



RIPE NCC

RIPE NETWORK COORDINATION CENTRE

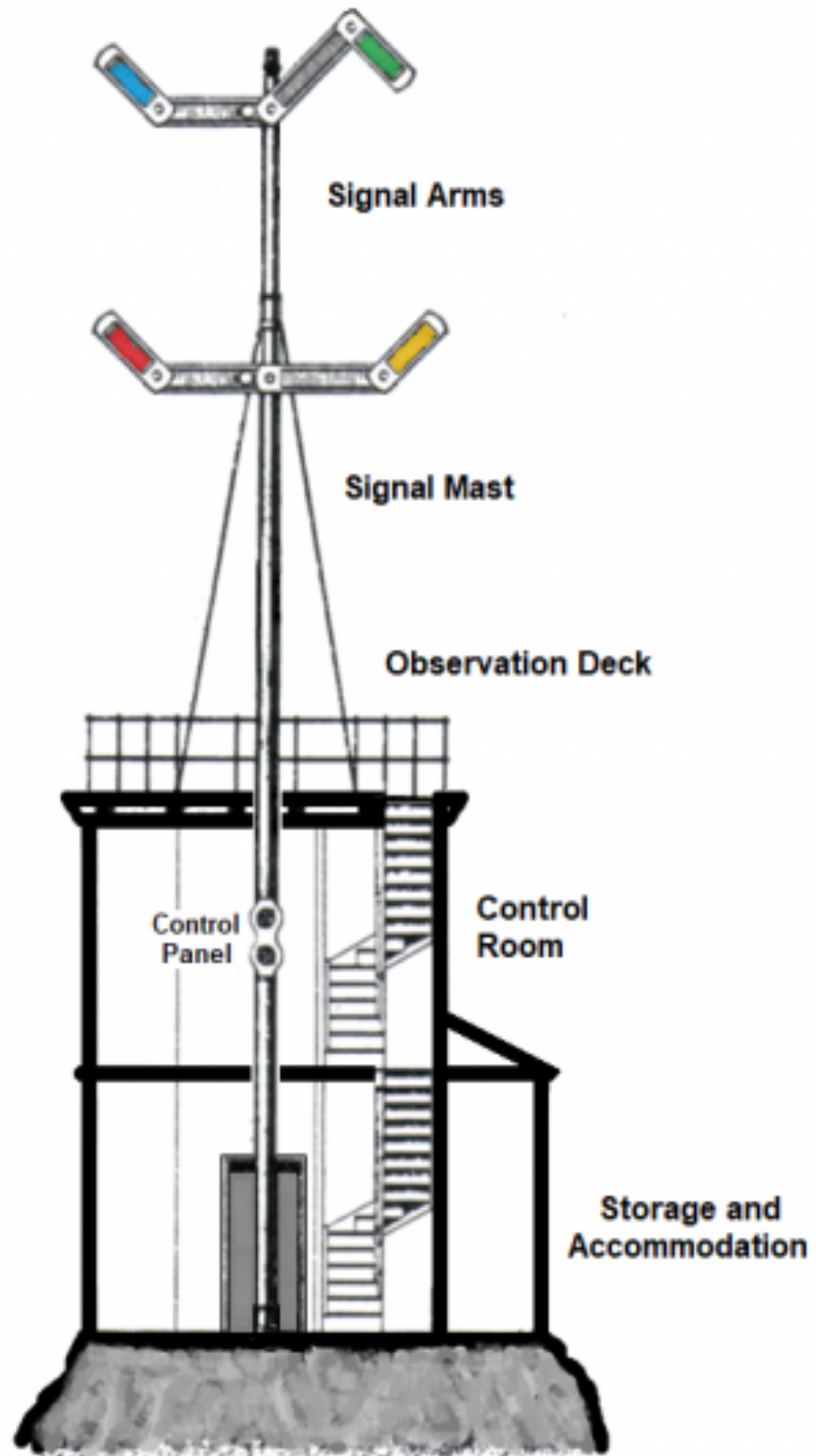
Evolution of telco market and trends

Jelena Ćosić | May 2023 | RIPE 86 Student event



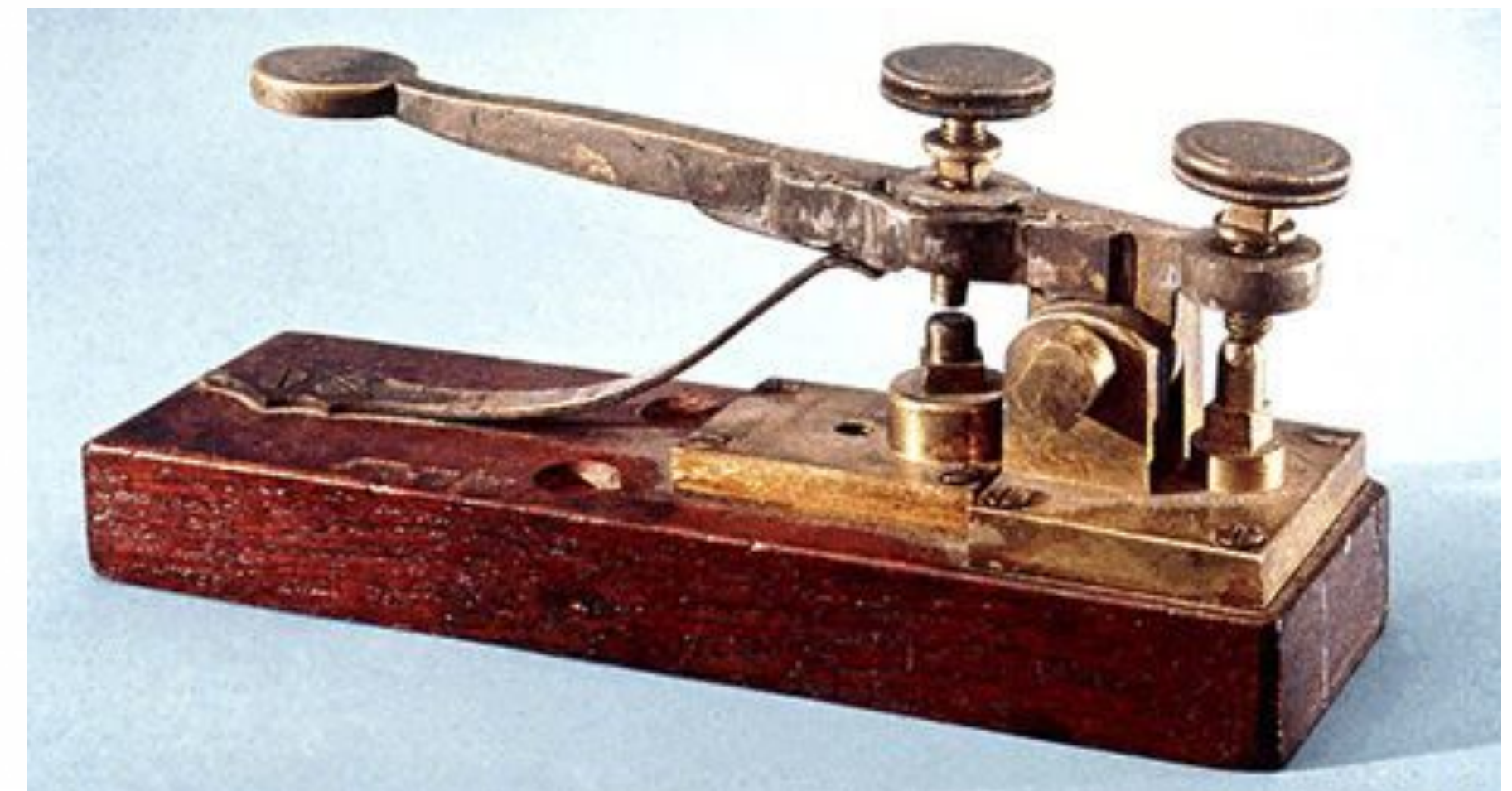
Brief historical overview





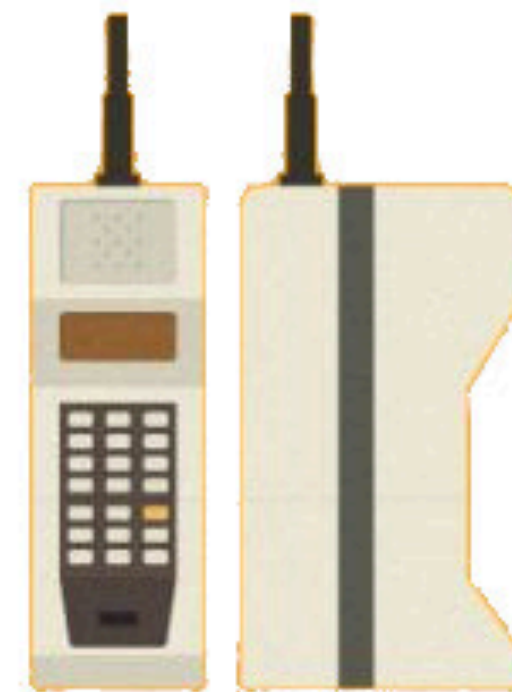
EXAMPLE ARM POSITIONS

A	B	C	D	E	F
G	H	I	K	L	M
N	O	P	Q	R	S
T	U	V	W	X	Y
Z	&	1	2	3	4
5	6	7	8	9	0



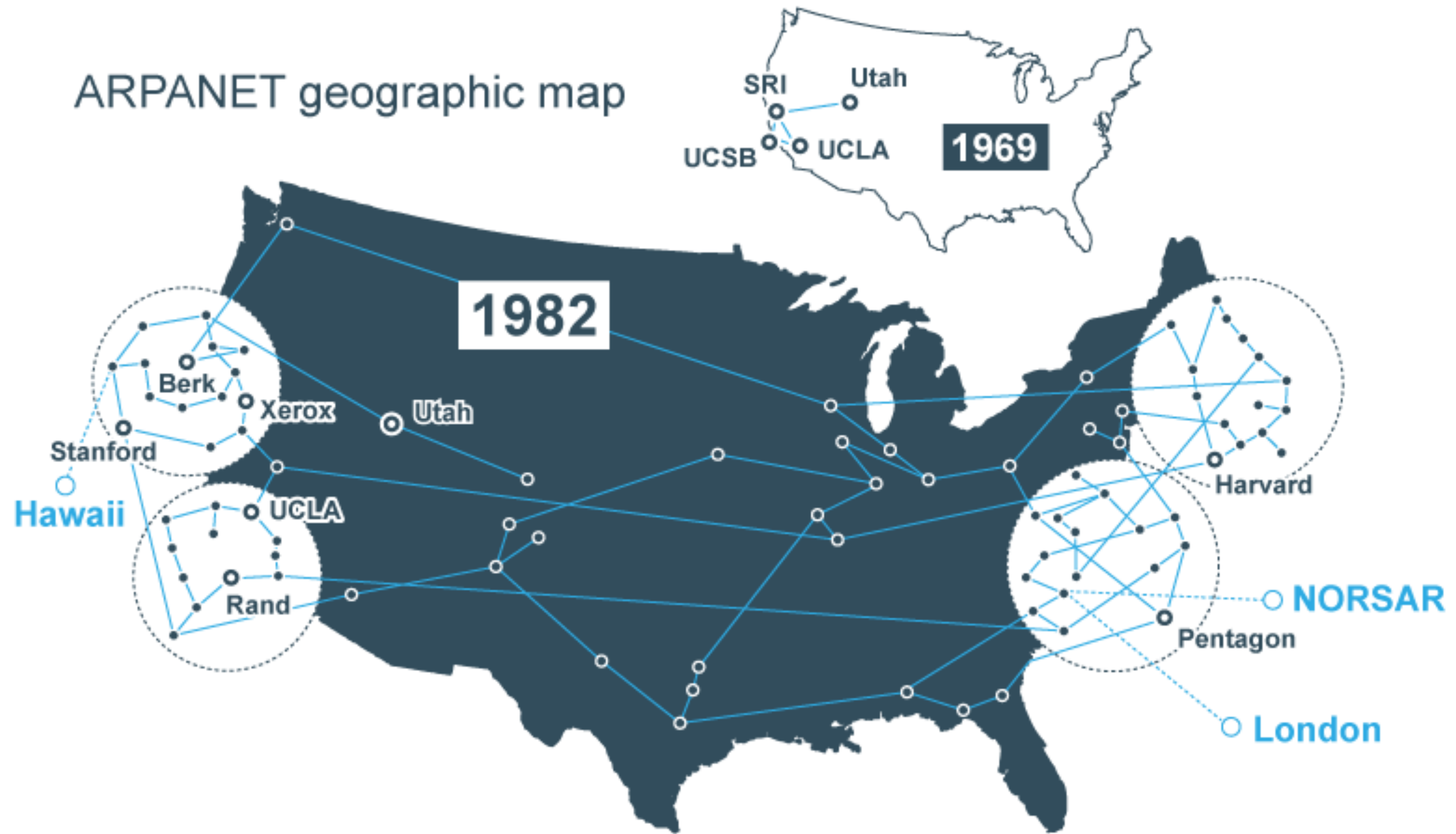


- Radio
- Television
- Geosynchronous satellite
- Computers
- Mobile phones





ARPANET geographic map





Nature of telecom markets

Post, Telegraph, Telephone



- State-owned postal services
- Telegraph; Cross-border cables
- Telephone
- Modern day PTT companies and splitting into two entities

Liberalisation



- Role of the EU Commission
- Competition of ISPs
- Different approaches to liberalisation across Europe



Natural monopolies?



**A look into the
future**

Market characteristics



- Increased competition (MVNOs and OTTs)
- Change in consumer behaviours and preferences (mobile data as a key driver of growth)
- Growing demand for high-speed internet
- Changes in regulatory environment (customer focused)

Telecom responses



- Restructuring of telecom companies (divestitures like spin-offs and carved-outs, outsourcing, mergers and acquisitions)
- Convergence and vertical integration
- Market consolidation

Consolidation



- Is there a magic number of mobile providers?
- EU Digital Single Market - to the benefit of whom?

“Fair share” battle



- Who gets to define what’s “fair”?
- OTTs vs Telecoms
- EU push for closing the digital gap; signing Declaration on Digital Rights and Principles for the Digital Decade
- Consultations still open

Calls for re-nationalisation



- Turkey, Hungary, Italy, Canada



Questions



jcosic@ripe.net