



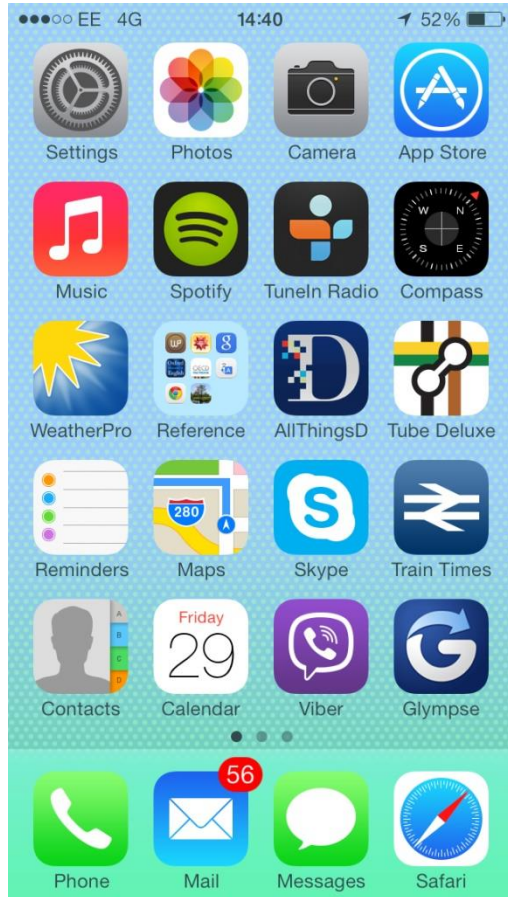
Relevant markets: The Times they are a-Changin'

Brian Williamson

ECTA Regulatory Conference

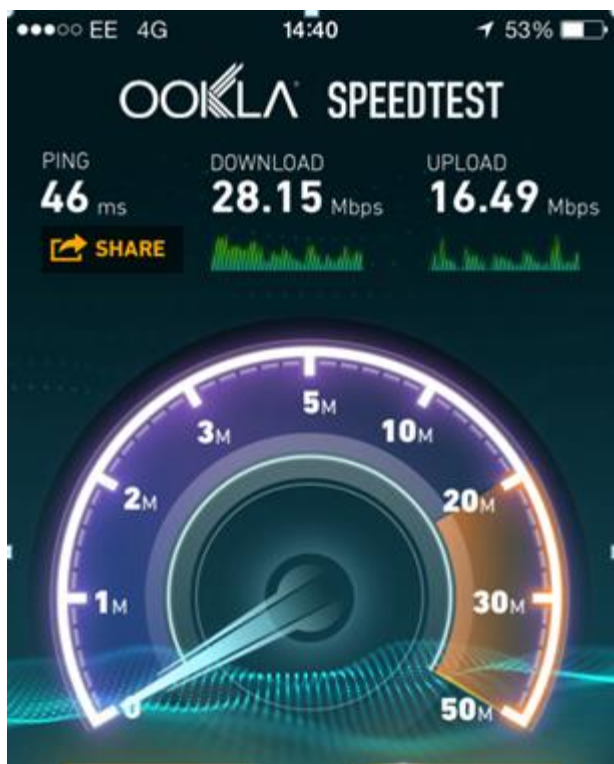
December 2013

Pivot towards mobile changes everything

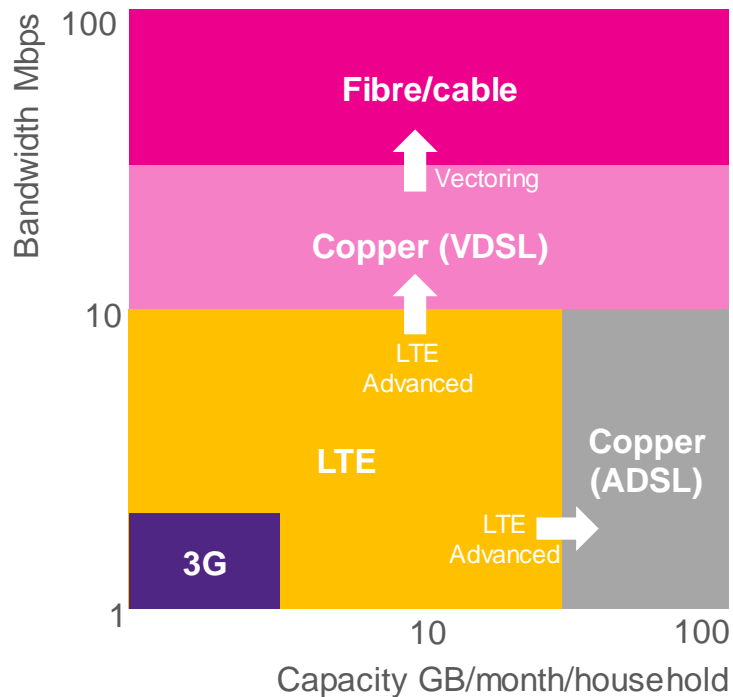


- Smartphone & tablet 'universality'
 - 6 years ago no one had one
 - 6 years from now almost everyone will
- Mobile-data unlimited-voice by default
 - Fixed for backhaul (with Wi-Fi)
 - Fixed broadband + voice not a bundle
- My apps, my bundle
 - Services competitive with OTT
 - "Call" termination monopoly enduring?
- Global pivot to mobile broadband
 - >85% mobile broadband before 2020
- Strong incentive to economise
 - Large scope for data savings
 - Better compression helps copper too

4G – coverage (with 800 MHz)↑; speed↑; cost↓



“Is two enough?”: from 1-2 → 3-4 platforms



- **Take account of all platforms**

- Retail market focus
- Consider indirect constraints

- **Consider/distinguish**

- Sub-markets
- Corporate dedicated high capacity vs. mass market

- **Maximise freedom to compete**

- Open access ≠ price control
- If regulate, regulate at one level

Regulate less, not more, with increased competition

To find out more

- **Contact me**



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- **Read more**

www.plumconsulting.co.uk/publications

- **IIC InterMEDIA article**

- Forthcoming in Winter 2013 edition

- **Relevant markets**

www.plumconsulting.co.uk/pdfs/Plum_June2013_Relevant_Markets_in_the_Telecoms_Sector_-_The_Times_They_are_a-Changin.pdf

- **Anchor product regulation**

www.plumconsulting.co.uk/pdfs/Plum_Oct2013_Anchor_product_regulation_retrospective_and_prospective.pdf

- **Mobile data unit costs**

www.plumconsulting.co.uk/pdfs/Plum_Insight_Jan2012_Mobile_data_growth_-_too_much_of_a_good_thing.pdf