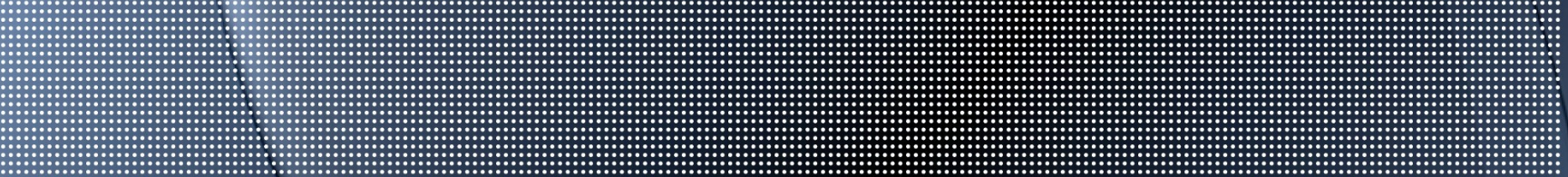


The deployment of NGA in Europe and Its impact on competition in the EC markets



José Ferrari Careto
CMT, Barcelona

Index

- Five key messages on NGAs regulation
- Five keystones in the Portuguese approach
- Where we stand in Portugal

First Message:

- In balancing investment and competition we should avoid yo-yo regulation



Five key messages

Second Message:

- NGAs should be approached from a technological neutral perspective



Third Message:

- Ducts are key (where available) and should be complemented with “open network offers” when needed



Fourth Message:

- We need to put things into perspective: copper still exists and will go on for several years



Five key messages

Fifth Message:

- TV as a driver and contents as the wheels



Five key stones in Portuguese regulation

First keystone:

- Ducts reference offer in place since 2006 and now improved reflecting the importance of an extensive network



Five key stones in Portuguese regulation

Second keystone:

- Regulatory framework released February 2009, considering competitive and non competitive regions



Five key stones in the Portuguese case

Third keystone:

- Efficiency and scope of reference offers improved to keep the playing field level



Five key stones in the Portuguese case

Fourth keystone:

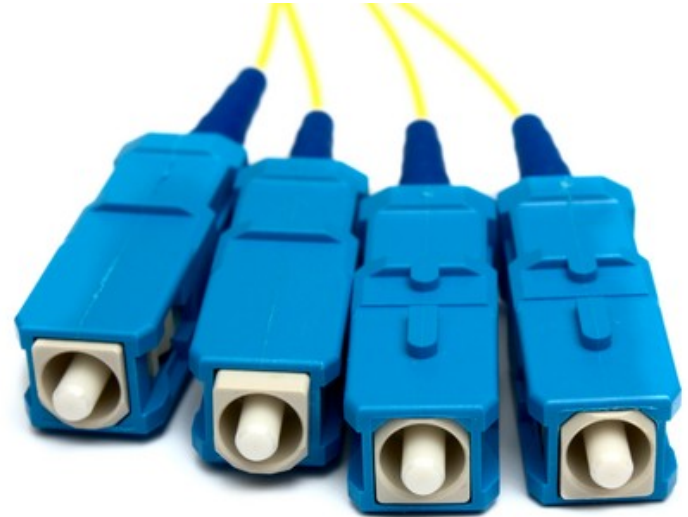
- Release radio spectrum in time to support wireless NGAs



Five key stones in the Portuguese case

Fifth keystone:

- Policy measures reinforcing the strategic role of NGAs and creating better conditions for it deployment



Where we stand in Portugal

- Several operators present in the NGA market
- Nationwide 13% of households optical fiber passed (> 30% in Lisbon area)
- Nationwide 30% of households can benefit from Docsis 3.0 (70% in Lisbon area)
- ... however still in a very supply driven economy



BWA AUCTION IN PORTUGAL

BROADBAND WIRELESS ACCESS

ANACOM will proceed with the allocation of rights to use frequencies for the development of applications using broadband wireless access (BWA), by auction.

10 NOV 2009 | Debriefing session

17 DEZ 2009 | Deadline to submit applications

Characteristics:

- Frequencies in the 3.4 to 3.6 GHz | 3.6 to 3.8 GHz
- Distributed across 9 geographical areas
- Flexibility in services/technologies definition

The auction process will be conducted over two stages:

First stage: any entity (national or foreign operators and municipalities) may participate in this stage, with the exception of terrestrial mobile operators, those with significant market power in the wholesale supply of broadband access and or those already holding rights of use in the mentioned frequency bands, in Portugal.

Second stage: rights of use which remain unassigned upon conclusion of the first stage will be made available without any restrictions on participation.

More information

www.anacom.pt

FREE FLOWING COMMUNICATIONS