

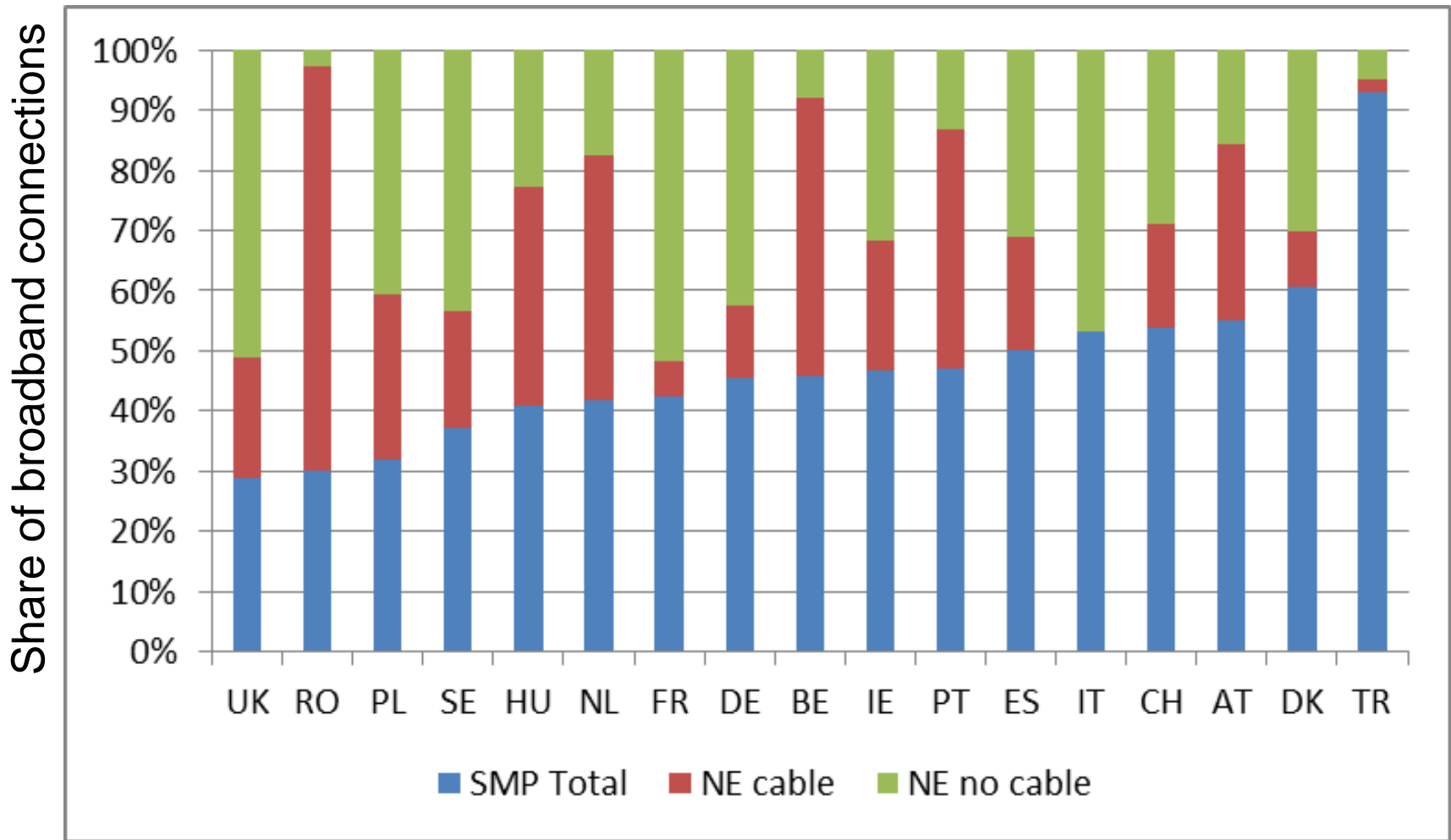
NGA regulation in Europe: What progress has been made?

Dr. Ulrich Stumpf

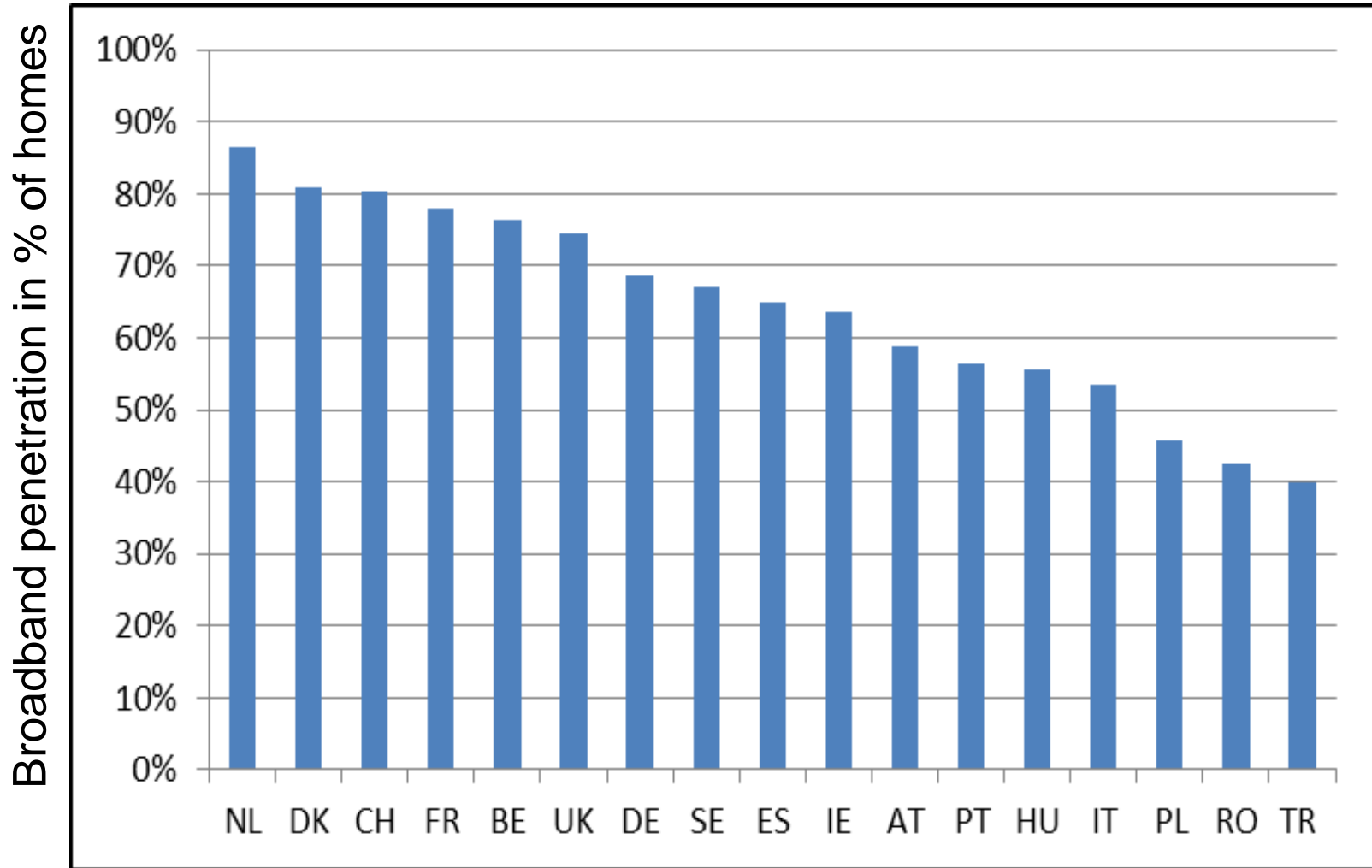
„Fiber to the Masses / Roadmap for 2023 vision of Turkey”,
Telcoder Conference, Izmir, 16 March 2012

Lessons from standard broadband

Unbundling and bitstream have turned broadband into a more competitive market

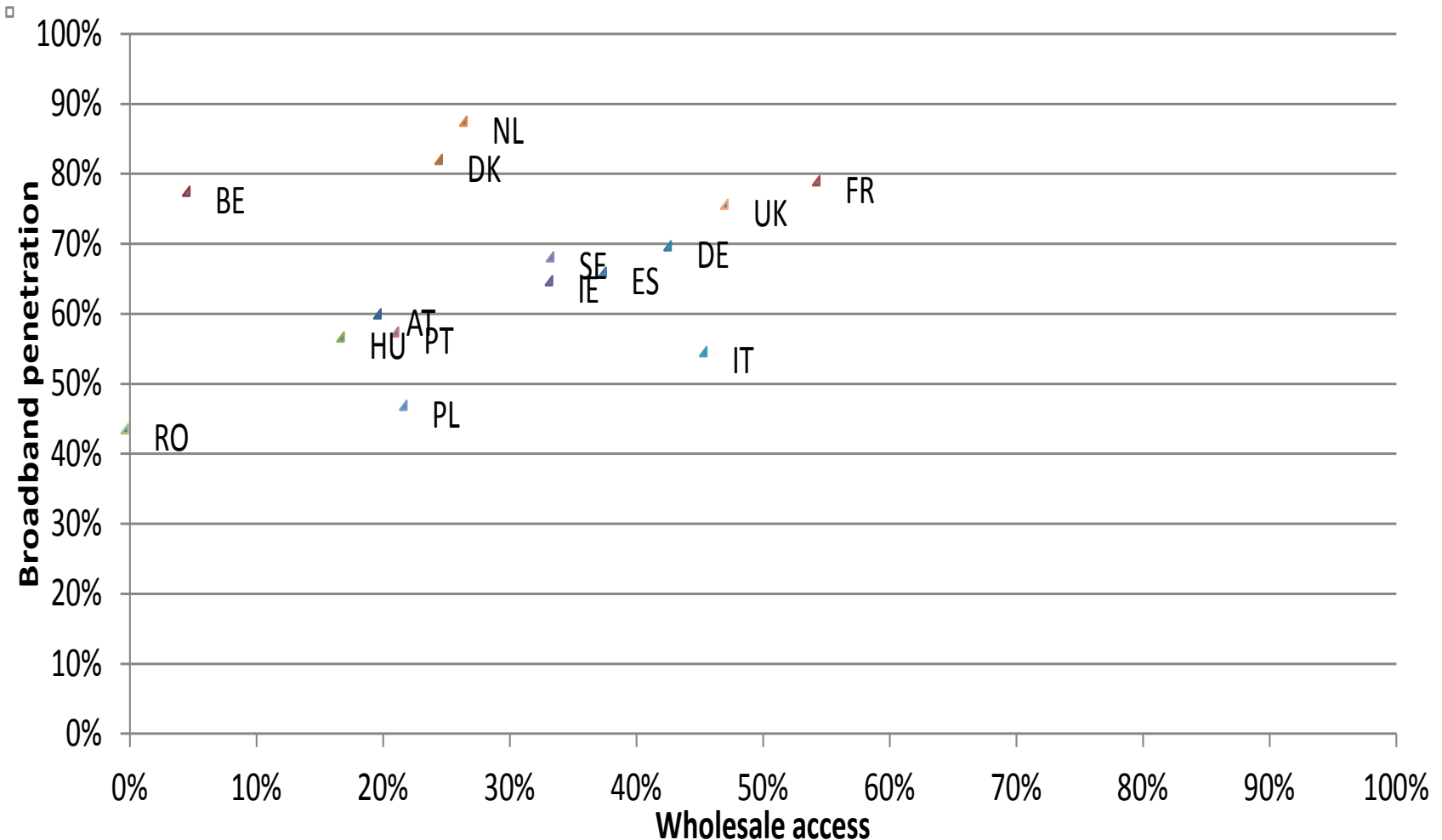


Unbundling and bitstream have had an important role in driving up broadband penetration, including for higher speeds



Source: IDATE (2011); OECD (2011)

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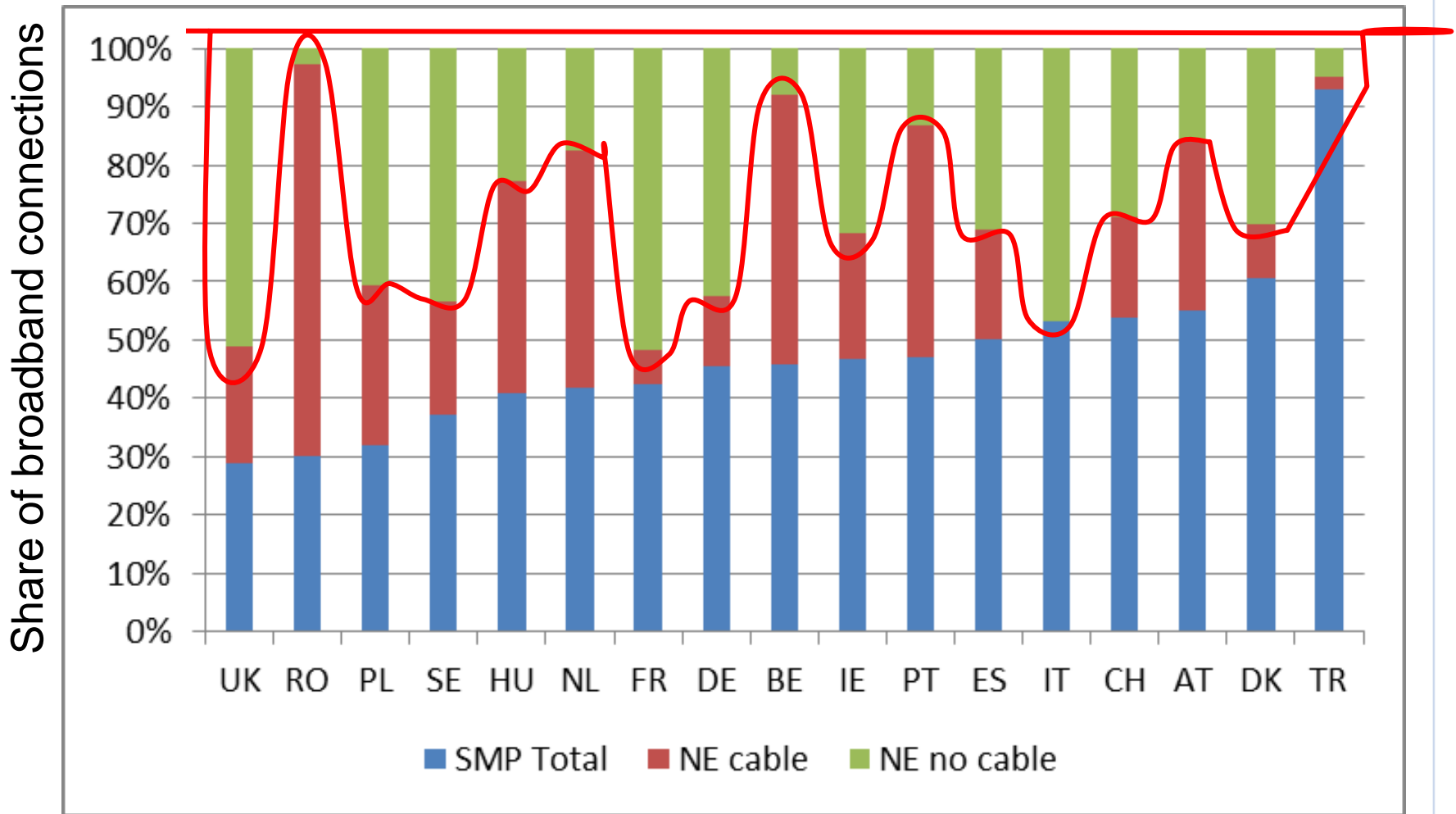
Source: COCOM (2011)

Where do we stand in ultrafast broadband?

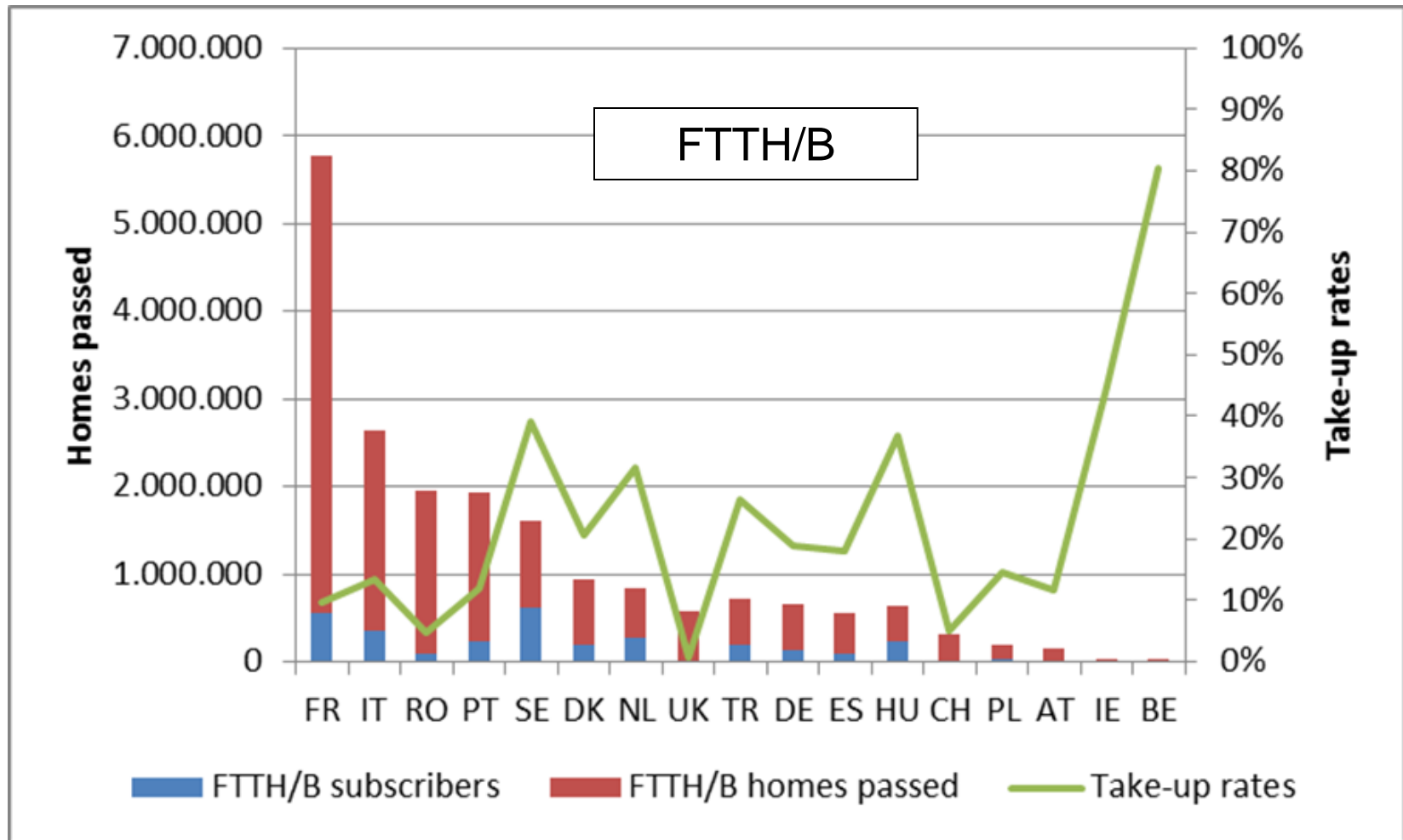
Unbundling and bitstream are not yet effective in ultrafast broadband

- Fibre-to-the-curb (FTTC)
 - No relevant unbundling of copper sub-loop
 - No relevant VDSL bitstream, except Germany
- Fibre-to-the-home (FTTH)
 - No relevant unbundling, except Netherlands and France
 - No relevant fibre bitstream
- A mix of reasons: Not imposed vs. not technically feasible vs. not economically viable

Risk of decreasing competition in overall broadband market ...

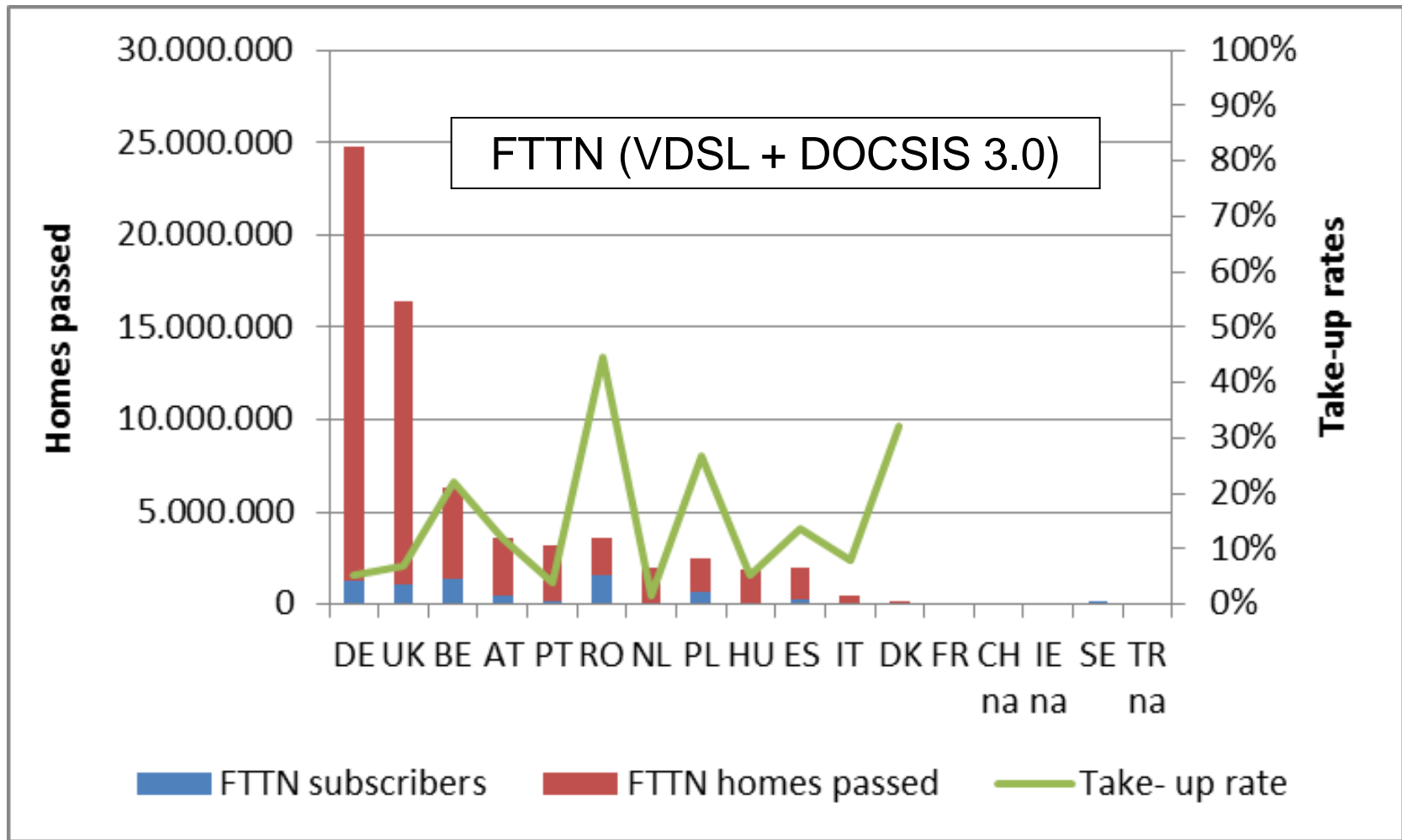


... and risk of negative impact on take-up of ultrafast broadband



Source: WIK based on FTTH Council/IDATE (2011)

... and risk of negative impact on take-up of ultrafast broadband



Source: WIK based on FTTH Council/IDATE (2011)

More effective access regulation in ultrafast broadband is called for

- Need for unbundling and bitstream in ultrafast broadband, except where competition is effective
- Where physical unbundling is not technically feasible *or* not economically viable, need for an effective virtual substitute = *virtual unbundled local access* (VULA)
- This is a bitstream product with access at local level that mimics pricing and characteristics of unbundling

More on this in new WIK report

WIK NGA Progress Report commissioned by ECTA covering 17 countries, including Turkey:

[http://www.wik.org/index.php?id=studiedetails&L=1&tx_ttnews\[tt_news\]=1411&tx_ttnews\[backPid\]=85&cHash=9d5167c145ca8928094ee4feb41548d2](http://www.wik.org/index.php?id=studiedetails&L=1&tx_ttnews[tt_news]=1411&tx_ttnews[backPid]=85&cHash=9d5167c145ca8928094ee4feb41548d2)

- Thank you for your attention -



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