

**INTUG**

**LIRNE Guaemala** September 2003

**[www.INTUG.net](http://www.INTUG.net)**

# *Performance indicators*

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Users Group**

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# INTUG contents

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# INTUG our aims

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- real and effective competition
- genuine choice for users
- lower prices
- higher quality
- more innovative services
- constructive co-operation with
  - international bodies
  - governments
  - regulators

# INTUG priorities

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1. open access to global mobile networks
2. regulatory best practice
3. liberalization
4. leased lines
5. IP telephony
6. digital divide
7. universal access
8. numbering

# INTUG performance indicators

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- to assess progress
  - absolute
  - relative
  - national
  - regional
- to inform decision-makers
  - consumers
  - politicians
  - investors
- to name and to shame

# INTUG choice of indicators

- define the purpose
- justify the selection
- use several indicators
- compare
  - over time
  - with other countries
  - different regions of one country
- don't over interpret results

# INTUG network development

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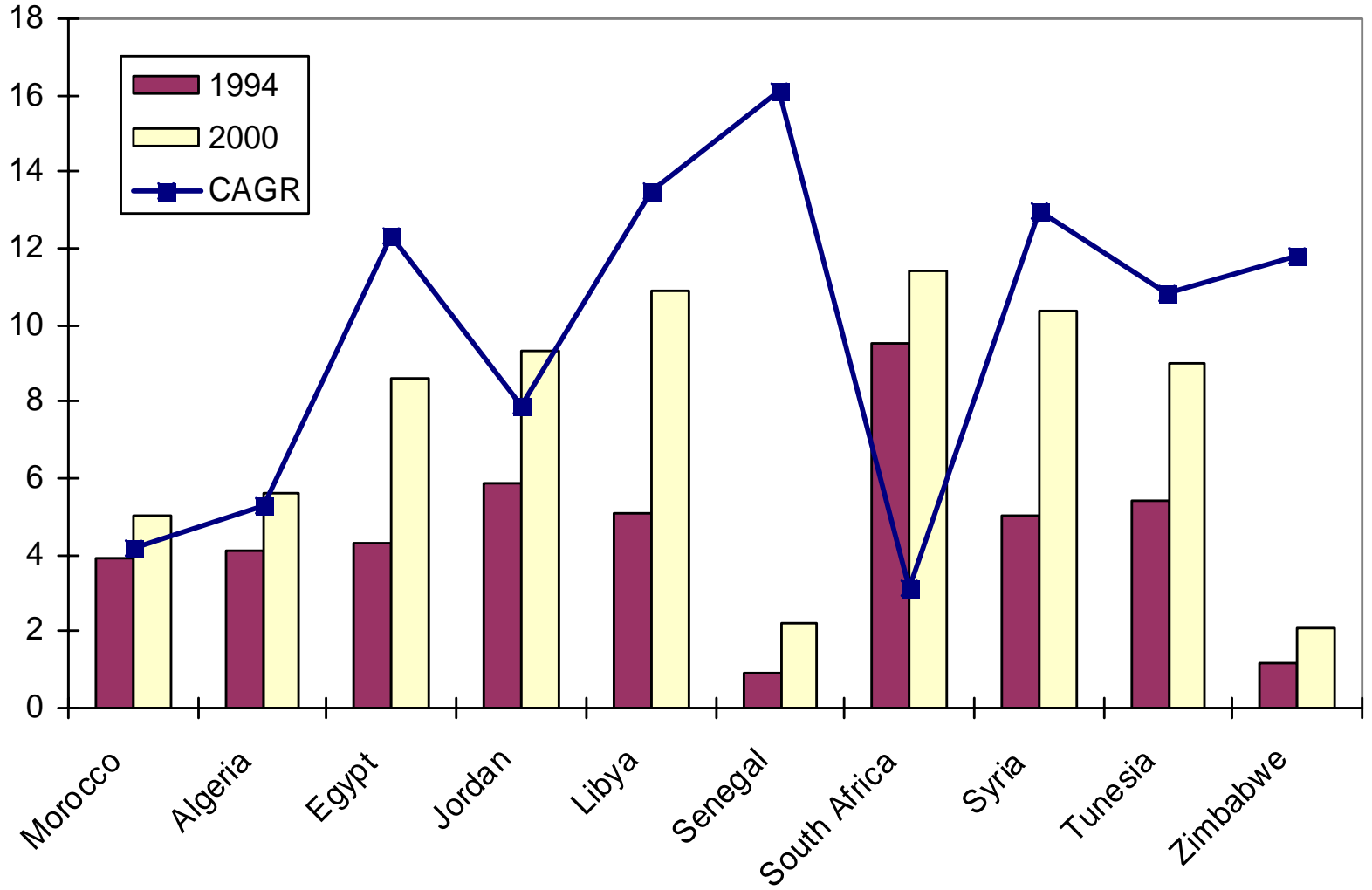
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- main lines (penetration and growth)
- but questions about
  - household composition
  - access to telephones
  - community and commercial telecentres
- mobile subscribers (penetration & growth)
- questions about counting pre-paid subscribers
- total access lines
  - can you add fixed and mobile?
- leased lines
- operators
  - number and market shares
  - churn rates

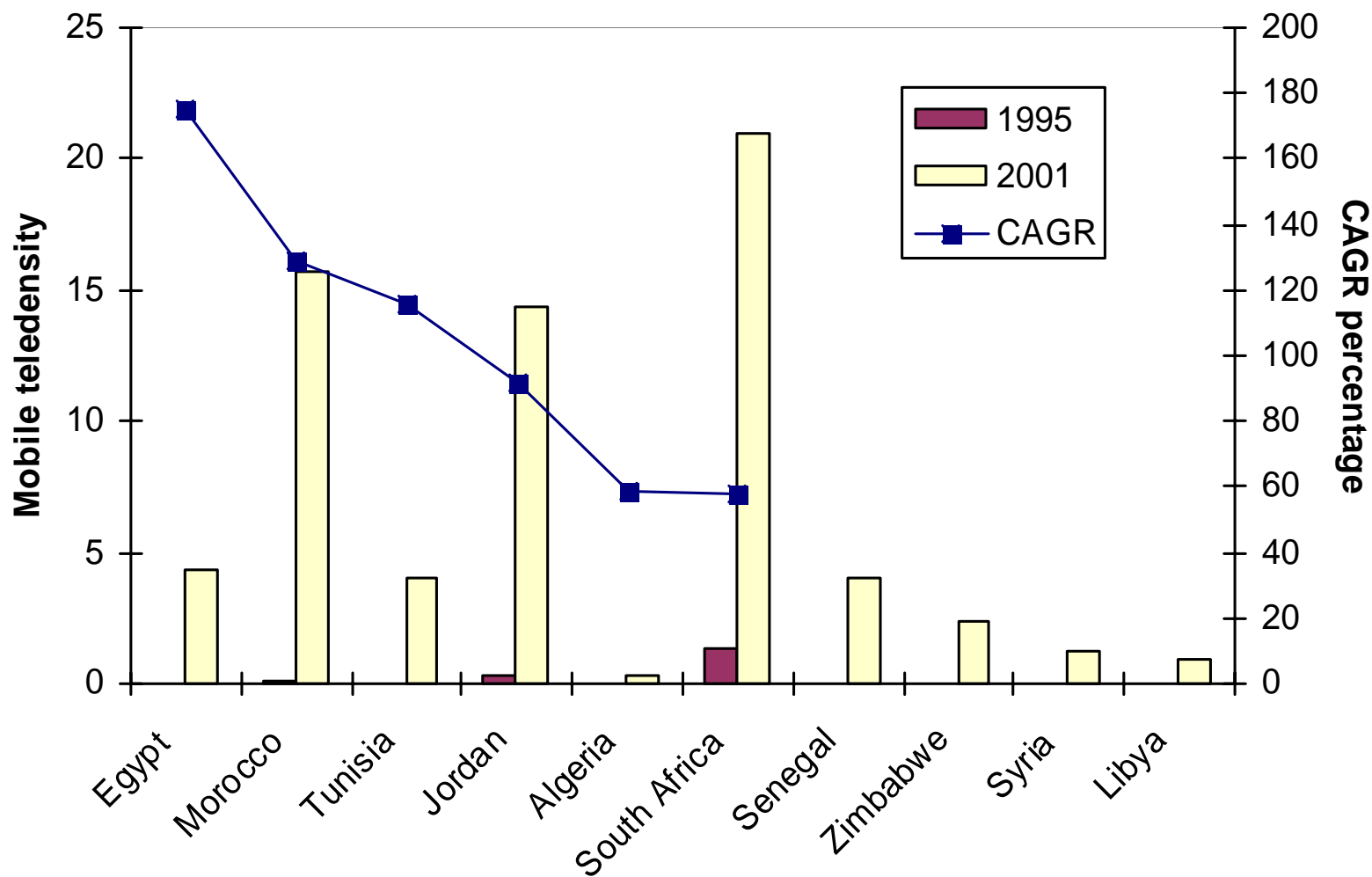
# INTUG main lines per 100 inhabitants

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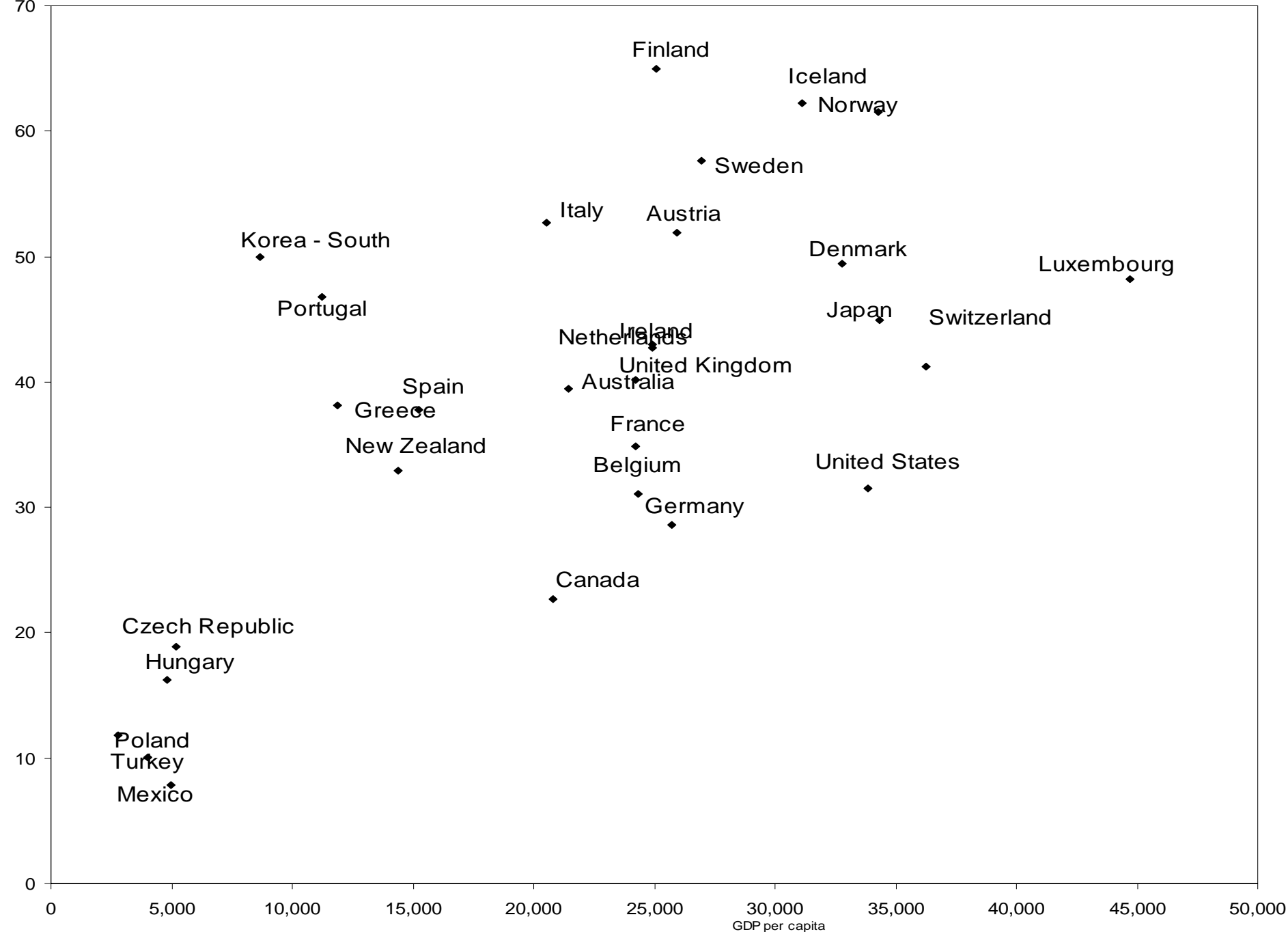
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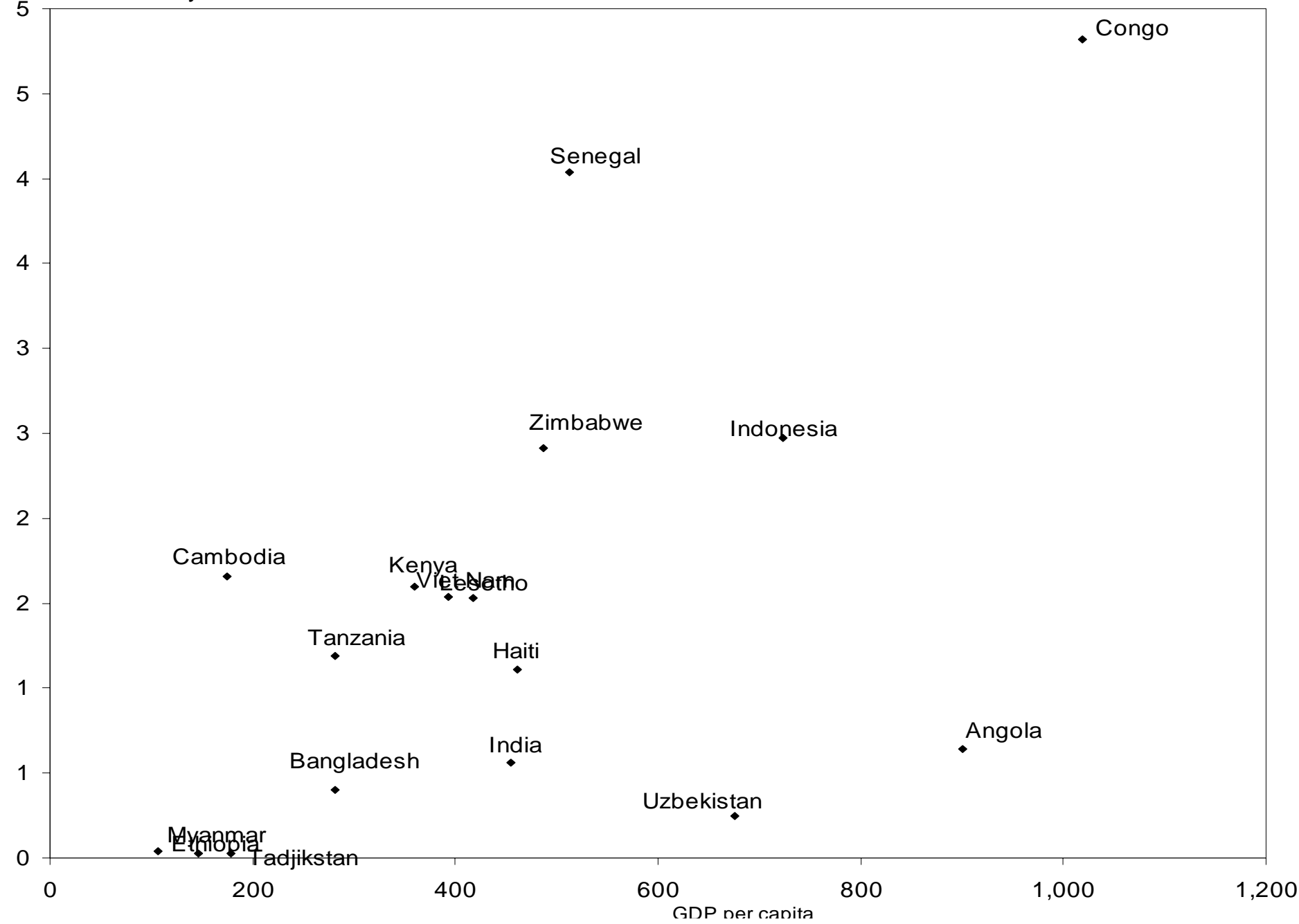




Mobile teledensity



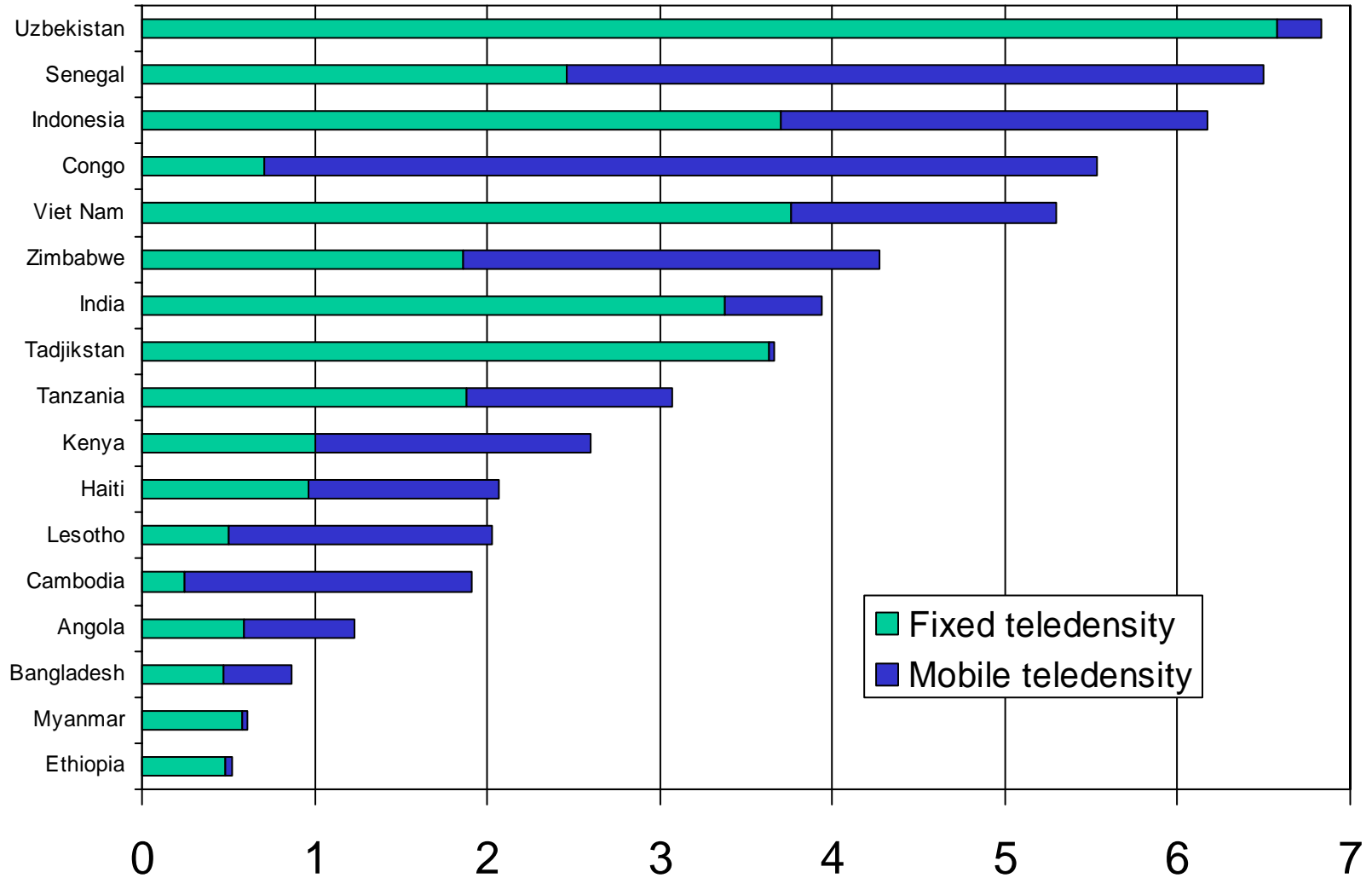
# Mobile teledensity

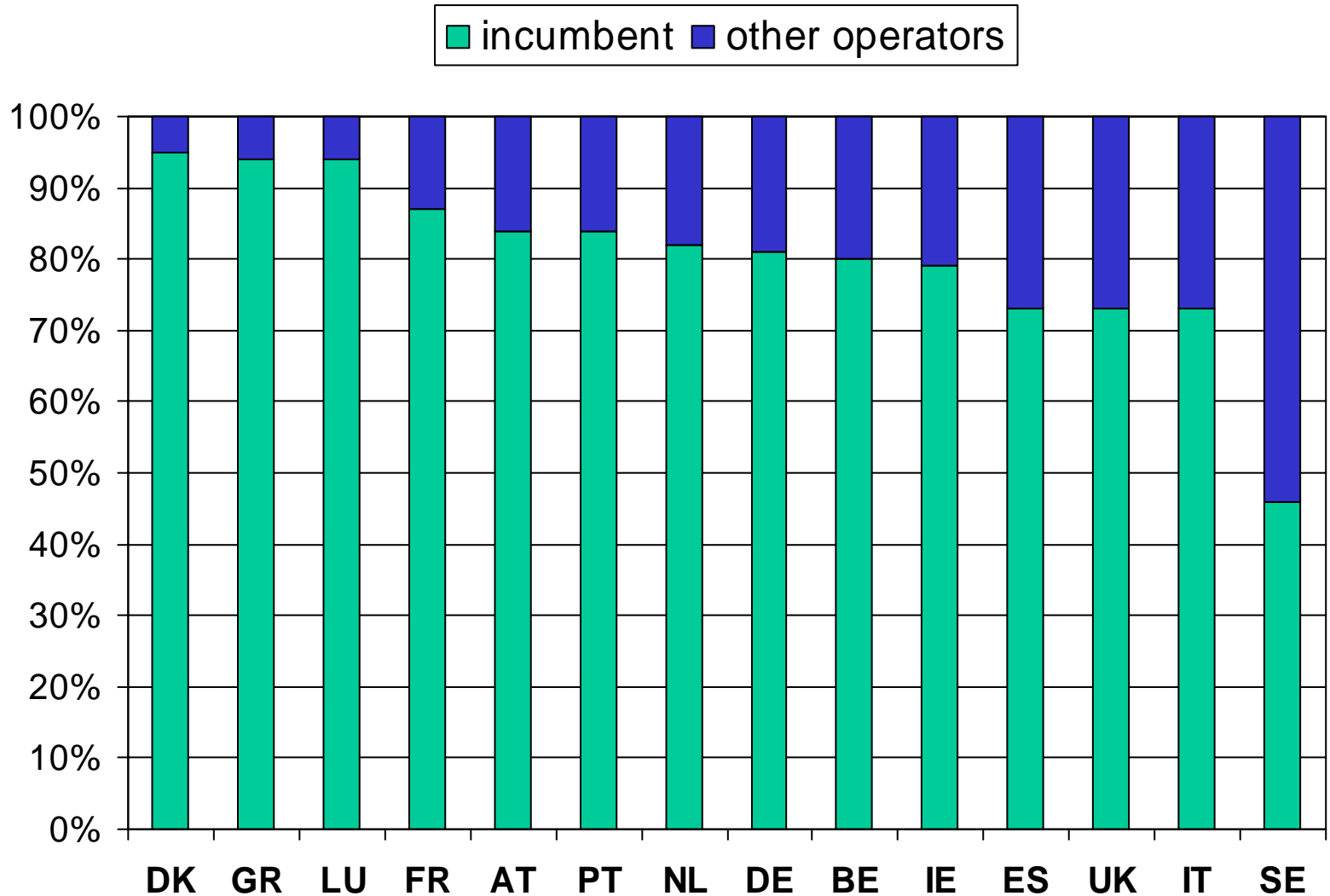


# INTUG total teledensity

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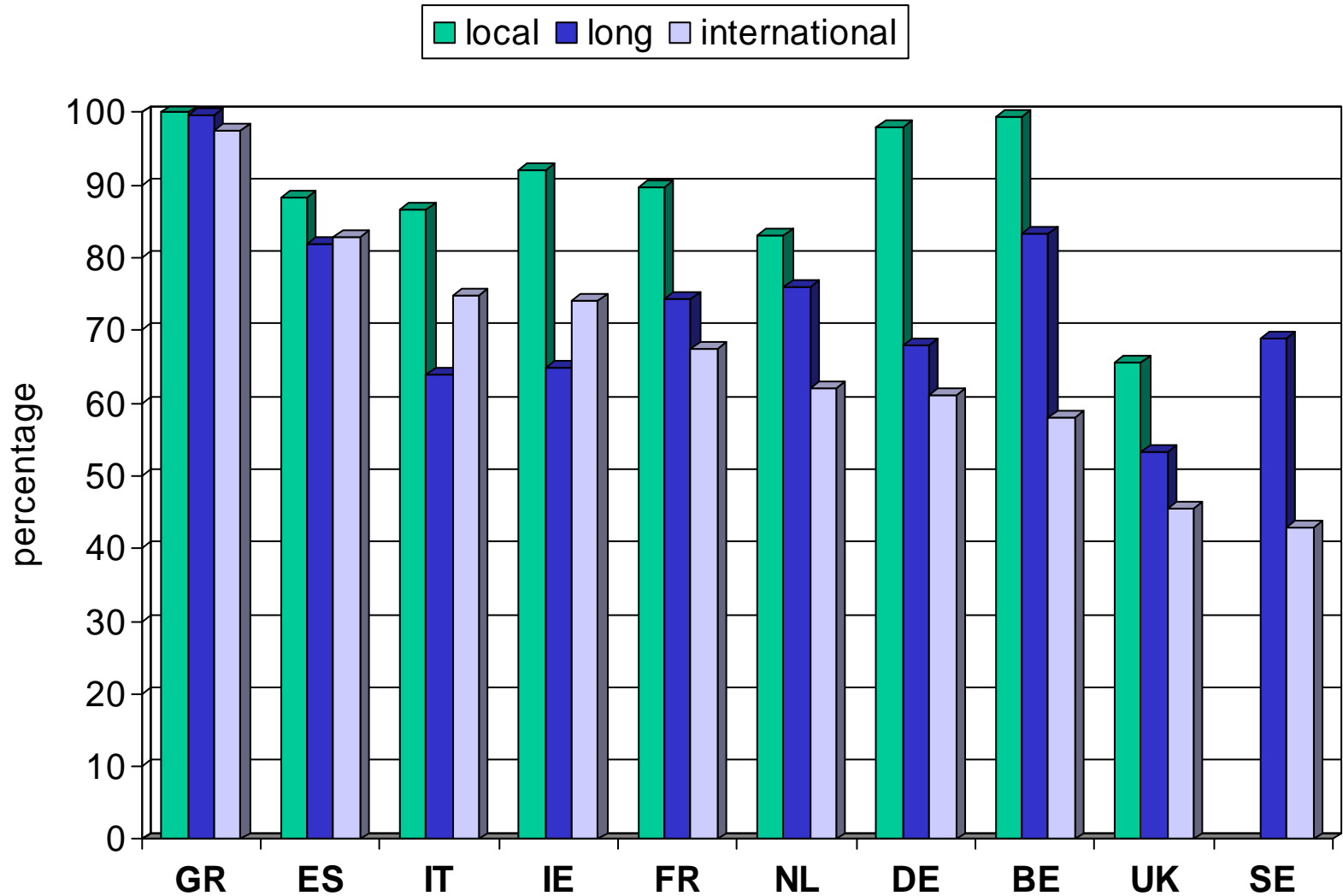
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## incumbent market shares (retail revenues)



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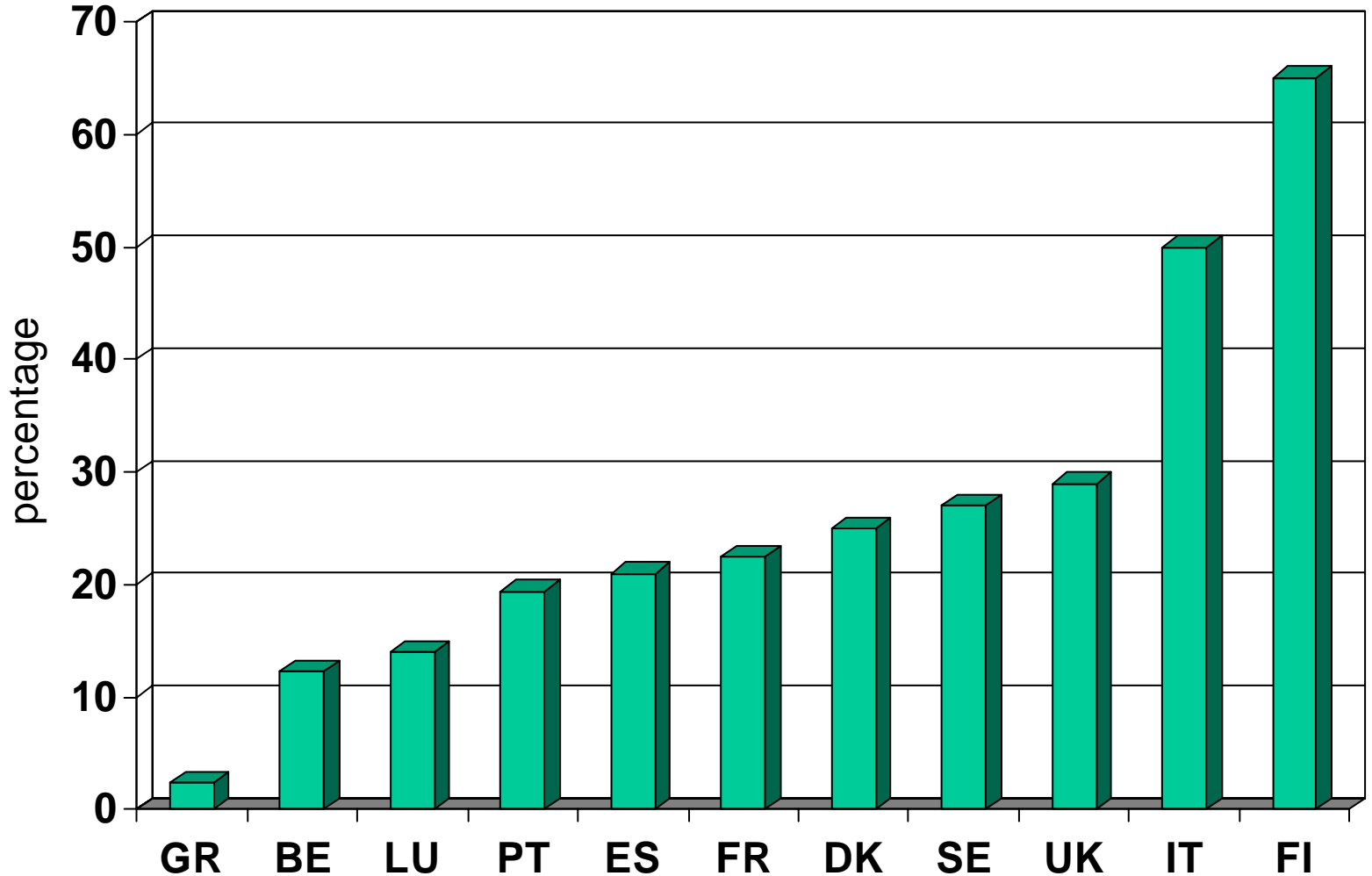
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subscribers actually using an alternative provider for long distance and international

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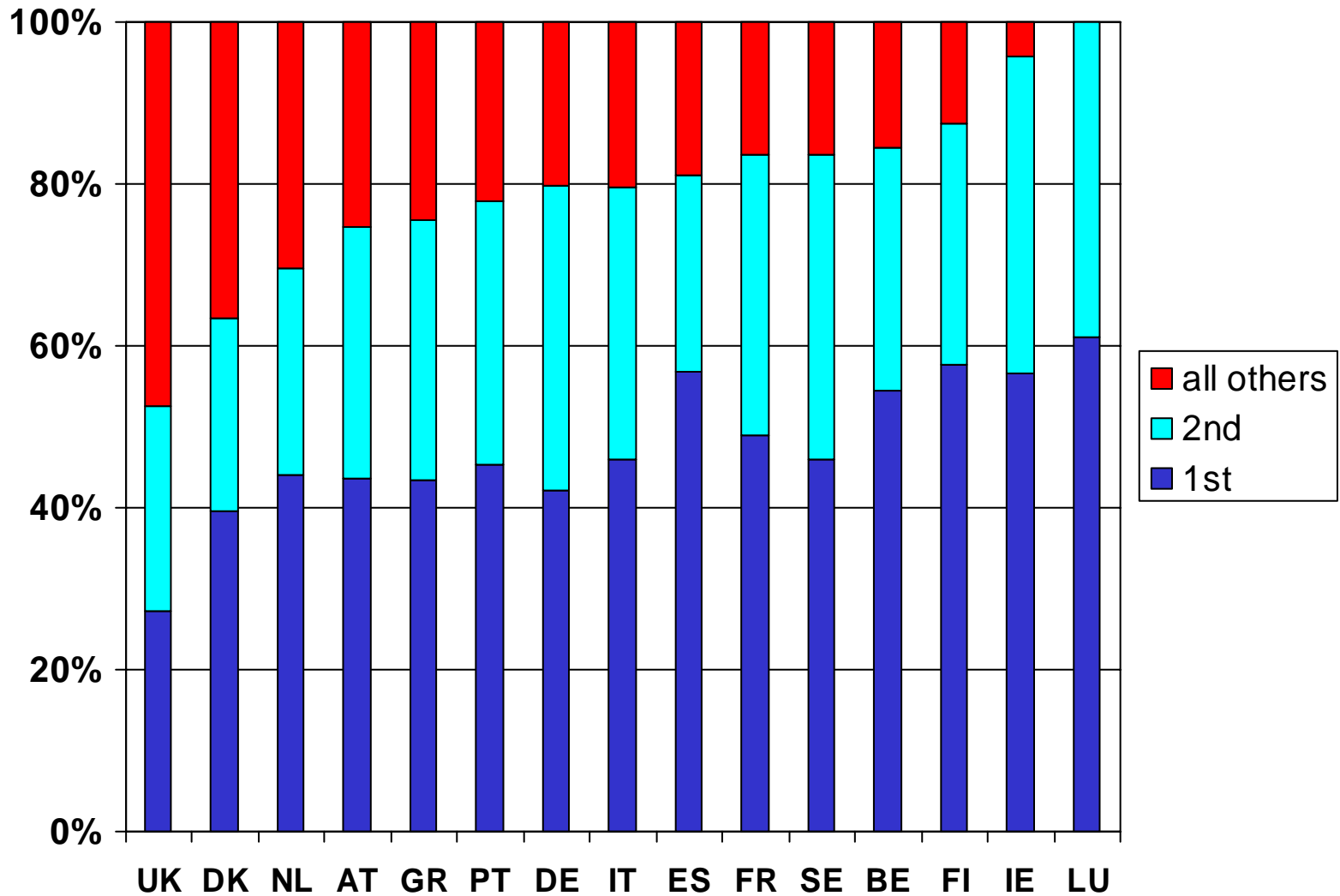
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# INTUG mobile operator market shares

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# INTUG information infrastructure

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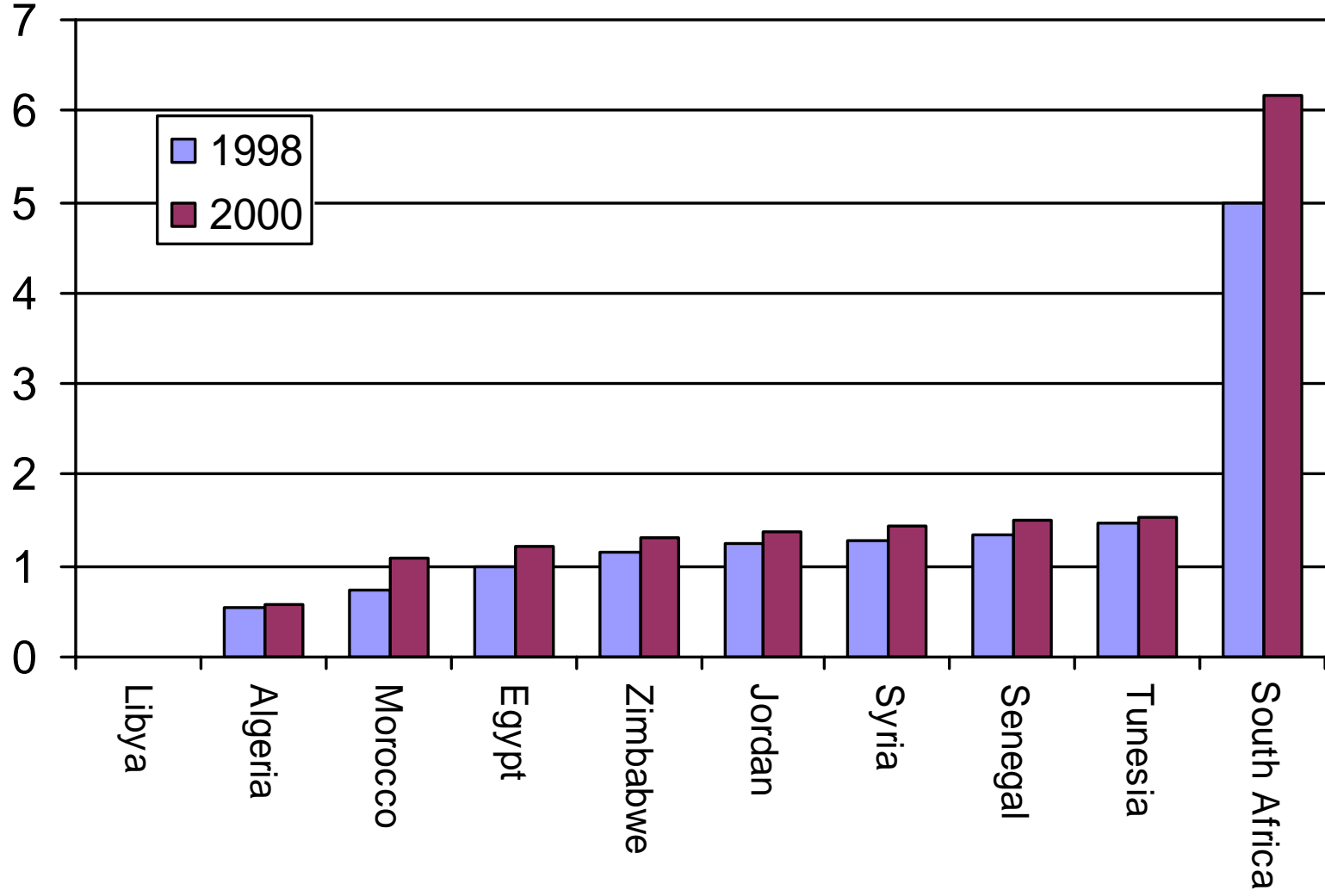
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- personal computers
- Internet access
- secure servers
- broadband

# INTUG PCs per 100 inhabitants

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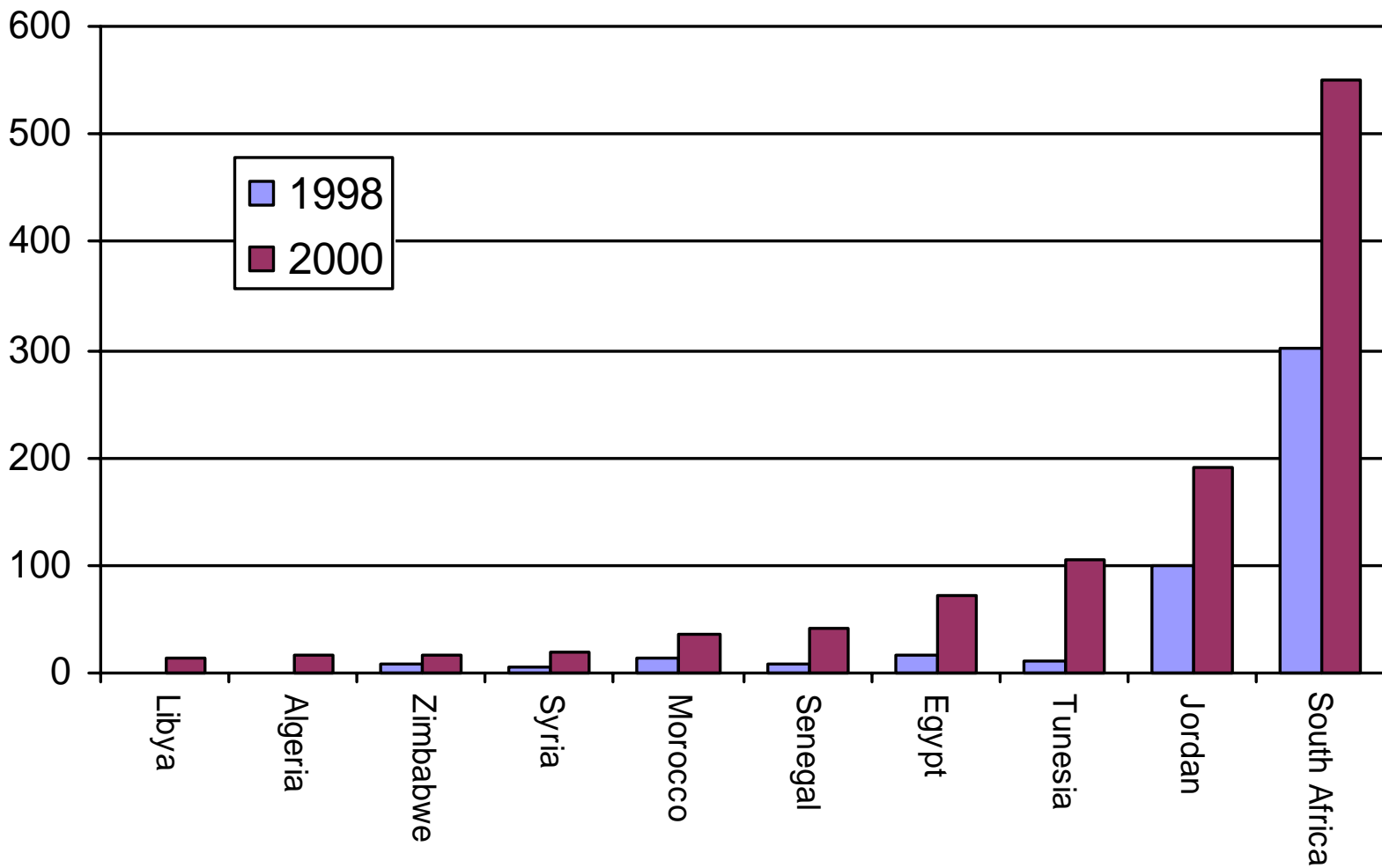


# INTUG

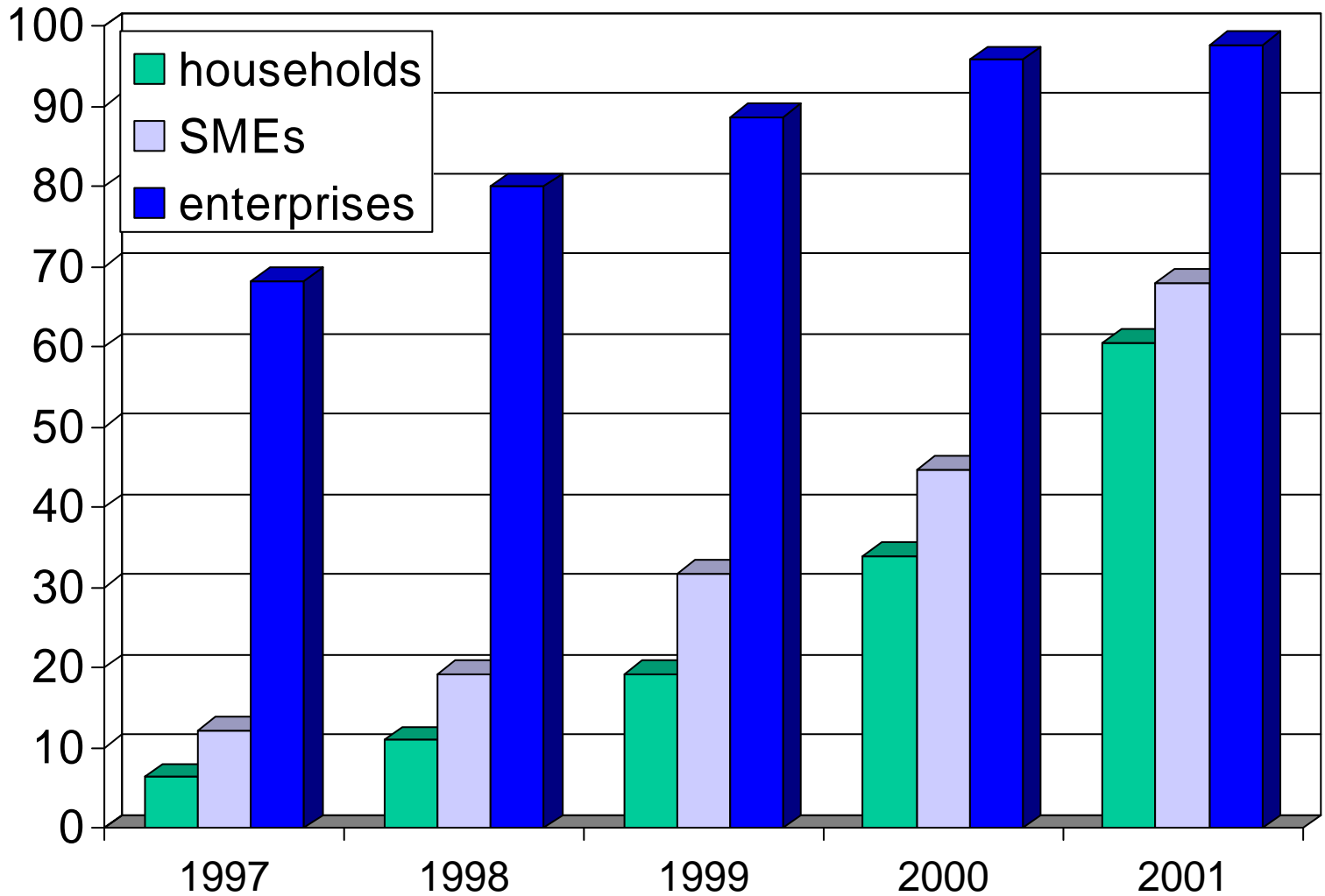
## Internet users per 10,000 popn.

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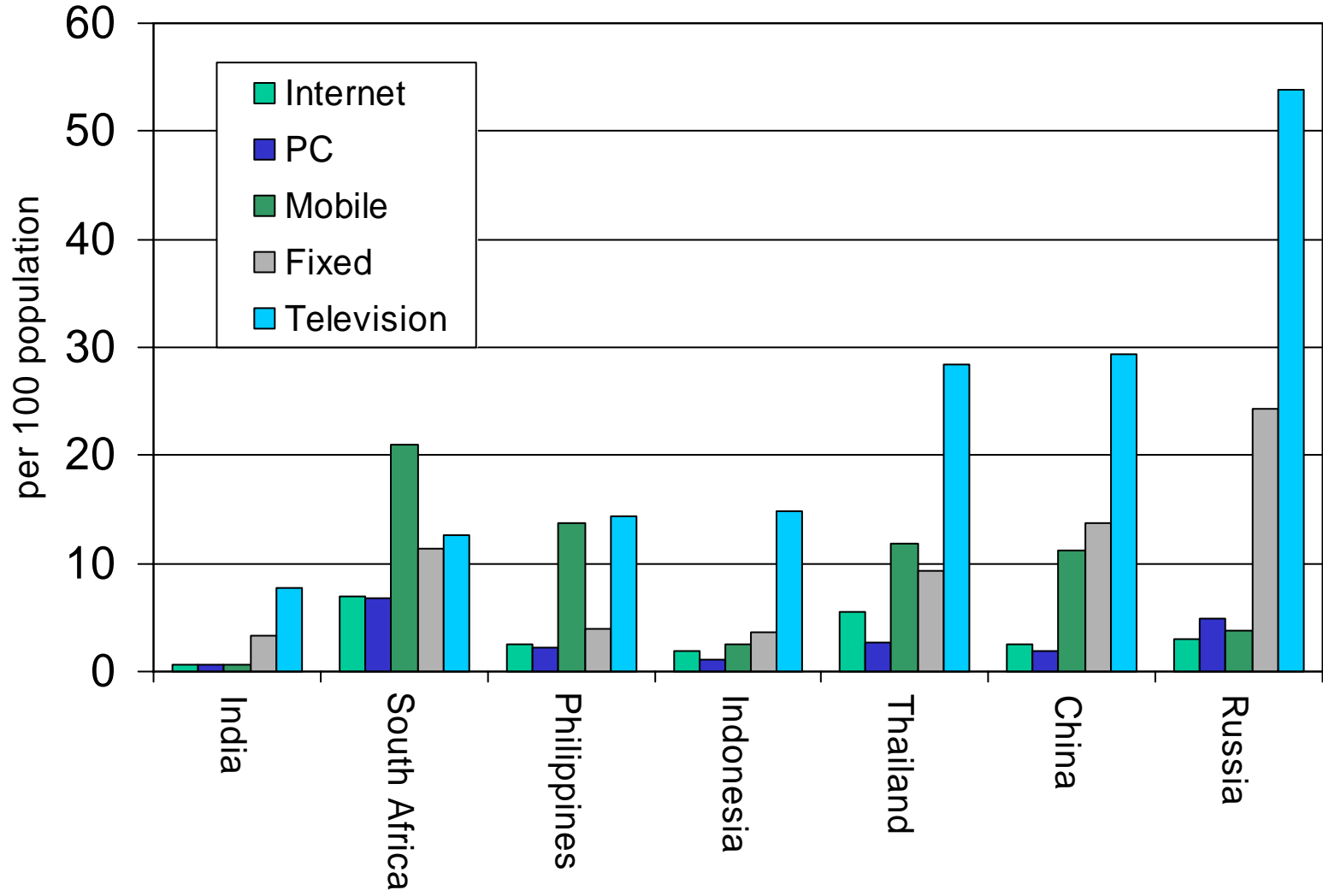
# INTUG Internet access in Japan



# INTUG convergence measures

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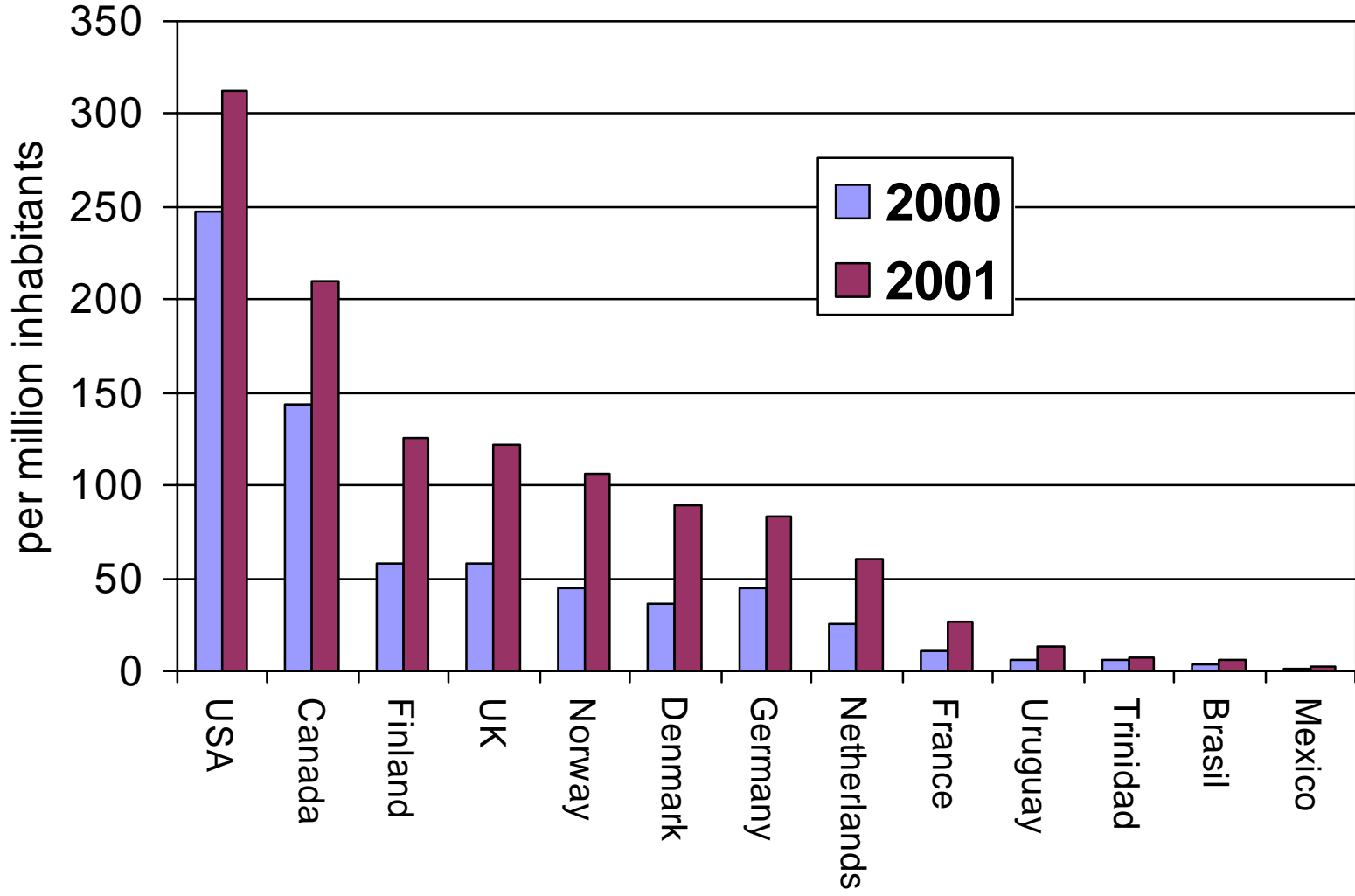
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# INTUG secure servers (SSL)

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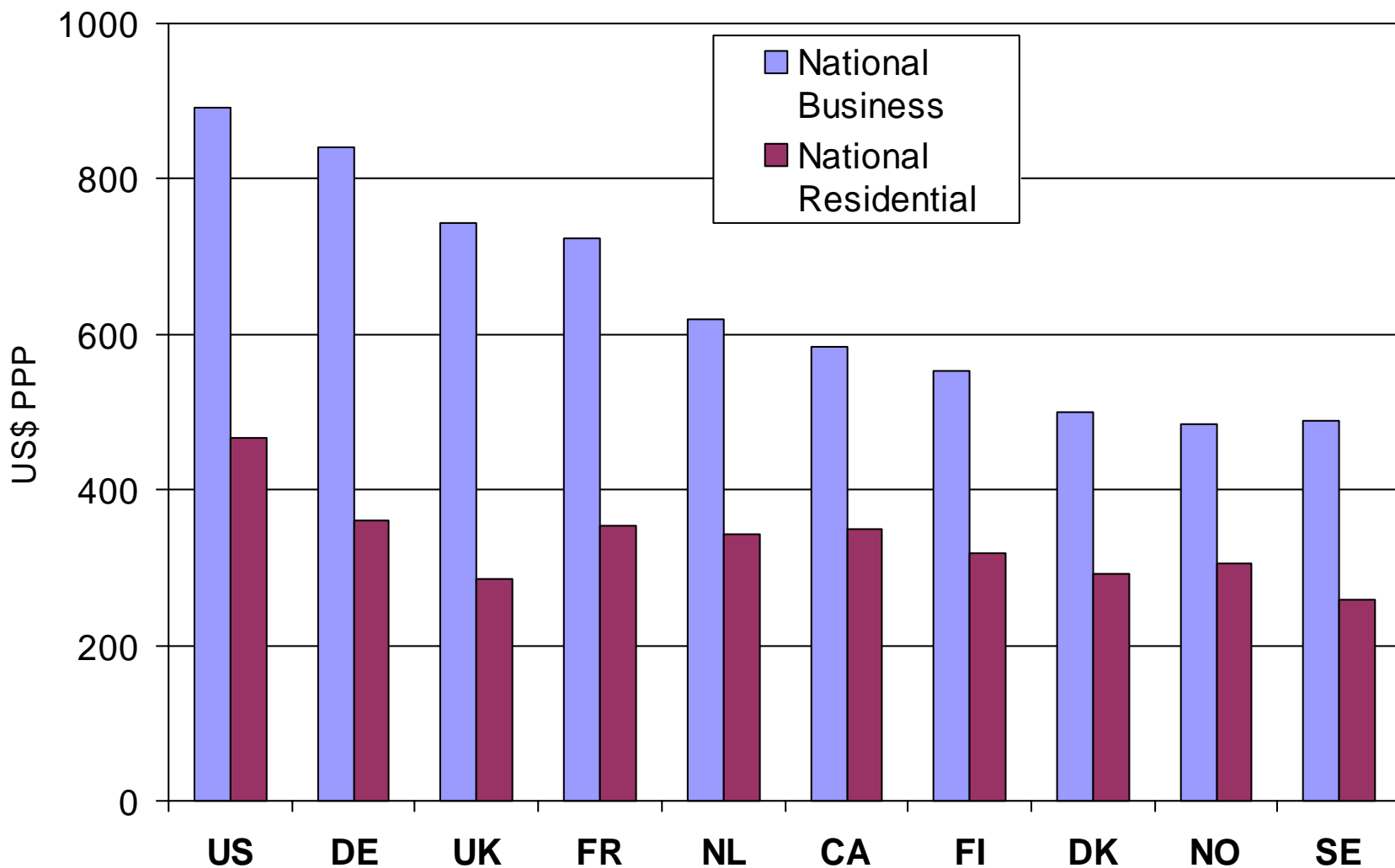
# INTUG prices

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- comparing like with like
- allowing for purchasing power parity (PPP)

## OECD Basket of Total Public Switched Telephone Network Charges

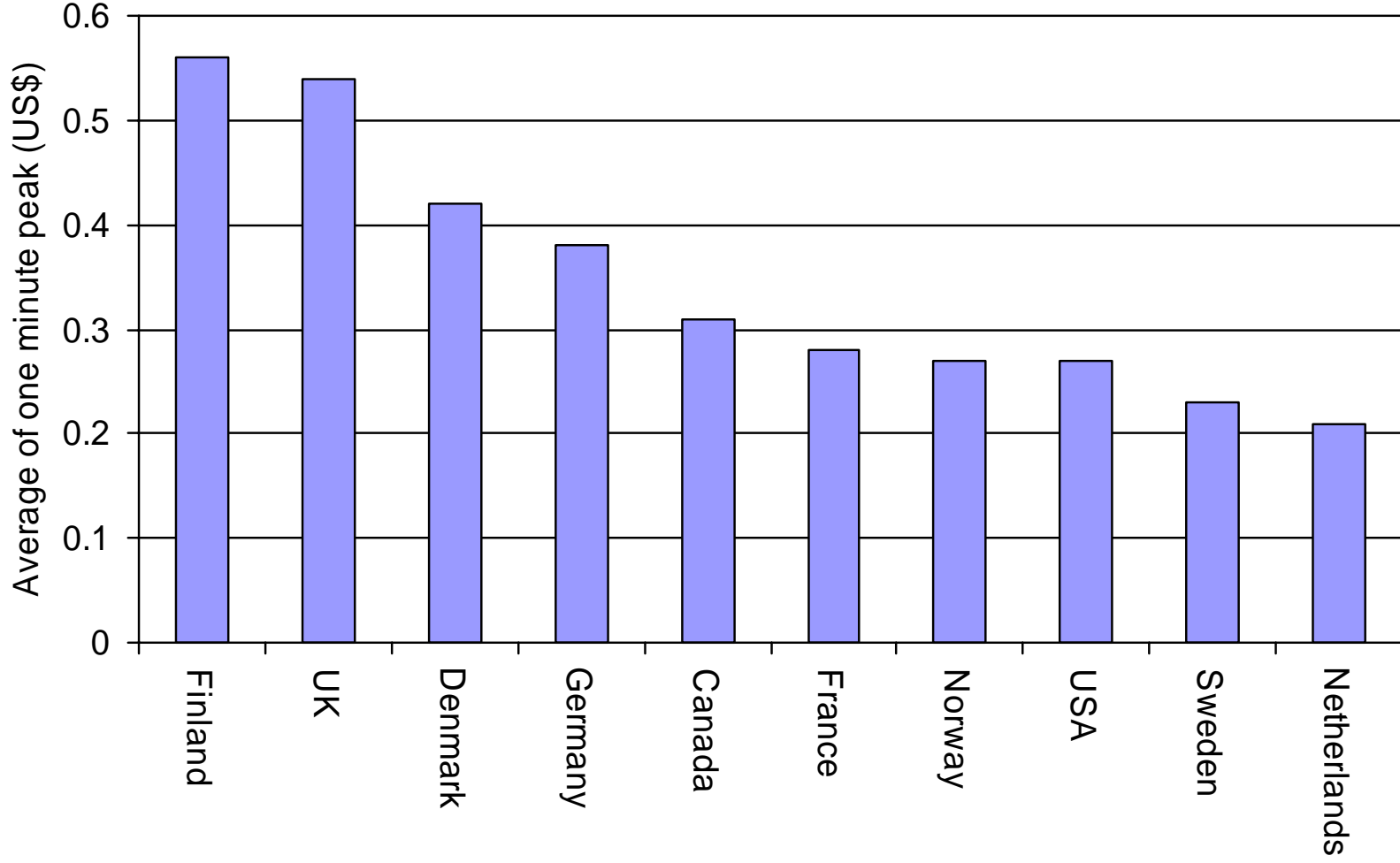




# INTUG international call charges

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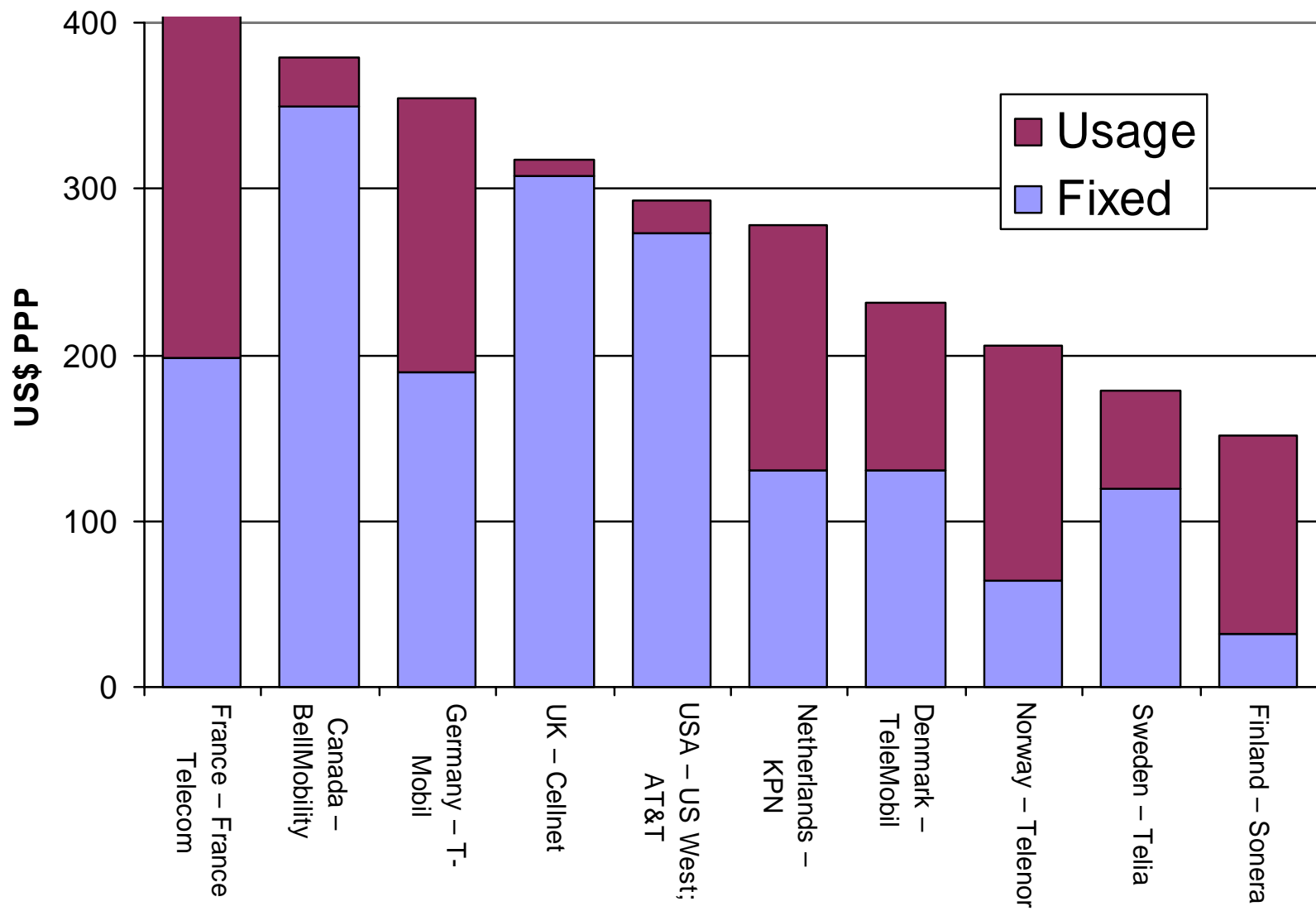
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# INTUG OECD National Mobile Basket

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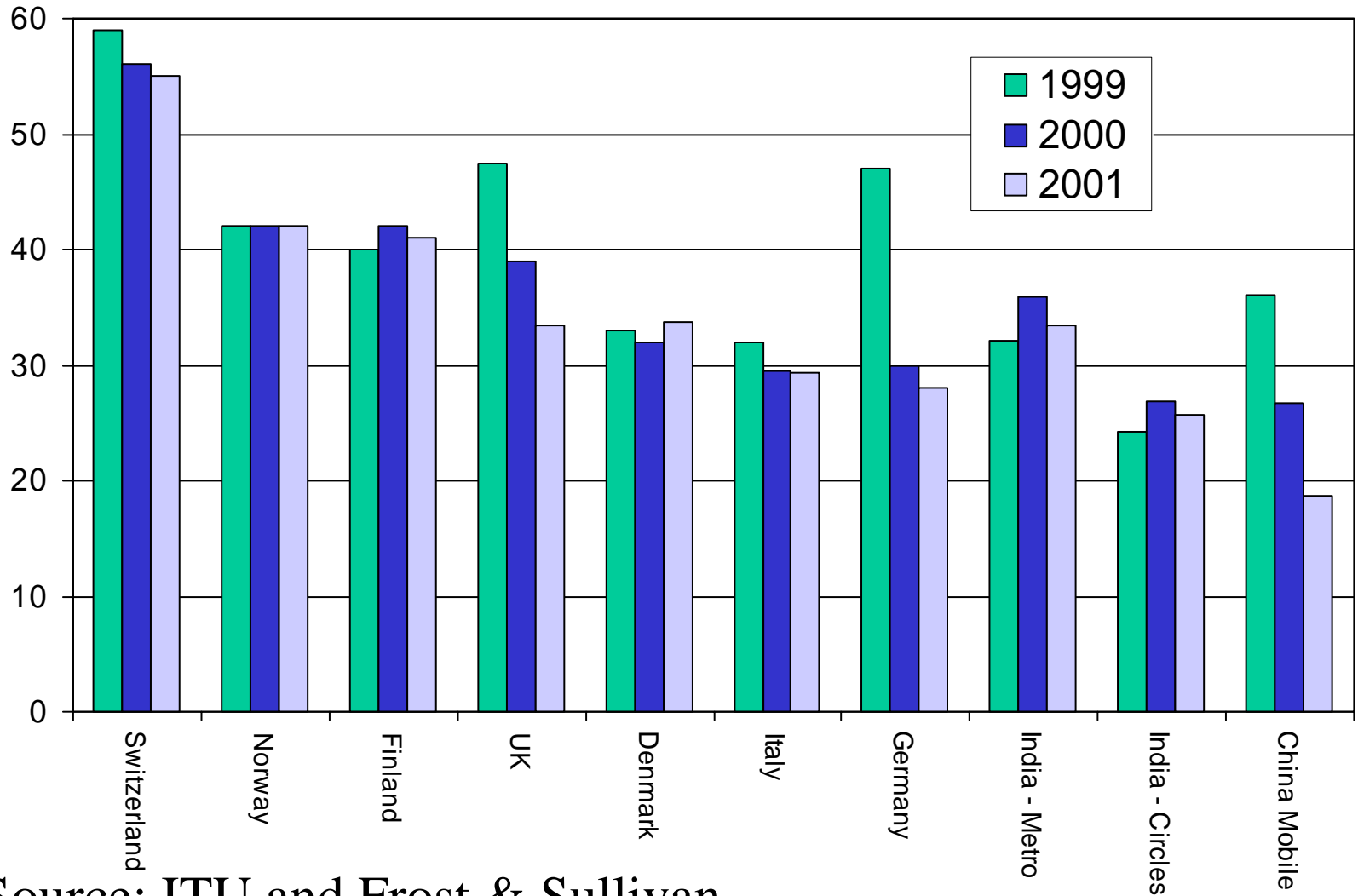
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# INTUG monthly ARPU (Euros)

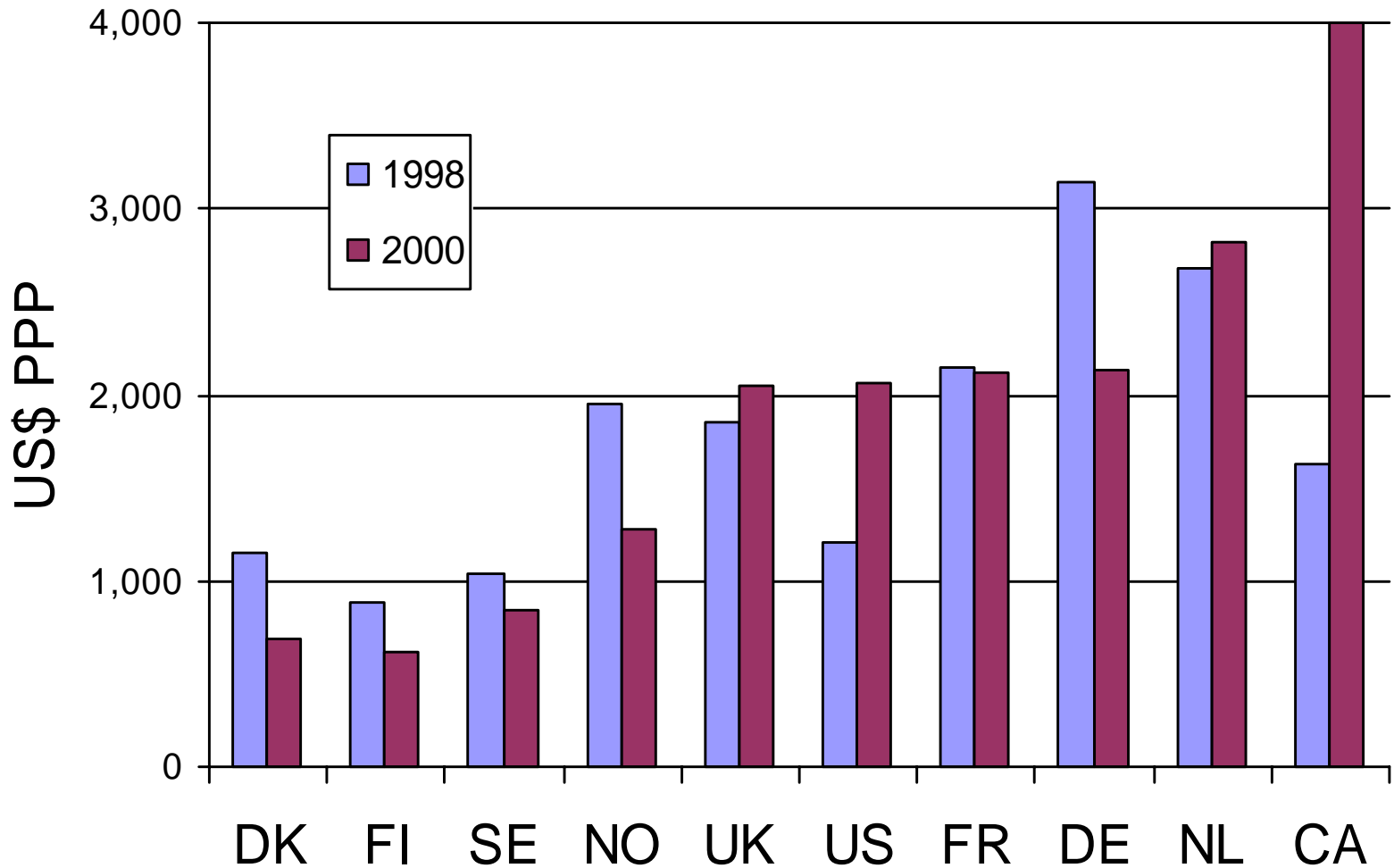
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Source: ITU and Frost & Sullivan

## OECD Basket of National Leased Line Charges (1.5/2Mbits)

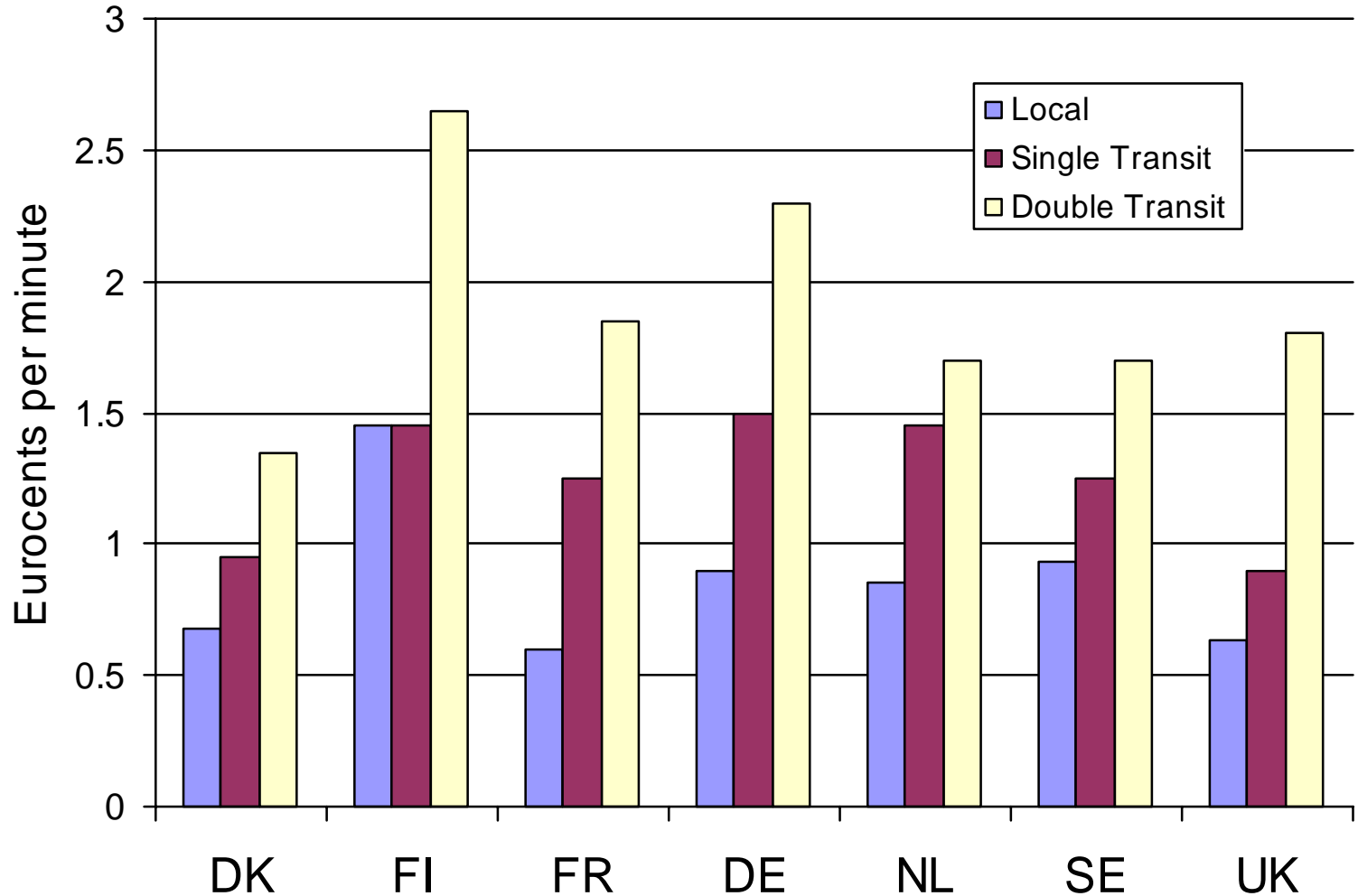


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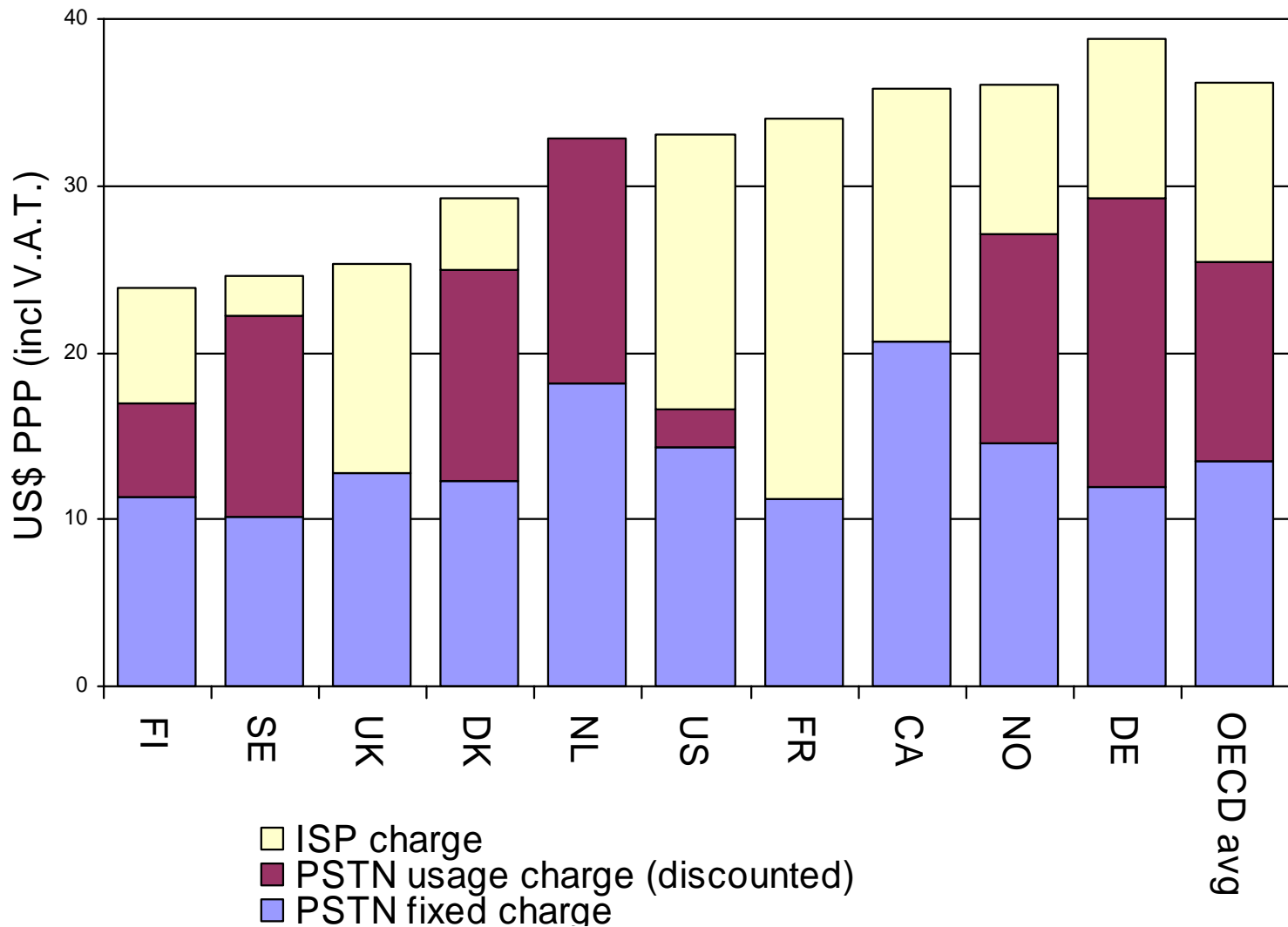
## interconnection fixed-to-fixed voice

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## OECD Internet Access Basket for 20 hours at off-peak times using discounted PSTN rates



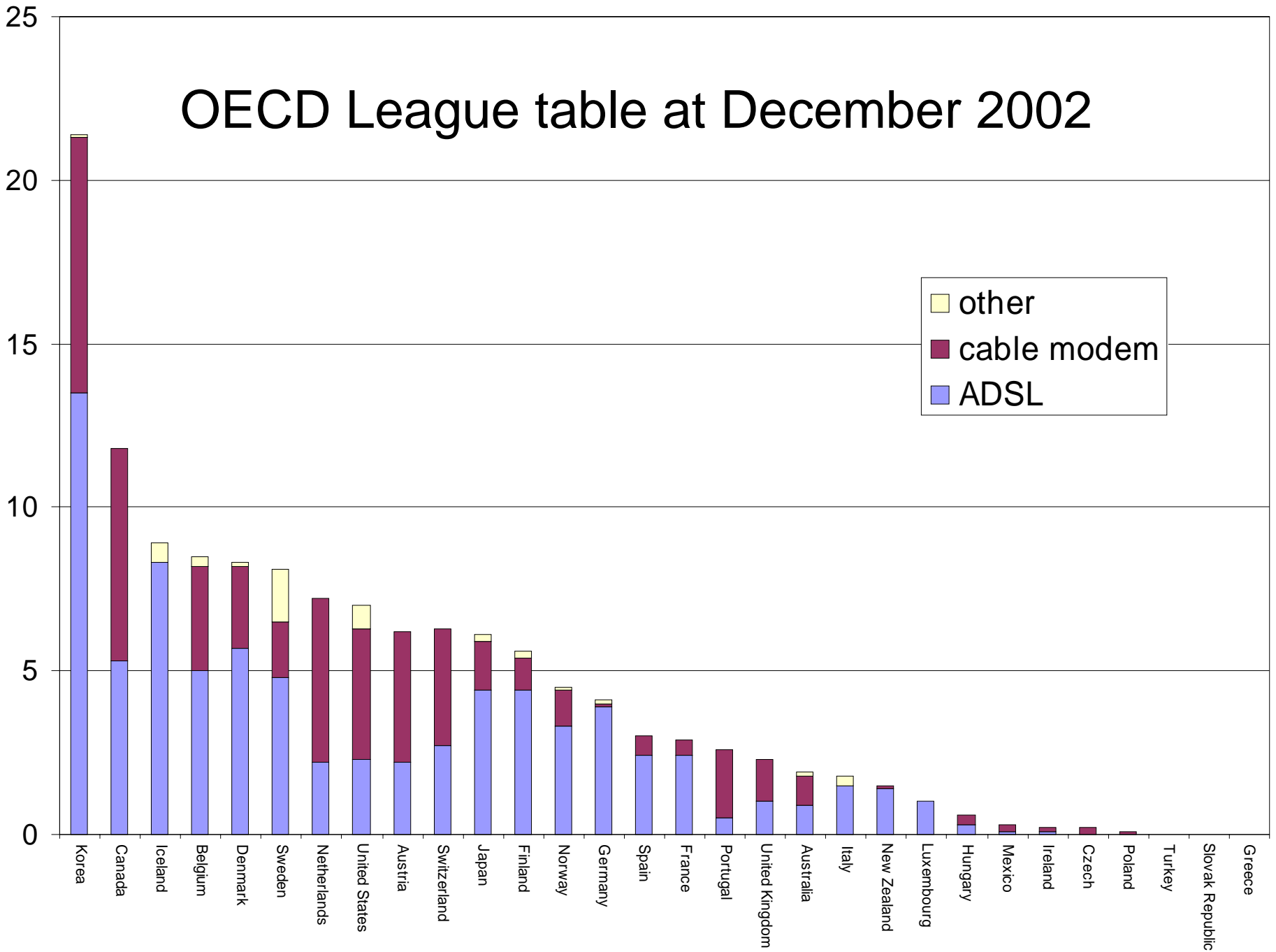
# INTUG broadband Internet access

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- a new “hot” topic
- many factors at work
- no pre-determined outcome
- strong pressure from incumbent operators against unbundling
- many potential new technologies and market players
- indicators still emerging

# OECD League table at December 2002



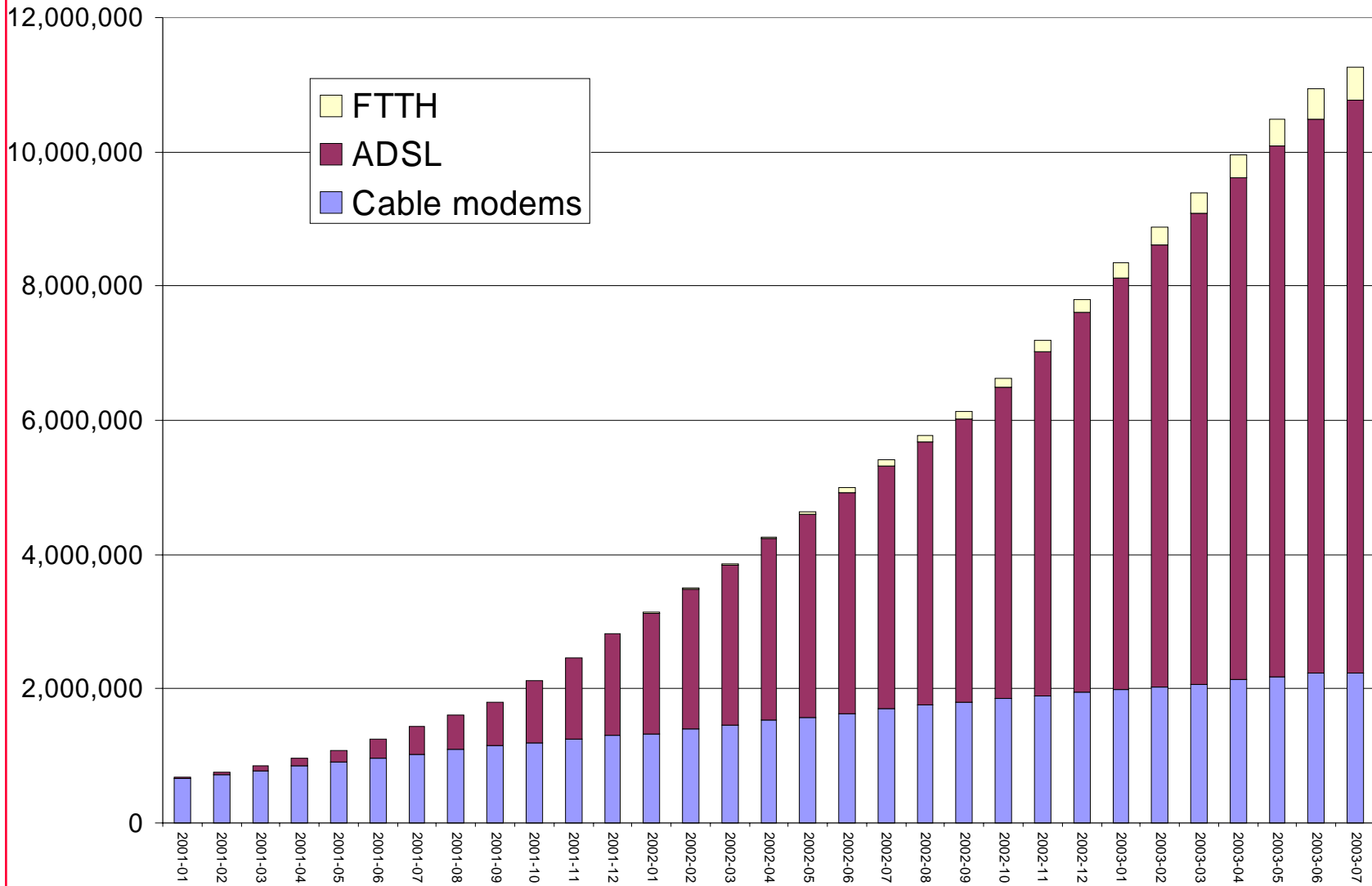


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## growth of Japanese broadband

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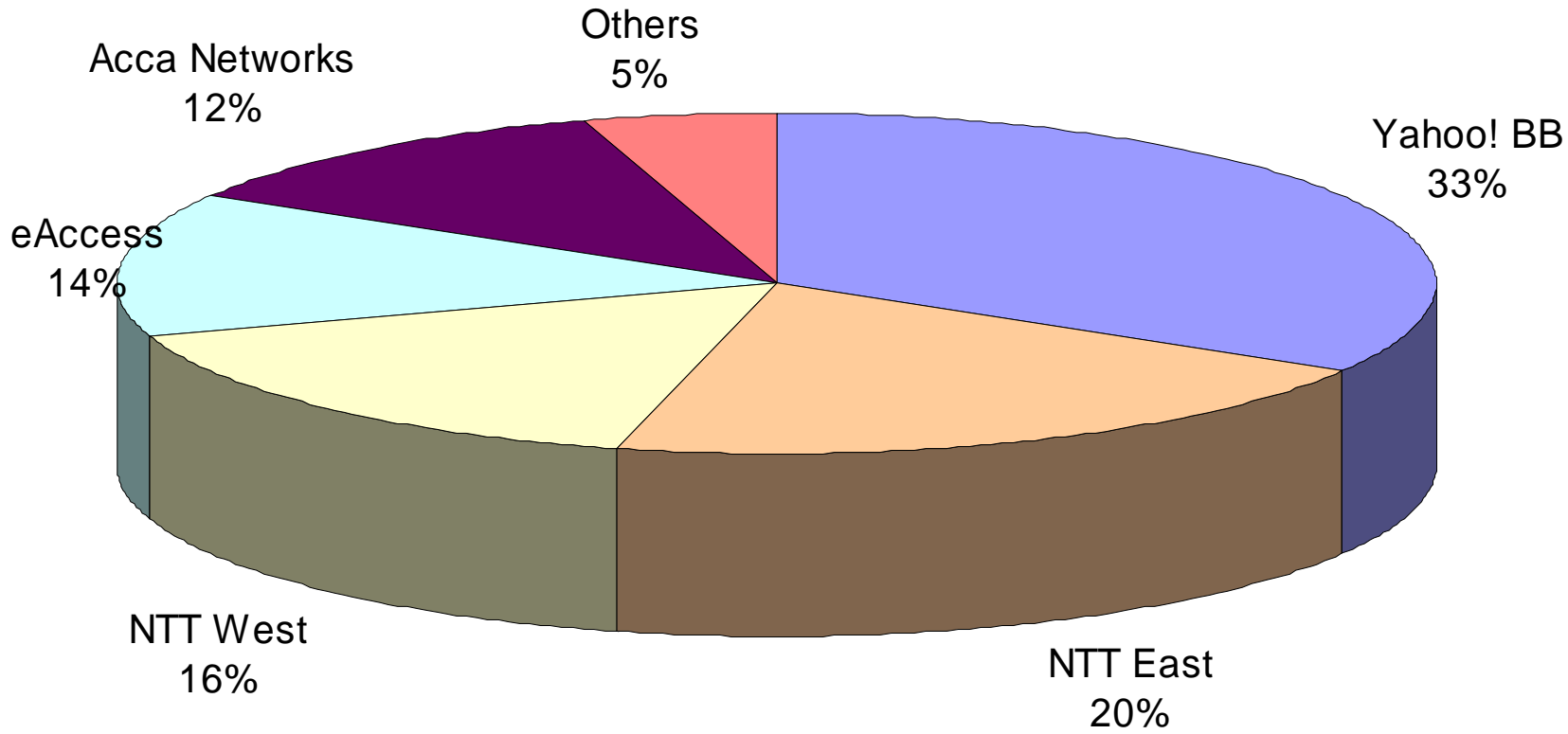
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# INTUG ADSL market shares

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# INTUG measuring the market

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- teledensity:
  - international ranking
  - variations within a country
- competition in markets
- need to compare offers
  - price
  - download speed
    - advertised
    - real
    - contention ratio
  - upload speed
  - transfer limits (if any)
- advanced services e.g., SDSL and VDSL
- comparisons with other countries

# INTUG conclusions

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- statistics are essential to understand
  - the nature of the problem
  - possible solutions
- monitor
  - market developments
  - effectiveness of policy implementation
- publish
  - national comparisons
  - international comparisons

# INTUG thank you

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