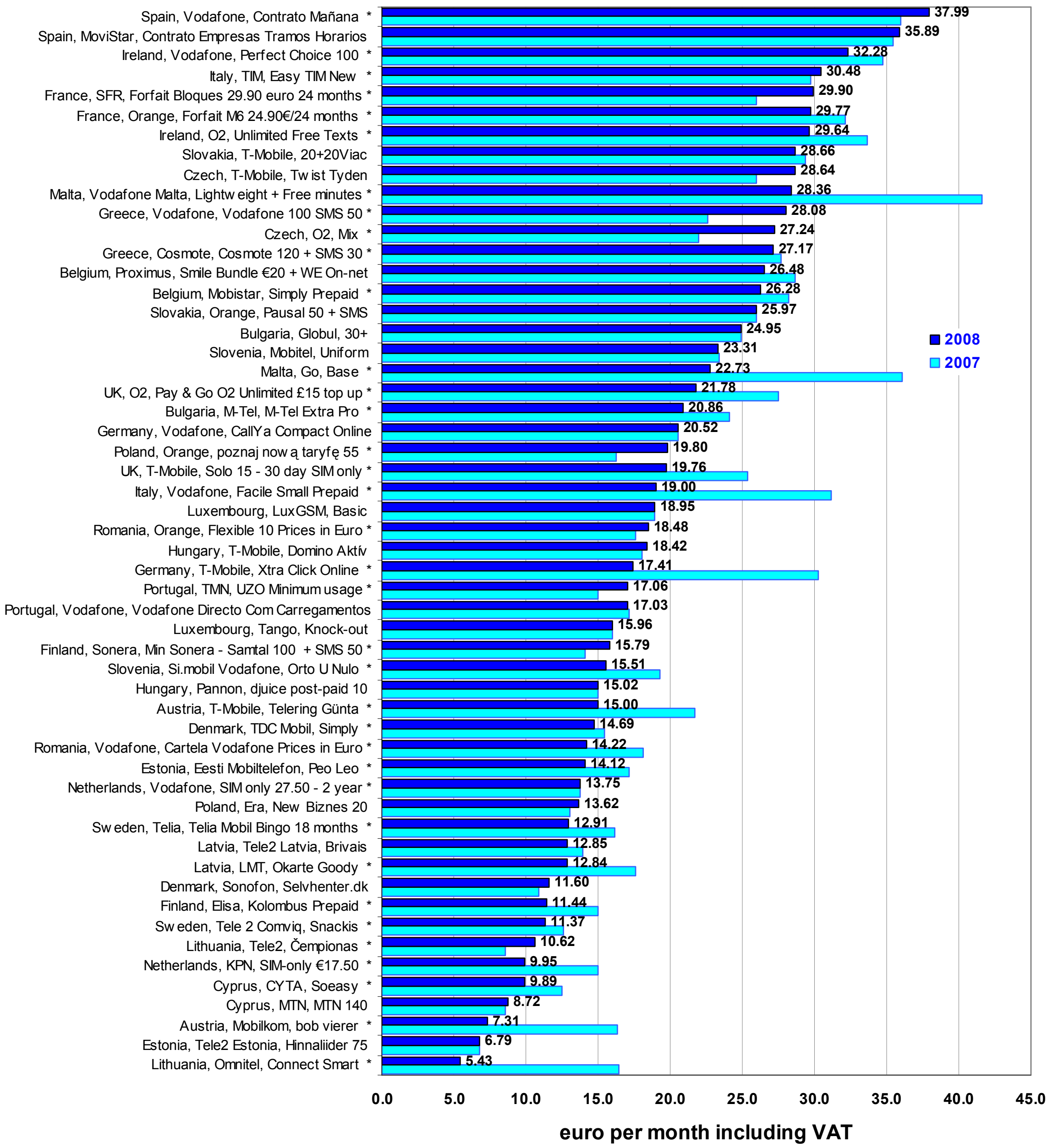
**Figure 19: Medium usage basket post-paid**




Entries with an asterisk (*) after the name have changed the package name and structure since last year.

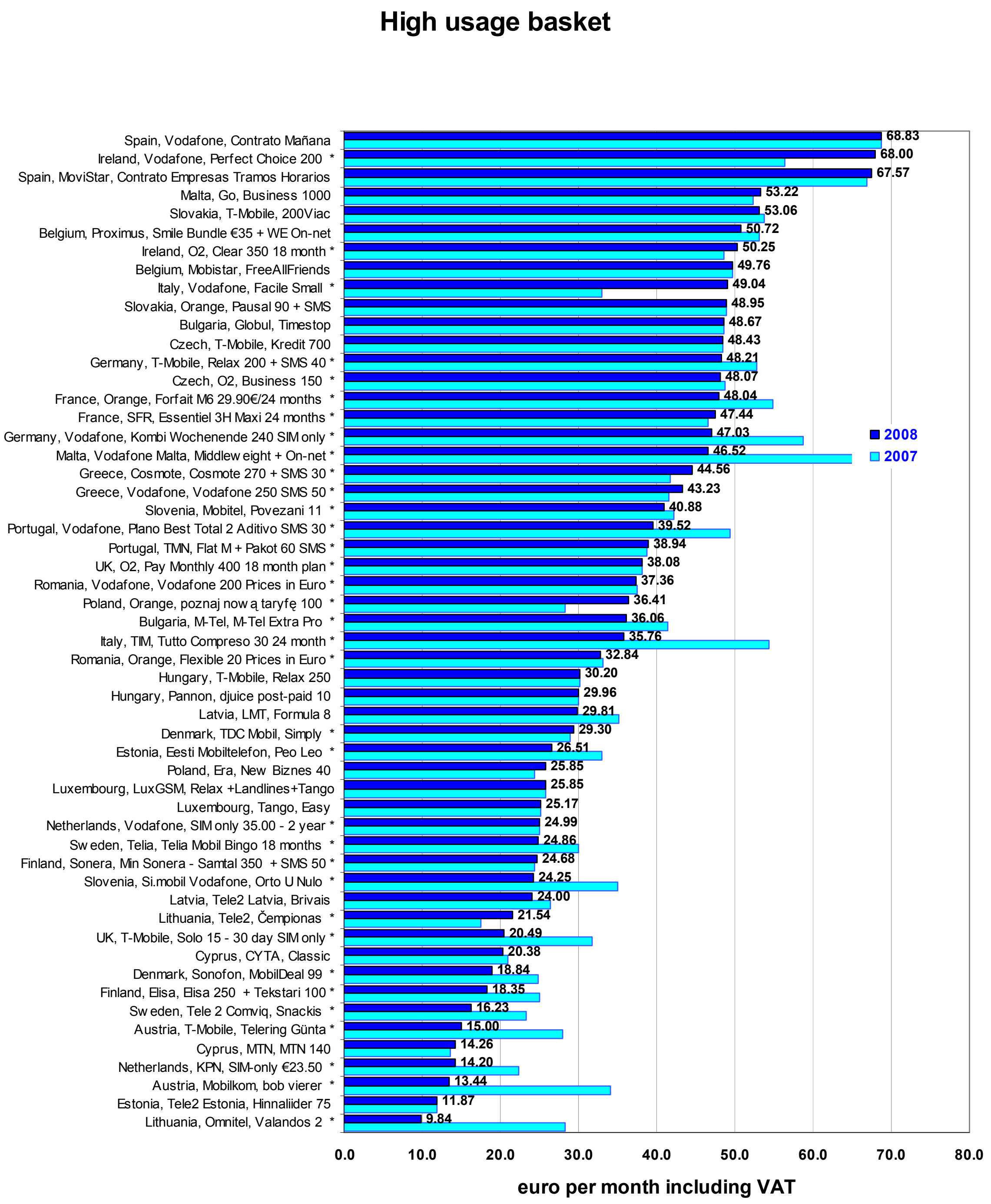
**Figure 20: Medium usage basket pre & post-paid**

## Medium usage basket Pre & Post-paid




Entries with an asterisk (*) after the name have changed the package name and structure since last year.

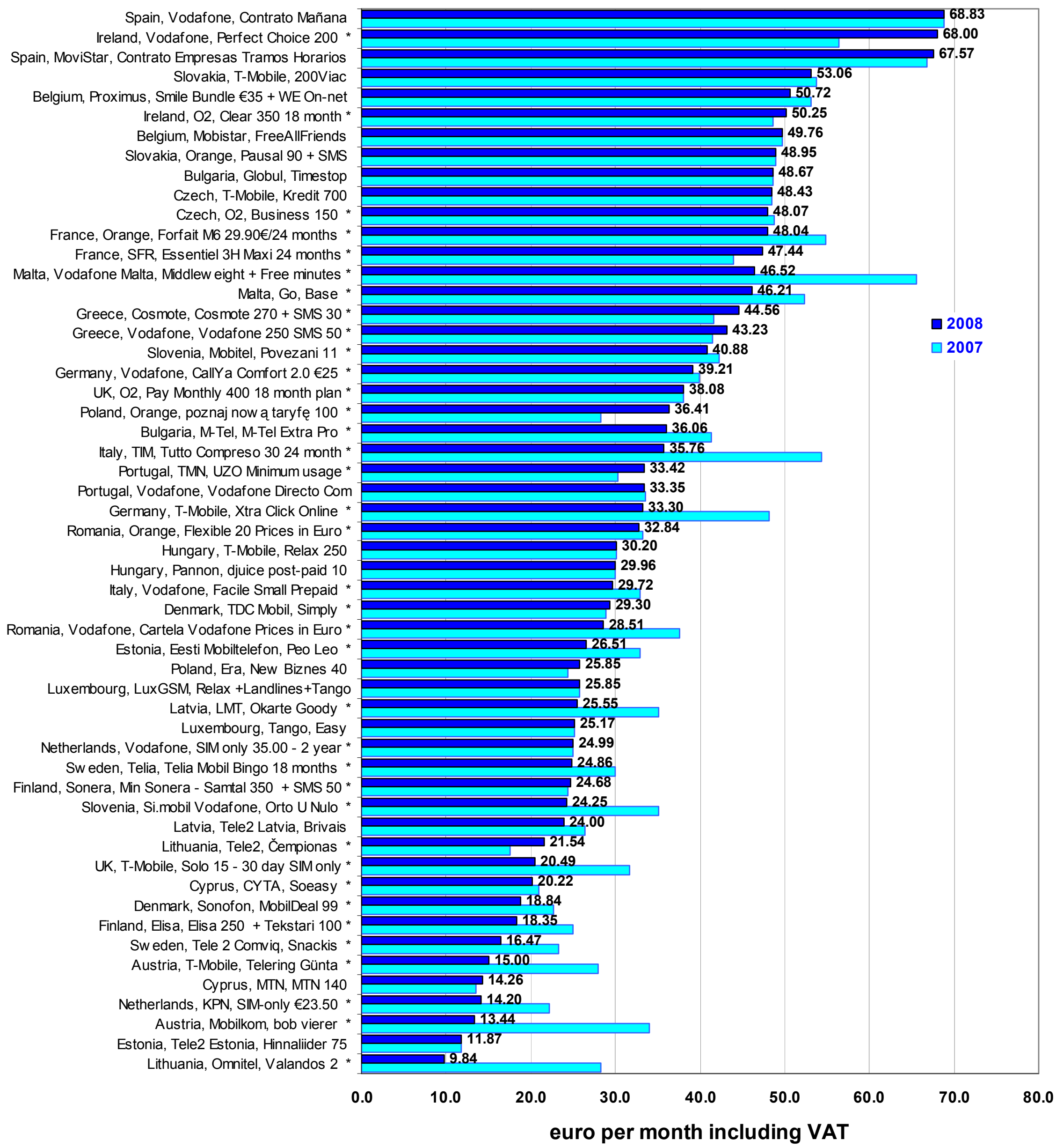
**Figure 21: High usage basket post-paid**




Entries with an asterisk (*) after the name have changed the package name and structure since last year.

**Figure 22: High usage basket pre & post-paid**

## High usage basket Pre & Post-paid




Entries with an asterisk (*) after the name have changed the package name and structure since last year.

*1.5.2. Simple average across all mobile operators*

**Figure 23: Average 2006-2008 Low usage basket post-paid**

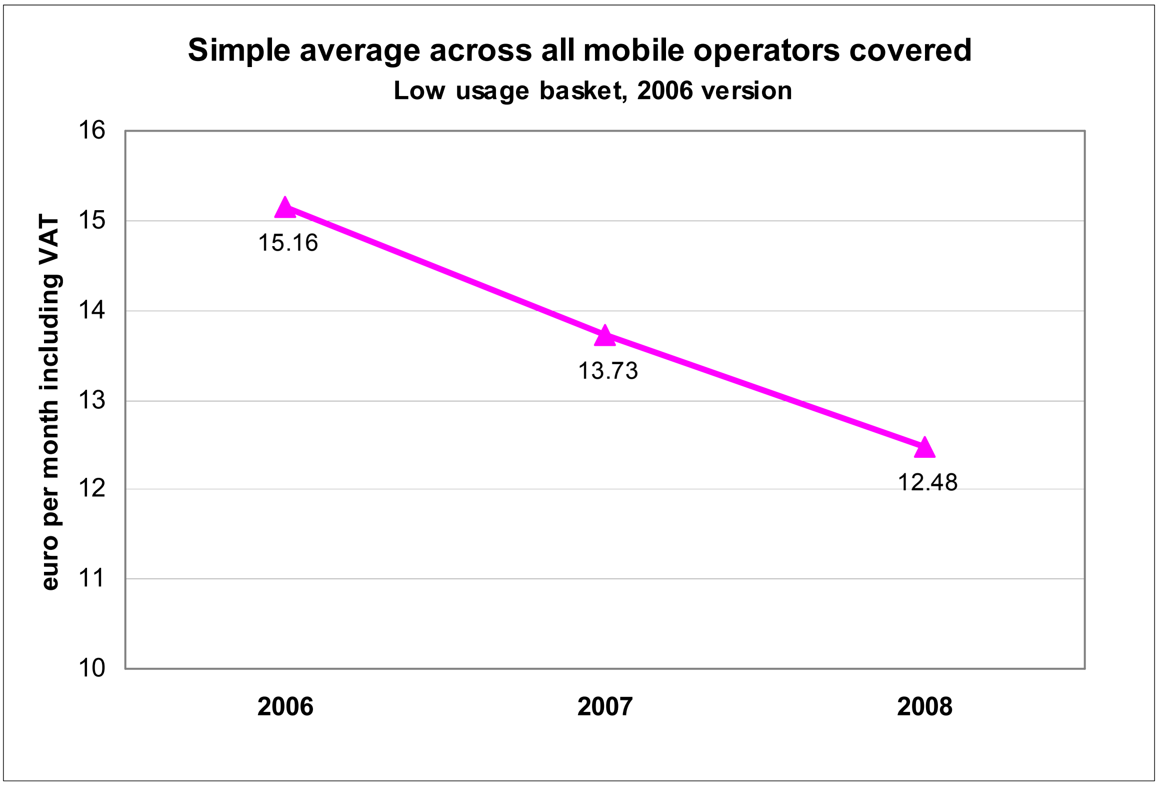



**Figure 24: Average 2006-2008 Low usage basket pre & post-paid**

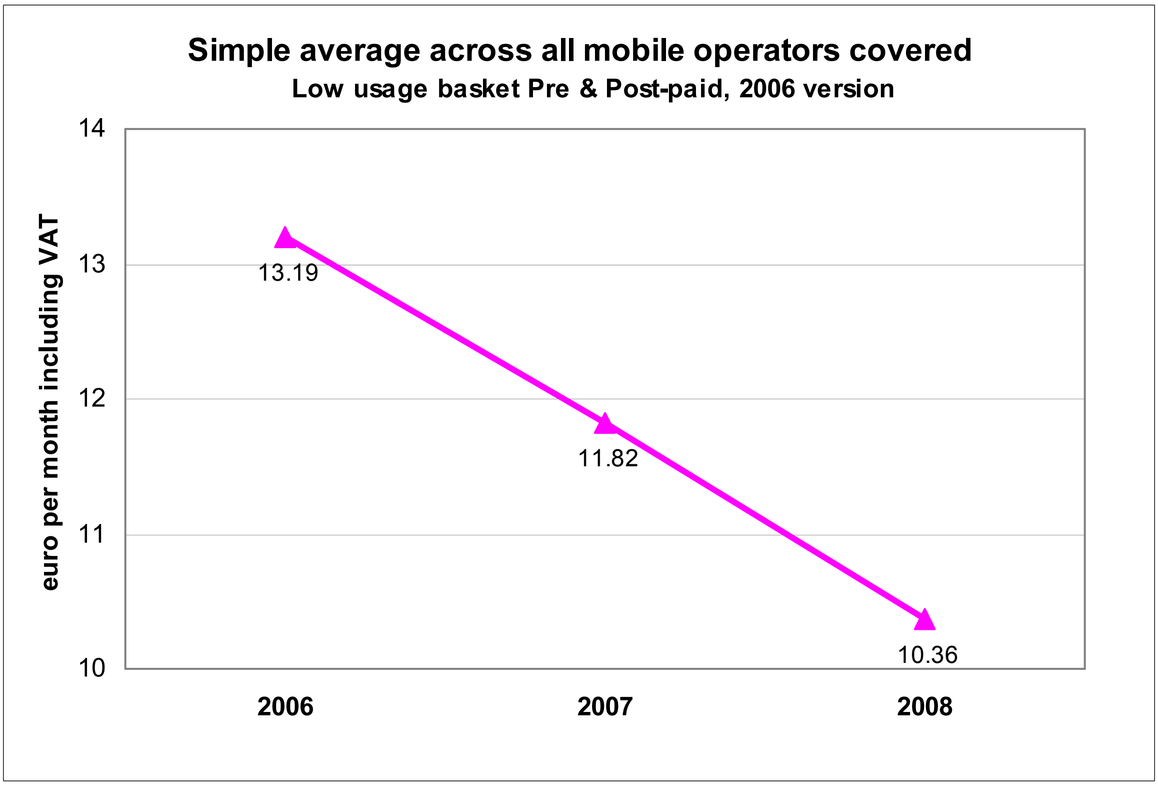


Figure 25: Average 2006-2008 Medium usage basket post-paid

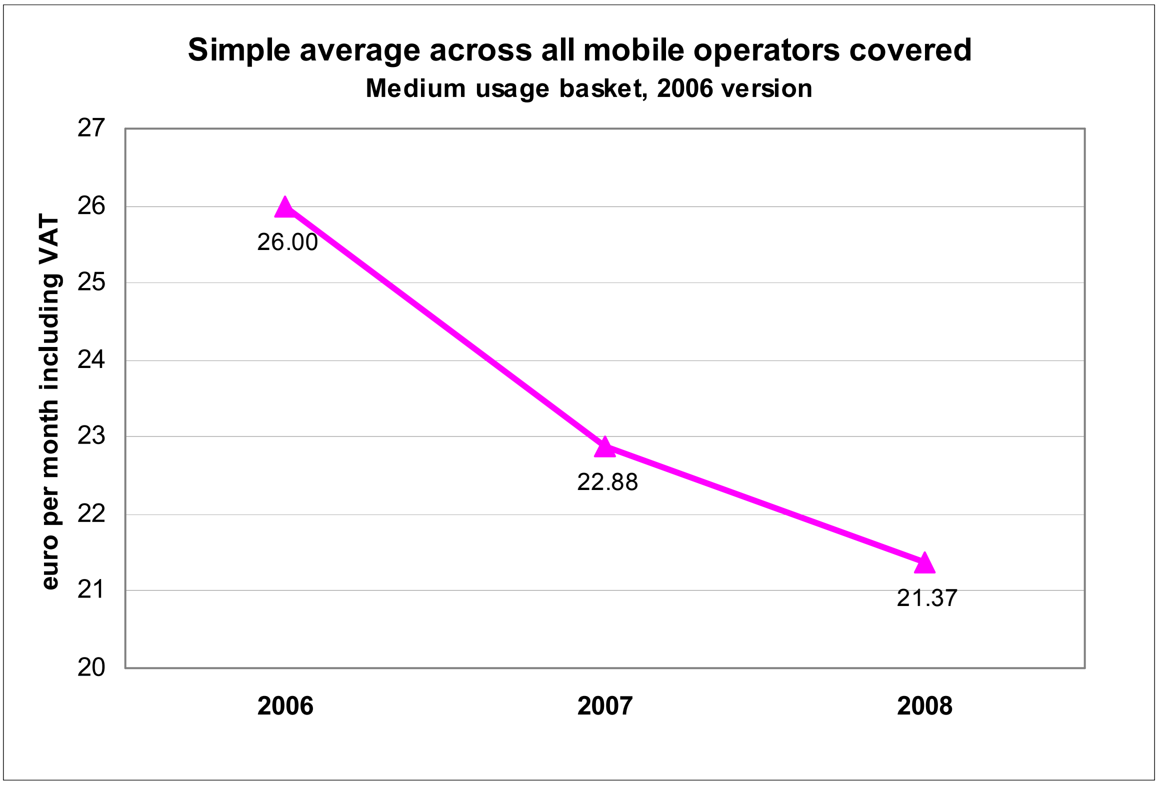



Figure 26: Average 2006-2008 Medium usage basket pre & post-paid

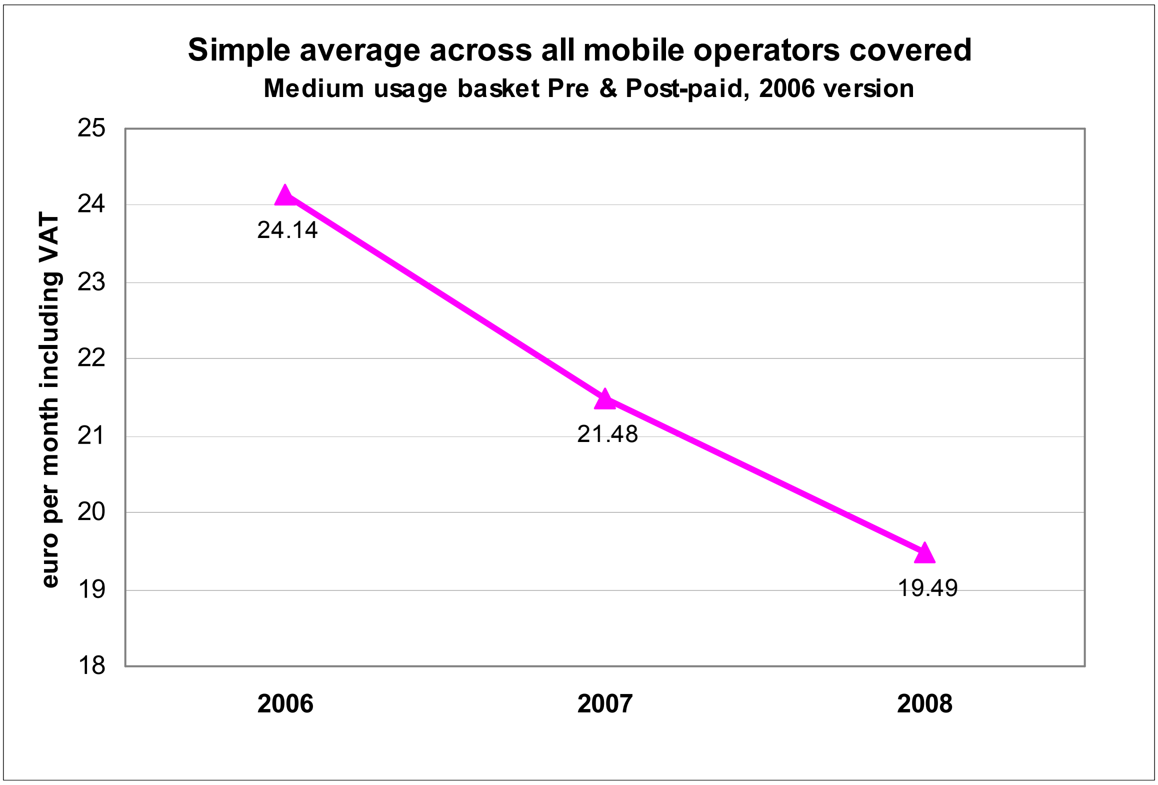


**Figure 27: Average 2006-2008 High usage basket post-paid**

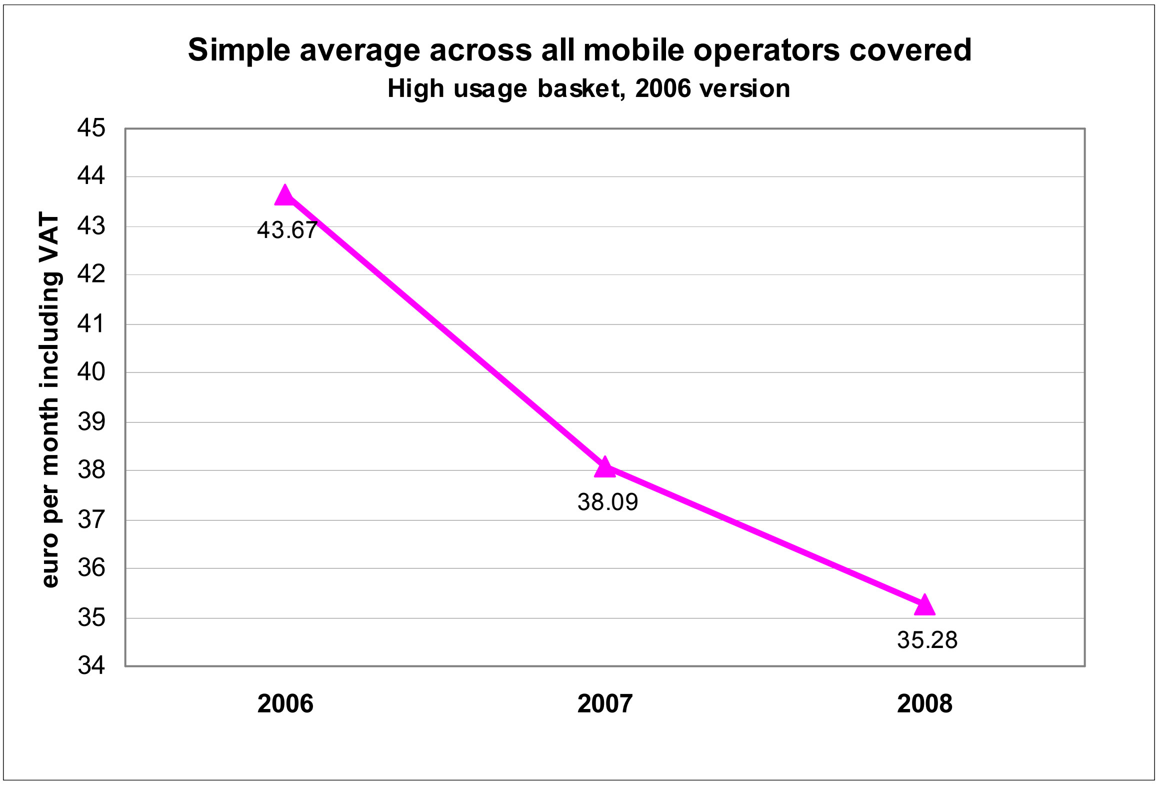
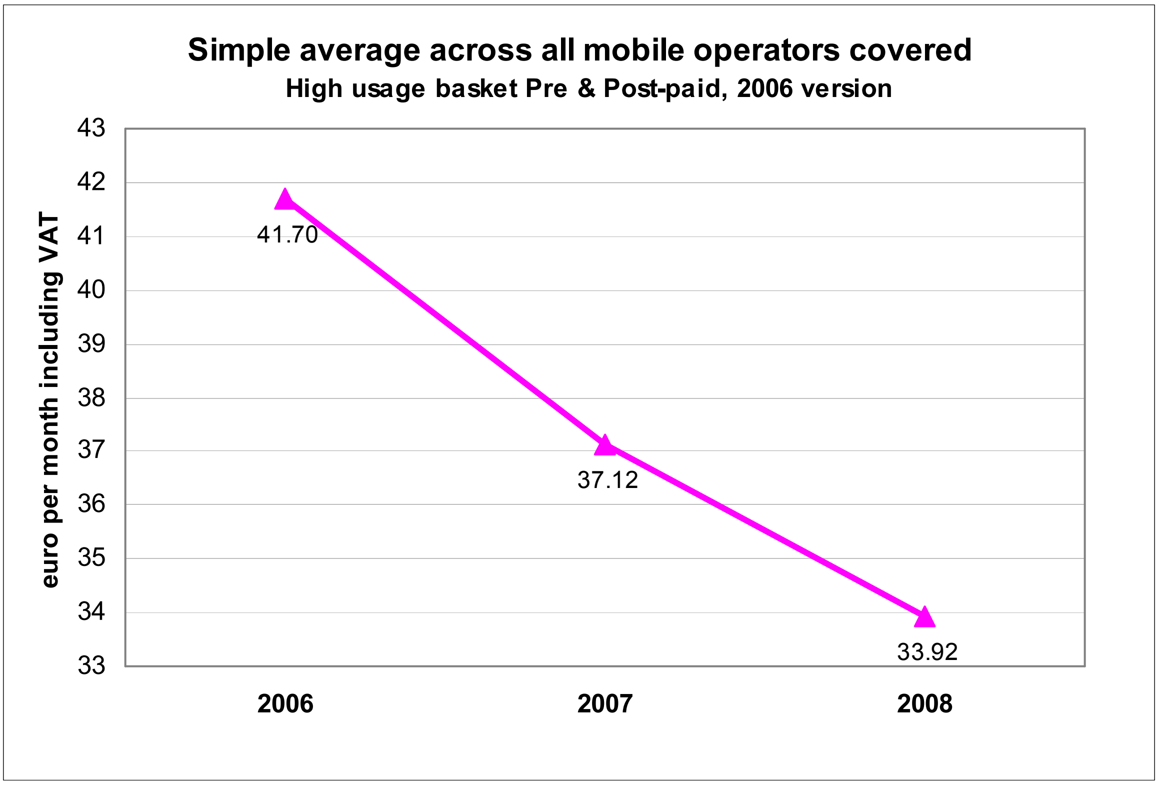



**Figure 28: Average 2006-2008 High usage basket pre & post-paid**



## 1.6. CALL TERMINATION ON MOBILE NETWORKS

This section presents the per-minute interconnection charges for fixed call termination on the networks of mobile operators based on the first three minutes of a call at peak rate. Where available charges for call termination on the networks of 3G operators and service providers (MVNO and resellers) have been included. Charges are for calls originated in the same countries

In the following charts information is shown for mobile operators in the EU (representing almost 100% of the EU mobile market). Where available, information on mobile-to-mobile termination rate has been indicated in the notes.

Data have been collected by the NRAs, and refer to 1 October 2008.

*1.6.1. EU and national average*

The following chart shows the trend at EU level in the (weighted) average fixed-to-mobile termination charges for all mobile operators in the EU since October 2005. The EU trend should be considered as indicative, since Bulgaria and Romania have been included only in 2007.

The national averages for all mobile operators in each Member States are weighted average charges based on the number of subscribers and the termination rate of each operator at 1 October 2008.

Where available, national averages based on interconnection traffic data have been shown. This gives a better indication of EU national average.

Where available, data for 3G operators and service providers have been taken into account. The 2008 exchange rates have been applied to the non euro-zone countries for previous years.

Despite the continuing decline, termination charges remain on average more than times higher than the fixed interconnection charges (double transit).

The trend shows that termination charges have continued to decrease and at October 2008 the EU average termination charge was % lower than one year before (% respect October 2005). The most significant reductions[1] have occurred in Slovenia (%), Belgium (%) and Austria (%). Reductions around % have taken place in France and Germany. However, mobile termination rate remain very high in Bulgaria and Estonia (more than % above the EU average) and in Ireland (almost % above the EU average).

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[1] National average calculated on the basis of subscribers.

Figure 29: EU average interconnection charges for call termination on mobile networks

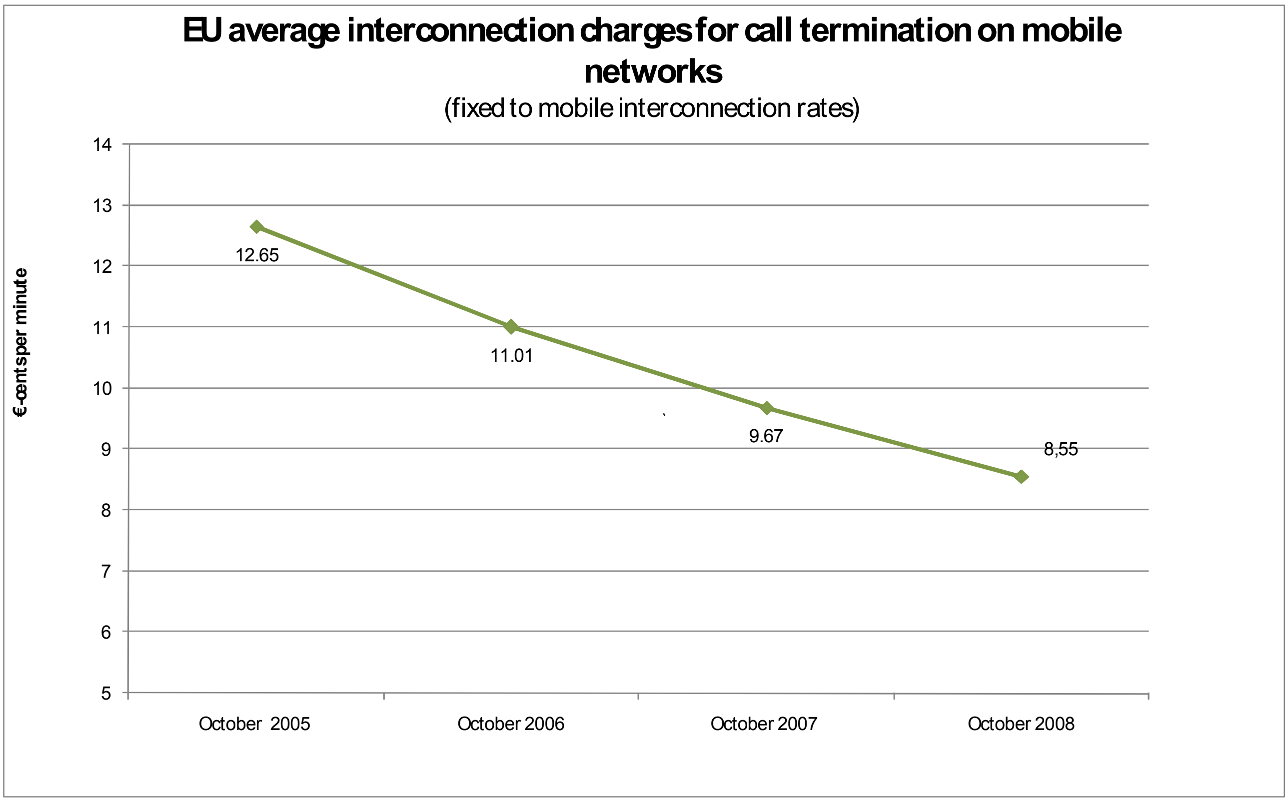
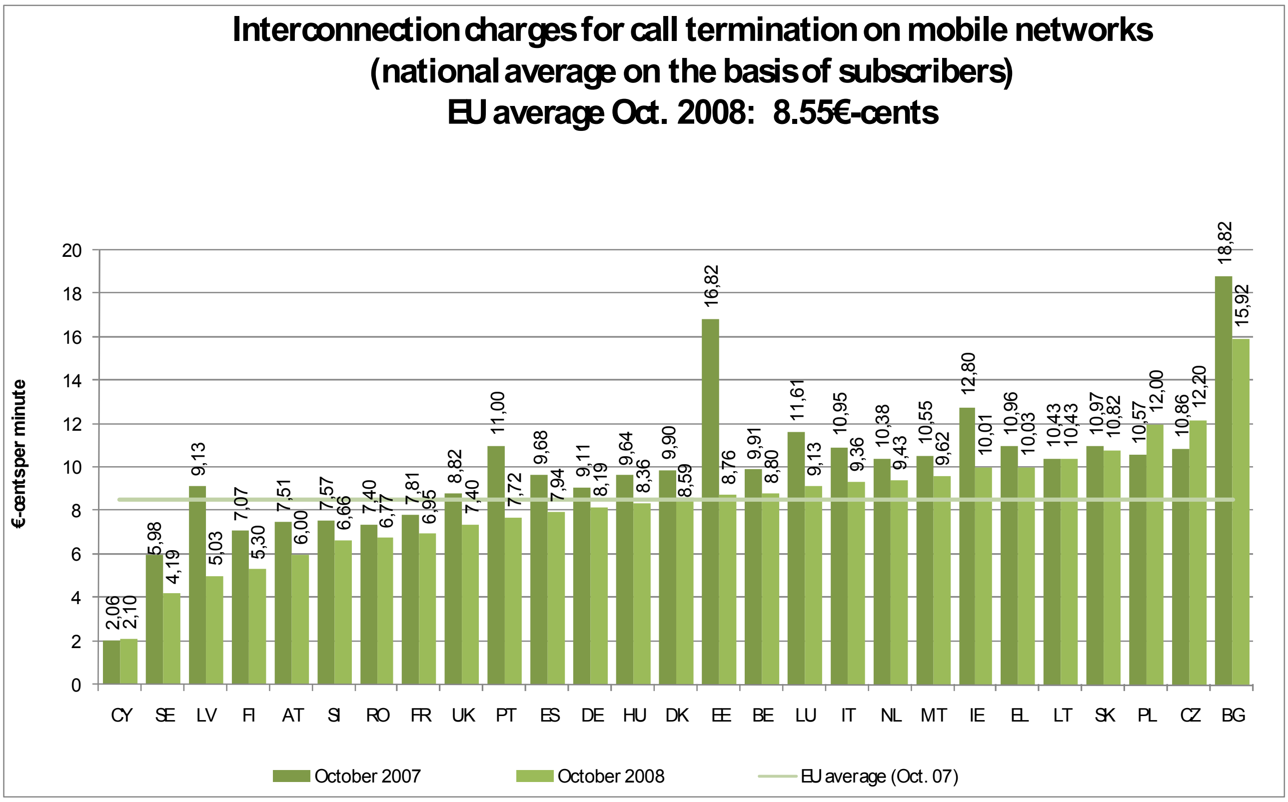


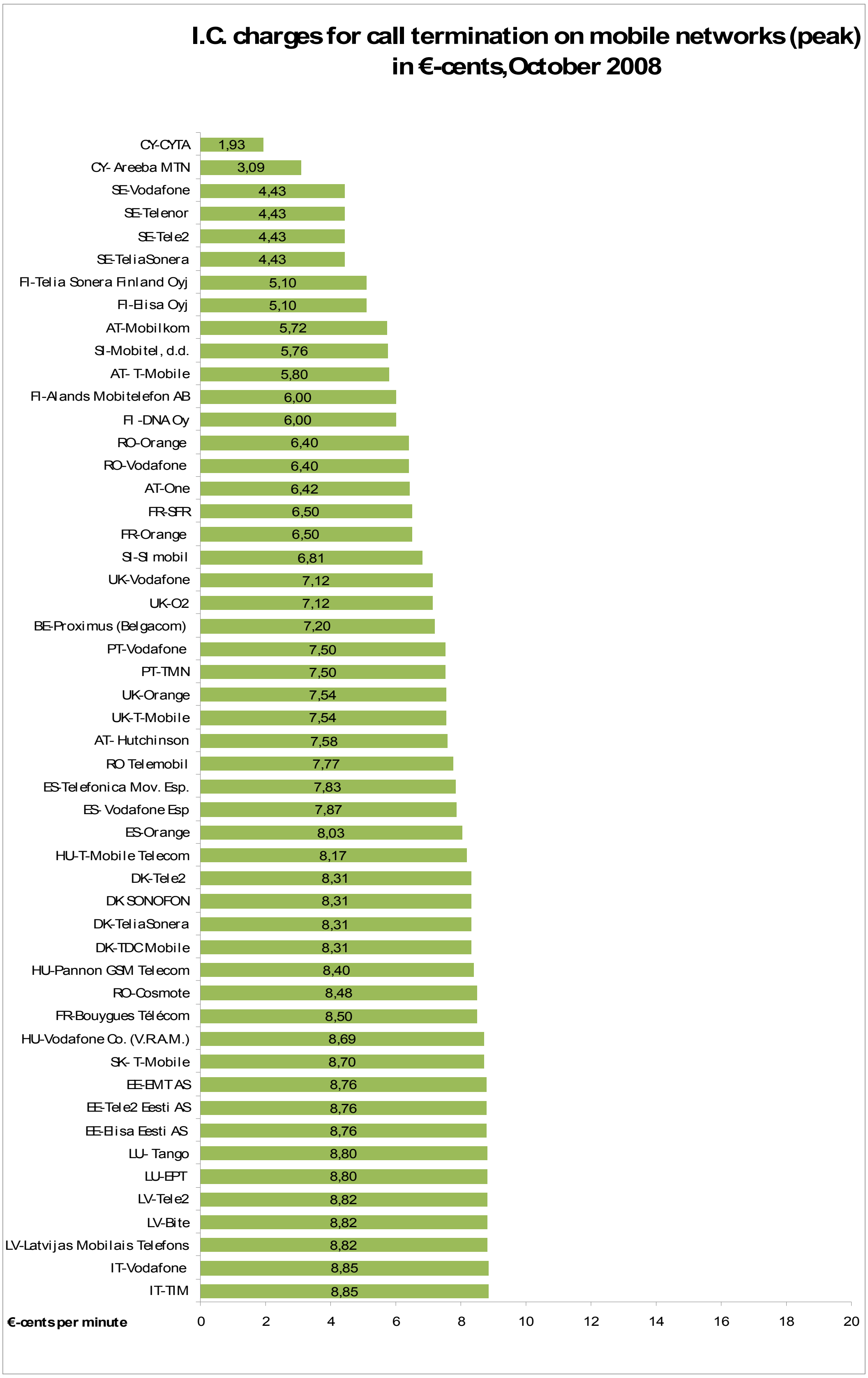

Figure 30: Interconnection charges for call termination on mobile networks

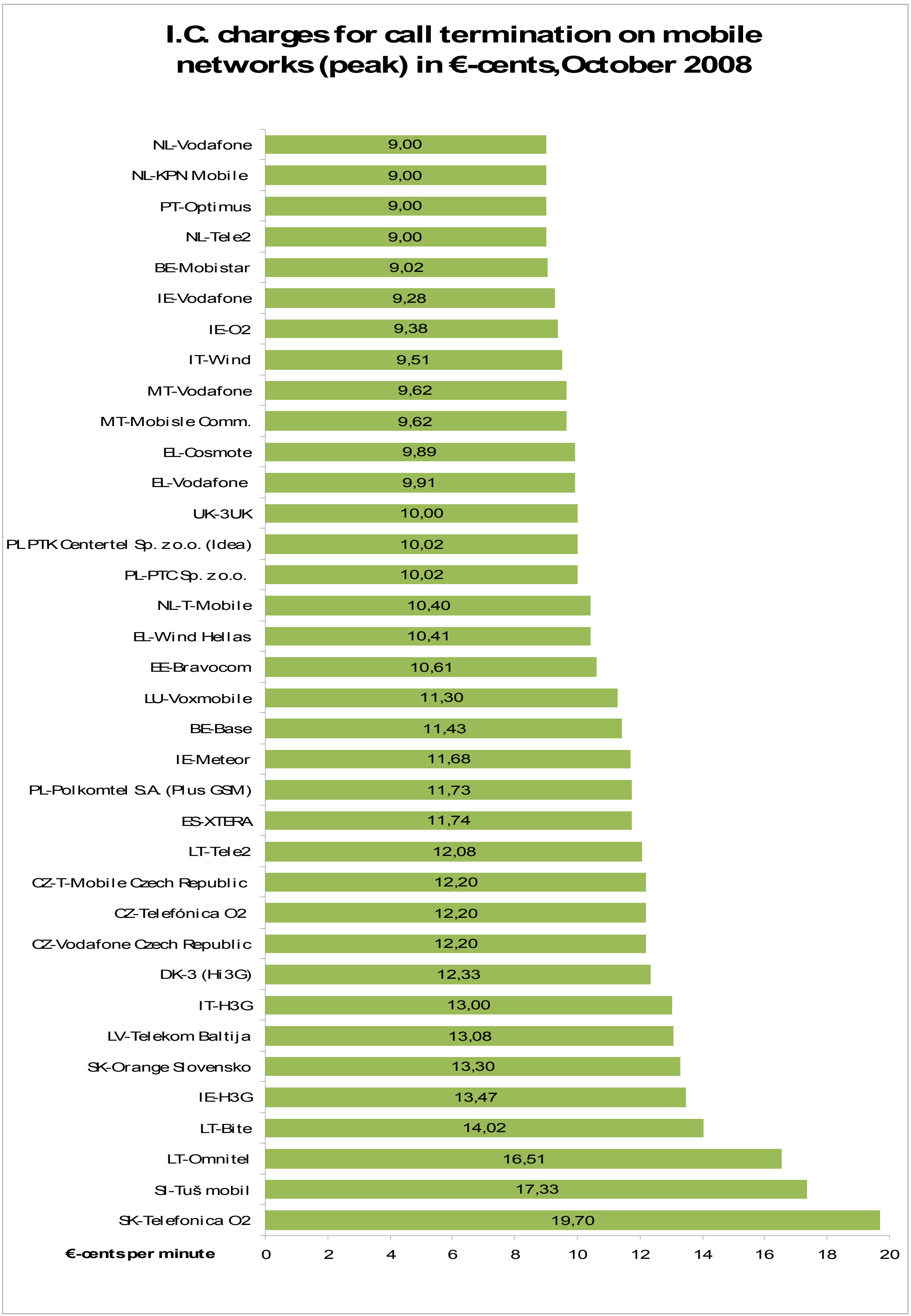


Romania: Cosmote and Telemobil are charging in USD dollars the mobile termination services provided to the fixed incumbent and to the main mobile competitor ; the exchange EUR/USD rates used for Cosmote and Zapp tariffs were 1.42 as of 1st October 2007 and 1.41 as of ast October 2008

The following charts show the individual fixed-to-mobile interconnection charges for mobile operators in the EU. Cyprus shows the lowest charge (€ cents) whereas the highest charge is found in € cents.

**Figure 31: Interconnection charges for call termination on mobile networks (peak)**


I.C. charges for call termination on mobile networks (peak) in €-cents, October 2008
CY-CYTA 1,93
CY- Areeba MTN 3,09
SE-Vodafone 4,43
SE-Telenor 4,43
SE-Tele2 4,43
SE-TeliaSonera 4,43
FI-Telia Sonera Finland Oyj 5,10
FI-Elisa Oyj 5,10
AT-Mobilkom 5,72
SI-Mobitel, d.d. 5,76
AT- T-Mobile 5,80
FI-Alands Mobitelefon AB 6,00
FI -DNA Oy 6,00
RO-Orange 6,40
RO-Vodafone 6,40
AT-One 6,42
FR-SFR 6,50
FR-Orange 6,50
SI-SI mobil 6,81
UK-Vodafone 7,12
UK-O2 7,12
BE-Proximus (Belgacom) 7,20
PT-Vodafone 7,50
PT-TMN 7,50
UK-Orange 7,54
UK-T-Mobile 7,54
AT- Hutchinson 7,58
RO Telemobil 7,77
ES-Telefonica Mov. Esp. 7,83
ES- Vodafone Esp 7,87
ES-Orange 8,03
HU-T-Mobile Telecom 8,17
DK-Tele2 8,31
DK SONOFON 8,31
DK-TeliaSonera 8,31
DK-TDC Mobile 8,31
HU-Pannon GSM Telecom 8,40
RO-Cosmote 8,48
FR-Bouygues Télécom 8,50
HU-Vodafone Co. (V.R.A.M.) 8,69
SK- T-Mobile 8,70
EE-EMT AS 8,76
EE-Tele2 Eesti AS 8,76
EE-Elisa Eesti AS 8,76
LU- Tango 8,80
LU-EPT 8,80
LV-Tele2 8,82
LV-Bite 8,82
LV-Latvijas Mobilais Telefons 8,82
IT-Vodafone 8,85
IT-TIM 8,85
€-cents per minute
0 2 4 6 8 10 12 14 16 18 20


I.C. charges for call termination on mobile networks (peak) in €-cents, October 2008
NL-Vodafone 9,00
NL-KPN Mobile 9,00
PT-Optimus 9,00
NL-Tele2 9,00
BE-Mobistar 9,02
IE-Vodafone 9,28
IE-O2 9,38
IT-Wind 9,51
MT-Vodafone 9,62
MT-Mobisle Comm. 9,62
EL-Cosmote 9,89
EL-Vodafone 9,91
UK-3UK 10,00
PL PTK Centertel Sp. z.o.o. (Idea) 10,02
PL-PTC Sp. z.o.o. 10,02
NL-T-Mobile 10,40
EL-Wind Hellas 10,41
EE-Bravocom 10,61
LU-Voxmobile 11,30
BE-Base 11,43
IE-Meteor 11,68
PL-Polkomtel S.A. (Plus GSM) 11,73
ES-XTERA 11,74
LT-Tele2 12,08
CZ-T-Mobile Czech Republic 12,20
CZ-Telefónica O2 12,20
CZ-Vodafone Czech Republic 12,20
DK-3 (Hi3G) 12,33
IT-H3G 13,00
LV-Telekom Baltija 13,08
SK-Orange Slovensko 13,30
IE-H3G 13,47
LT-Bite 14,02
LT-Omnitel 16,51
SI-Tuš mobil 17,33
SK-Telefonica O2 19,70
€-cents per minute
0 2 4 6 8 10 12 14 16 18 20