

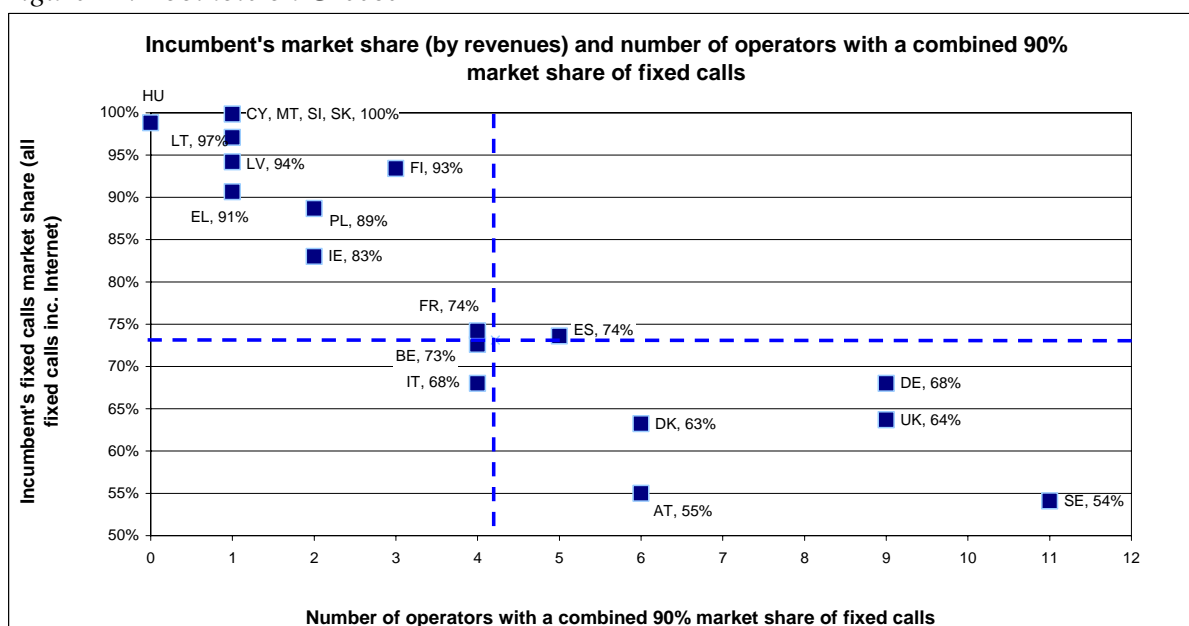
European Electronic Communications Regulation and Markets 2004 (10th report)

Staff Working Paper -
Vol. 2 – MARKET OVERVIEW

CORRIGENDUM

SECTION 2: PLAYERS IN THE FIXED MARKET

Figure 12. Footnote on Greece



Data for the Netherlands, Luxembourg and Portugal not available.

Data on market shares for Estonia and Czech Republic are confidential.

Belgium: No distinction between local and national calls

Denmark, Greece: Market share based on minutes, not on traffic

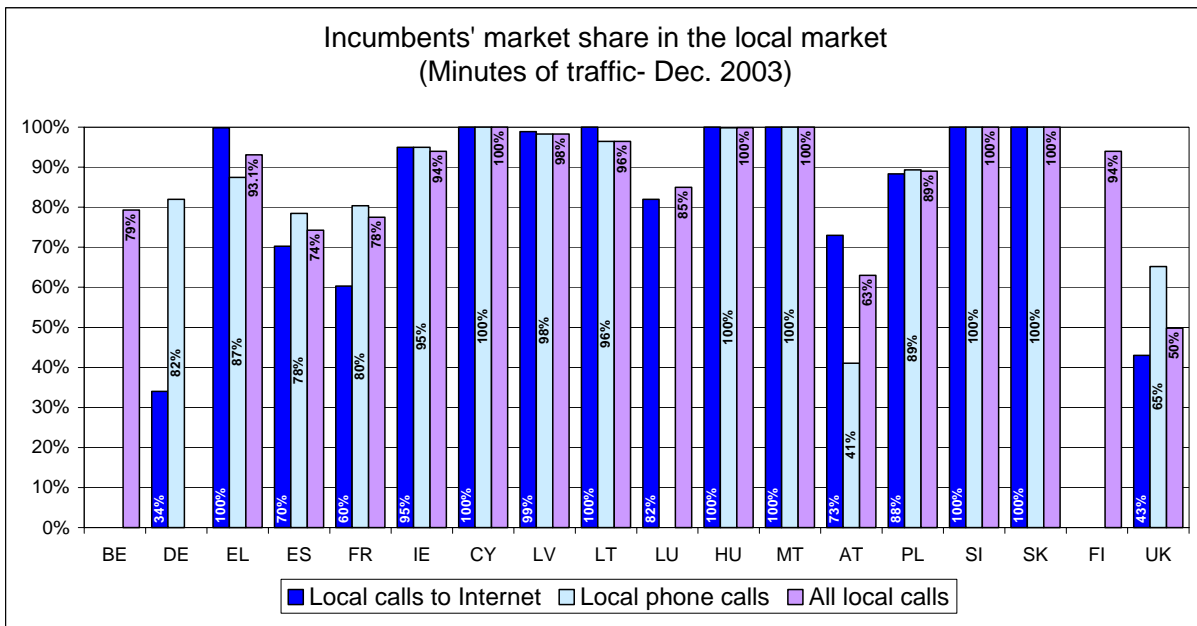
Slovakia: Only the incumbent operator is actually providing services.

Finland: The 3 incumbent groupings hold 93.4% of voice market

Sweden: Figure includes VoIP players

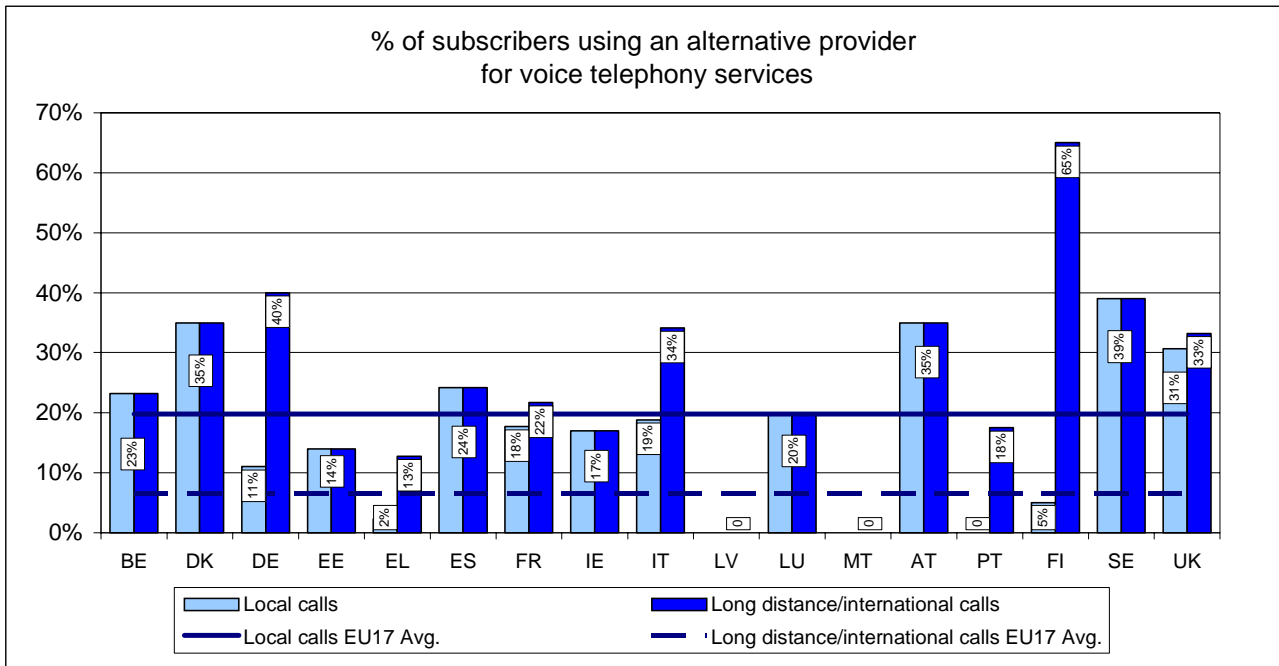
Hungary: There are 5 fixed incumbent operators, each of them former local monopolies in their primary areas. The level of competition in these 5 fixed traffic markets is not significant yet.

Figure 17. Value of the market share of the Greek incumbent operator in the overall local calls market.



SECTION 3: CONSUMERS' CHOICE OF FIXED OPERATORS

Figure 22. Footnote on Slovenia



Belgium: Data refer to 31/12/2003.No distinction between local, national and international calls.

Denmark: No distinction between local, national and international calls. Only active subscriptions to CPS in the last 3 months are included with a weighting of 25%. The figure therefore is likely to be underestimated

Greece: Data refer to 31/12/2003.

France: Correction of data for previous reports so as to be comparable with 10th report. Data of 8th report are not comparable to those of 9th and 10th reports,

Italy: Data refer to 31/12/2003. Data are not comparable with that of previous years.

Luxembourg: No distinction local/long-distance/international.

Austria: Estimate for CPS only, no distinction between local/long-distance/international calls.

Portugal: Not available for local calls. Data for 2003 and 2002 have been adjusted following a redefinition of the indicators and a new data collection. Data for 2002 and 2003 are estimated based on the new methodology.

Estonia: No distinction between local and national calls.

Lithuania: Data available for direct access only.

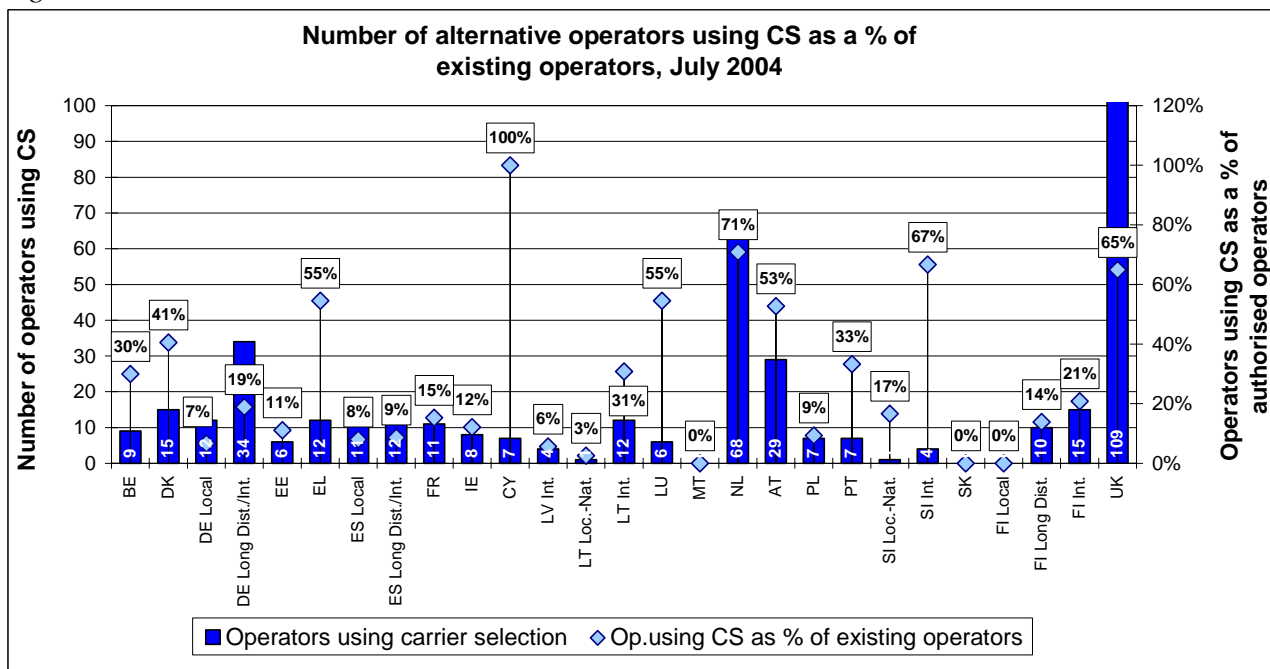
Malta: No alternative operators

Sweden: Data refer to CPS only by end 2003. No distinction between local and national calls.

United Kingdom: No data for long distance/international calls.

Cyprus, the Netherlands, Czech Republic, Hungary, Latvia, Poland, Slovenia, Slovakia: No data available

Figure 24. Footnote on Slovenia



Belgium: Figures refer to national calls only and not to international calls. There is no distinction between local and national calls.

Denmark: Value is a minimum.

Estonia: No distinction between local and national calls.

France: The 11 operators displayed in the chart provide services to residential customers.

Ireland: No distinction between local, long-distance and international calls.

Cyprus: Commercial provision of CS and CPS service started in January 2004.

Latvia: CS is only available for international calls. CS for local and national calls (no distinction) will be available from 1.1.06.

Malta: No alternative operators

The Netherlands: No distinction between local and long distance.

Austria: Data refer to 31/12/2003.

Poland: Figures refer to the number of operators that have access to a network number (NDS) and that are actually offering public voice telephony.

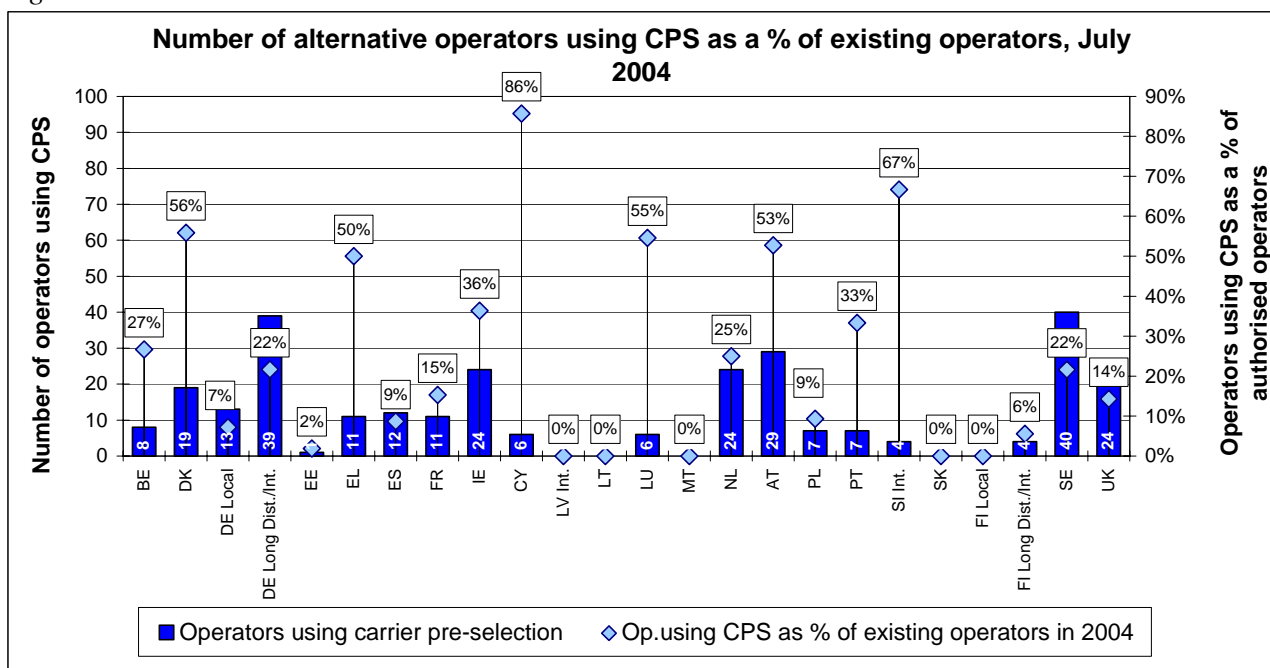
Portugal: There are 9 indirect access operators of which 7 are offering services to residential customers on a call-by-call basis.

Slovakia: CS, CPS and LLU not established yet

United Kingdom: As at 1/4/04.

Czech Republic, Italy, Hungary, Sweden: No data available. CS and CPS are available since 1.1.2004 in Hungary. **In Slovenia CS is available since December 2003.**

Figure 25. Footnote on Slovenia



Belgium: Figures refer to national calls only and not to international calls. There is no distinction between local and national calls.

Denmark: Value is a minimum.

Estonia: No distinction between local and national calls.

France: The 11 operators displayed in the chart provide services to residential customers.

Ireland: No distinction between local, long-distance and international calls.

Cyprus: Commercial provision of CS and CPS service started in January 2004.

Latvia: CPS is only available for international calls. CPS for local and national calls (no distinction) will be available from 1.7.06.

Malta: No alternative operators

The Netherlands: No distinction between local and long distance.

Austria: Data refer to 31/12/2003.

Poland: Figures refer to the number of operators that have access to a network number (NDS) and that are actually offering public voice telephony.

Portugal: There are 9 indirect access operators of which 7 are offering services to residential customers on a call-by-call basis.

Slovakia: CS, CPS and LLU not established yet.

Sweden: Estimated.

United Kingdom: As at 1/4/04.

Czech Republic, Italy, Hungary: No data available. CS and CPS are available since 1.1.2004 in Hungary. In Slovenia CPS is available since December 2003.

SECTION 5: MOBILE MARKET

The Greek NRA has provided new data on active subscribers as at end of June for three national operators and as at 1 May for one operator. This has resulted in a reduction of 0.9 million subscribers in Greece and consequently a reduction at EU level, from 378.71 million to 377.85 million subscribers.

The penetration rate in Greece should be 82% of the population instead of 90%. At EU15 level, the penetration rate should decrease from 86.6% to 86.3% of the population.

In the following figures the values for Greece and for the EU15 have been adjusted where appropriate.

Figure 42. Data for Greece

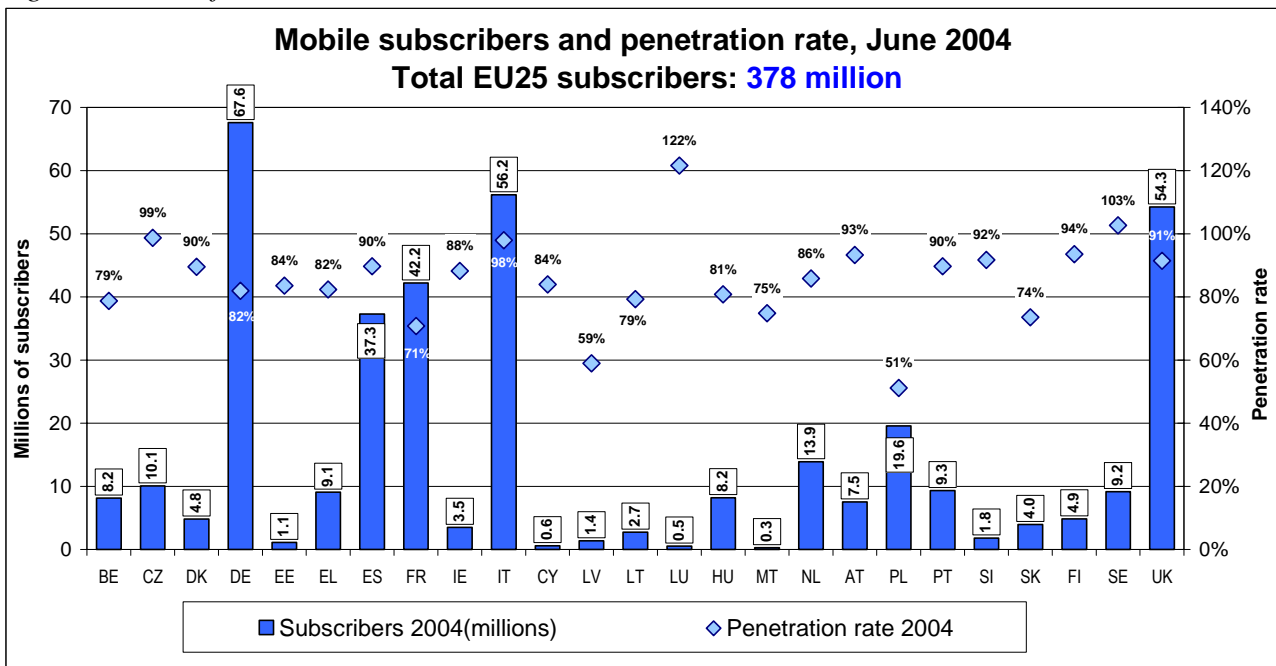


Figure 43. Data for Greece and Finland

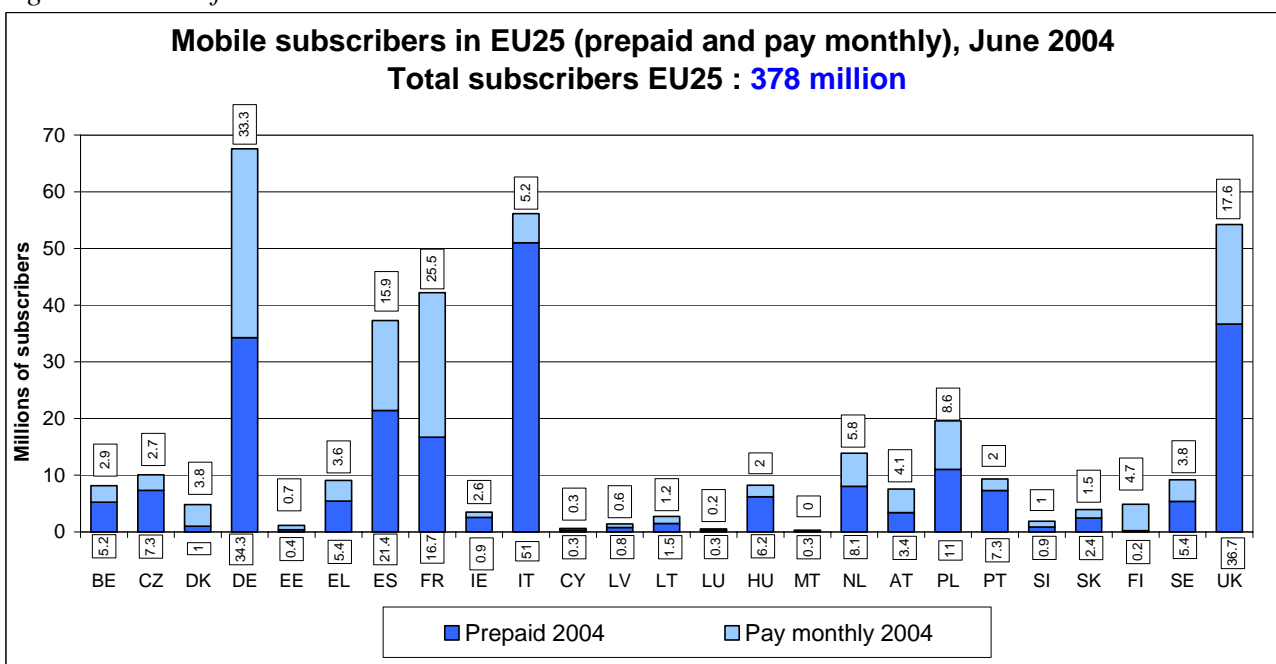


Figure 44. Data for Greece

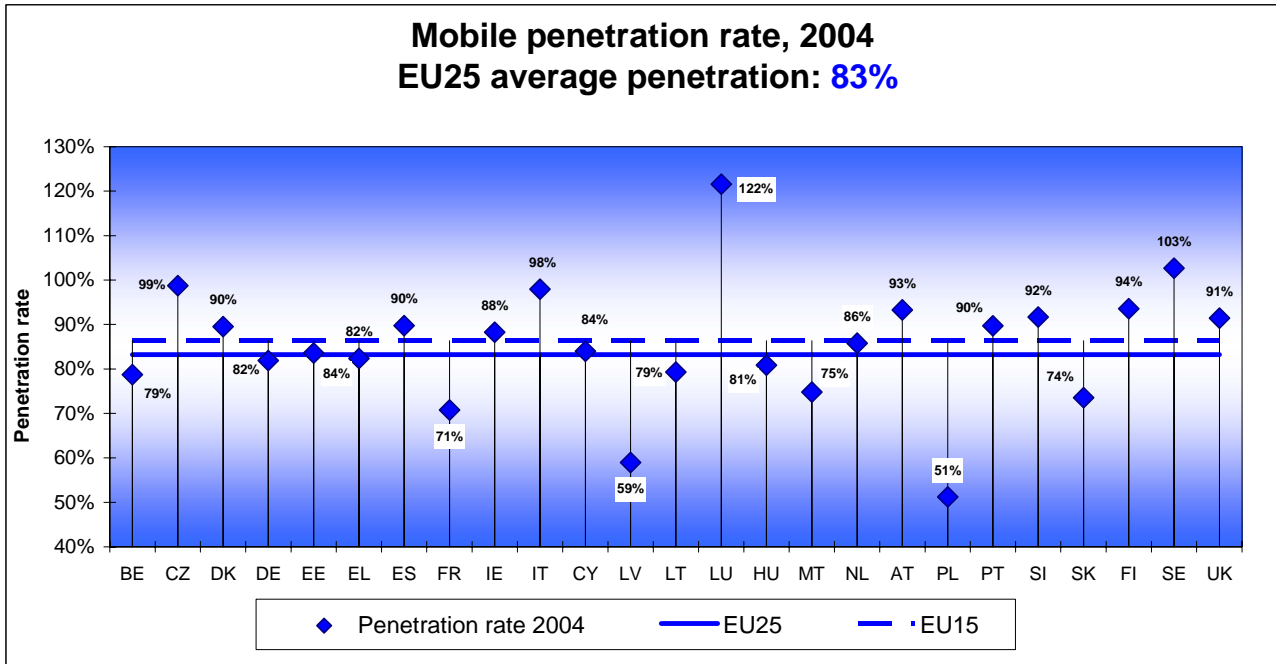


Figure 45. Data for Greece

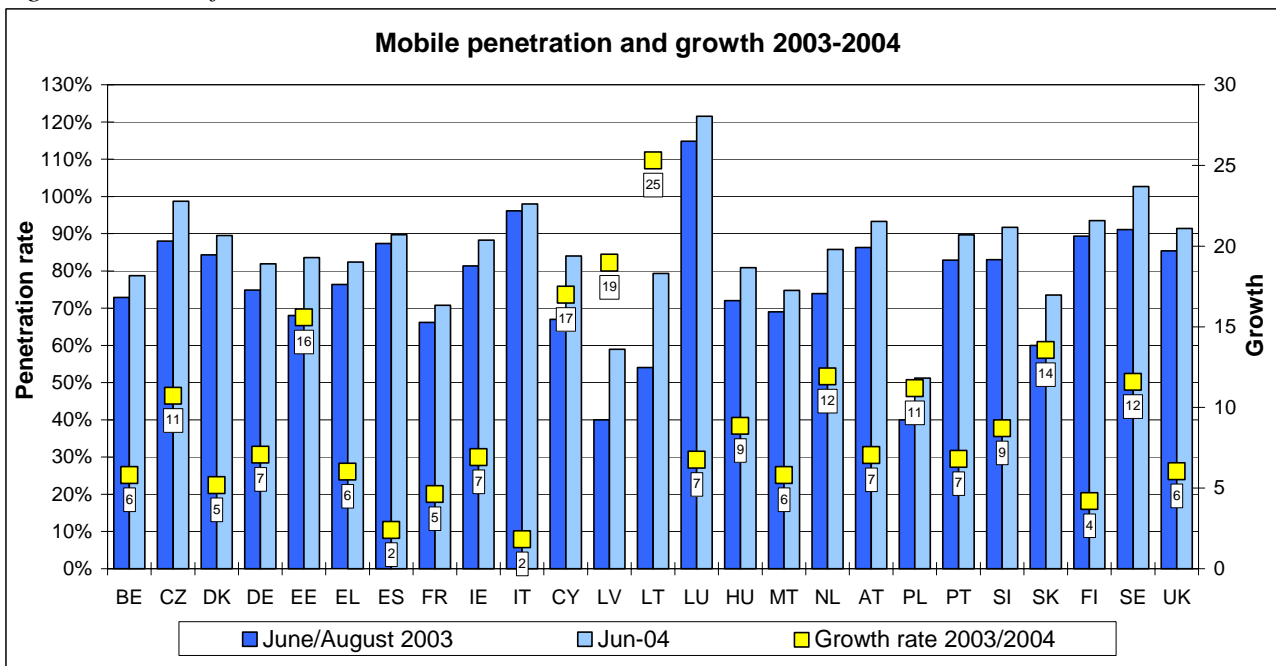


Figure 46. Data for EU in 2004

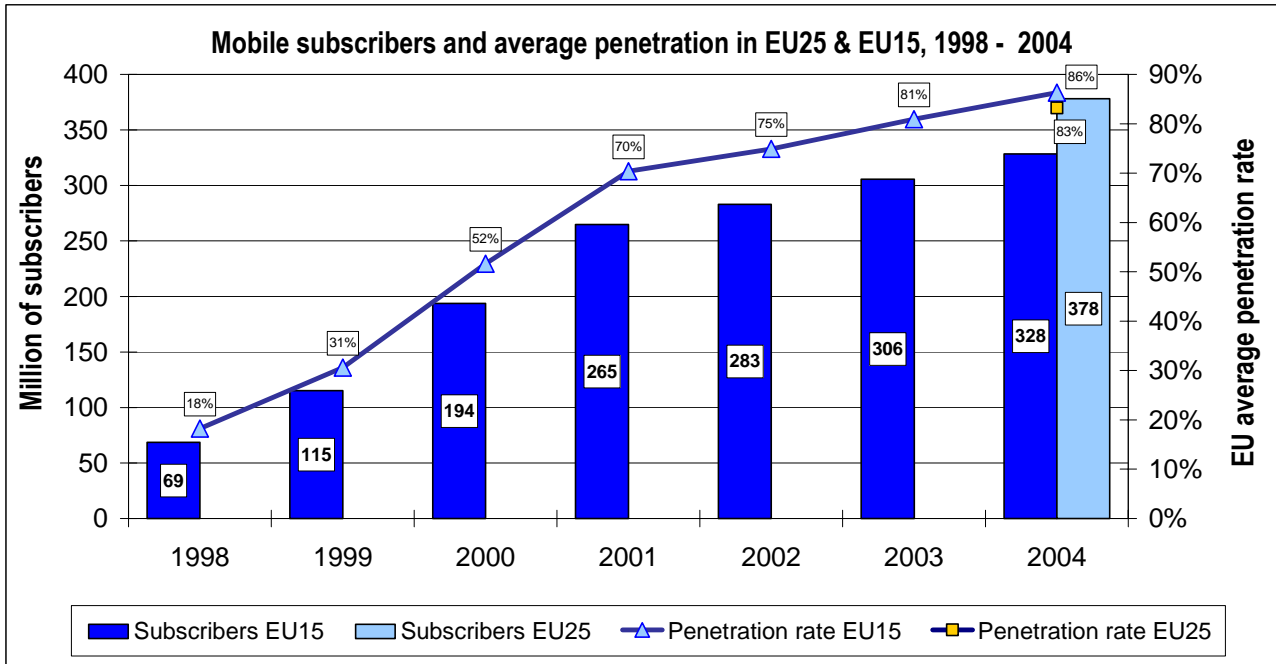


Figure 47. Data for EU in 2004

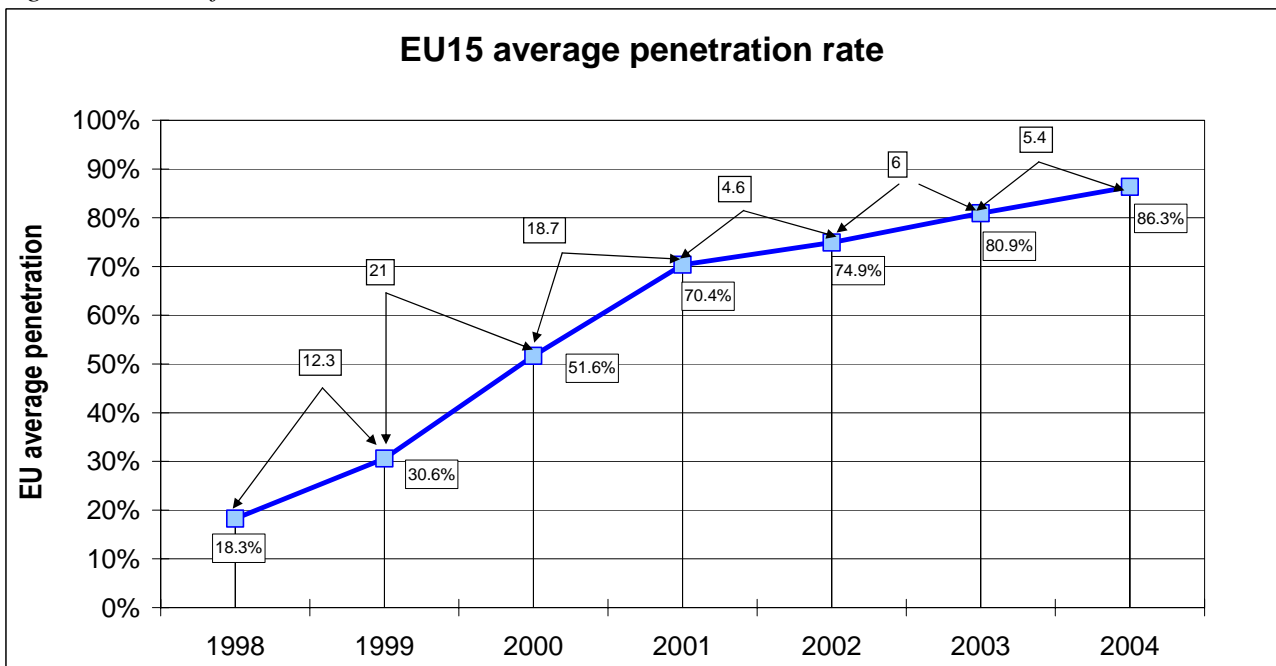


Figure 51. New map including all MS. Revised figures on network coverage for some MS.

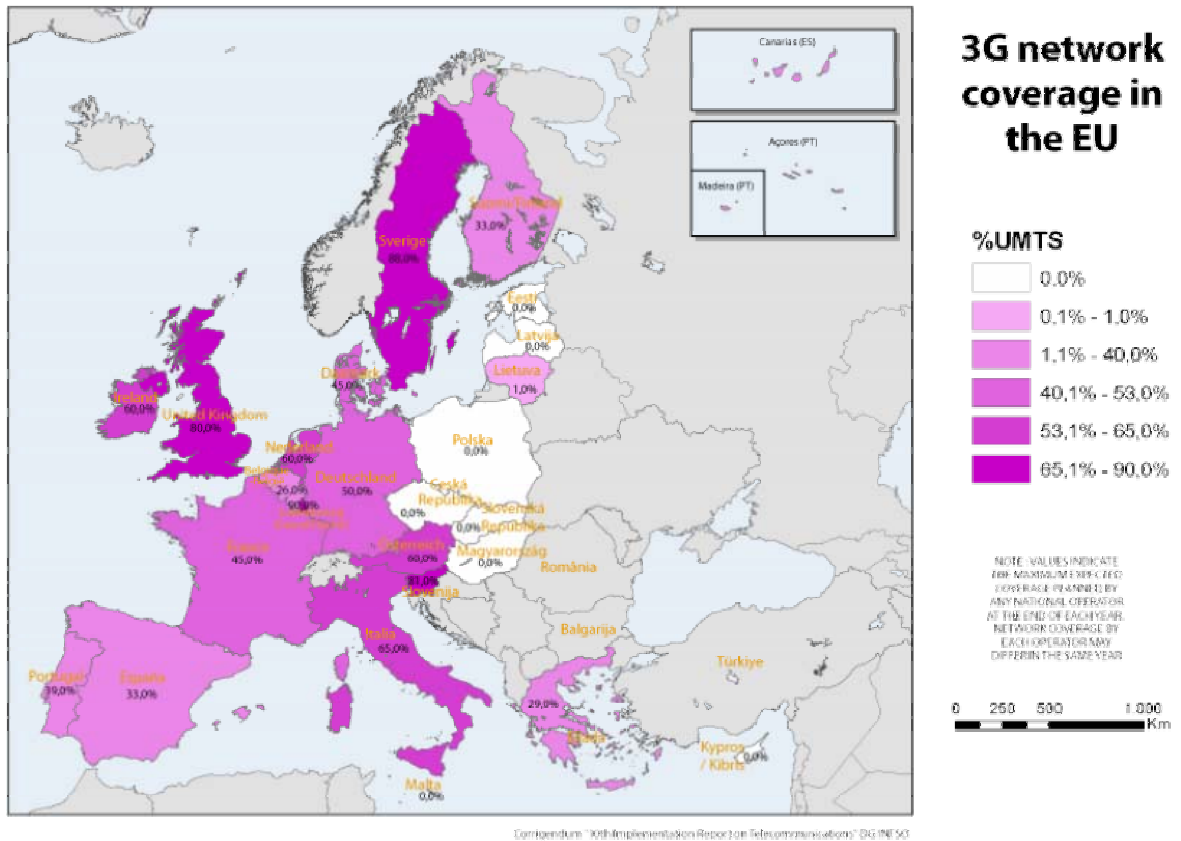


Figure 52. Data for Greece

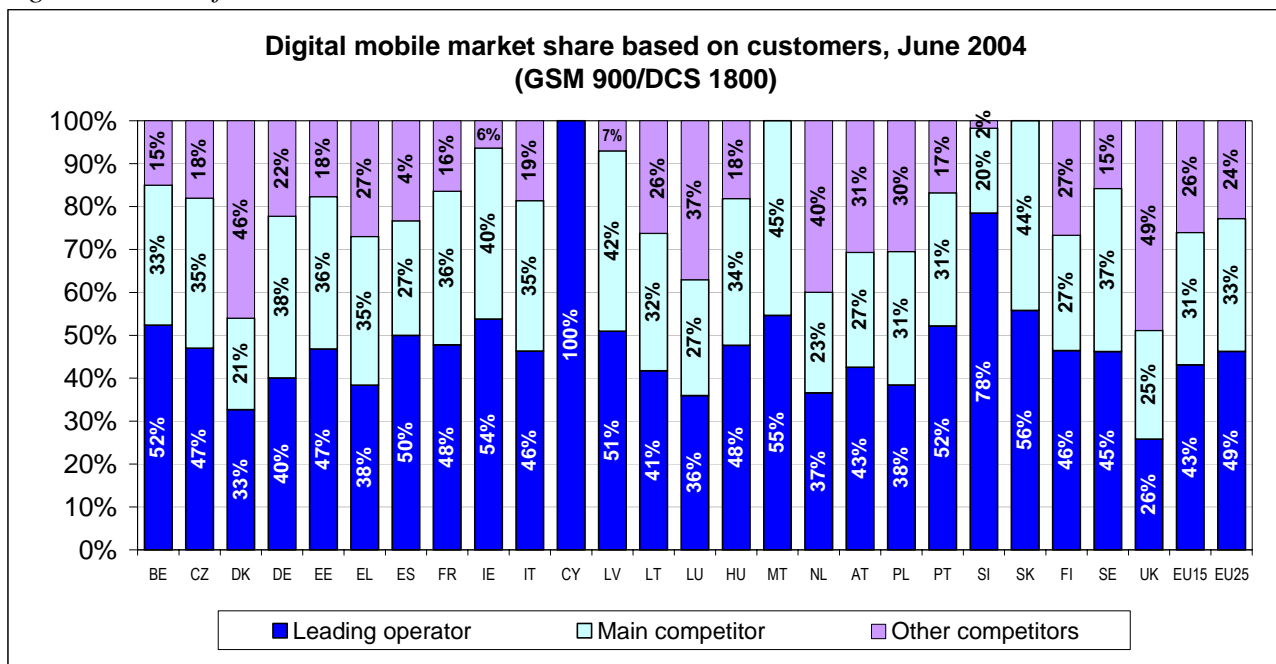


Figure 53. Data for Greece

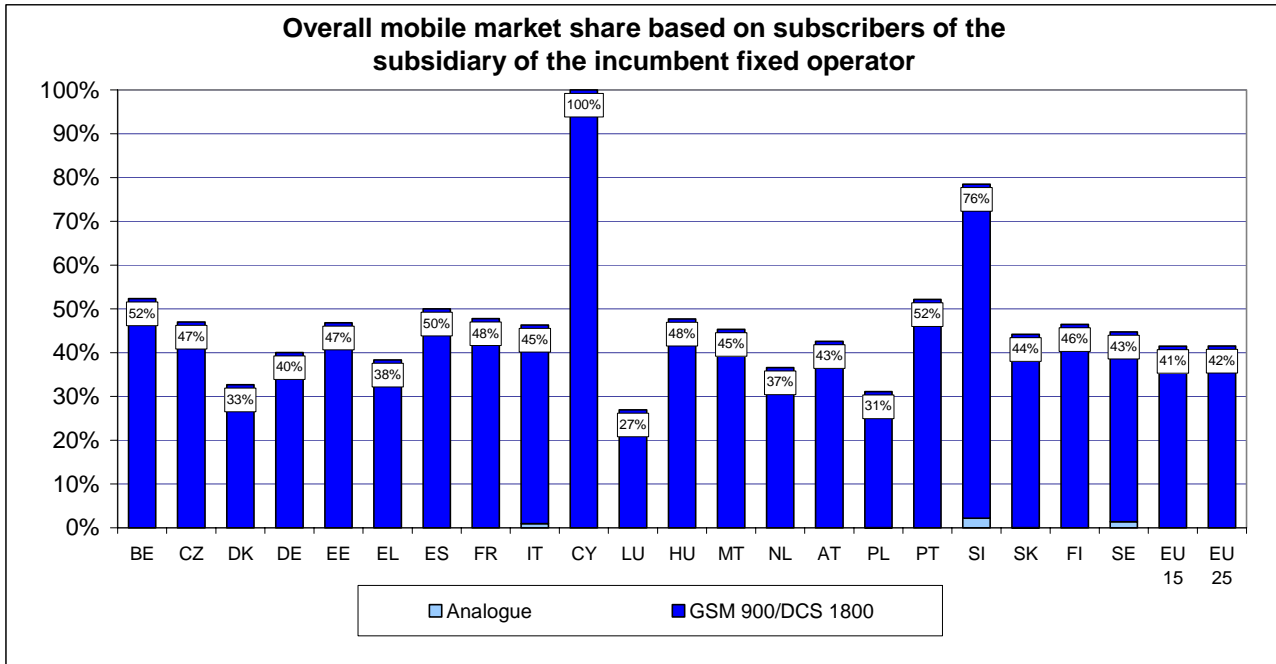
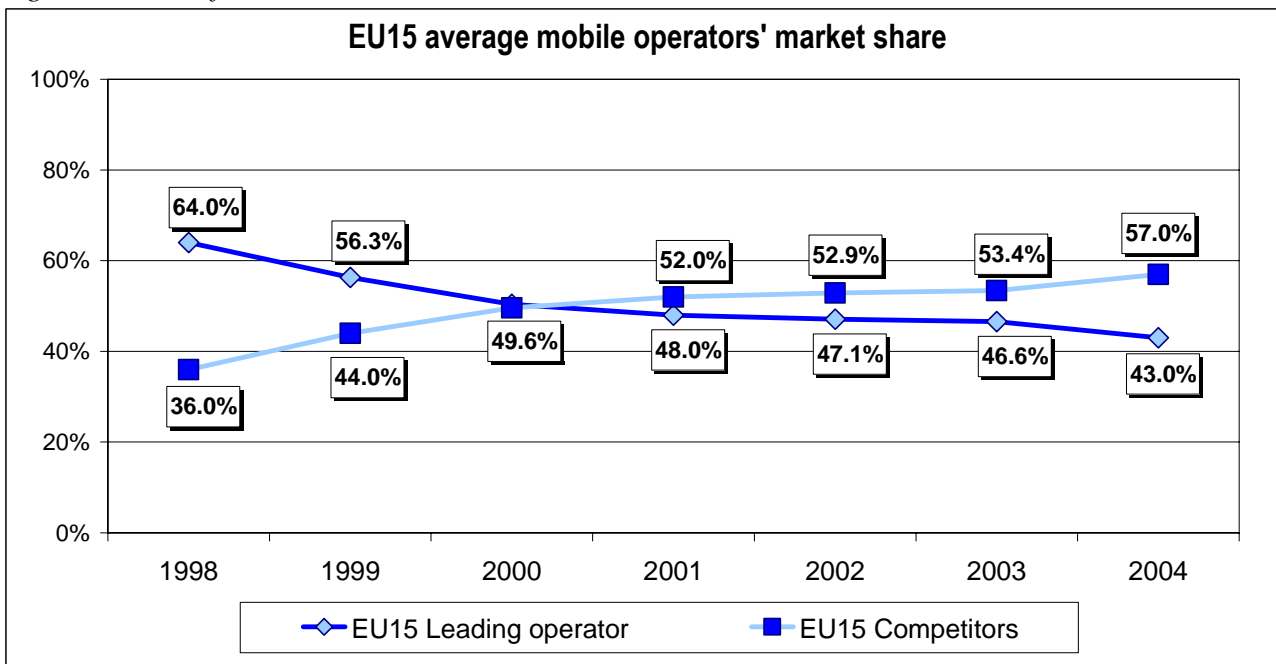


Figure 54. Data for EU in 2004



SECTION 6: NUMBER PORTABILITY

Table on number portability. Comments on mobile number portability for Slovenia

	Date of introduction of fixed number portability	Date of introduction of mobile number portability	Comments mobile
Slovenia		1 May 2004	Mobile portability not yet implemented

SECTION 8: PUBLIC VOICE TELEPHONY TARIFFS

Figure 81. Data for Austria

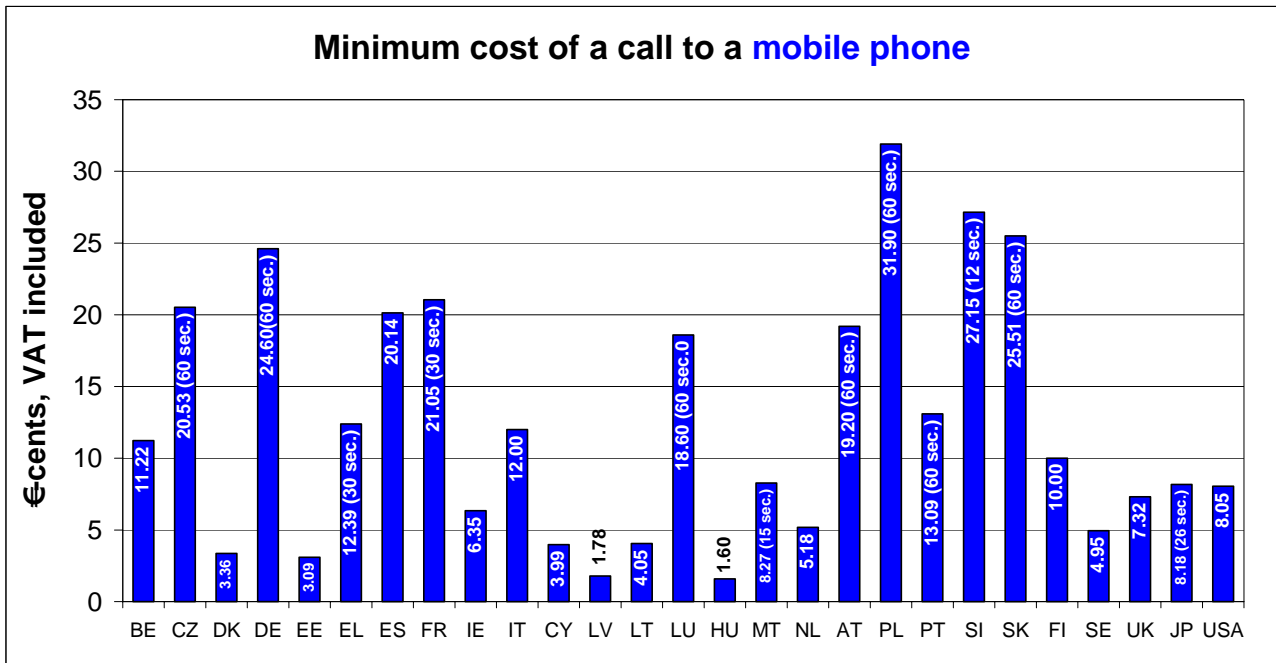
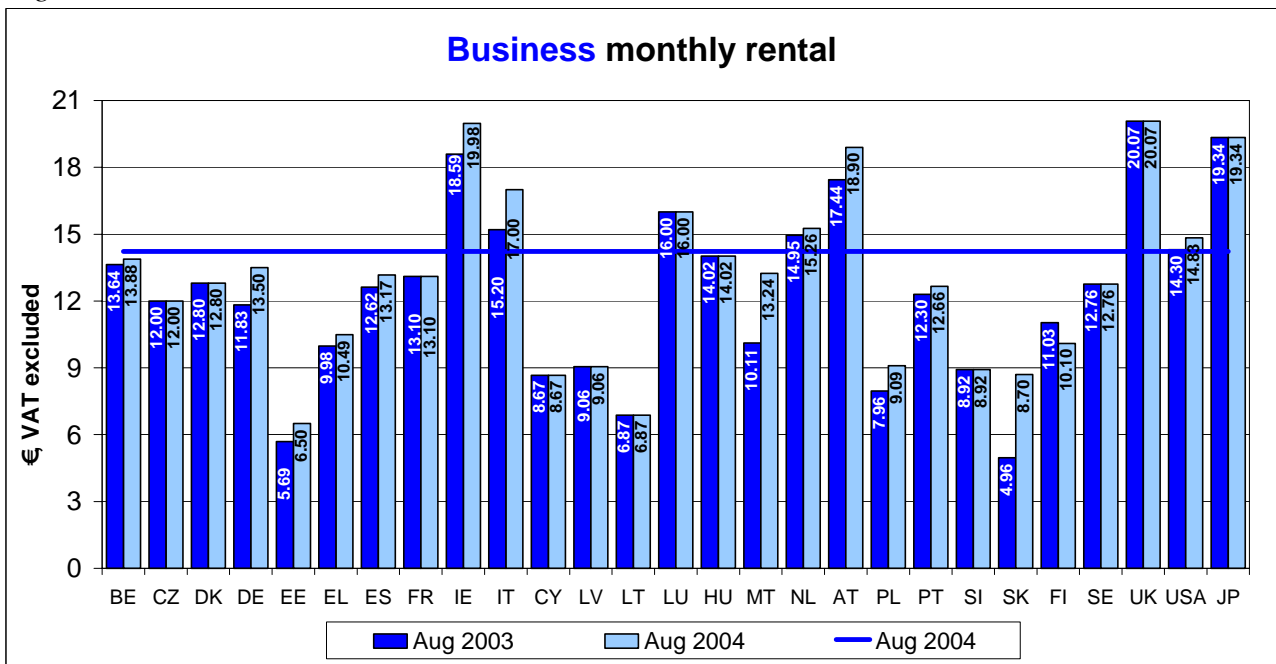


Figure 84. Footnote on Austria



The apparent rise of the monthly rental in Austria is due to a difference in the tariff option selected for the benchmarking. The figure for 2003 refers to the “Geschäftstarif 1” package. Since this option is no longer offered by Telekom Austria, the “Tik-Tak Office” package has been used to benchmark prices in 2004.

Figure 88

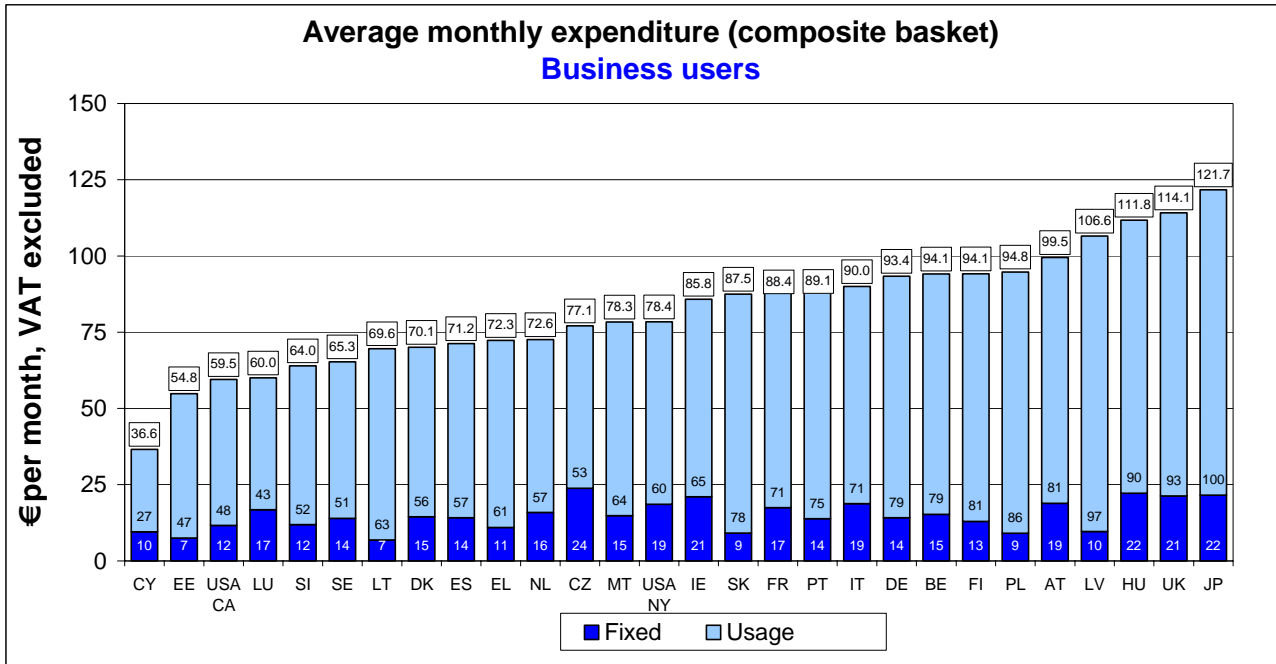


Figure 126. Data for Lithuania

