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FOR INFORMATION

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TITLE: Telecommunications Statistics in Greece – The role of EETT

Telecommunications Statistics in Greece – The role of EETT

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EETT and its role in telecoms statistics

- EETT
 - EETT is the national regulator for the markets of electronic communications and posts.
 - The Telecommunications Law 3431/2006 specifies its responsibilities with respect to the electronic communications market.
- According to law 3431/2006
 - EETT retains a file, which contains all necessary data recording the status of electronic communications in Greece.
 - EETT may ask from telecom operators any type of information, through a justified request.
- Responsible unit:
 - “Department for Market and Competition Monitoring”



Data collection

- Semi-annual questionnaire
 - All operators with revenues > 150,000
 - Covers economics, infrastructure, fixed telephony, leased lines, internet, interconnection
- Interconnection questionnaire
 - Bi-monthly
 - OTE, mobile operators, OLO's interconnected with OTE
- Broadband questionnaire
 - Quarterly
 - Operators active in the broadband market



Challenges in data collection

- Smaller operators typically have difficulties responding
- Production vs. consumption side
- Need for a “learning curve”
 - Unwillingness, delay, unreliable data: Issues streamlined over time.
 - New operators or changes in operators’ management often require a new “learning curve”.
- Confidentiality issues
- Volatility of the market
 - Creates requirements for changes in the questionnaires.
 - E.g., today we need to address traffic from mobile networks, in the framework however of services that seek to substitute fixed telephony.
 - Changes in business models often render obsolete the methodologies used.



Dissemination – direct

- Annual report – Market Overview
 - An extensive report published annually and covering all aspects of the market
 - Fiscal data, licensing, access to the public telephony network, fixed & mobile telephony, interconnection, internet, broadband
 - Provides detailed assessment of the Greek market within the EU.
 - Available in Greek and English in EETT’s site
 - www.eett.gr > publications > Annual Reports
 - Initially part of EETT’s Annual Report
 - Currently an independent document but a joint production process
- Broadband report
 - Published quarterly and covering all aspects of the broadband market
 - Available only in Greek in EETT’s site

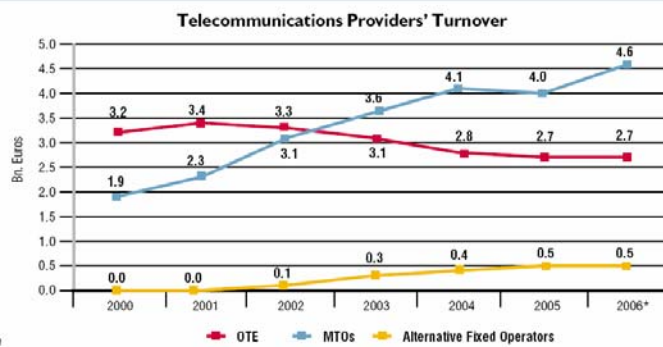


Dissemination – indirect

- Annual Implementation Report of the EC
 - Extensive coverage of the electronic communications market in the EU, based on data provided by the NRAs.
- Other international organizations
 - Communications Committee of the EC (broadband reports)
 - Eurostat
 - ITU
 - OECD
 - ...

Key statistics – Market Overview

Chart 5

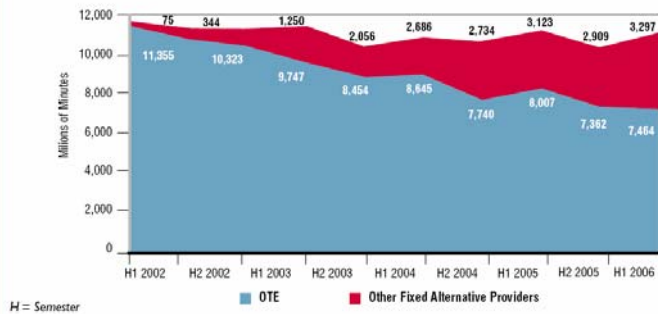


Increasing turnover for mobile operators.
Decreasing turnover for OTE which has stabilized after 2004.
Alternative operators present a slow up-trend.

Key statistics – Market Overview

Chart 16

Evolution of Outgoing Calls Volume from a Fixed Telephone (except Dial-up Calls)

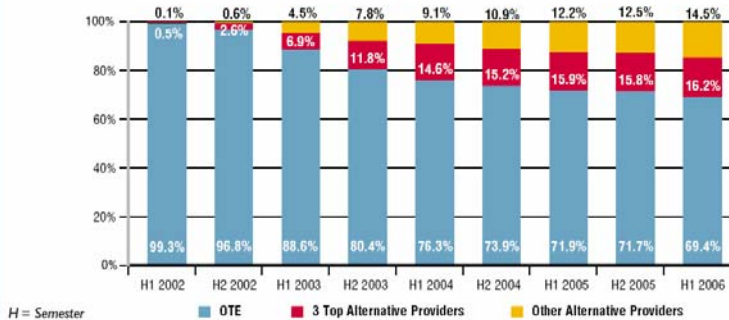


Fixed telephony traffic remains relatively stable and presents a strong seasonality.

Key statistics – Market Overview

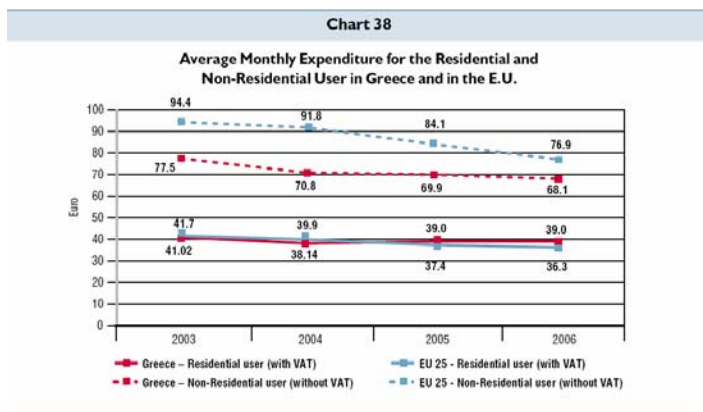
Chart 14

Evolution of Market Shares based on Outgoing Calls Volume (except Dial-up Calls)



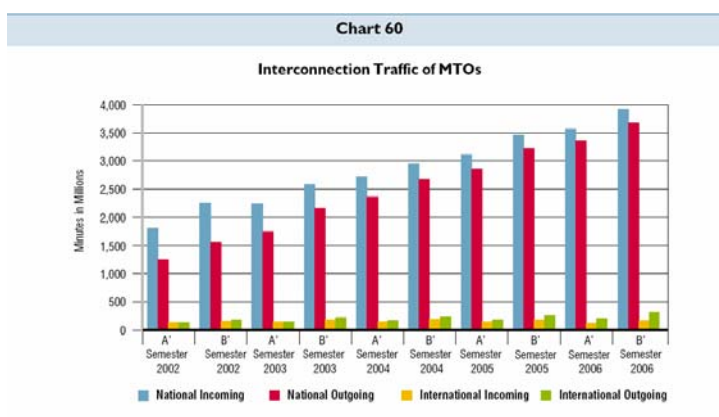
Alternative operators increase their market share.
Smaller alternative operators also present an increasing trend.

Key statistics – Market Overview



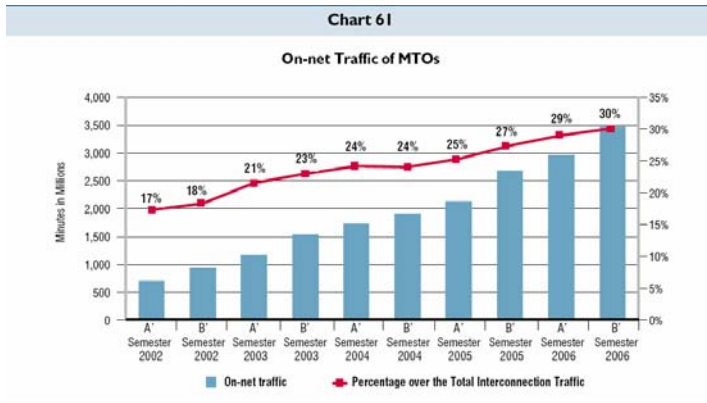
Expenditure of residential users is slightly above EU average.
Expenditure of non-residential users is below EU average but the difference is steadily reducing.

Key statistics – Market Overview



Mobile traffic presents a steady increase, even though the mobile market has long reached maturity.

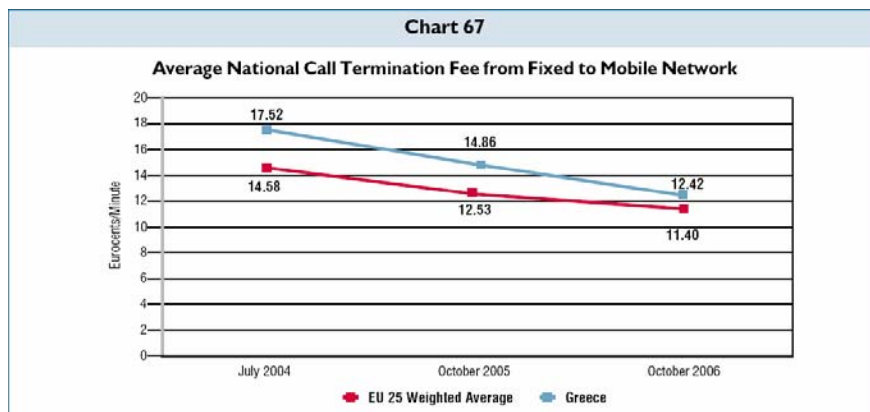
Key statistics – Market Overview



Mobile operators have a clear strategy for increasing their internal traffic.

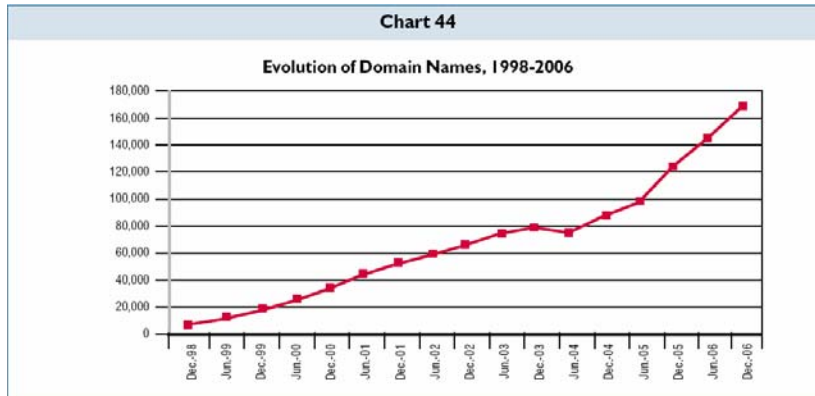
From 2004-B to 2006-B on-net traffic has almost doubled and its share on total traffic has increased from 24% to 30%.

Key statistics – Market Overview



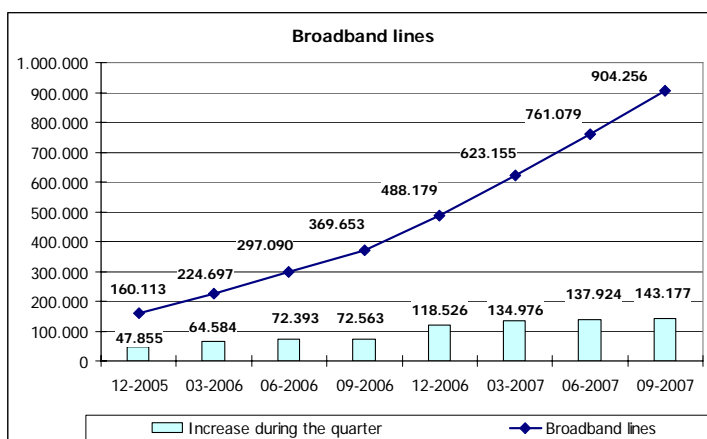
The average mobile termination fee remains higher than the EU average but this difference is steadily decreasing.

Key statistics – Market Overview



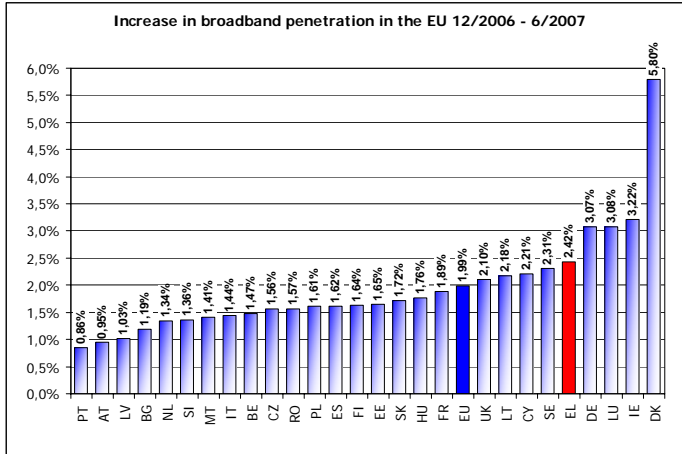
Domain names [.gr] present a steady increase.
Almost doubled in 2 years (12/2004 – 12/2006).

Key statistics – Market Overview



Steady and accelerating increase in broadband lines.

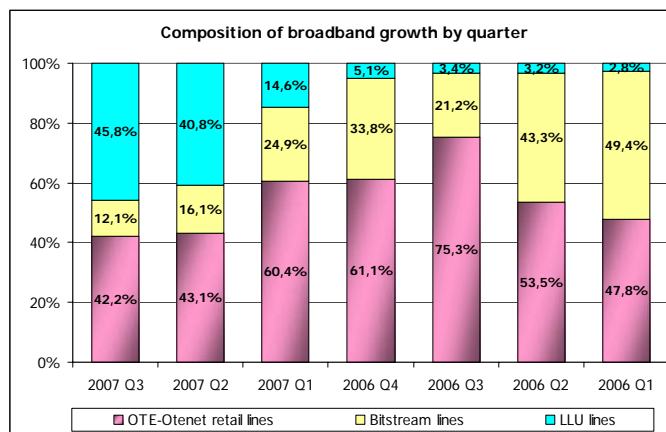
Key statistics – Market Overview



In 2007 the gap between Greece and the EU is decreasing.
In the first half Greece presented the 5th highest increase in broadband penetration among EU member states.



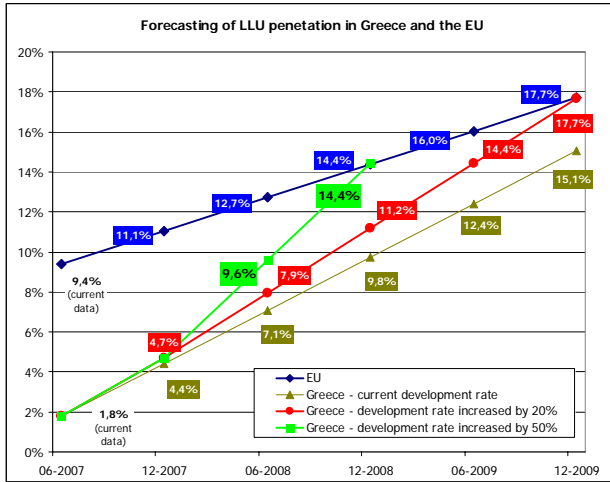
Key statistics – Market Overview



The rapid growth of 2007 is to a large degree due to the LLU.
LLU contributed >45% of broadband growth in the third quarter of 2007 and 34% for the year (compared to 4% in 2005, 2006).



Key statistics – Market Overview



LLU penetration measured as LLU lines over fixed telephone lines.

Assumption: LLU growth remains stable in the EU. Greece will reach the LLU penetration in the EU:

- In 2009, if the growth rate increases by 20% (red line).
- In 2008, if the growth rate increases by 50% (green line).

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