

**Notification: Study into the current and future technological access options to all of the fixed telecommunication infrastructures in the Netherlands.**

**Organisation: the Netherlands Authority for Consumers and Markets**

**Purpose of the notification**

The Netherlands Enterprise Agency is publishing this notification on behalf of the Netherlands Authority for Consumers and Markets (ACM). The purpose of this notification is to determine whether there are parties interested to perform the abovementioned study.

**Extent and duration**

The final report is due to be delivered towards the beginning of May 2017.

**Background information.**

In the past, ACM has investigated the access possibilities of the fixed telecommunication infrastructures in the Netherlands. Currently, ACM is obligating the owner of both the dominant copper based infrastructure, as well as the fiber optics based infrastructure (FttH), to grant potential entrants access. Currently there are no obligations on coaxial cable based infrastructures.

However, telecommunication infrastructures in the Netherlands are continuously being developed and upgraded by their respective owners. As a result, it is likely that the technical capabilities of providing access to these fixed telecommunication infrastructures are also continuously changing.

Furthermore, the structure of the telecommunication market in the Netherlands is also continuously changing. Recently most notable by the proposed merger between Ziggo (owner of the coaxial cable based telecommunications infrastructure) and Vodafone, resulting in a second market player capable of providing quad play services via its own infrastructure (next KPN).

Considering all these developments, ACM would like to gain insight into the current and foreseeable future technological developments of these fixed telecommunication infrastructures, and how they might influence the options and capabilities of providing access to potential access seeking third parties.

**Aim of the study**

The aim of this project is therefore, to investigate and map all current and foreseeable future technological access options to all fixed telecom infrastructures in the Netherlands and how they might influence access regulation during the upcoming LLU-market analysis (period 2019-2022).

Furthermore, ACM would also like to obtain an analysis on the business case of potential access seekers on coaxial cable. This research should concern both physically unbundled access (LLU), virtual access (VULA) and unbundled access on WBA level for coaxial networks. This in order for ACM to be able to make a comparative analysis between the business cases for potential access seekers on coaxial cable and the (already available) business cases for access seeking third parties on copper- and fiber optics-based infrastructures.

It should be noted that this study only concerns the technological access capabilities, and not an analysis of the market structure (as this research will be conducted by ACM in due time).

**Central research questions**

- What are the current and foreseeable future developments on the fixed telecommunication infrastructures (coaxial-, copper-, and fiber optics-based) in the Netherlands, and what would be the effect of these developments on the options of providing access to these infrastructures on LLU, VULA, and WBT level?

- What is the business case for potential access seekers on the coaxial-based infrastructure in the Netherlands on LLU, VULA, and WBT level?

### **Definitions and scope**

- The study should focus on (future) developments in the Dutch fixed telecommunications infrastructures. These infrastructures include coaxial cable, copper cable, and fiber optics.
- The final report has to contain descriptions and scenarios of future market developments.
- Current European legislation should be considered.
- The business case should contain a model for (potential) local, regional, and national access on coaxial networks due to the upcoming market analysis.

### **Final product**

The study must lead to a clear final report-, including a management summary, written in either English or Dutch.

### **Required skills / experience**

The company or companies (in case of a consortium) should indicate on the reply form if they:

- Have a firm knowledge of the different fixed telecommunications infrastructures and how they are implemented and developed in the Netherlands;
- Have knowledge regarding the relevant European legislation;
- Have experience in research into telecommunication infrastructures and/or access regulation on national or European level;
- Have experience with determining business cases (preferably for access seekers);
- Have all further technical and economic knowledge required to perform this study.

### **Application**

Interested companies / consultants, fitting the abovementioned requirements, are invited to fill in the reply form and e-mail the completed reply form to the Procurement Department, to the attention of Ms. Marjolein Switzar by email [IUCEZteam5@rvo.nl](mailto:IUCEZteam5@rvo.nl).

You do not have to send documents, other than the completed reply form if you are interested.

Interested parties will receive the request for the tender by email, as soon as possible after the deadline for responding to this Notification.

The deadline for responding to this Notification is set at December 1, 2016, 12.00 CET.

**Reply form Study into the current and future technological access options to all of the fixed telecommunication infrastructures in the Netherlands 16.1056.64**

Name of tenderer/company:	
Contact details:	
Name of signatory:	
Signature:	
Date:	

Requirement	Description	Yes/no	Explanation
1.	Have a firm knowledge of the different fixed telecommunications infrastructures and how they are implemented and developed in the Netherlands		
2.	Have knowledge regarding the relevant European legislation		
3.	Have experience in research into telecommunication infrastructures and/or access regulation on national or European level.		
4.	Have experience with determining business cases (preferably for access seekers).		
5.	Have all the further technical and economic knowledge required to perform this study.		