GREECE

EU Telecom rules: Where are we now?

European Commission
Information Society and Media

The Greek electronic communications market presented a contrasting picture in 2006. While there was an intensive competition and consolidation in the mobile sector, the fixed incumbent maintained its position as the only access network provider in the fixed market. The poor broadband penetration record remains an area of concern. The adoption of the law on Electronic Communications and other provisions finally transposed the EU Telecom Rules. To catch up with implementation, the Greek national regulatory authority (NRA), EETT, launched a large number of parallel public consultations and market analysis. EETT notified 17 out of 18 relevant markets imposing the full set of regulatory obligations. Missing secondary legislation, complex rights of way procedures, and ineffective appeal processes still hinder the proper functioning of the market.

Overview

Broadband

As of 1 October 2006, broadband penetration was still the lowest in the EU (EU-25 average 15.7%). 369,653 broadband lines in Greece represent a year-on-year increase of 229%.

A considerable increase of LLU lines was observed in 2006, while bitstream access lines recorded the biggest increase. Other technology platforms have also been used by operators with fibre-to-the-home technologies entering the market.

The regulator made great efforts for construction of co-location facilities for the alternative operators at the incumbent's local exchanges. A new draft reference unbundling offer (RUO) is currently under public consultation.

Mobile

Mobile penetration (100 %) continued to increase this year (89% in 2005). The incumbent's mobile subsidiary still leads the market with 40.5% market share. Its main competitor had a market share of 30.8% while the third and forth had a combined market share of 28.7%.

Availability and take-up of 36 services and mobile broadband products have continued to increase. Three of the four mobile operators have a 3G licence.

There have been concerns from mobile operators regarding the very tight glide-path (10 months) imposed by EETT for the move of mobile termination tariffs towards cost orientation and the special levy imposed by the government on post-paid mobile subscriptions.

Fixed telephony

The market is dominated by the incumbent (74% of the market in revenues in December 2005). There were fourteen operators offering fixed voice telephone services over a leased or own network. The lack of alternative fixed network infrastructures, notably cable, has not facilitated infrastructure-based competition.

Interconnection prices for call termination on the incumbent's network decreased very slightly for single transit (€0.86 in October 2006 compared to €0.89 in October 2005) and had a bigger decrease for double transit (from €1.30 to €1.10).

Broadcasting

At the end of the third quarter of 2005, 94.3% of households (around 4 million households) had analogue TV as the main means of receiving TV, while 5.7% had digital satellite TV. There is no cable TV offered in Greece. Digital switchover is expected to take place after 2010.

There is a serious problem concerning regulation of the wholesale broadcasting services market, since EETT had not been given competences to regulate this market by the Greek law of January 2006. A specific law seemed to be under preparation but has not yet been notified to the Commission.

Important consumer information

Tariff transparency and quality of service	The NRA provides online information on fixed and mobile prices, including roaming, which acts as a practical tool for consumers.
Universal service	The incumbent operator remains the universal service provider until a new designation will take place in line with the new Greek law. No precise timing for such designation has been announced.
Directory services and enquiry directory services	In May 2006, the universal service provider completed the printing and publication of the USO printed telephony directories which includes both fixed and mobile numbers and covers all territories of Greece, and all post-paid and pre-paid customers. The Commission has closed the infringement procedure on this issue.
Emergency services	Caller location information is not available to emergency services for calls from either fixed or mobile phones, and therefore the Commission started an infringement proceeding.
Number portability	There has been a considerable increase of ported numbers since the date of introduction of number portability in Greece for both fixed and mobile numbers. In October 2006, fixed ported numbers reached 60 948 compared to 24 307 a year before, while mobile ported numbers had a 141% increase, reaching 141 154 numbers.
Must-carry	Despite the adoption of the new law which provides for 'must carry' obligations there is still no secondary legislation to impose such obligations
Consumer complaints and out of court dispute resolution	The NRA has the competence to deal with consumer complaints and requests for information.

Infringement proceedings pending under the EU Telecom Rules: 1

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