

INTUG

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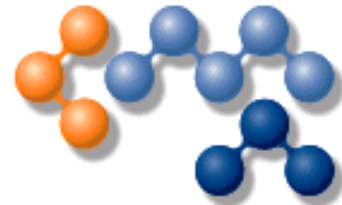
A global perspective; regulation and markets

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communications
management
association

INTUG contents

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- benchmarking the United Kingdom
- ICTs and economic growth
- the new legislation
- the future?



INTUG what is INTUG?

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- members
 - national associations
 - corporations
 - individuals
- activities
 - ITU and WTO
 - OECD
 - APEC TEL, CITELE and EU



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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- open access to global mobile networks
- regulatory best practice
- liberalization
- universal access
- broadband
- leased lines
- IP telephony
- numbering

INTUG benchmarking

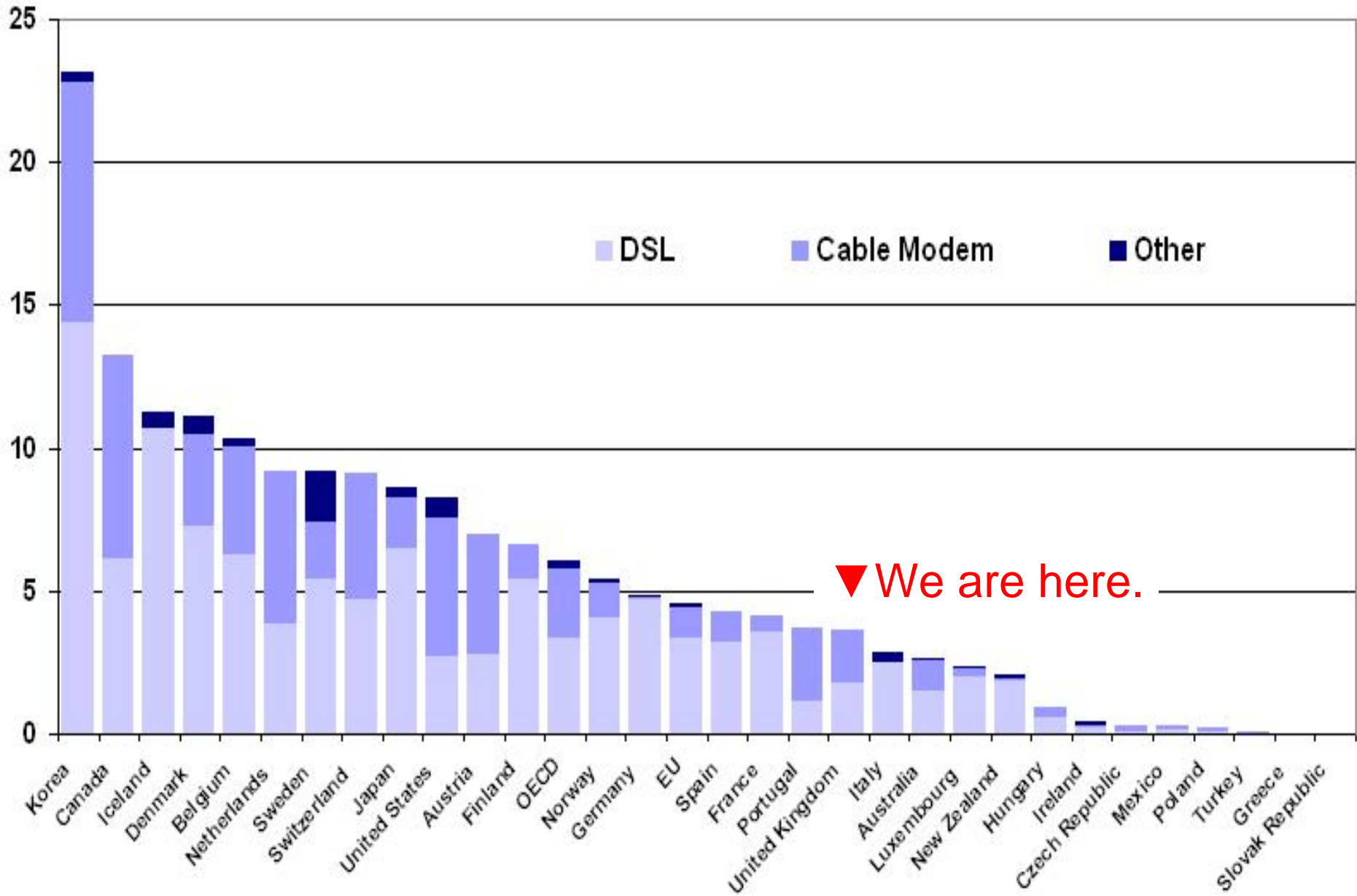
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- UK against the rest of the
 - G7
 - European Union
 - OECD
 - Japan/Korea
- technologies and services:
 - broadband
 - mobile
 - prices

Broadband access in OECD countries per 100 inhabitants, June 2003

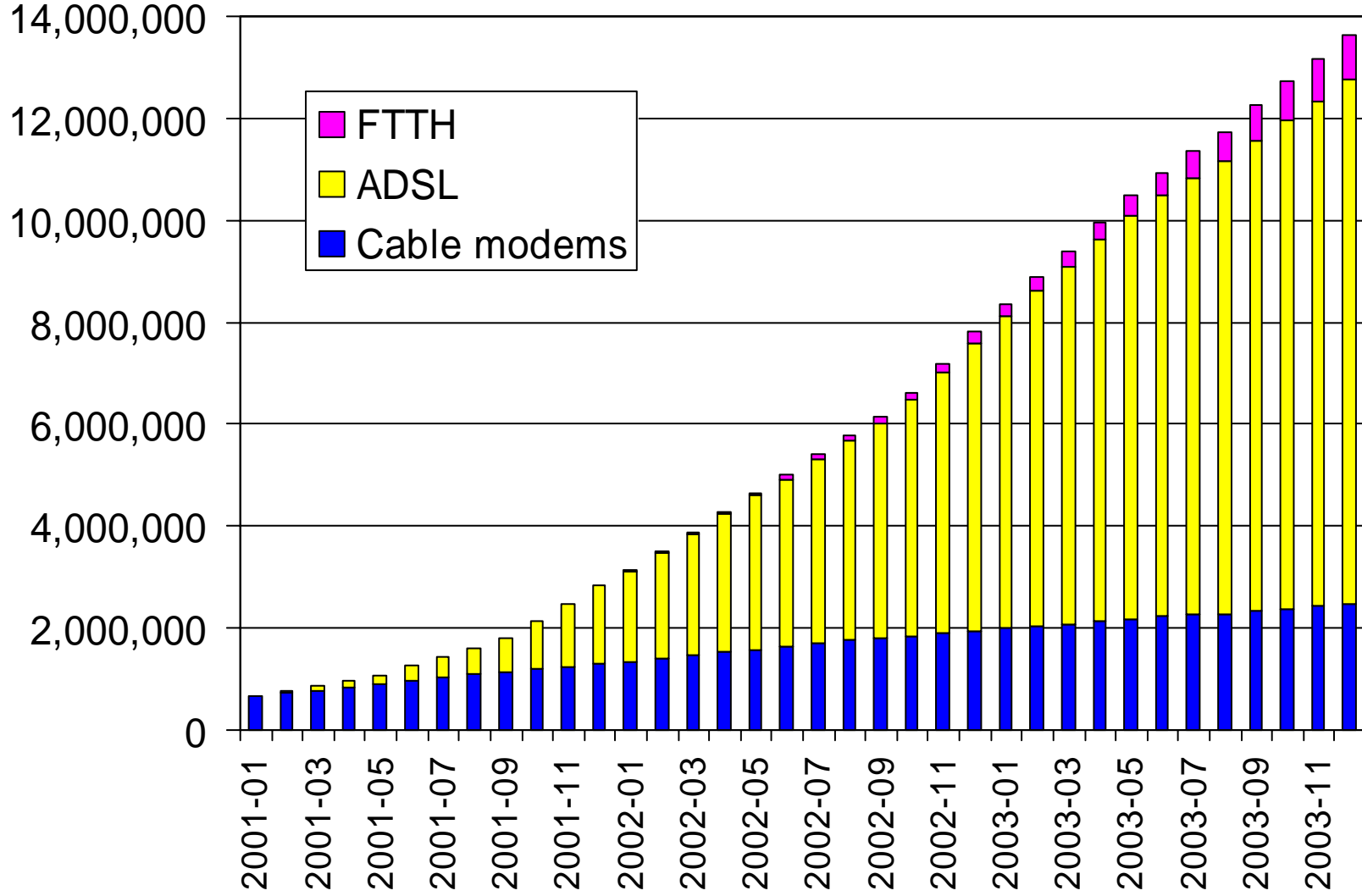
Source: OECD



INTUG Japanese broadband

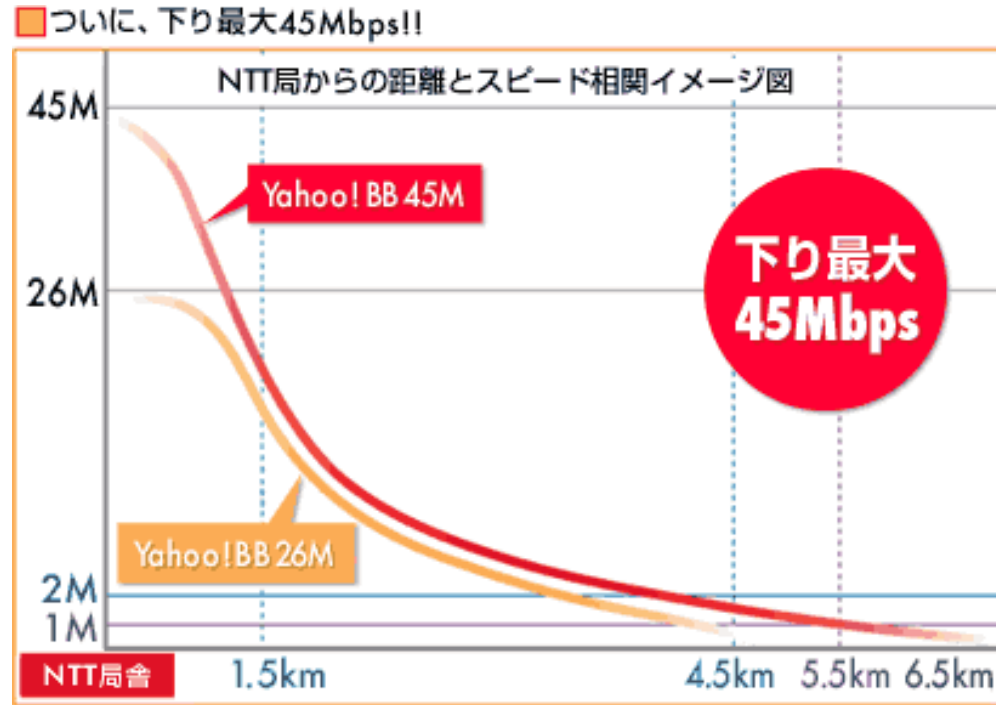
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INTUG some monthly charges

- Yahoo! BB ADSL
 - 45Mbps ¥ 3,938
 - 26Mbps ¥ 3,838
 - 12Mbps ¥ 3,538
 - 8Mbps ¥ 3,138
- eAccess + InterQ
 - 40Mbps ¥ 3,880
 - 8 Mbps ¥ 3,680
- TEPCO
 - 100Mbps FTTH ¥6,480

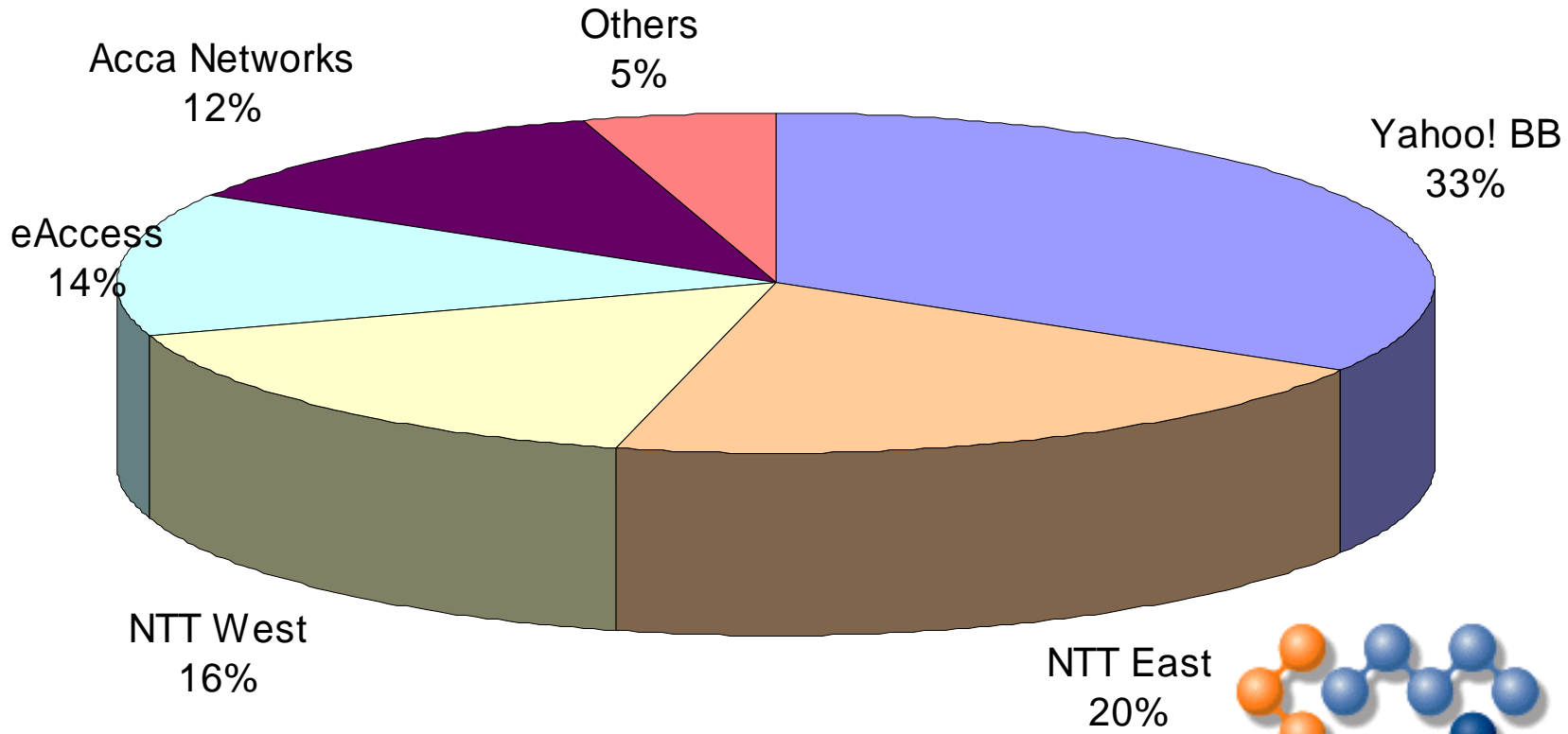


£1 = ¥194

INTUG ADSL market shares

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INTUG ICTs and the economy

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- neither technology nor deregulation for its own sake
- we need to overcome barriers to economic growth, especially barriers to the adoption of ICTs

... the most competitive and dynamic knowledge-based economy in the world capable of sustaining economic growth with more and better jobs and greater social cohesion.



INTUG the new legislation

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- Pan-European legal framework
- operators struggling to get out from under any and all regulation
- shift in the burden of proof
- we need for a very strong regulator
- we should benchmark OFCOM resources not against other NRAs but against operators



INTUG conclusions and the future

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- twenty years of liberalisation has really been “political” game playing by the operators
- operators use policy debates to preempt competition and regulation
- broadband leadership is firmly in Asia
- mobile leadership is still uncertain
- economic growth is being held back



INTUG thank you

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