



Commission for  
**Communications Regulation**

**Alex Chisholm  
Chairperson**

**Commission for Communications Regulation**

**TIF Council Meeting  
16 April 2010**



## ComReg Strategic Planning Process

- **Statutes require ComReg to publish Strategies for ECS, Spectrum and Postal every 2 years**
- **ECS Draft Strategy 2010-12 being published today – contributions welcome – finalise document end May**
- **Annual Work Plan (FY to 30 June) driven off strategy**
- **Work Plan & Budget presented to DCENR & published**
- **Annual Output Statement will also now be published**
- **Government Statement on Economic Regulation – stronger emphasis on accountability for performance**
- **Individual Market Analyses – every 3 years (from 2011)**



# Global Communications Market Trends



## Summary of Trends

### CONSUMER

Mobility/Wireless everything

Video preference

User-generated content

### REGULATION

Harmonised regulation

Market oriented/Deregulation

Defining Minimum Standards

### INDUSTRY

Convergence

Globalisation

Consolidation and Cooperation

### TECHNOLOGY

An IP world

High Capacity Networks/Carriers

Network-Service separation

[www.comreg.ie](http://www.comreg.ie)



## Irish Communications Market Trends

- **Falling revenues & tighter margins due to recession & competition** (but ARPUs & Line Rental still high by EU standards)
- **Consumers and business users looking for value – from switching** (Mobile ports up 24% YoY, CallCosts – 175K users in '09) and **bundles** (40% of subs, Millward Brown Q4 '09)
- **40% of broadband market is mobile or fixed wireless**
- **Cable now making its presence felt in broadband** (over 150K users) and **telephony** (over 60K)
- **GSM, USO – critical regulatory decisions coming up**
- **LLU, NGA – will 2010 be a breakthrough year?**



## **Evolving Legislative and Policy Context**

- **ComReg's responsibilities have grown since last strategy – ECAS, IEDR, now PRS (WEF 12/07/10)**
- **Postal legislation implementing 3<sup>rd</sup> Directive will liberalise market WEF 1/1/2011**
- **New EU Framework increases consumer protections, establishes BEREC – Transposition by June 2011**
- **Current EU reviews of NGA and Universal Service**
- **Government Review of Economic Regulation**
- **Government initiatives around economy & efficiency**
- **Smart Economy competitiveness agenda**



## ComReg Vision for Irish Communications

- **Competitive and dynamic market in which:-**
  - The 'super-connected consumer' can interact with the content or application they want - any time, anywhere
  - Users have an excellent choice of content, services and providers, at prices that represent value
  - Service providers make a reasonable return, and are able to fund continuing necessary investment in the sector
  - New entrants and product innovations come into the market
  - Regulation is proportionate, predictable, fair and transparent
  - Infrastructure performance and availability compares favourably with like regions in Europe
  - Communications is seen as key enabler for economic recovery



# ComReg: Key Goals, Challenges & Opportunities 2010

## **Promote cross-platform competition and innovation to support wider availability of faster broadband and development of Smart Economy**

- Next Generation Broadband – more fibre deployment
- Spectrum Liberalisation & Release – more spectrum for wireless broadband
- Local Loop Unbundling – faster speeds & more competition
- Cable – speeds of 30 MBits/s now widely available, 100 MBits/s planned Q3
- Innovation – facilitate trials of new technologies e.g. LTE, Femtocells, Cognitive ..

## **Measures to protect and inform consumers**

- USO Targets & Designation
- Premium Rate Services regulation – enhanced protection
- Price comparison, guidance & support: [askcomreg.ie](http://askcomreg.ie), [callcosts.ie](http://callcosts.ie), disability forum, new SME service
- Quality Standards for Billing, Complaints Management
- Preparation for full opening of the postal market 1/1/2011



## Promoting Competition – 2010 Priorities

- **Encourage rollout of competitive NGA**
  - EU NGA Rec.; follow on to ComReg NGA Principles 09/88
- **Support infrastructure-based competition**
  - WPNIA (Market 4); LLU, Ethernet – ongoing product work
- **Support services-based competition**
  - WBA (Market 5); Bitstream pricing review
- **FMC: facilitate bundling, with competition safeguards**
  - Markets 4 & 5; Retail Narrowband/bundling rules
- **Ensure efficient release and use of radio spectrum**
  - 900 & 1800 MHz/2.3 MHz/2.6MHz review/FWALA mobility





## Innovation & Investment – 2010 Priorities

- **Promote Ireland as location for spectrum innovation**
  - Test & Trial Ireland, Cognitive Radio Forum 21 April
- **Facilitate new spectrum-based technologies, services**
  - Technology & service neutrality, 900 MHz liberalisation
- **Contribute to Ireland's Digital Dividend**
  - ComReg role in RSPG, DTT coordination in Ireland
- **Promote investment by providing regulatory certainty**
  - Transparency, consistency, proportionality, fairness
  - (eg) complete 900 MHz process and WPNIA/WBA reviews



## Protecting & Informing Consumers – 2010 Priorities

- **Guidance and tools to empower consumers**
  - CallCosts, AskComReg, SME portal, Customer Contact Centre
- **Protecting vulnerable consumers**
  - Universal service – new designation due, EU review
  - Premium-Rate Services – new statutory regime
- **Promoting quality of service**
  - USO Targets; Quality standards for billing & complaints
- **Addressing new challenges**
  - New responsibilities – ECAS, IEDR, PRS
  - New market developments – bundles, VOIP, Net neutrality



## ComReg Organisational Priorities 2010

- **Continue to develop skills & expertise of our people**
  - Excellence Through People, Engineers Ireland, IMI ..
- **Engage effectively with key stakeholders**
  - Oireachtas, DCENR, EC, TIF, TCA/NCA, BEREC, RSPG, ITU ..
- **Ensure best corporate governance & value for money**
  - Cost controls, Procurement Framework, smarter working ..
- **Maintain high level of transparency**
  - Publish Strategies, Action Plan, Annual Output Statement ..
- **Benchmark for continuous improvement**
  - EC Implementation Report, ECTA, EIU/GSER, ESRI ..



# Feedback

- **Any questions or comments today?**
- **ComReg Draft Strategy now published – responses sought by 14 May**