



Multi-year Expert Meeting on

# **TRADE, SERVICES AND DEVELOPMENT**

*Geneva, 15-17 April 2014*

## **SESSION 1:**

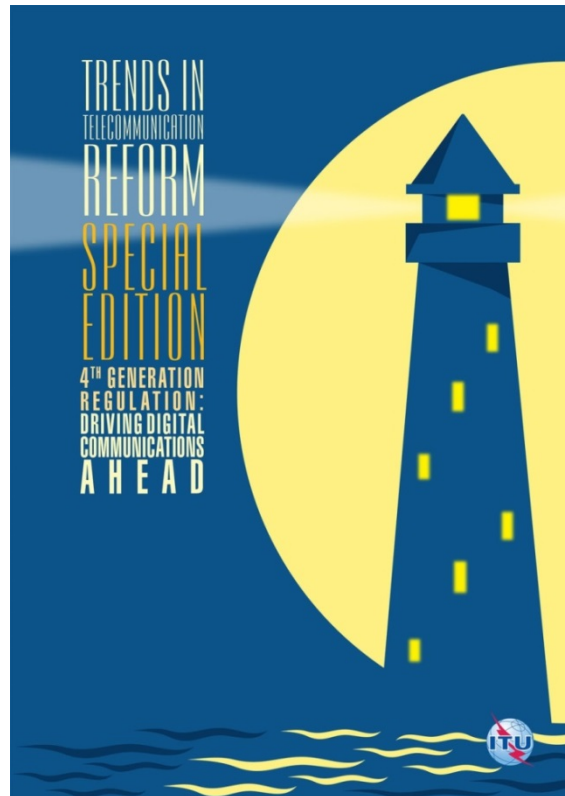
### **TRENDS IN INFRASTRUCTURE SERVICES SECTORS**

**Ms. Youlia Lozanova**

**ICT Regulatory Analyst**

**Telecommunication Development Bureau (BDT)**

**International Telecommunication Union**

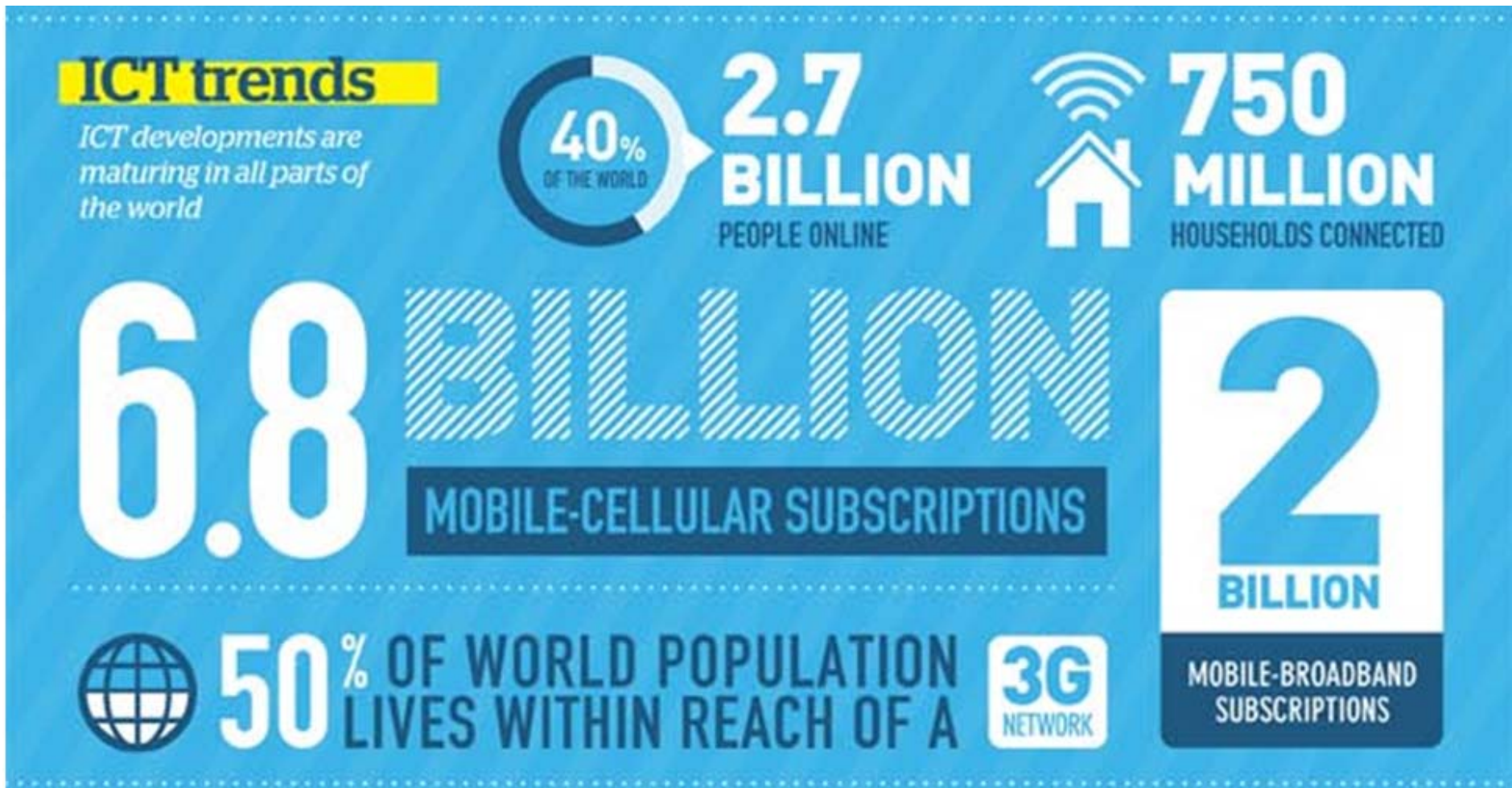


# Trends in ICT services & regulation

*Multi-Year Expert Meeting on Trade,  
Services and Development,  
UNCTAD, Geneva, Switzerland  
15-17 April 2014*

**Youlia Lozanova**  
Telecommunication Development Bureau (BDT)

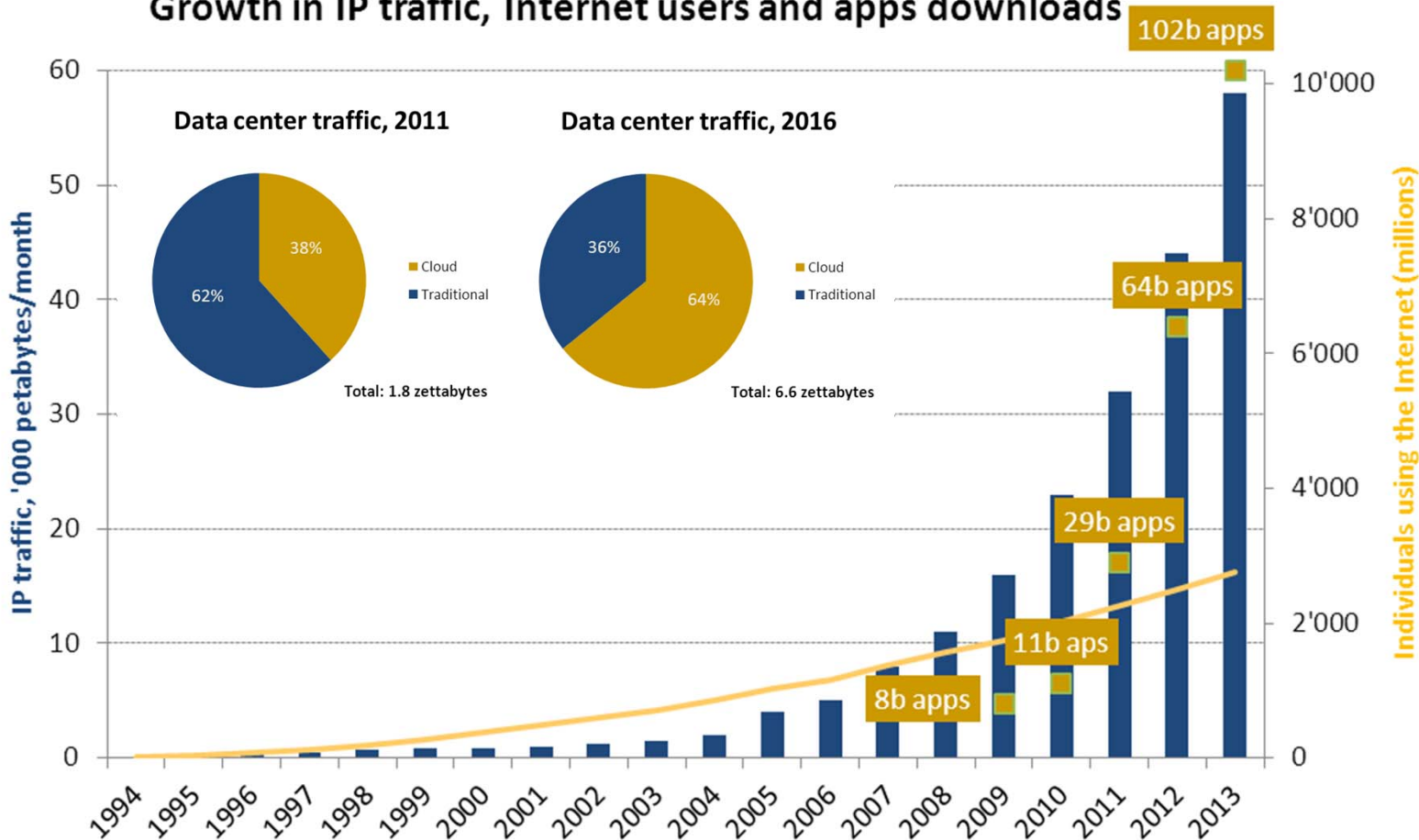
# Trends in ICT markets



Source: ITU.

# The sky is the limit

Growth in IP traffic, Internet users and apps downloads



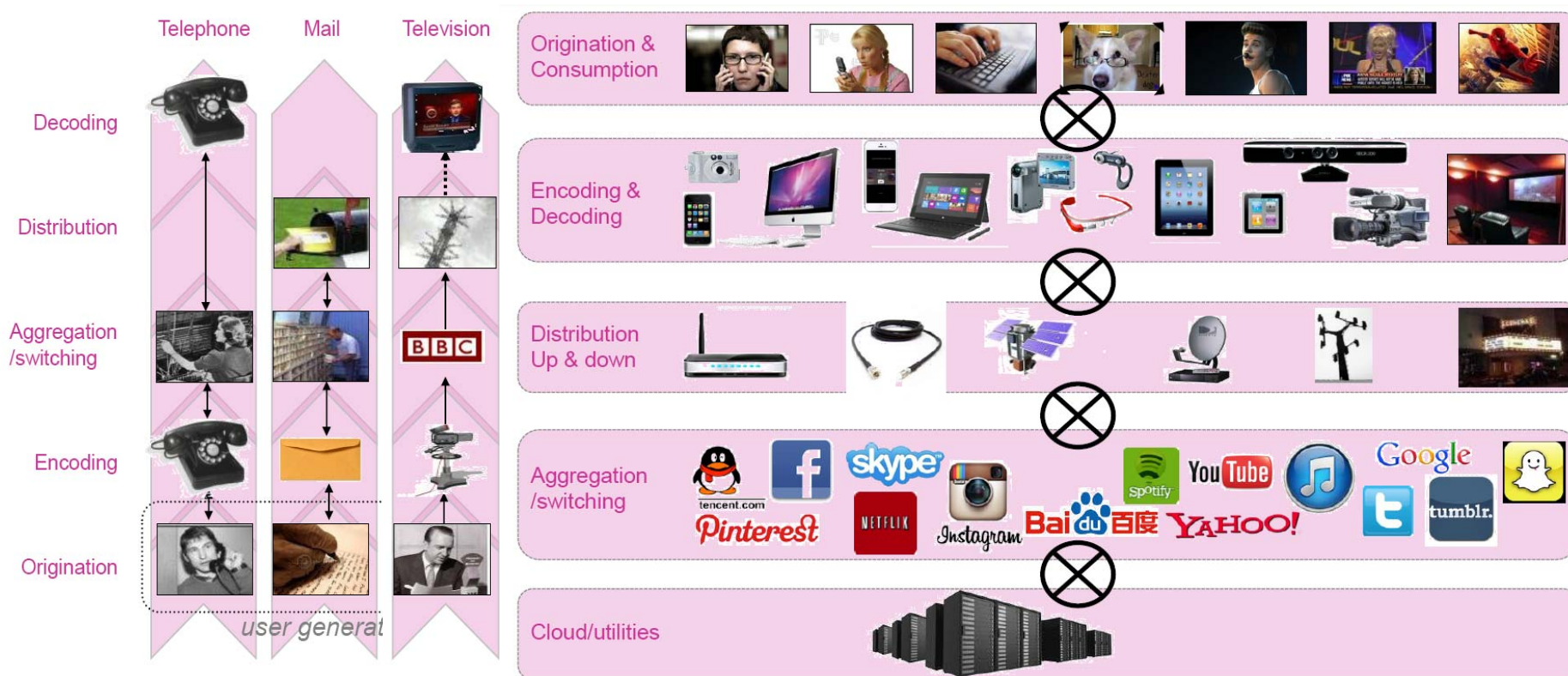
Source: ITU, Trends in Telecommunication Reform 2013: Transnational aspects of regulation in a networked society



# ICT industry: past & present

## Past: vertical

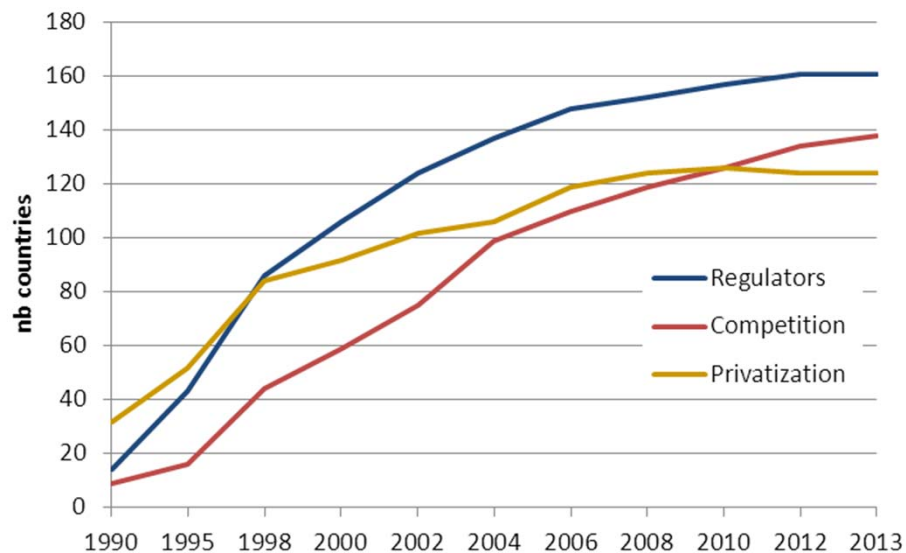
## Present: horizontal



Source: The Boston Consulting Group.

# Shaping markets, creating opportunities

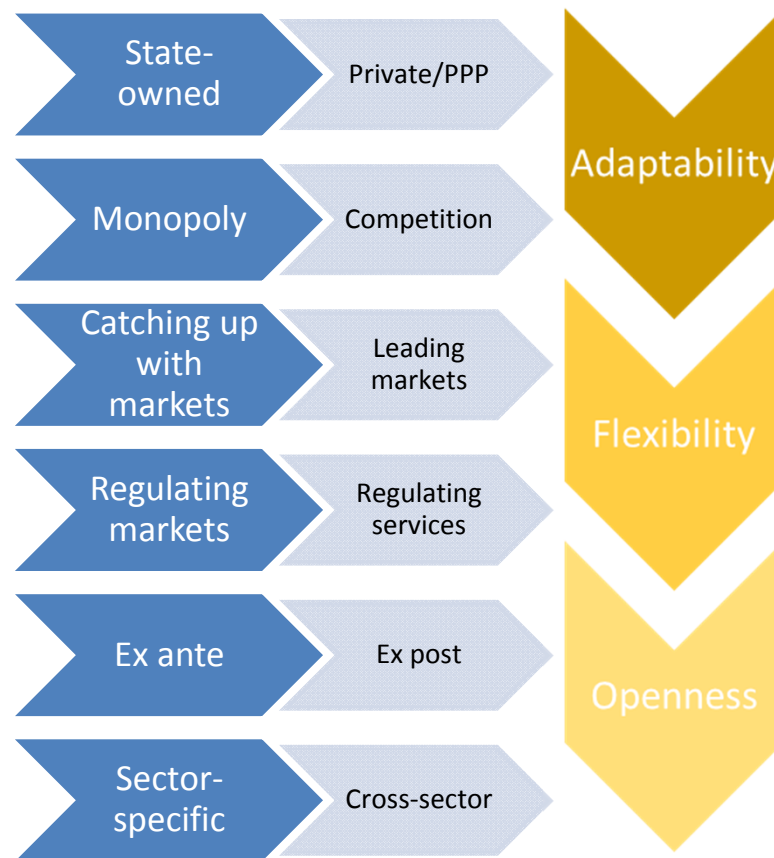
Regulatory trends



In 2013, there were:

- 161 national ICT regulators
- 124 competitive ICT markets
- 123 private/ized incumbents

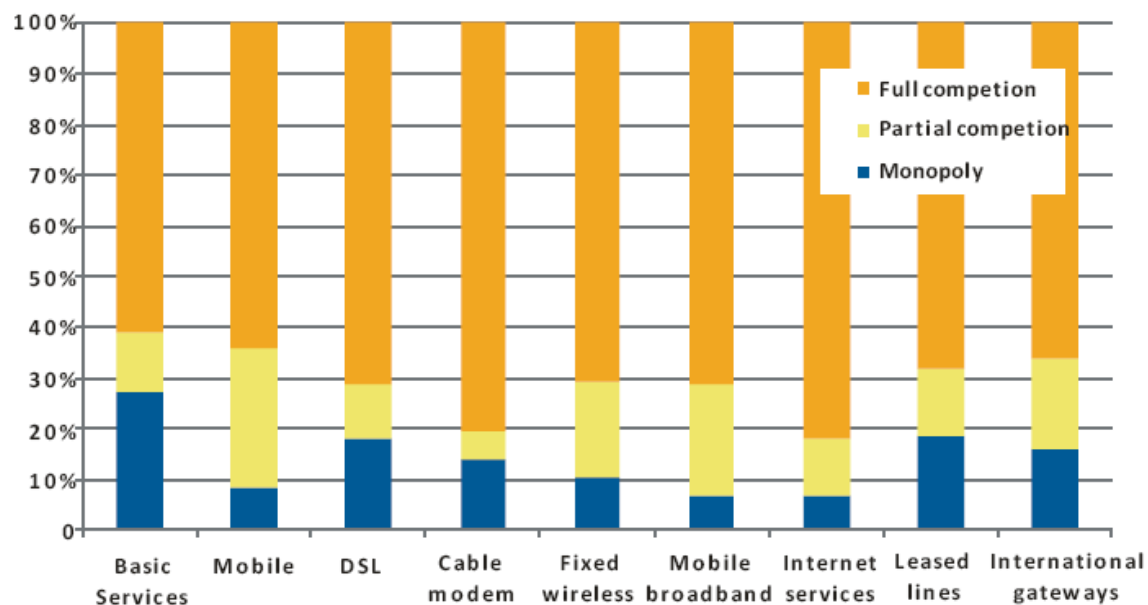
Evolving regulation



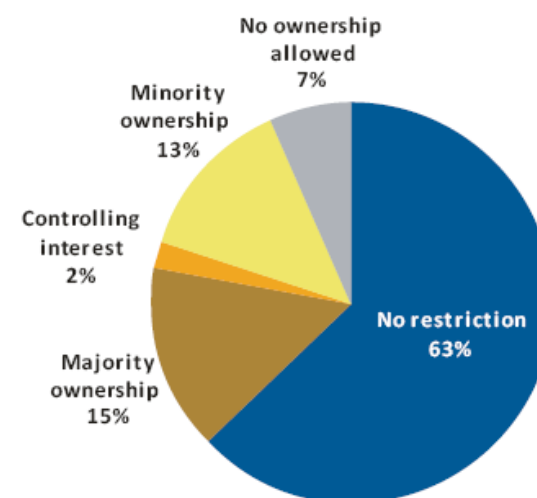
Source: ITU.

# Competition

Level of competition in ICT markets, 2013



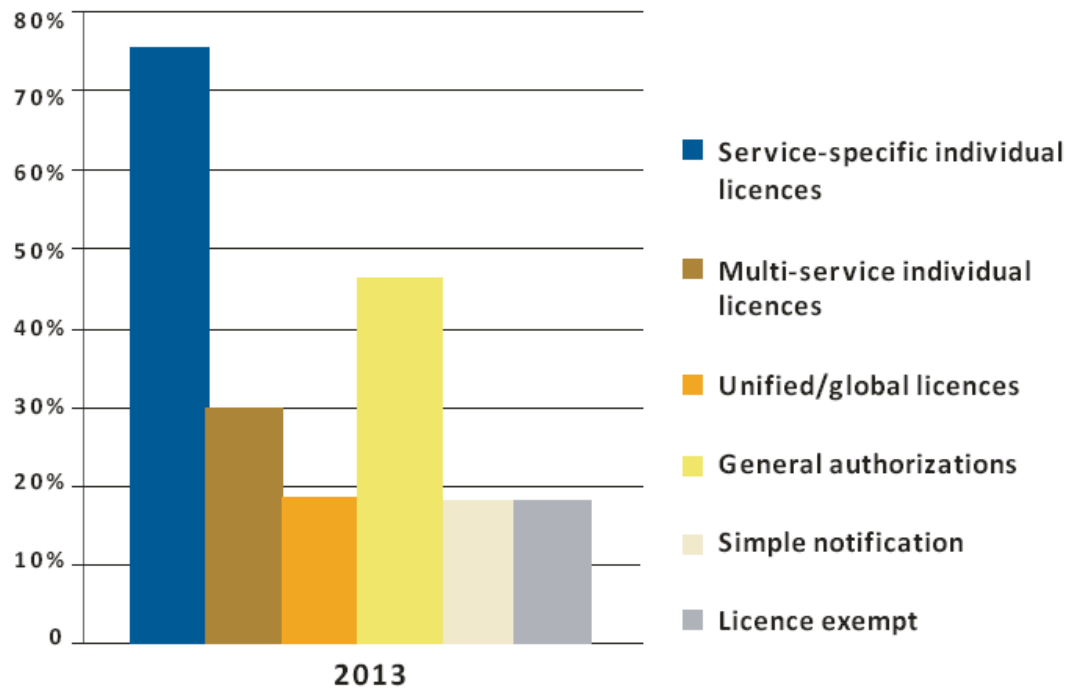
Foreign ownership in the ICT sector, 2013



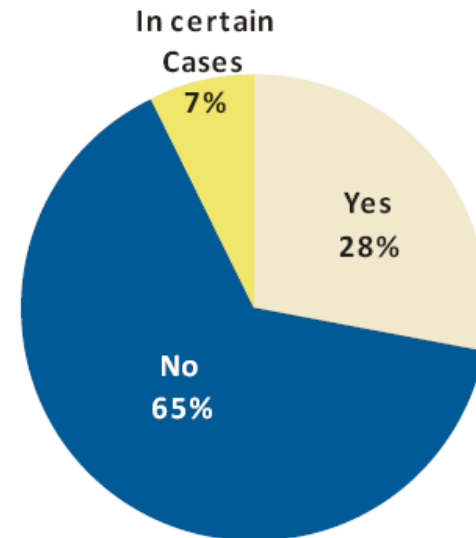
Source: ITU, Trends in Telecommunication Reform Special Edition (2014)

# Licensing

Licensing frameworks for ICT services, by type of licence, 2013



Legal limit of the number of licences exist, 2013



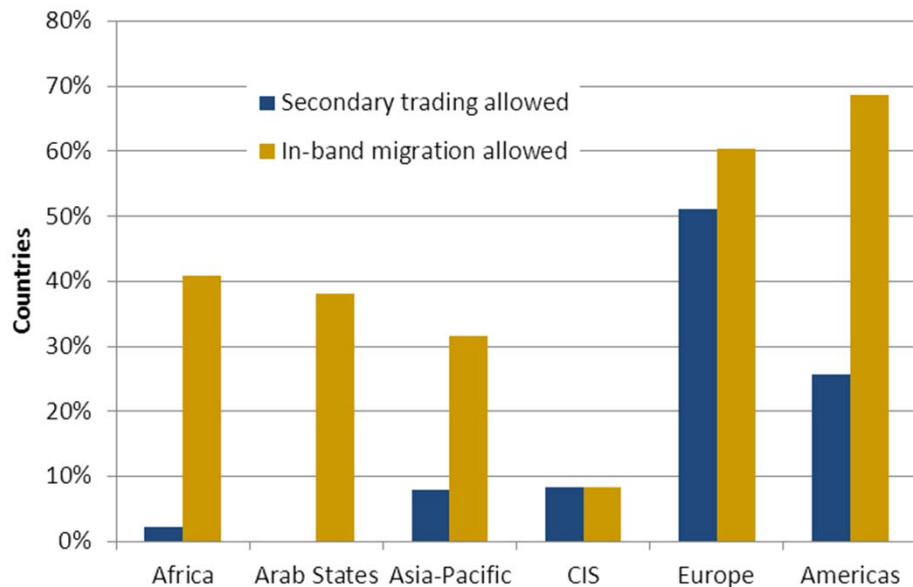
Source: ITU, Trends in Telecommunication Reform Special Edition (2014)





# Need for more spectrum

Spectrum management practices around the world, 2013



Source: ITU ICT Eye, [www.itu.int/icteye](http://www.itu.int/icteye)

## Issues

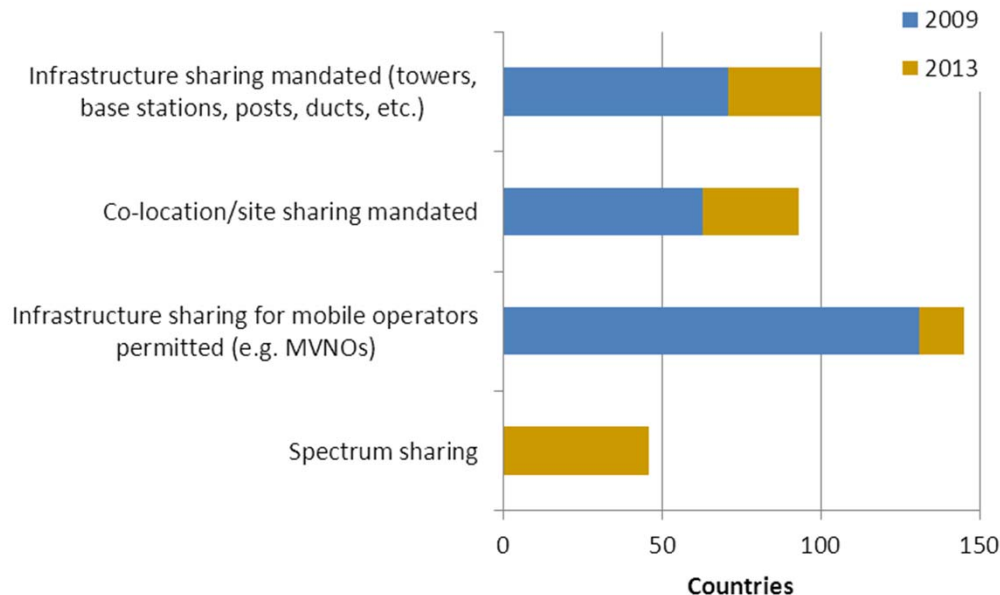
- Scarce resource
- Growing demand
- Competitive interests

## Regulatory response

- ✓ Technology neutrality
- ✓ New licensing schemes
- ✓ Differentiated geographical approach
- ✓ Market-based mechanisms

# Sharing

## Infrastructure sharing

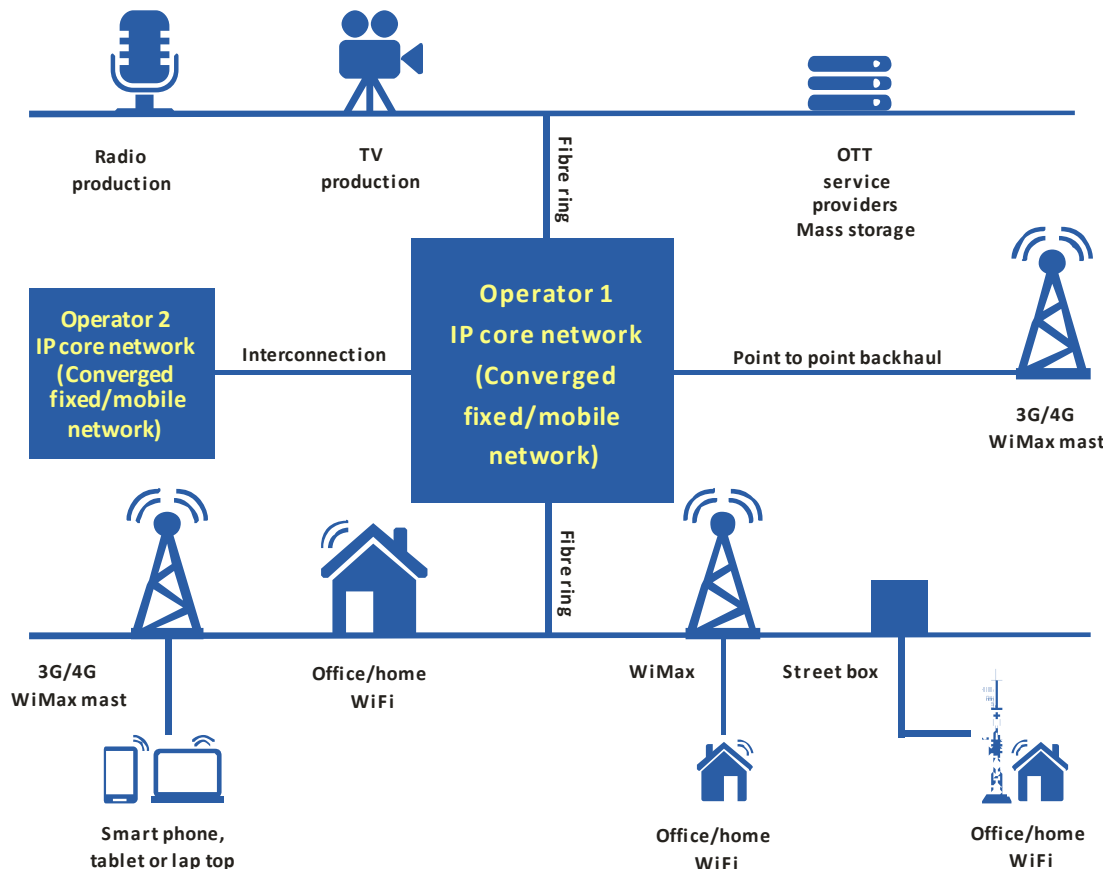


Source: ITU ICT Eye, [www.itu.int/icteye](http://www.itu.int/icteye)

## Why share?

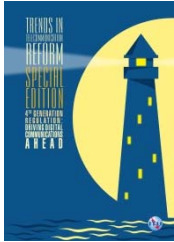
- Makes economic sense
- Allows for leverage available resources
- Intensifies intra-modal competition
- Gives rise to new business models
- Attention to be given to investment incentives
- Share with other utilities: a win-win scenario

# Regulatory challenges in the digital age

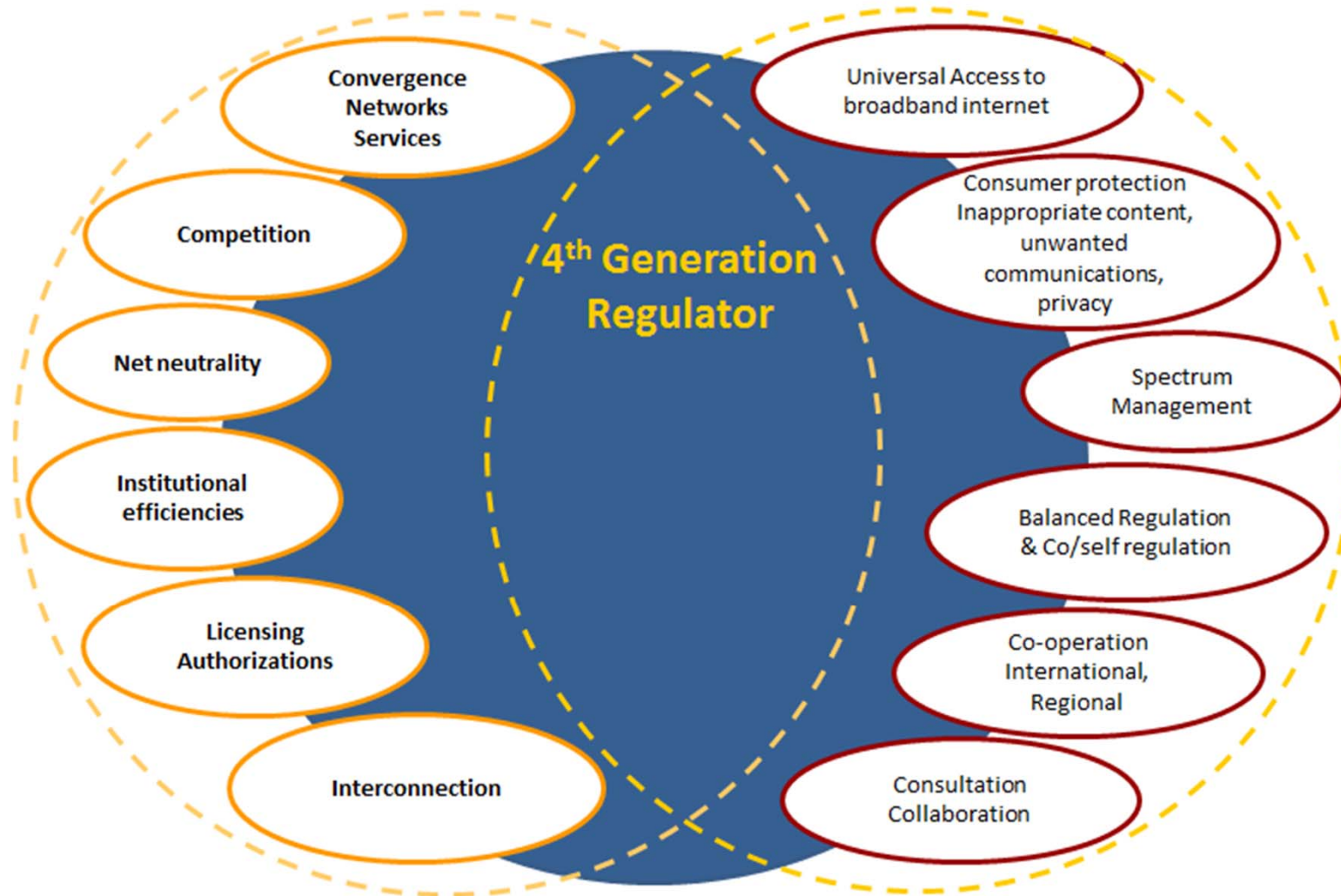


- ✓ Secure sufficient investment
- ✓ Maintain a level-playing field
- ✓ Universal access
- ✓ Anti-trust policies
- ✓ Cybersecurity & data protection
- ✓ Interconnection
- ✓ Interoperability
- ✓ Net neutrality
- ✓ Transition to IPv6
- ✓ Innovation
- ✓ Content regulation

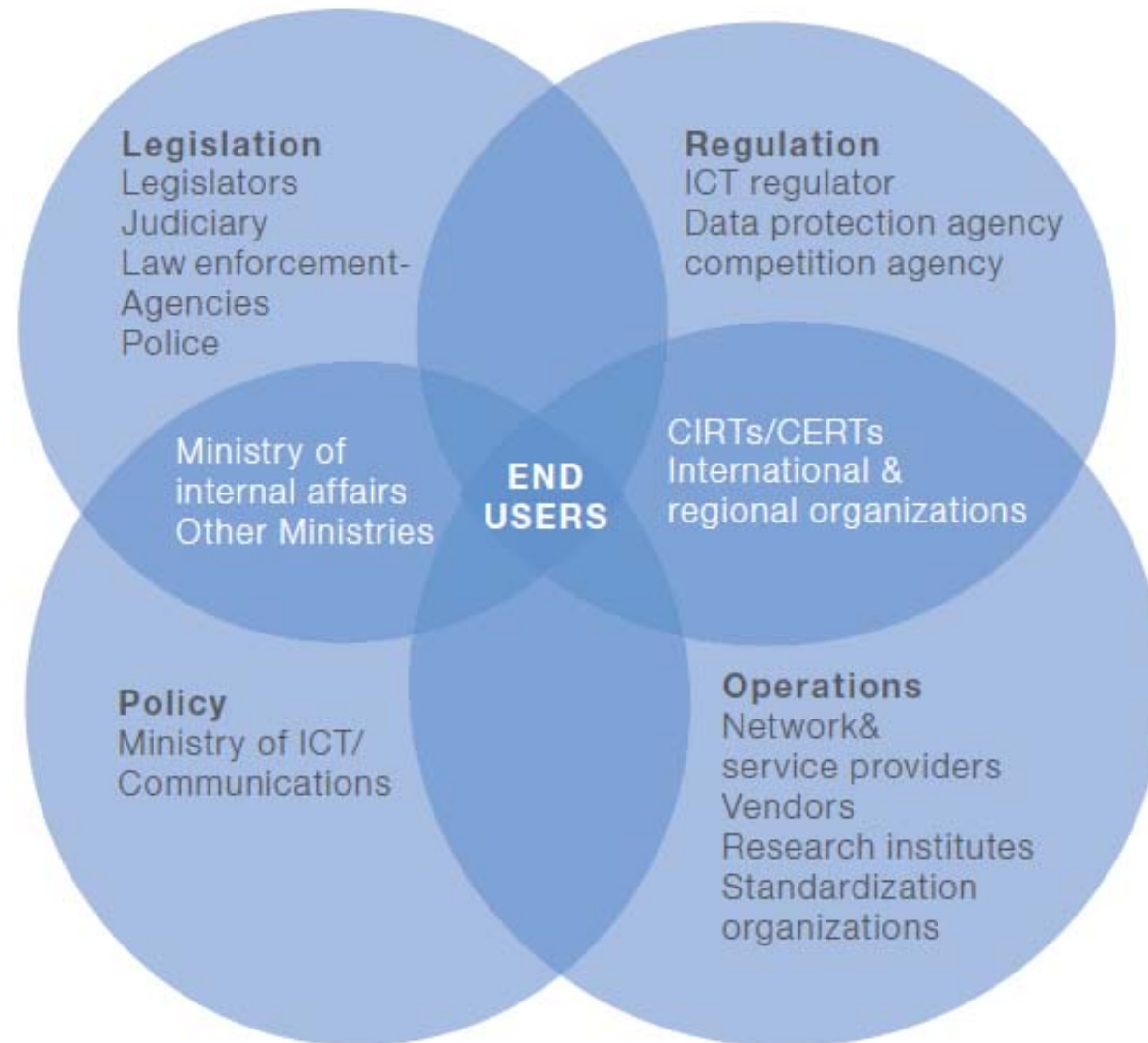
Source: ITU, Trends in Telecommunication Reform Special Edition (2014)



# Regulation 4.0



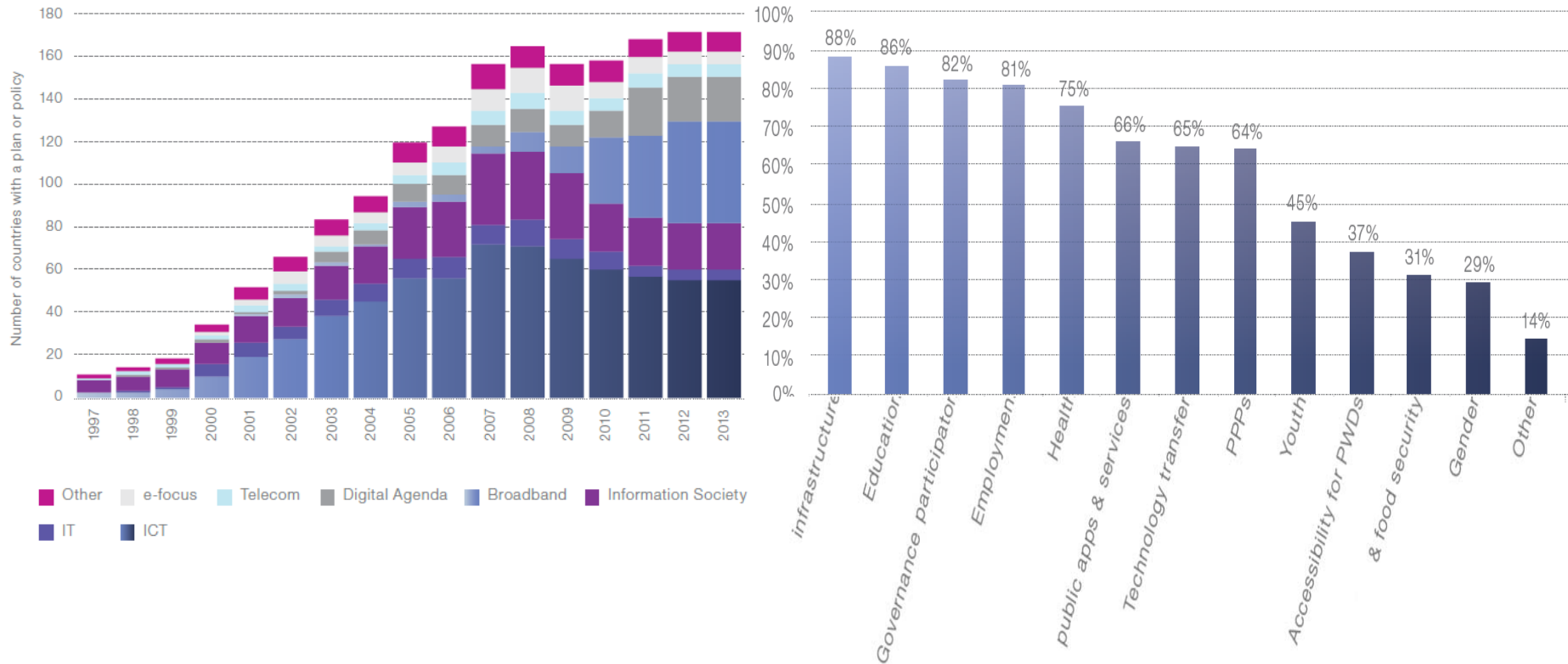
# Broadband Plans



Source: ITU.



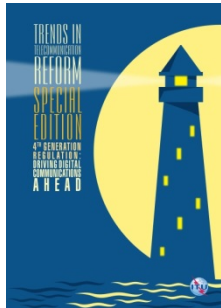
# Changing Focus of Broadband Plans



Source: ITU.

# ITU Reports

## Trends in Telecommunication Reform Special edition



- ✓ 4<sup>th</sup> generation regulation: a new model of regulation for the digital ecosystem
- ✓ White spaces: managing spaces or better managing inefficiencies
- ✓ Interconnection charging models in a national broadband network environment
- ✓ Digital broadcasting and online content delivery
- ✓ Digital transactions in today's smart society
- ✓ The Need for More IP Addresses

[www.itu.int/trends-special](http://www.itu.int/trends-special)

## Trends in Telecommunication Reform 2013 : Transnational aspects of regulation in a networked society



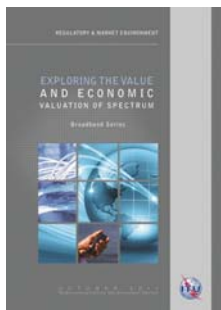
- ✓ Net neutrality: a regulatory perspective
- ✓ Spectrum policies in a hyperconnected digital mobile world
- ✓ International roaming services: a review of best practice policies
- ✓ Global and regional IP interconnection

## Broadband Thematic reports in 2013:

- Developing successful Public-Private Partnerships to foster investment in universal broadband networks
- Competition and regulation in a converged broadband world

## Regulatory, Economic and Financial Reports 2013:

- Strategies for the deployment of NGN and NGA in a broadband environment – regulatory and economic aspects
- ITU Study on Taxing telecommunications/ICT services: an overview
- Regulating broadband prices



Thank you!  
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