



The Regulation of VoIP in Europe – Trends across Member States

Brussels, 11 March 2008

James Thomson

Cullen International

james.thomson@cullen-international.com



Scope of Research

- VoIP regulation in 10 European countries
- Austria, Denmark, Estonia, France, Germany, Italy, Netherlands, Poland, Spain, UK
- Research for WIK-Consult as input into study for DG Information Society
- Data collected October-December 2007
- Reviewed by all NRAs (except Poland)



VoIP services allowing calls to/from PSTN

	Voice over Internet (VoI) e.g. Skype Out/In	Voice over Broadband (VoB)
How sold?	Stand-alone service accessed over public internet	Bundle with broadband connection, possibly part of multi-play package
Terminal equipment	Usually PC-based, can be phone-based	Phone-based
Nomadic use	Yes	Fixed location, but may allow nomadic use
Marketed as full PSTN replacement service?	No	Yes



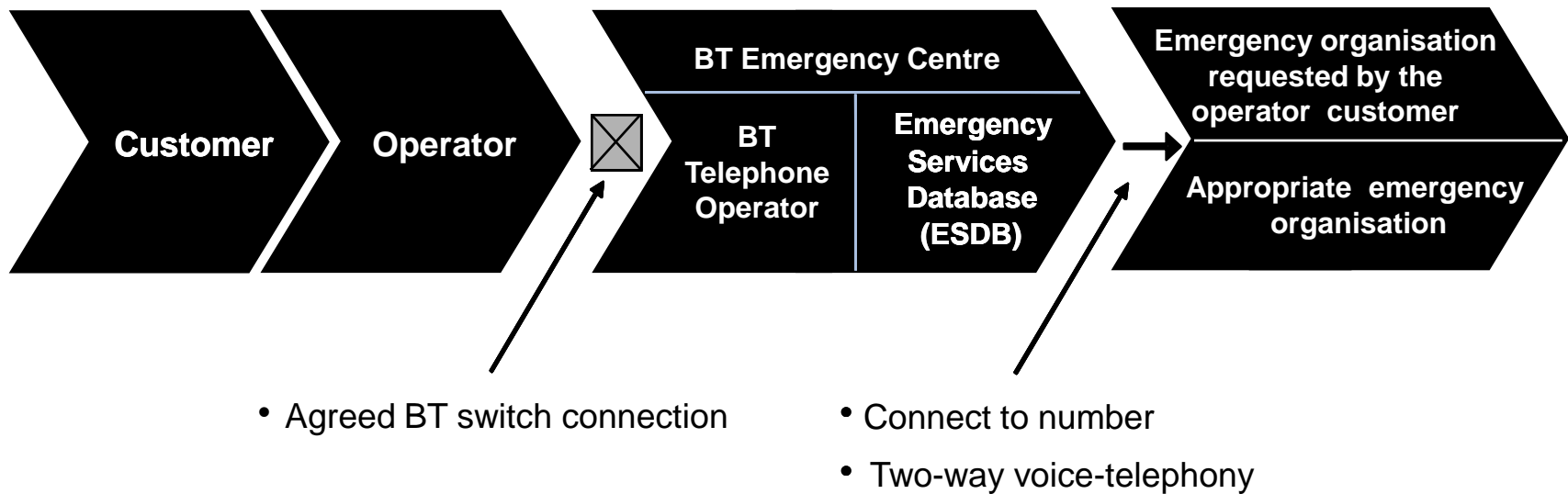
European Commission's Review Proposals – November 2007

	Current	Proposed
Calls to Emergency Services	PATS providers only	All providers of calls to national and/or international numbers
Caller location information	<i>“to the extent technically feasible”</i>	Must be provided automatically to PSAP for all emergency calls
Number portability	PATS subscribers	All subscribers with number from national numbering plan Porting within 1 working day
Net neutrality		Transparency of any limitations to access content or run services/applications Minimum QoS for PCNs

Calls to Emergency Services

Who is required to provide calls to emergency services?	
Austria	PATS
Denmark	All PECS that allow calls to national numbers
Estonia	PATS
France	All PECS
Germany	PATS (but exemption until 1 Jan. 2009 for PATS based on new technologies)
Italy	PATS + 'Nomadic voice services'
Netherlands	PATS
Poland	
Spain	PATS + 'Nomadic voice services' which can either be limited to use within local area (8XY) or national nomadic (051)
UK	PATS (From Sept. 2008 all PECS that allow calls to national numbers)

BT Emergency Call Conveyance Service in the UK



Approx. 80% of emergency calls answered by BT
and 20% by Cable & Wireless



Caller Location and Routing Emergency Call to correct PSAP

***“Technically feasible”* solution at present is for following customer information to be included in Emergency Services Database (ESDB)**

PSTN at fixed location	VoIP at fixed location	Nomadic VoIP
Phone number Customer name Installation address	Same + VoIP flag	Same + VoIP flag Installation address = address where service is <i>“normally used”</i>

Ofcom plans to review in early 2009



Customer awareness of VoIP service limitations

**Point of signature acknowledgment?
(e.g. VoIP provider must get customer to tick box when they sign-up for VoIP service acknowledging they have been informed of limitations)**

Yes

Italy
UK

No

Austria
Denmark
Estonia
France
Germany
Netherlands
Poland
Spain



Can fixed geographic numbers be used for nomadic VoIP services?

Yes	Yes, with restrictions		No
Nomadic use allowed without restrictions	Nomadic use limited to geographic area corresponding to number	No limitation on nomadic use, but user must have registered address in geographic area corresponding to number	Nomadic use not allowed
UK	France Italy Spain (8XY)	Germany Netherlands	Austria

Note – In Denmark and Estonia all numbers are non-geographic



Fixed Call Termination Rates for VoIP services by ANOs

	Not regulated	Regulated – Higher than incumbent	Regulated – Same as incumbent
Not regulated	Denmark Poland Spain (8XY and 051)		
Regulation applies only to fixed geographic numbers			
Regulation applies both to fixed geographic numbers and non-geographic numbers specific to VoIP		Estonia France Germany Italy (until 2010) Netherlands	Austria Italy (from 2010) UK

Note – In Denmark and Estonia all numbers are non-geographic