Multi-year Expert Meeting on
TRADE, SERVICES AND DEVELOPMENT
Geneva, 15-17 April 2014

SESSION 1:
TRENDS IN INFRASTRUCTURE SERVICES SECTORS

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Trends in ICT services & regulation

Multi-Year Expert Meeting on Trade, Services and Development, UNCTAD, Geneva, Switzerland
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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.
In 2013, there were:

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

Source: ITU.
Committed to Connecting the World

Competition

Level of competition in ICT markets, 2013

Foreign ownership in the ICT sector, 2013

Licensing

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


Legal limit of the number of licences exist, 2013

In certain Cases
- Yes: 28%
- No: 65%
- 7%

Individual licence
Multi-service licence
Class licence
Registration
Notification
Open entry
Need for more spectrum

Issues

- Scarce resource
- Growing demand
- Competitive interests

Regulatory response

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

Source: ITU ICT Eye, www.itu.int/icteye
Sharing

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

Source: ITU ICT Eye, www.itu.int/icteye
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

Regulation 4.0

- Convergence Networks Services
- Universal Access to broadband internet
- Consumer protection Inappropriate content, unwanted communications, privacy
- Spectrum Management
- Balanced Regulation & Co/self regulation
- Co-operation International, Regional
- Consultation Collaboration
- Competition
- Net neutrality
- Institutional efficiencies
- Licensing Authorizations
- Interconnection
Broadband Plans

Legislation
Legislators
Judiciary
Law enforcement-Agencies
Police

Regulation
ICT regulator
Data protection agency
competition agency

Policy
Ministry of ICT/Communications

Operations
Network & service providers
Vendors
Research institutes
Standardization organizations

CIRTs/CERTs
International & regional organizations

Ministry of internal affairs
Other Ministries

END USERS

Source: ITU.
Changing Focus of Broadband Plans

Source: ITU.
ITU Reports

Trends in Telecommunication Reform Special edition

✓ 4th 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

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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