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National Telecom Agency

Changing Telecommunications Markets

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*Director General
Jørgen Abild Andersen, NTA
Denmark*


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Main challenges for the regulator

Policy goal

*"Best and cheapest services in the
world"*

*(Minister for IT and
Research Frank Jensen, 1994)*


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Main challenges for the regulator

Means to reach the goal

- Establishment of free and real competition*
- Establishment of appropriate consumer protection*



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- ## 1999 - Agreement in Principle on Telecommunications Policy Aims
- *Access to the Network Society*
 - *Best and Cheapest*
 - *Competition leading to innovation and growth*
 - *Market should supply a broad variety of products that meet the increasing demand for high-speed networks and large bandwidth*

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- ## Telecommunications Policy
- *Main telecom policy goal:*
 - *Promoting access to the Network Society*
 - *Main telecom regulatory tool:*
 - *Promoting competition in the access network*

"Several pipes to the home"

- *ULL - "raw copper"*
- *FWA*
- *2G*
- *3G*
- *Cable modems*
- *Fibre to the Home*
- *Satellite*
- *Power Line Access*

Key Indicators for Information Infrastructure Development

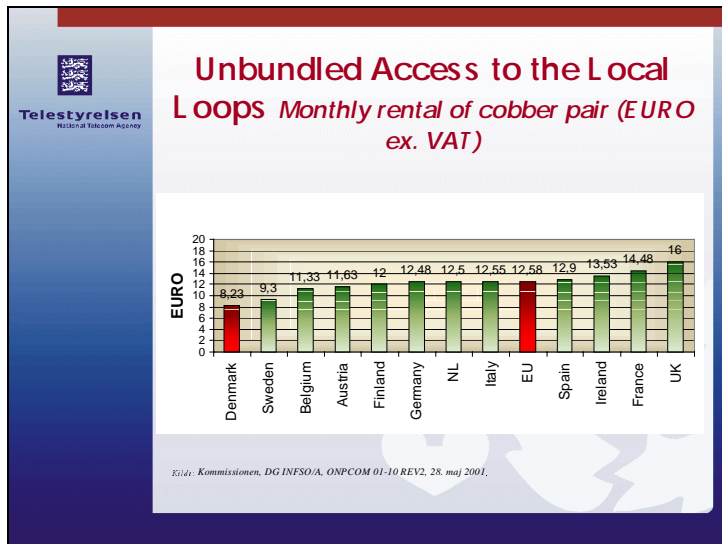
*International Discussion Forum 2000
(William H. Melody):*

- *Interconnect prices*
- *Leased line prices*
- *Unbundled access to the local loops*

Interconnect prices

Euro/100 per minute (vat excluded)	Local	Single transit	Double transit
Austria	0,91	1,39	2,25
Belgium	0,77	1,24	1,65
Denmark	0,67 ②	0,95 ②	1,35 ②
Finland	1,43	1,43	2,63
France	0,58 ①	1,23	1,83
Greece	0,91	1,5	1,82
NL	0,79	1,03 ③	1,32 ①
Italy	0,75	1,33	1,80
Ireland	0,84	1,15	1,54 ②
Luxembourg	1,27	1,27	1,60
Portugal	0,90	1,37	2,14
Spain	0,90	1,50	2,16
Sweden	0,91	1,24	1,70
Germany	0,83	1,42	2,17
U.K.	0,62 ②	0,90 ①	1,80

Source: EU-Commission - Interconnection cost data for Member States - 1st July 2001.



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Price Development 1998-2001 - Best offer

Month/Year Incl. Tax	Per quarter		
	Fixed Telephony 900 minutes	Mobile Telephony 450 minutes	Internet 600 minutes
August 1998	644 DKK	651 DKK	170 DKK
August 1999	648 DKK	574 DKK	95 DKK
August 2000	559 DKK	540 DKK	83 DKK
August 2001	560 DKK	514 DKK	80 DKK
Price reduction	-13%	-21%	-53%
Real price reduction	-20%	-27%	-56%

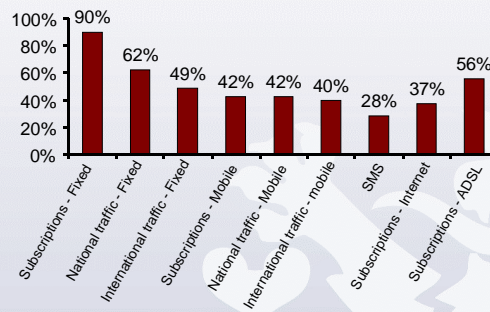
Source: The National Telecom Agency

Establishment of Transparency

Enable consumers to make rational choices in the market:

- *Price information*
- *Interactive priceguide*
(www.teleprisguide.dk)

Market Shares of TDC Tele Danmark - 1 July 2001

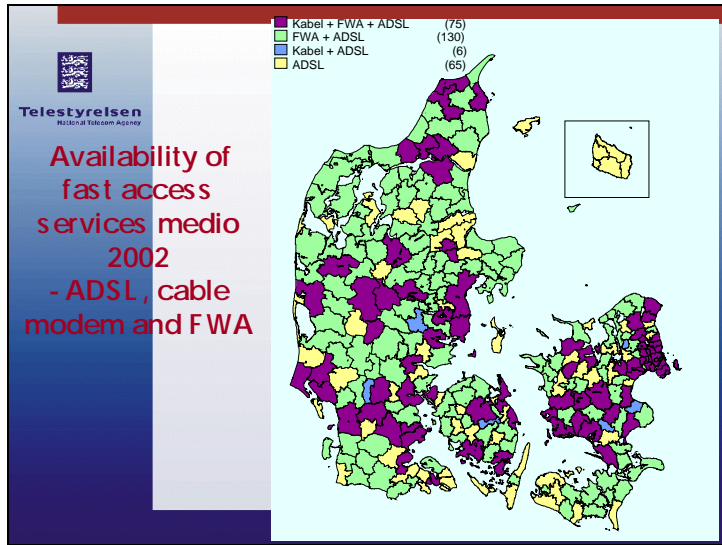


Source: National Telecom Agency

Investments in the Danish Telecommunications Sector

	1992	1993	1994	1995	1996	1997	1998	1999	2000
Mio. DKK	2.694	2.642	2.993	3.078	4.734	5.872	7.218	6.879	8.898

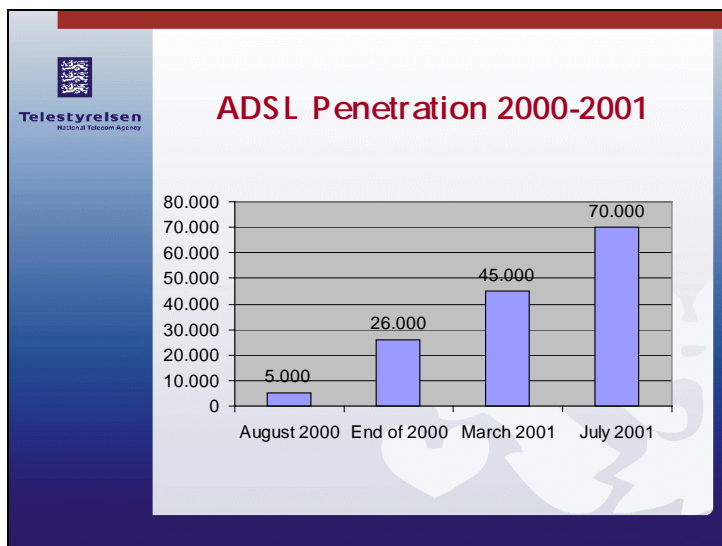
Source: The National Telecom Agency

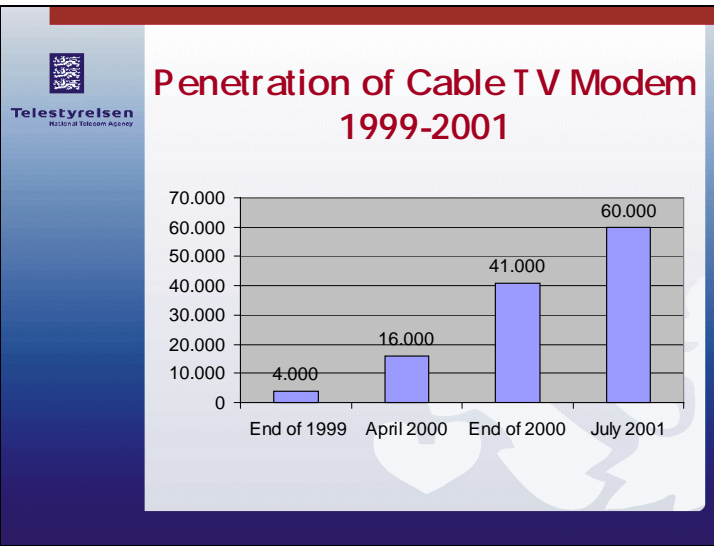



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Availability of fast access services (% of households)

ISDN	100%	(USO)
Leased lines 2 Mbit/s	100%	(USO)
ADSL	50-70%	(May 2001)
	70-95%	(July 2002)
FWA	95%	(January 2002)
Cable TV modem	15-20%	(January 2001)
	40-45%	(July 2002)





-  **Key Focus Area**
- A Cheaper, Faster, and Secure Internet
- *Confidence*
 - *Content*