

CLEC seminar 21/02/2008
**The definition of geographic markets in
electronic communications**

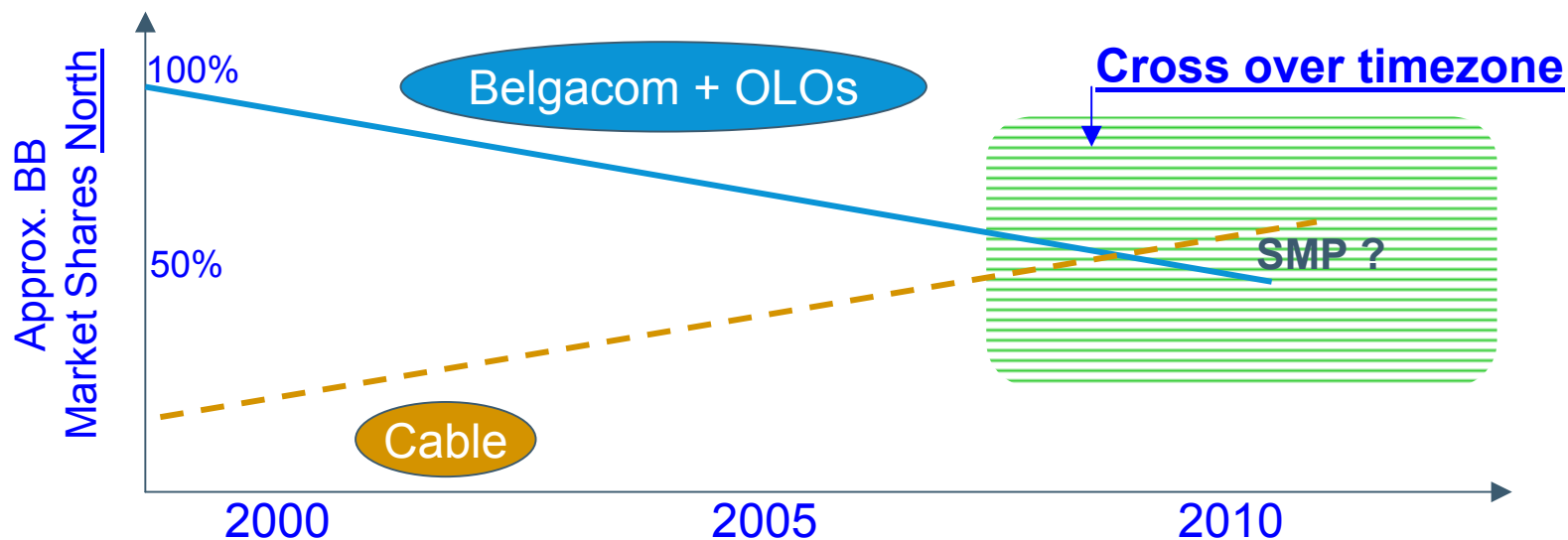
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belgacom

Sub-national markets ? The situation in Belgium

Belgian population 2007 (Mio) :

Total :	10.6
North :	6.1
Brussels :	1.0
South :	3.5



Broadband market shares in Belgium and “sub-Belgium”

- **North :**

1. Cable : >50%
2. Belgacom : <40%
3. OLOs : <15%

- **South and Brussels :**

1. Belgacom : >50%
2. Cable : <30%
3. OLOs : >15%

Sources : - ISPA

- Belgacom

Questions that need urgent answer by Y/N

1. Is infrastructure competition the key competition driver in Belgium ?
2. Is infrastructure competition limited to the unbundling of the copper pair loop or is it technology neutral ?
3. Is the notion of sub-national market technology dependant ?
4. Is it agreed that sub-national markets are intended to accelerate optimal regulation by :
 - Removing ex-ante regulation where possible
 - Focusing ex-ante regulation where needed