



APEK

Agencija za pošto in elektronske
komunikacije Republike Slovenije

**4th World Telecommunication Indicators Meeting
10-11 February 2005, Geneva, Switzerland**

**ITU World Telecommunication Indicators:
Data Collection and Dissemination
in Slovenia**

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Presented by: Gregor Hauc, CPM
(Certified Project Manager – IPMA)

- **Profession: Economist – business informatics**
- **Market Analyst (special – mobile markets 15,16,17)**
- **20 years experiences (½ in economy, ½ government)**
- **In APEK since 2000 (SMP process for mobile markets)**
- **Work in Market Analyses Department as a consultant**



Overview of Slovenia

- 1990 separate from Yugoslavia, 2004 member of EU
- 2 MIO population, GDP₂₀₀₃ /person = 12.319 EUR
- Currency: SIT (1 EUR = 240 SIT)
- 0,7 MIO households
- Inflation 3,5%
- GDP real growth rates 3,8%
- Largest city Ljubljana 265.000 citizens
- Registered unemployment rate 11,2%



Overview of Telecom/ICT sector

Government / Management

Responsible
Ministry for economic affairs

Regulator - APEK

Legislation:

- May 2004 – The new electronic communication Act
- New Regulatory Framework from EU

Operators:

Telephone services:

- Local calls 7
- Long distance call 7
- International 14

Other services:

- Cellular Mobile 3+1
- Mobile data 6
- Radiopaging 0
- Internet Access 73



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Overview of APEK

Agency for Post and Electronic Communications
National Regulatory Association

- Before 2000 under the Ministry of traffic
- Since 2000 independent regulatory body
- Responsible for Post and Telecommunication markets
- Employed 80 personnel, 10 work on Market Analyses
- Since May 2005, new Electronic Communication Law
- 18 Relevant Markets in Slovenia

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Electronic Communication Markets in Slovenia

Total revenue - all Telecom services in 2003:
728 MIO EUR

4 Market clusters:	Market share / revenue:
▪ Fixed telephony	38%
▪ Mobile telephony	54%
▪ Switched Data and Leased Line	6%
▪ Internet	2%

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Situation on Market services

Fixed telephony:

- 100% SMP Telekom Slovenia
- 0,8 MIO main telephone lines
- Public payphones 3.563
- Competition on intern. calls is 15%
- Use of CS/CPS since June 2004
- Low prices of retail services
- Intercon. prices / on EU average
- RIO on May 2004

Switched Data / Leased Lines:

- Leased Line:
 - More infrastructure (Telecomm, Energy, Railway, other)
 - Services: ATM/Frame Relay/IP-VPN
 - Prices for 2 Mbit/s comparable/EU
- Broadband access (ADSL):
 - Penetration more than 5%
 - Prices for 1 Mbit/s are 4 time lower than EU average

Mobile telephony:

- 3 MNO (73%, 20%, 2%) + 1 SP (5%)
- High market penetration in SLO 92% (in EU 81%)
- Coverage: popul. 98%, land 84%
- 2 SMP operators in 2002/2003
- Regulation of the wholesale prices
- Asymmetrical prices
- UMTS services since Dec 2003

Internet access:

- 73 companies offer access
- Full competition
- Dial(183.000), Cable(21.154), DSL(36.836)
- 800.000 internet users
- 62% of homes with PC (650.000)
- 45 connections / 100 residents
- 38 connections / 100 households
- Market share 44% Siol, 56% Others



Data Collection – Situation in Slovenia

Responsible: APEK (also SURS) Problems:

- Time: 9 months
- 1+18 questionnaires for data (60 days, 6 people)
- 129 operators in Slovenia
- Data collection – 6 months
- Data analyses – 3 months + ...
- Document for Analys Market 15 (95 pages – internal report)
- Work: 12 people
- First SMP (Market 11, Market 15/16)
- Not enough known process on operators side
- No data series (until 2000)
- Sending data without checking
- No common definition (what is enduser for Mobile Market?)

Solutions:

- More education for operators
- More unformal communication
- Better IT tools (DWH, Analys tools, Internet access for data)
- Seminars, Conferences

Data collection – Use of data

Domestic use:

- APEK for SMP procedure
- Slovenian Statistic Department
- Journalyst (Papers, Magazines)
- National Courts
- Industry
- New Entrants on the Market

International use:

- ITU
- Eurostat
- OECD
- EU Commission
- Other NRA in EU Countries
- Business Associations

Thank you for listening me!

**Best Regards from our
Team 15!**

Gregor Hauc, CPM

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<http://www.slovenia.info>

