

**CMA CONFERENCE
LONDON, 15 MAY 2015
CONSOLIDATING BUSINESS
TELECOMMUNICATIONS**

INTERNATIONAL UPDATE

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



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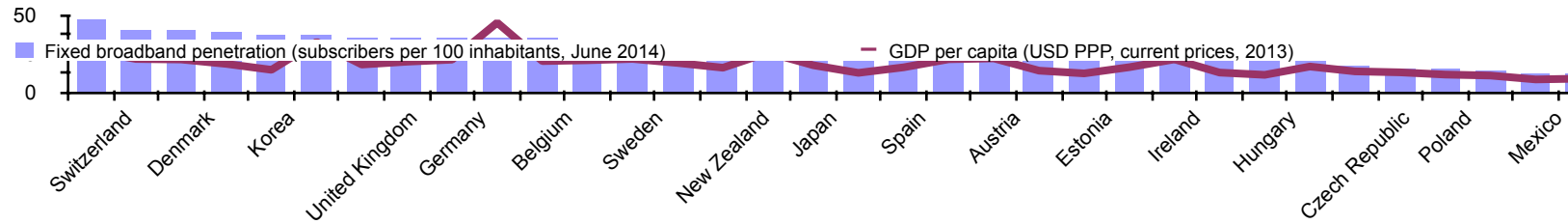
INTERNATIONAL ISSUES

- **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**



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OECD FIXED BROADBAND V GDP



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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**



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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**



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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**



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CLOUD SERVICES

- **Contract Terms and Conditions**
- **Service Level Agreements**
- **Software Escrow and Licensing**
- **Vertical Lock-in**
- **Application Openness**
- **Switching**



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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**



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INTERNATIONAL REGULATION

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



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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**



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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**



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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**



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Thank you



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