

BEREC E-news

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Brief summary of the results from the 22^h Plenary in Berne (Switzerland) on 25-27 February 2015

BEREC held its first plenary meeting of the year in Bern, Switzerland, on 26 and 27 February 2015.

The Plenary meeting was preceded by a public workshop, on 25 February 2015, to discuss the emergence of oligopolies in both fixed and mobile markets, and consider whether existing regulatory tools are adequate to address the potential for “collective dominance”. The workshop benefited from the active participation of stakeholders, as well as from NRAs from markets which have experienced recent market consolidation.

During the Plenary meeting BEREC members discussed the main challenges that the sector will face in the next five years, in an attempt to identify potential bottlenecks to be addressed by the next review of the EU regulatory framework. This was the first of a series of sessions for exchanging views with the European Commission aiming at supporting the Commission in its undertaking for the legislative review, in the context of the Digital Single Market (DSM). A number of high level key challenges were identified: in an all-digital society new competition bottlenecks may emerge and must be dealt with to protect consumer choice; ensuring all consumers available and affordable high-speed broadband must be addressed in rural and more sparsely populated areas; the framework must evolve to ensure consumers can engage with digital services with more and more confidence; despite the level and quality of broadband coverage in many regions, lack of demand remains a concern which has to be appropriately addressed.

This was the first BEREC Plenary meeting under the chairmanship of **Fátima Barros**, President of the Portuguese Regulator, ANACOM.

Main document approved for publication:

[BoR \(15\) 29 International Roaming BEREC Benchmark Data Report April 2014 –September 2014](#)

Public debriefing:

[Outcomes BEREC 22nd Plenary Meeting 26-27 February 2015 – Presentation by Fátima Barros, BEREC Chair 2015](#)

[BEREC Workshop on Oligopolies Analysis and Regulation \(Bern, February 25th\) – Presentation](#)

BEREC Workshop on Oligopoly Analysis and Regulation (25 February 2015, Berne)

‘On **25 February 2015, in Berne**, BEREC held a public Workshop on oligopoly analysis and regulation.

The workshop was organised in 3 panel sessions, dedicated to the following topics:

- Trends leading to oligopolistic market structures, namely mergers and acquisitions, in the EU;
- Market analysis in the context of potential oligopolistic situations;
- Remedies in the context of oligopolistic situations.

Some of the main conclusions from the workshop, are the following:

- Telecoms markets are oligopolistic in nature due to the characteristics of the market, namely: high investment costs, sunk costs, economies of scale, fast technological progress, high rate of innovation, network externalities and scarcity of spectrum in mobile markets;
- Trends of concentration are also widely observed;
- As other drivers of concentrated markets, the need for more investment, the convergence and the evolution of bundle offers are new sources of pressure which lead to less operators in markets.

However, oligopolies are per say not harmful, although some markets are more susceptible to uncompetitive outcomes than others. Uncompetitive outcomes can lead to threats to the interests of end-users (risk of slower innovation, higher prices and lower quality), can increase the likelihood of coordination, which could lead to harmful effects, or can raise a potential problem of foreclosure. In some cases oligopolies can also bring benefits to market, in terms of incentives for investments and innovation.

As a general conclusion from the workshop, it was emphasised that there is no need for new regulatory tools in order to deal with oligopolistic situations and the use the existing ex-ante regulation remedies should in principle be sufficient, but on a case by case basis there might be a need for use of other regulatory tools to remedy the situation. For example, in the mobile markets there might be a need for including additional requirements in the rights of use.’

[#BERECWorkshop on Oligopoly Analysis and Regulation: final agenda](#)

[Photo Gallery](#)

[A summary of the main outcomes from the workshop - Presentation](#)

[BEREC Workshop on Oligopoly Analysis and Regulation - Storify](#)

BEREC Workshop on Oligopoly Analysis and Regulation – Video gallery

[BEREC Workshop on Oligopoly Analysis 25 2 2015 Part 1](#)

[BEREC Workshop on Oligopoly Analysis 25 2 2015 Part 2](#)

[BEREC Workshop on Oligopoly Analysis 25 2 2015 Part 3](#)

[BEREC Workshop on Oligopoly Analysis 25 2 2015 Part 4](#)

[BEREC Workshop on Oligopoly Analysis 25 2 2015 Part 5](#)



14th BEREC Benchmark Report in view of the Roaming Regulation

This BEREC Benchmark Report on International Roaming (the “Report”) presents the results of the 14th round of data collection on European international roaming services undertaken by the Body of European Regulators for Electronic Communications (BEREC). The Report covers the period 1 April 2014 – 30 September 2014, i.e. quarters 2 and 3 for 2014. The Report also includes data from previous rounds of data collection conducted by BEREC and its predecessor, the European Regulators Group (ERG), to provide context for the current figures. The earliest data is from quarter 2 2007, when the Roaming Regulation was about to enter into force.

Main Findings

The information gathered by BEREC continues to show a good level of compliance with the Roaming Regulation in all EU Member States. At the retail level, all consumers have access to a Euro-Voice, Euro-data and a Euro-SMS tariff. At the wholesale level, the voice, SMS and data roaming charges set between operators are in line with the declining regulated average caps. Some countries reported average prices slightly above the price caps.

Evolution of prices

The applicable caps and the related EEA average prices during the data collection period were:

Service at Retail level (no VAT)	Q2 2014		Q3 2014	
	Price Cap	EEA Average	Price Cap	EEA Average
Eurotariff voice (making call) (€/min)	24	19.9	19	16.1
Eurotariff voice (receiving call) €/min)	7	5.4	5	3.9
Euro-SMS sent (€/SMS)	8	6.7	6	5.1
Data transfer (€/MB)	45	13.0	20	7.9

Service at wholesale level (no VAT)	Q2 2014		Q3 2014	
	Price Cap	EEA Average	Price Cap	EEA Average
Wholesale voice (€/minute)	10	6.3	5	5
Wholesale SMS (€/SMS)	2	1.6	2	1.6
Wholesale data (€/MB)	15	3.7	5	2.7

Charts

Figure 3: EEA average retail price per minute for intra-EEA roaming voice calls made

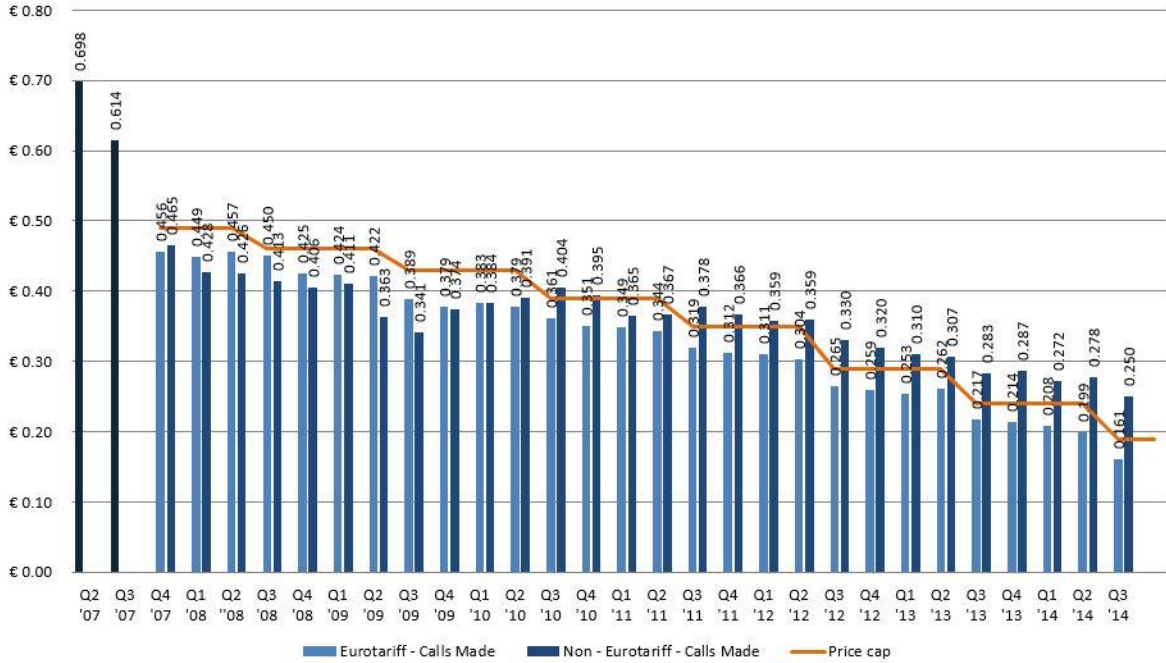


Figure 6: EEA average retail price per minute for intra-EEA retail roaming voice calls received

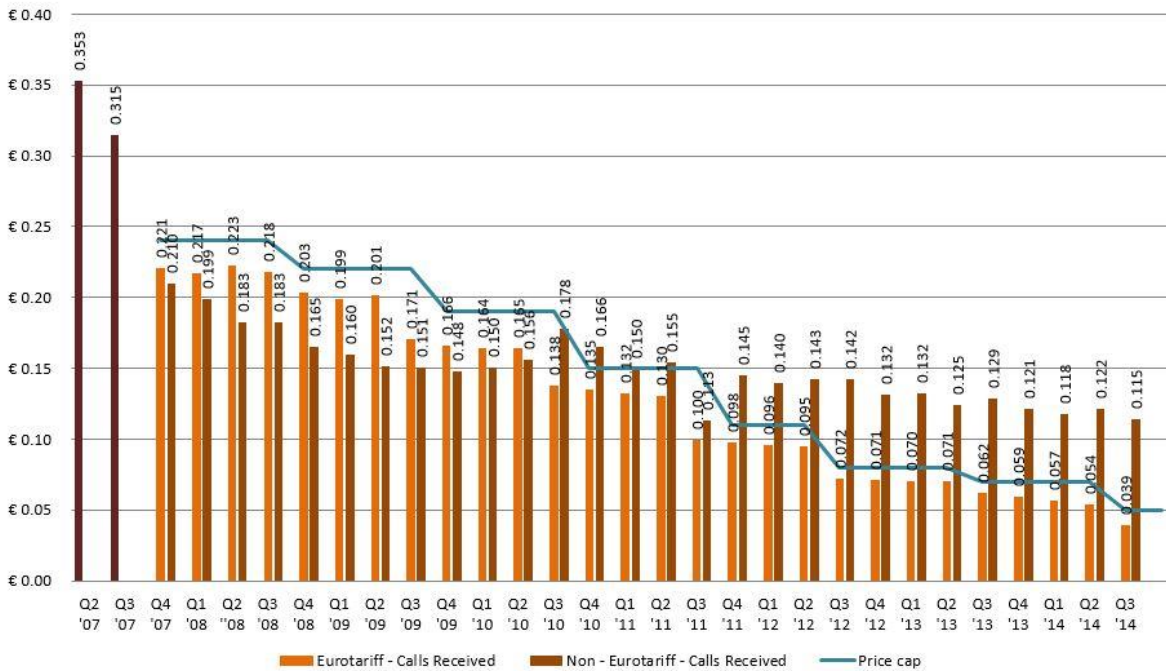


Figure 14: EEA percentage of calls made: Eurotariff and alternative tariffs (millions of minutes)

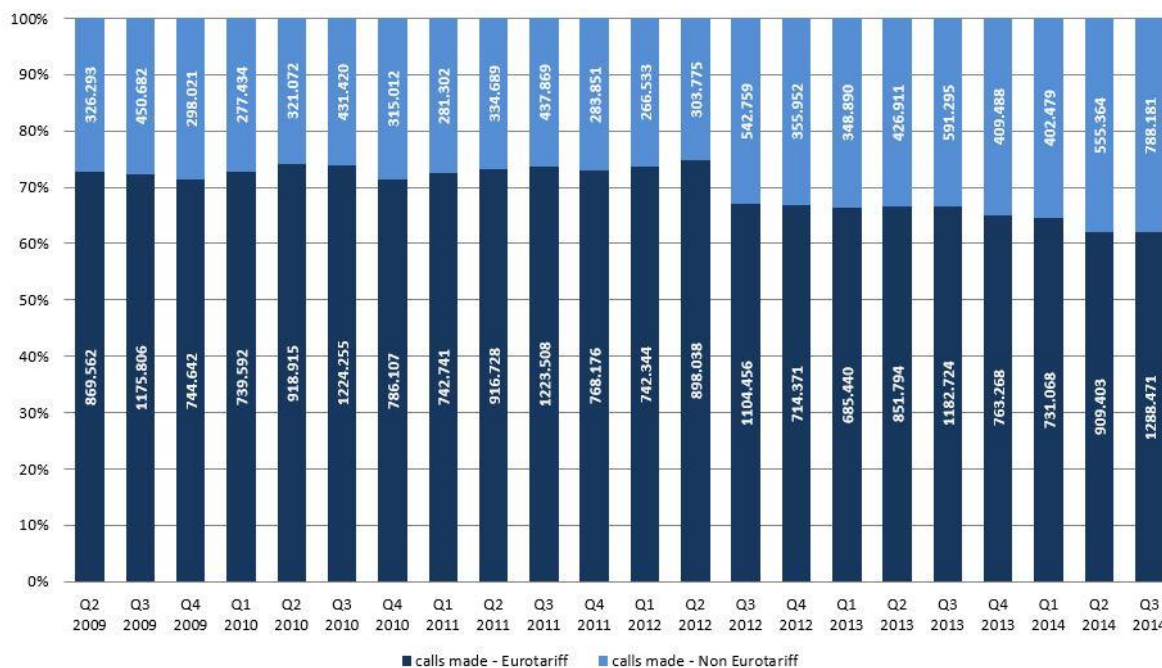


Figure 27: Average EEA price per retail SMS (Euro + Non Euro SMS tariffs)

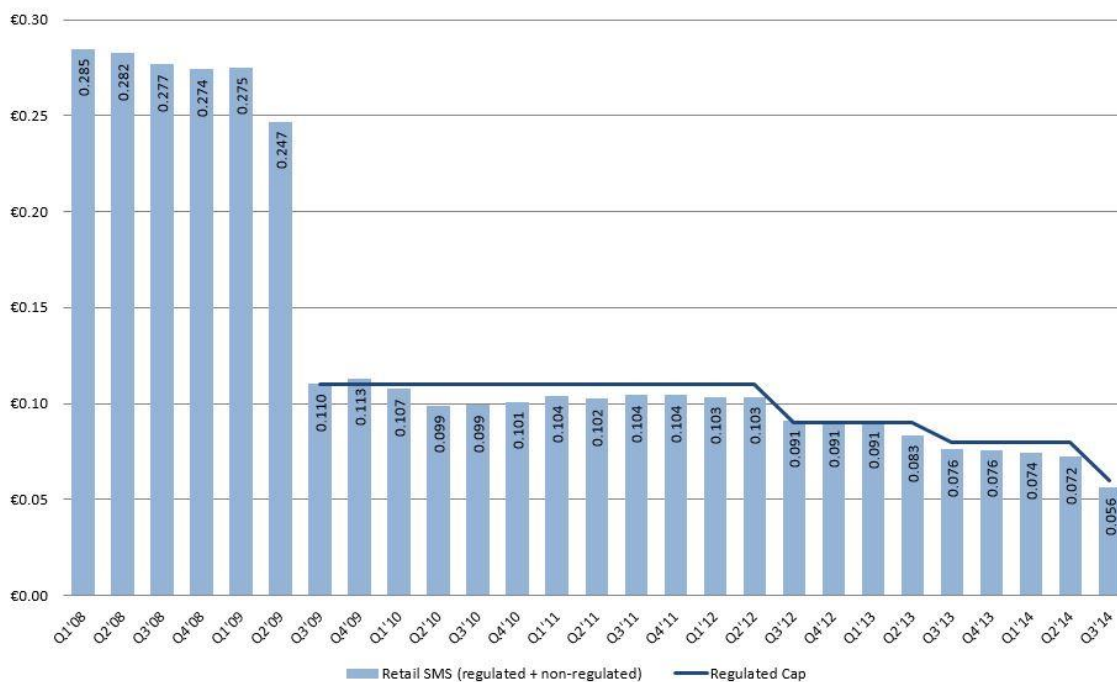
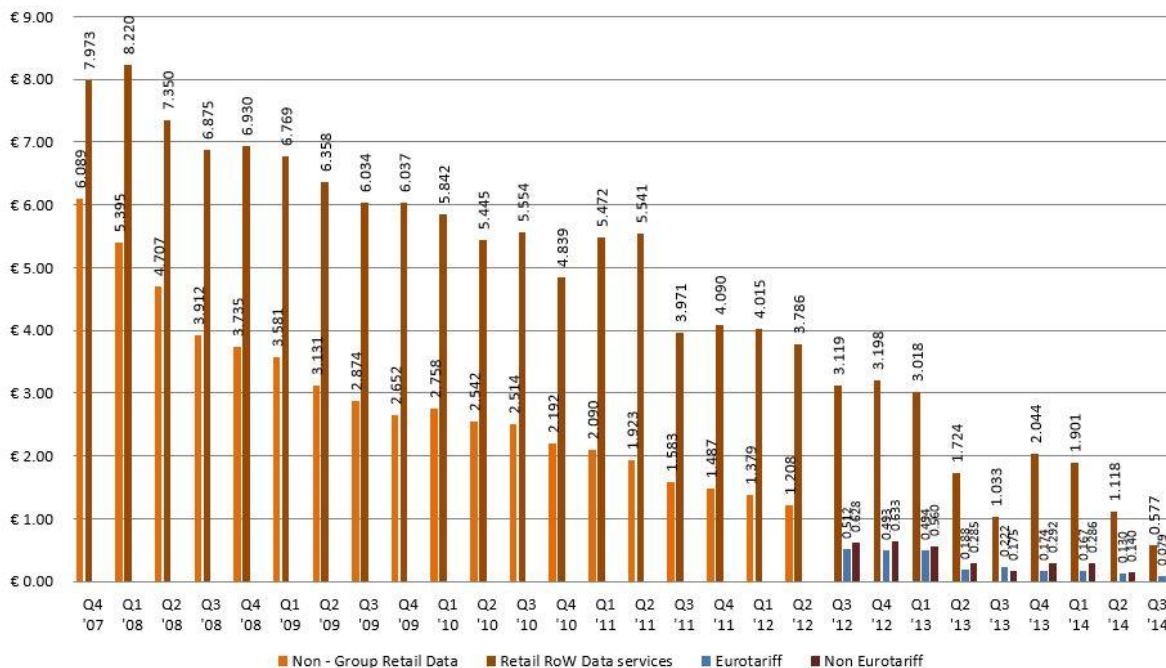


Figure 36: EEA average price per Mb for retail EU/EEA and RoW data (Eurotariff and Non Eurotariff: prepaid + postpaid)



For more information

[BoR \(15\) 29 International Roaming BEREC Benchmark Data Report April 2014 –September 2014](#)

BEREC Workshop about the accessibility of electronic communications services for end-users with disabilities (4 March 2015)

On 4th March BEREC organised an Accessibility Workshop, a public event dedicated to the accessibility of electronic communications services.

The workshop will serve as a valuable input to BEREC's update to its Report on Equivalent Access and Choice for Disabled End Users and BEREC will continue to follow the issues raised during the event.

The workshop focused on four main issues:

- a) The accessibility and usability challenges faced by disabled end-users when accessing electronic communications services;
- b) The contribution of regulators to improving accessibility for disabled citizens;
- c) Accessibility considered from the industry perspective;
- d) Designing for all - A manufacturers and service providers' challenge.

The event was opened by the BEREC Chair (Prof. Fátima Barros) and there was active participation from around 70 representatives from regulators, manufacturers, disability associations, service providers, independent experts and from the European Commission.

A number of recommendations and suggestions were made (directed to BEREC and to stakeholders) to improve policies and business practices and help promote equivalent access and choice for end-users with disabilities. These covered areas such as better monitoring, accessible information and better regulation.

Regarding better monitoring, some participants suggested it would be important to benchmark relevant indicators for accessibility in communications markets; others were also in favour of collecting more detailed and more updated statistics across the EU; and participants looked forward to the update to BEREC's Report on Equivalent Access and Choice for Disabled End-Users that is planned for the end of 2015.

Concerning accessible information, particular emphasis was placed on the need for institutions and service providers to constantly improve the accessibility and usability of their websites; the value of accessible communications in helping to promote the inclusion of disabled citizens in the workplace was noted; and the importance of active engagement with disabled citizens and their representative organisations was highlighted, namely in order to gain more sensitivity and insight

into disability issues and promote measures (e.g. consumer guides and comparison websites) that support better decision making by all end-users, in particular those with disabilities.

As for better regulation, it was suggested that NRAs need to have a more regular and open dialogue with other public entities about disability issues; NRAs were recommended to strengthen their cooperation with disability associations, consumer associations and with the private sector; and participants also discussed issues around “universal design”, (industry-led) technical standardisation and the possibly of re-examining the provisions that operators make to serve disabled customers.

Presentations

Photo gallery

Video Gallery

BEREC Accessibility workshop - Part 1

BEREC Accessibility workshop - Part 2

BEREC Accessibility workshop - Part 3

BEREC Accessibility workshop - Part 4

BEREC Workshop about the accessibility of electronic communications services for end-users with disabilities - Storify



European parliament ITRE Committee has met BEREC and visited BEREC Office in Riga

A delegation from the European Parliament Committee on Industry, Research and Energy (ITRE), has visited the BEREC Office and held a meeting with BEREC representatives.

The ITRE delegation was composed of:

- Gunnar HÖKMARK - Group of the European People's Party (Christian Democrats) (EPP) (Sweden);
- Constanze KREHL - Group of the Progressive Alliance of Socialists and Democrats in the European Parliament Member (S&D) (Germany);
- Krišjānis KARIŅŠ - Group of the European People's Party (Christian Democrats) (EPP), accompanying Member of host country Latvia; and
- Mark BEAMISH - European Parliament, DG Internal Policies of the Union, Committee on Industry, Research and Energy.

Among the representatives of BEREC and the BEREC Office were:

- Fátima BARROS - BEREC Chair 2015 and President of the Board of ANACOM;
- Wilhelm ESCHWEILER - BEREC Vice-Chair 2015 and incoming Chair for 2016, Vice President of BNetzA;
- Pedro FERREIRA - BEREC Contact Network Chair 2015 (ANACOM);
- Annegret GROEBEL - BEREC Contact Network Chair 2016 (BNetzA);
- László IGNÉCZI - BEREC Office Administrative Manager;
- Panos KARAMINAS - Head of the Programme Management Unit of BEREC Office.

The first part of the visit was dedicated to the BEREC Office, the European agency located in Riga, Latvia. Fátima Barros, BEREC Chair 2015, welcomed the ITRE delegation to Riga and explained briefly the role of BEREC and of the BEREC Office.

During this session, László Ignéczi gave a comprehensive presentation on the BEREC Office identity and mission, highlighting the most significant activities performed by the Office in support of BEREC.

Panos Karaminas, Head of the Programme Management Unit of the BEREC Office, illustrated the main projects that are currently being carried out by the Office in the interest of BEREC.

In the following session, Fátima Barros presented an overview of BEREC's responsibilities and achievements in the development and better functioning of the internal market for electronic communications networks and services in Europe.

Afterwards, a state of play regarding the "Telecom Single Market" proposal was made.

Finally, a fruitful exchange of views was held on upcoming telecoms challenges. Looking forward to the Review of the European Framework on electronic communications in 2016, Fátima Barros stressed: "*BEREC continues to be ready to deliver opinions to the European Parliament (and the other European Institutions) on any matter regarding electronic communications within its competence.*"

At the end of the meeting, ITRE representatives and BEREC expressed their great satisfaction with the outcomes of the visit to the BEREC Office of a delegation of the European Parliament.

Glossary

BEREC: *Body of European Regulators for Electronic Communications;*

BEREC Office: *Office of the Body of European Regulators for Electronic Communications;*

ANACOM: *Autoridade Nacional de Comunicações (ANACOM) is the Portuguese regulatory authority responsible for regulating postal and electronic communications;*

BNetzA: *The Federal Network Agency for Electricity, Gas, Telecommunications, Post and Railway, or Bundesnetzagentur as it is commonly known, promotes effective competition in the regulated areas and ensures non-discriminatory access to networks in Germany.*



BEREC's calendar of the future events

Meeting	2015 dates	Meeting Host	Location
Public debriefing	4 March	BEREC Office	Brussels (Belgium)
2 nd CN meeting	14-15 May	EKIP	Budva (Montenegro)
2 nd plenary meeting	3-5 June	NKOM	Bergen (Norway)
Public debriefing	16 June	BEREC Office	Brussels (Belgium)
3 rd CN meeting	10-11 September	RTR	Vienna (Austria)
3 rd plenary meeting	30 September – 2 October	SPRK	Riga (Latvia)
3 rd BEREC Stakeholder forum	15 October 2015	BEREC Office	Brussels (Belgium)
Public debriefing	9 October	BEREC Office	Brussels (Belgium)
4 th CN meeting	19-20 November	CNMC	Barcelona (Spain)

Meeting	2015 dates	Meeting Host	Location
4 th plenary meeting	9-11 December	Ofcom	London (UK)
Public debriefing	16 December	BEREC Office	Brussels (Belgium)

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