Digital Agenda Scoreboard 2016
Electronic communications market indicators: Definitions, methodology and footnotes on Member State data

Financial indicators, fixed and mobile telephony, broadcasting and bundled services indicators

Definitions

Revenues and investment

- **Electronic communications sector revenues**: All wholesale and retail revenues of electronic communications excluding VAT.

- **Electronic communications sector network investment**: All telecommunications network investment (both tangible and intangible) excluding license fees.

Fixed telephony

- **Fixed telephony market**: the market for publicly available telephone services and includes managed VoIP and calls made from public payphones; and should exclude 'peer-to-peer' VoIP services, simple reselling and calling cards.

- **National fixed calls**: all national public fixed voice telephony calls including local calls, long-distance calls and calls to internet (both to geographic and non-geographic numbers, excluding flat tariffs (FRIACO)).

- **Calls to mobile**: all calls in the fixed voice telephony market terminating on a mobile network, excluding calls to foreign mobiles.

- **International calls**: all calls in the fixed telephony market originating in the Member State and terminating abroad. International calls should include calls from fixed geographic numbers to foreign fixed and mobile numbers.

- **Managed VOIP (voice over broadband) operator**: an operator providing a publicly available telephone service (PATS) service using voice over internet protocol technology (VoIP), whereby the operator controls the quality of service provided though an IP network, at a speed over 128 kbit/sec. Unmanaged voice and 'peer to peer' services should not be included. The market share should be calculated based on outgoing minutes of fixed voice communications.

- **Direct access**: the provision of publicly available telephone services through LLU and/or proprietary infrastructure (excluding incumbents).

- **Full LLU**: full unbundled access to the local loop, the provision to a beneficiary of access to the local loop or local sub loop of the notified operator authorising the use of the full frequency spectrum of the twisted metallic pair.

- **Shared access**: the provision to a beneficiary of access to the local loop or local sub loop of the notified operator, authorising the use of the non-voice band frequency spectrum of the twisted metallic pair; the local loop continues to be used by the notified operator to provide the telephone service to the public.
Mobile market

- **Mobile subscriptions**: 2G, 3G and 4G subscriptions of a mobile network operator or Mobile Virtual Network Operators. Number of post-paid active subscribers means number of subscribers with a valid contract. Number of prepaid active subscribers means numbers of subscribers that have made or received a call, sent an SMS or MMS or used data services at least once in the last three months.

- **M2M SIMs**: "M2M is about enabling the flow of data between machines and machines and ultimately machines and people. Regardless of the type of machine or data, information usually flows in the same general way -- from a machine over a network, and then through a gateway to a system where it can be reviewed and acted on.” – [www.m2mcomm.com](http://www.m2mcomm.com).

- **MVNO**: Mobile Virtual Network operators with own SIM cards and own mobile network code. Operators that fulfil the above two conditions, but are majority owned (more than 50%) by any of the Mobile Network Operators operating in the same national market should not be included (e.g. operators being only a sub-brand of Mobile Network Operator should be excluded).

- **APRU**: Average Revenue per User. Retail mobile revenues divided by the average number of subscriptions.

Broadcasting

- **Satellite TV**: analogue and digital transmission of TV signals to and/or receiving from satellites.

- **Cable TV**: a system of providing television to consumers via radio frequency signals transmitted to televisions through fixed optical fibres or coaxial cables.

- **IPTV**: a system whereby television programmes are delivered to subscribers using Internet Protocol over a broadband connection.

Number portability

- **Time needed for porting a number - regulatory framework**: The maximum time between the conclusion of the agreement to port a number (when the agreement takes into effect), and the activation of the number at the new operator (i.e. the end of the porting process). For fixed numbers, indicate the time needed for porting a number from the incumbent to the major alternative operator. For mobile numbers, indicate the time needed for porting a number from the major mobile operator (operator with the highest market share in terms of revenue) to the second largest operator. Those cases should be excluded, where (1) the customer requests to port a number later than the standard timing proposed by the operator, (2) the porting process is delayed purely due to the lack of cooperation of the customer, and (3) any unexpected event delays the process at the operator's side concerning maximum 5% of all the portings in the given period.

- **Time needed for porting a number – total time**: The maximum time between the first action of the customer (e.g. the submission of the request to port a number or the request to terminate the old contract with the intention to port a number to a new operator including the notice period) and the activation of the number at the new operator. Those cases should be excluded, where (1) the customer requests to port a number later than the standard timing proposed by the operator, (2) the porting process is delayed purely due to the lack
of cooperation of the customer, and (3) any unexpected event delays the process at the operator's side concerning maximum 5% of all the portings in the given period.

Methodology

The data (except for interconnection charges and roaming prices) have been collected by the European Commission, Communications Networks, Content and Technology Directorate General, from national ministries and regulatory authorities except when noted. The definitions have been agreed in the Communications Committee (COCOM).

In some cases, information for some types of access is not available. In a number of countries certain figures are estimates, as the National Regulatory Authorities had not received consolidated data from operators. It should also be noted that in some cases information only refers to major broadband access providers and that broadband access lines provided by small operators are not included.

This report includes information from all 28 Member States.

Data should be interpreted taking the below comments of Member States into consideration:

Austria

Broadcasting: Number of paying subscriptions of DVB-T and DTT technologies is not available.

Belgium

Broadcasting: Data is as of the end of the year (end 2014 for mid 2014).

Number portability: A transaction can contain more than 1 ported number.

Bulgaria

Broadcasting: Data is as of the end of the year (end 2014 for mid 2014).

Germany

Revenues and Investment: Fixed revenues include IPTV. Pay TV includes only cable revenues. Intangible investments are not included.

Fixed telephony choice: Data for international calls is based on estimates.

Fixed telephony market shares: National fixed calls exclude calls to internet.

Traffic: Fixed traffic data excludes calls to the internet.

Broadcasting: Data is as of end 2014. Source: ASTRA TV-Monitor, TNS Infratest. IPTV: Source BNetzA

Estonia

Number portability: Ratio of ported numbers is estimated.
Greece
LLU: The disconnection fees are defined separately and are the following: €10.23 for full LLU and €21.07 for shared LLU.
Number portability: Number of days are average values, counted in calendar days.

Spain
Fixed telephony choice: 2014 data is as of 30 September 2014 and 2015 data is as of 30th September 2015.

Finland
Marked shared fixed: VoIP: estimation based on number of subscriptions.
LLU: Prices are (simple) average prices. Prices vary significantly from operator to operator.

Croatia
ARPU: Only mobile voice related revenues were included.

Ireland
Revenues and Investment: Investment data is based on estimates.
Fixed subscriptions: Data is based on estimates.
Broadcasting: Data is sourced from Nielsen TV Audience Measurement Establishment Survey on behalf of TAM Ireland.

Lithuania
Revenues and Investment: Device revenues are not included in the electronic communications sector revenues.
Broadcasting: Cable TV includes MMDS.

Luxembourg
LLU: Shared access is no longer available in LU.
Mobile subscribers: Data is as of 1 July 2015.

Portugal
Revenues and investment: Investment data is estimated.

Romania
Mobile subscribers: Data is as of 1st July each year.
UK

LLU: In 2015 a cheaper MPF product was also available with a different Service Maintenance Level (£7.09 per month).

Mobile subscribers: It is assumed that all M2M connections are post-pay.