INTERNATIONAL UPDATE

CMA CONFERENCE
LONDON, 15 MAY 2015
CONSOLIDATING BUSINESS TELECOMMUNICATIONS

INTERNATIONAL UPDATE

Nick White, Executive Vice President
International Telecommunications Users Group (INTUG)
INTERNATIONAL ISSUES

- Fixed/Mobile Access Infrastructure
  - Competition and Investment
- Network Neutrality
  - Quality of Service, End-to-End
- Cloud Services
  - Big Data Protection/Security
- Internet of Things
  - M2M, cross border
- Sector-specific ex-ante Regulation
  - Digital Single Market/Framework Review
OECD FIXED BROADBAND V GDP

Fixed broadband penetration (subscribers per 100 inhabitants, June 2014)

GDP per capita (USD PPP, current prices, 2013)
FIXED AND MOBILE ACCESS

• Efficient infrastructure investment
• Encouragement of community funding
• Spectrum harmonisation/sharing
• Satellite, unlicensed spectrum e.g. WiFi
• Objective comparable national targets
• Wholesale access for global providers
• Global service-based competition
ACCESS INVESTMENT DRIVERS

• Sharing at all levels – passive and active
• Elimination of Cross-border mark-ups
• EU Business Relevant Market
• Elimination of excessive copper profits
• Prevention of access exclusivity deals
• Avoidance of vertical integration lock-in
• Competition in cross border services
NETWORK NEUTRALITY

• Not about IPR but about quality
• Needs consistent definition
• Differentiation without discrimination
• Needed for end-to-end B2B access
• Transparent traffic management
• Covers all elements of ecosystem
CLOUD SERVICES

• Contract Terms and Conditions
• Service Level Agreements
• Software Escrow and Licensing
• Vertical Lock-in
• Application Openness
• Switching
INTERNET OF THINGS/M2M

• Major public sector opportunities
  - health, education, transport, utilities
• Must enable flexible mobile access
• Must not incur cross-border charges
• Standard definition and classification
• Must provide resilient connectivity
INTERNATIONAL REGULATION

- ITU, WARC
- FCC
- OECD
- REGULATEL, APECTEL, CITEL ETC
- EU/EC/BEREC/NRAs
  - The Digital Single Market
EC DIGITAL SINGLE MARKET

• Connected Continent Proposals
  - only roaming and net neutrality
• EP/EC/Council negotiation
• Better access to online services
  - only 7% EU SMEs sell cross border
  - only 4% VOD available cross border
• Break down national regulation silos
EC DIGITAL SINGLE MARKET

- Customer’s country VAT
- No roaming charges especially data
- Removal of geo-blocking
- Consistent approach to spectrum
- Harmonised net neutrality rules
- Transparency of platform services
EC DIGITAL SINGLE MARKET

- Free flow of data/Cloud initiative
- Interoperability and standardisation
- E-Government/EU Portal/Gateway
- Business register interconnection
- Regulatory Framework Review
- Satellite, Cable and e-Privacy review
CMA CONFERENCE
LONDON 15 MAY 2015
INTERNATIONAL ISSUES

Nick White
Executive Vice President
nick.white@intug.org  www.intug.org
International Telecommunications Users Group (INTUG)

Thank you