

Les Télécoms et l'Europe

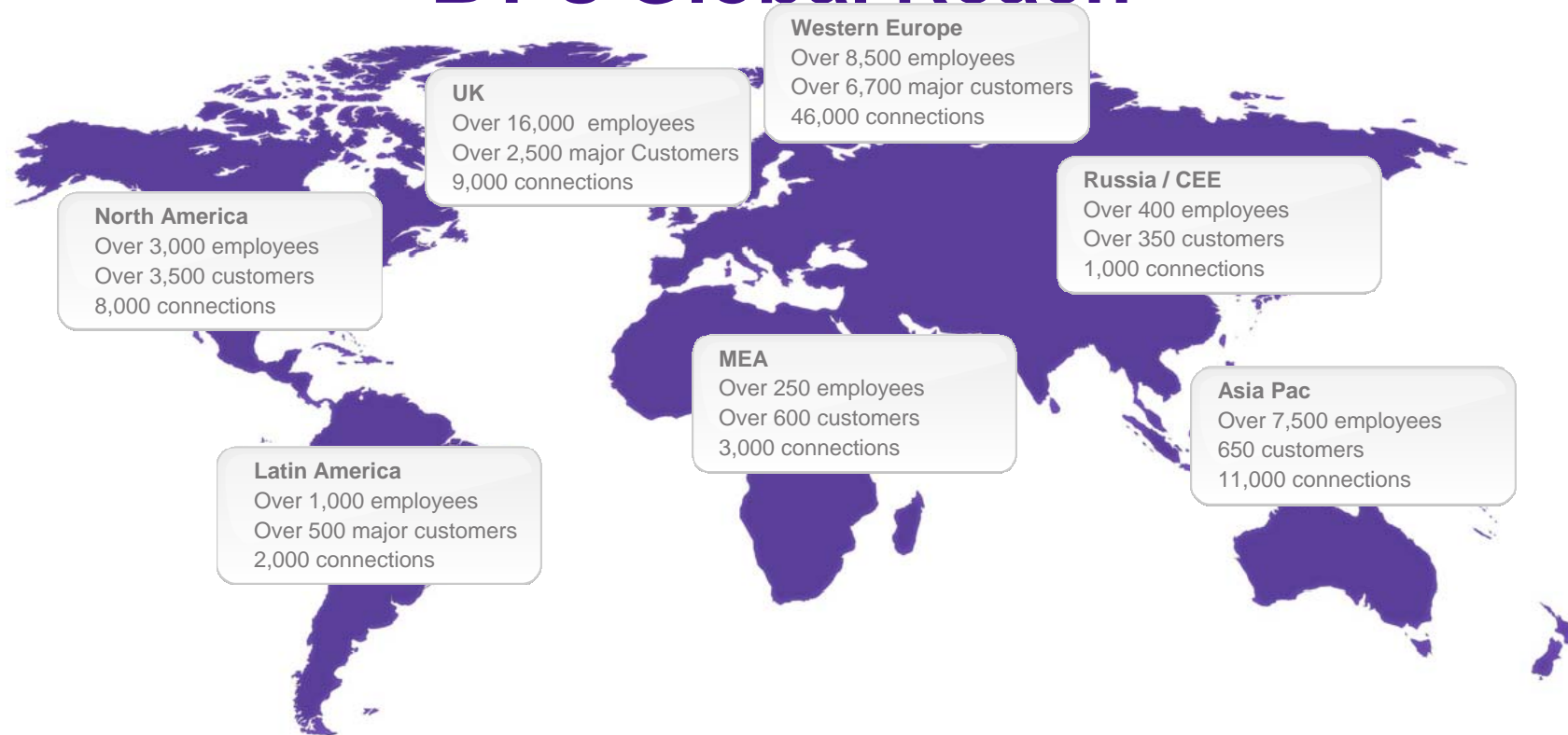
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BT – 2008/2009

- Revenue £21.4 billion
- Profit before tax £0.2 billion
- EBITDA £5.5 billion
- Capital Expenditure £3.1 billion
- Total Exchange lines in UK 26.3 million
- Wholesale Broadband connections 13.8 million
- Employees (direct) 105,000



BT's Global Reach



Over **37,000** people delivering service to more than **170** countries
8,500 major, multi-site government and private sector customers
Over 3,000 local network access points worldwide
80,000 customer connections to the global MPLS network
Global MPLS generates \$1bn annual revenue (07/08)



Des evolutions sectoriales

- Technologie
 - Internet, mobile, haute débit, fibre optique, IPTV
- Concurrence
 - Operateurs alternatifs
- Convergence entre télécoms et autres acteurs
 - Canal+, Google, MSN
- Transformations de la chaine de valeur
- Globalisation

Piliers de la politique européenne

- Le marché unique
 - L'économie, compétitivité, croissance
 - Le TIC vert
 - La concurrence
 - La protection des consommateurs
- L'Europe dans le monde
 - Gouvernance de l'Internet

The first wave of legislation (1990-1998)

The transition from monopoly to competition

- Established the principles of competition
 - Outlawed monopolies
 - Separated operation from regulation
 - Did not challenge state ownership (or vertical integration)
- Created harmonised conditions for economic regulation of ex-monopolists:
 - Competition law not enough on its own
 - Granting competitors access to incumbent networks
 - Ensuring access on non-discriminatory terms
- Ensured consumer rights were protected in a competitive world:
 - Price controls; Universal Service

The second wave of legislation (1999-2003) - the current framework -

Re-enforcing competition but being more flexible

- Package of 5 main Directives, plus associated Guidelines etc
 - adopted 2002; implementation 2003 (in theory)
- Linked to Lisbon objectives
 - Stimulus to broadband
- Technology neutral
 - Same principles for all networks (fixed; mobile; cable)
- “Floor” and “ceiling” to regulation
 - Strengthen essential elements of competition
 - Create exit-path to de-regulation
- Reliance on competition law concepts
 - Flexible and reflecting dynamics of market
- Single market
 - European Regulators Group; Commission veto over national regulators

Réseaux d'Accès de Nouvelle Generation (NGA)

TODAY...



Fast internet...



Instant messaging...



VoIP...



BT Vision...



iPlayer...

...But growth of simultaneous usage raises potential peak bandwidth issues for the future

TOMORROW...



Multi viewing High Definition TV...



Advanced High Definition gaming experience...



High Definition video conferencing...



A world of new possibilities from super-fast broadband (up to 100Mbps)...

...Assured high quality experience even with simultaneous usage of all new high speed applications and services

Les défis

- Progrès économique - Société de la connaissance
- Impulse politique pour le déploiement rapide
- Perspective commercial
 - Demande ? Rémunération ?
 - Investissements énormes et à long terme
- Perspectives politiques:
 - Comment encourager les investissements ?
 - Comment assurer la concurrence ?
 - Le boucle local de cuivre = monopole
 - La fibre optique ?
 - Comment éviter un “digital divide” ?

NGA et le cadre réglementaire

- Objectifs pour l'ARN:
 - les investissements efficaces dans l'infrastructure
 - L'innovation, et la concurrence
- Analyse du marché
 - analyse de l'état de la concurrence
 - Haut débit
 - l'accès physical
 - L'accès virtuel
- Désigner les opérateurs disposant d'une influence significative;
- Fixer les obligations spécifiques (de non-discrimination et d'objectivité)
- Notification à la Commission européenne

NGA - autres considerations

- La Service Universelle
- Les aides d'état
- "Digital divide"

Les Institutions

- Delors
 - Le marché unique
- Prodi
 - Le sommet de 'Lisbon' 2000
- Barroso I
 - Direction libérale ?
 - Fin de l'intégration ?
 - forces protectionnistes des états membres ?
- Barroso II
 - "Digital Europe" – renforcer le marché unique
 - Protection des Consommateurs ?