



AGENCY FOR ELECTRONIC COMMUNICATIONS AND POSTAL SERVICES

Agency for Electronic Communications and Postal Services

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Agency

- Agency for Telecommunications - established in 2001
 - 1 fixed line operator,
 - 2 mobile operators,
 - 1 Internet service provider
- Full market liberalization on 01.01.2004
- Applicable Law on Electronic Communications (adopted in 2013), as well as all bylaws (adopted in 2013 and 2014) are in accordance with the EU Regulatory Framework

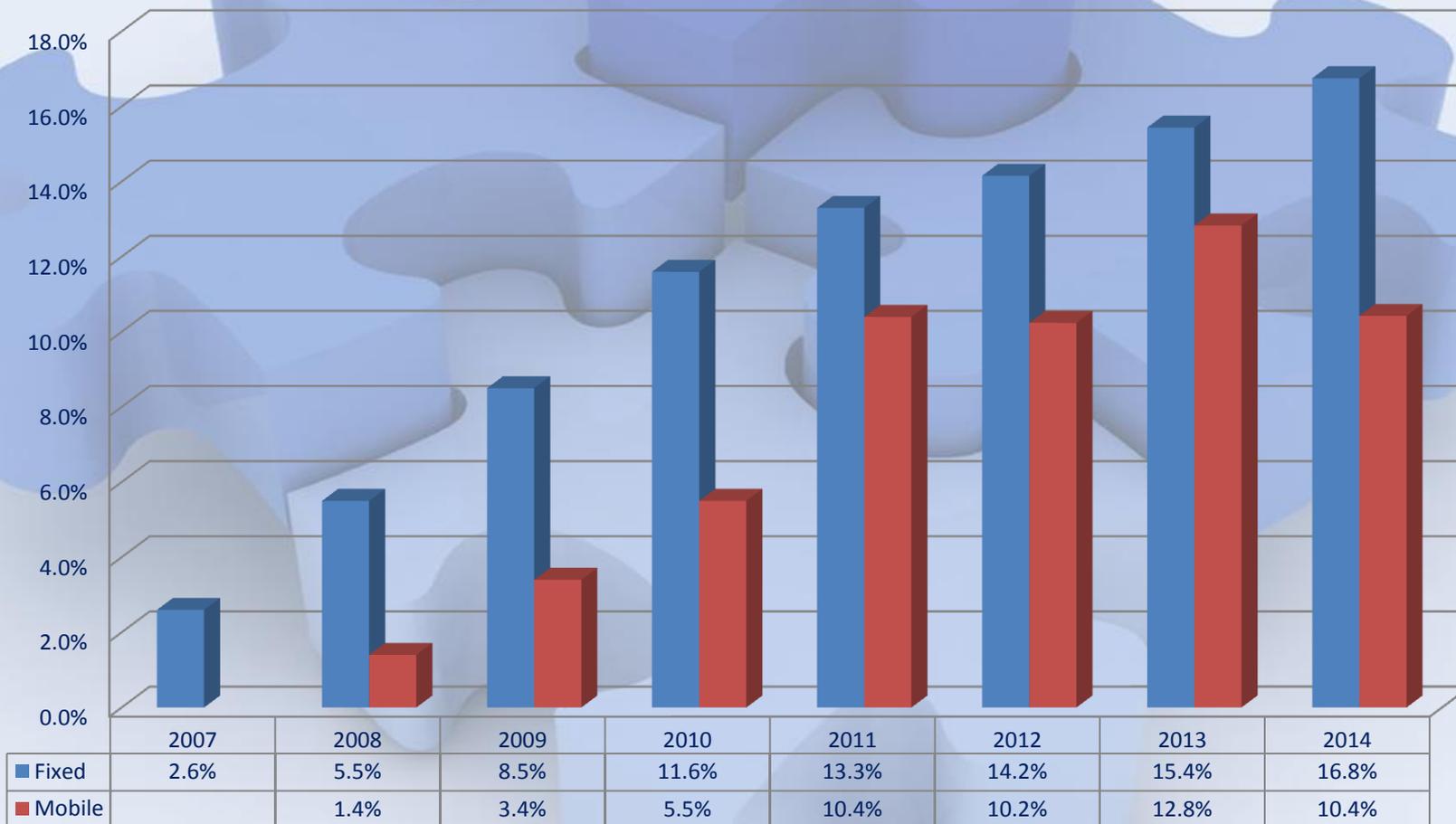


Current situation

- Over 50 operators registered for the provision of public electronic communications services
- Provision of services by use of the latest technological solutions (FTTx, LTE)
- The increase in the number of users of broadband services

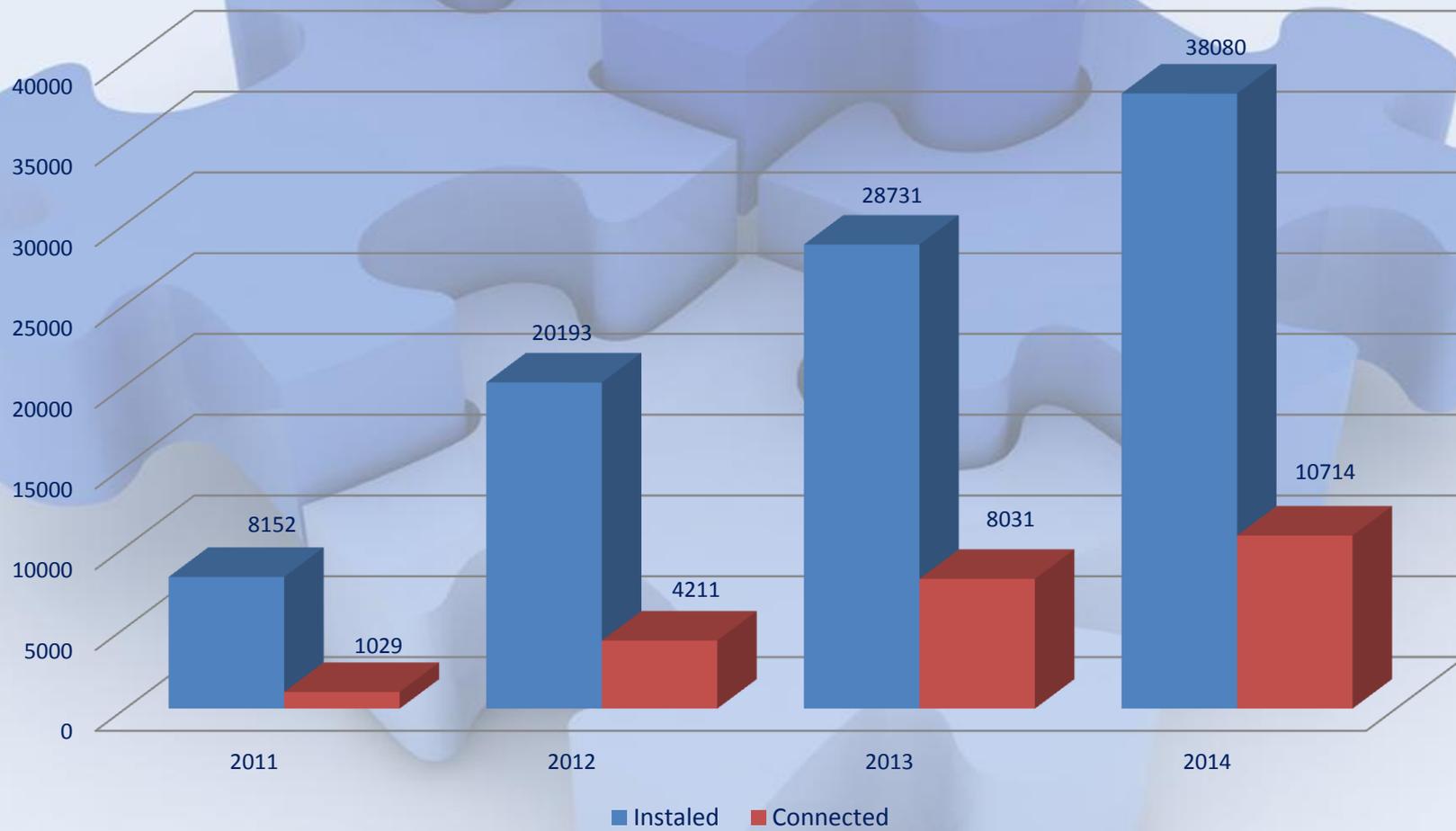


Broadband penetration





Movement of the number of FTTx connections





Traffic trends

- A slight decrease in the volume of traffic in fixed telephony;
- A slight increase in telephone traffic in mobile networks;
- Decrease in the number of sent SMS messages;
- A significant increase in the amount of transferred data.

Revenues

- **Sector revenues:**
- 2009 - 274,817,251 €
- 2010 - 275,392,962 €
- 2011. - 259,735,951 €
- 2012 - 25,349,967 €
- 2013 - 236,373,546 €

- CT, Telenor and Mtel generate around 93% of the sector revenue





Analysis of relevant markets

- Analysis of relevant wholesale markets
 - Imposing remedies on SMP operators
 - Reducing tariffs for wholesale services
- Analysis of relevant retail markets
 - Reducing prices for fixed phone calls – from 01.04.2014
 - Reducing prices for ADSL Internet access (35% on average) – from 01.12.2014



Roaming regulation

- Price regulation of roaming services with neighboring countries
- Implementation starting from 1st July 2015



Planned activities

- Assignment of radio frequencies from the digital dividend;
- Creating conditions for better and more intensive development of broadband access;
- Protecting of user interests, in terms of improving the quality of service and network neutrality;
- Further promotion of competition in the market.



Thank you for your attention!

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