

INTUG

A user view of international & national teleregulations

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www.INTUG.net



INTUG contents

- INTUG
- what it does what it does
- why it does that
- what it has achieved
- challenging areas and priorities
- conclusions

INTUG what is INTUG?

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

INTUG our aims

- 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

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

INTUG mobile priorities

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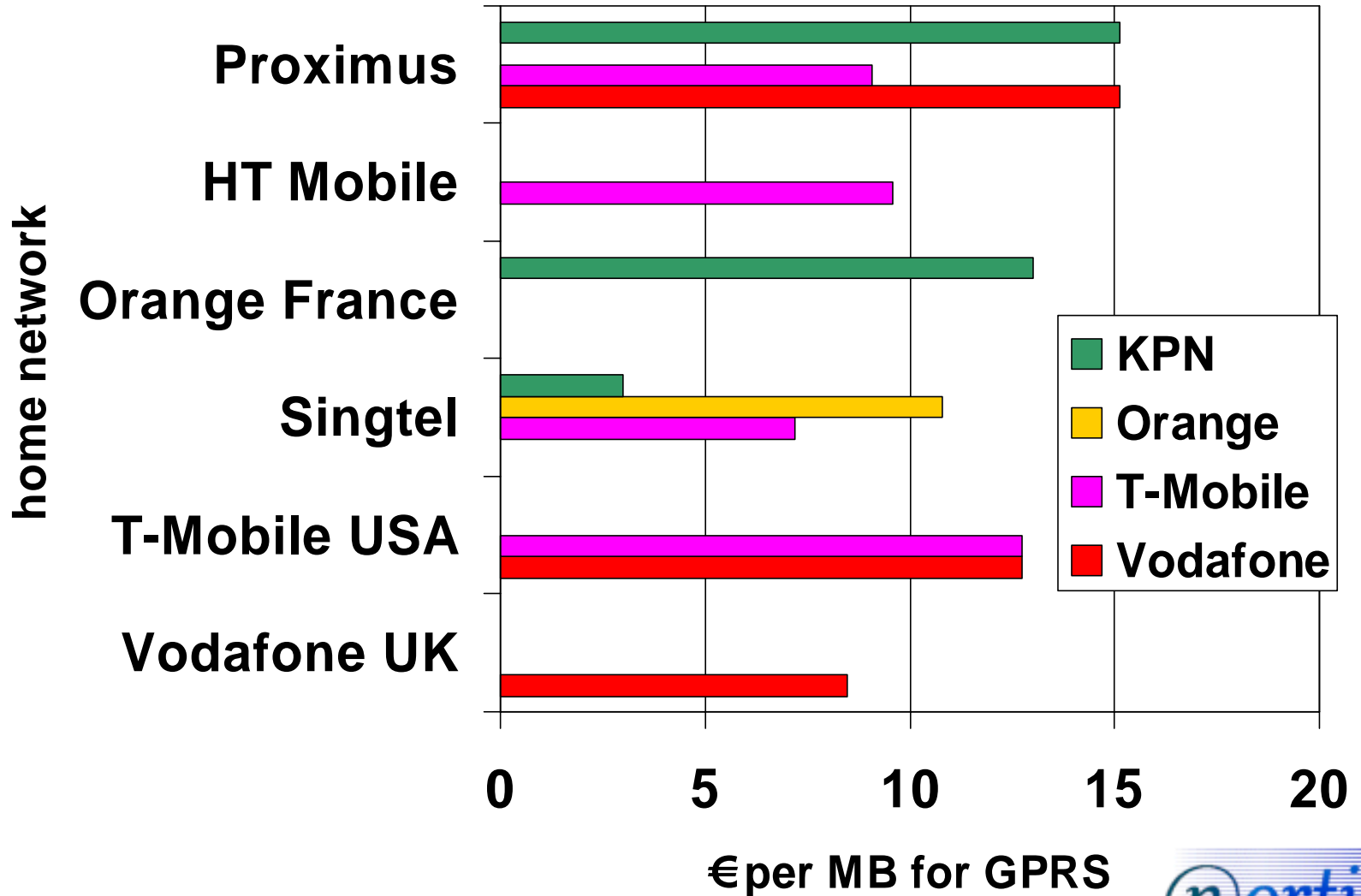
- **International Mobile Roaming (IMR)**
 - significant reductions in charges
 - availability of a range of services, including global and multi-country tariffs, without necessarily having to pay roaming charges
 - regulatory action to end the cartel of mobile network operators
- **Fixed-to-Mobile call termination (F2M)**
 - cost orientation of wholesale prices
 - wholesale price reductions speedily passed onto users
 - Mobile Number Portability (MNP)
 - availability on demand
 - inexpensive or free
 - no consequential loss of facilities or special offers
- **Short Message Service (SMS)**
 - interconnection of all operators
 - significant reductions in prices
 - regulatory action to end the cartel of mobile network operators
- **national mobile roaming**
 - availability in areas of low population density
 - availability to support introduction of new operators and new technology

- sheltered from competition by
 - inter-operator arrangements
 - absence of market entry
 - inappropriate regulation
- extremely high voice charges
- new & outrageous GPRS charges
 - why charge by the Megabyte?
- what is next?
 - EDGE, video telephony and 3G

INTUG data roaming in the Netherlands!

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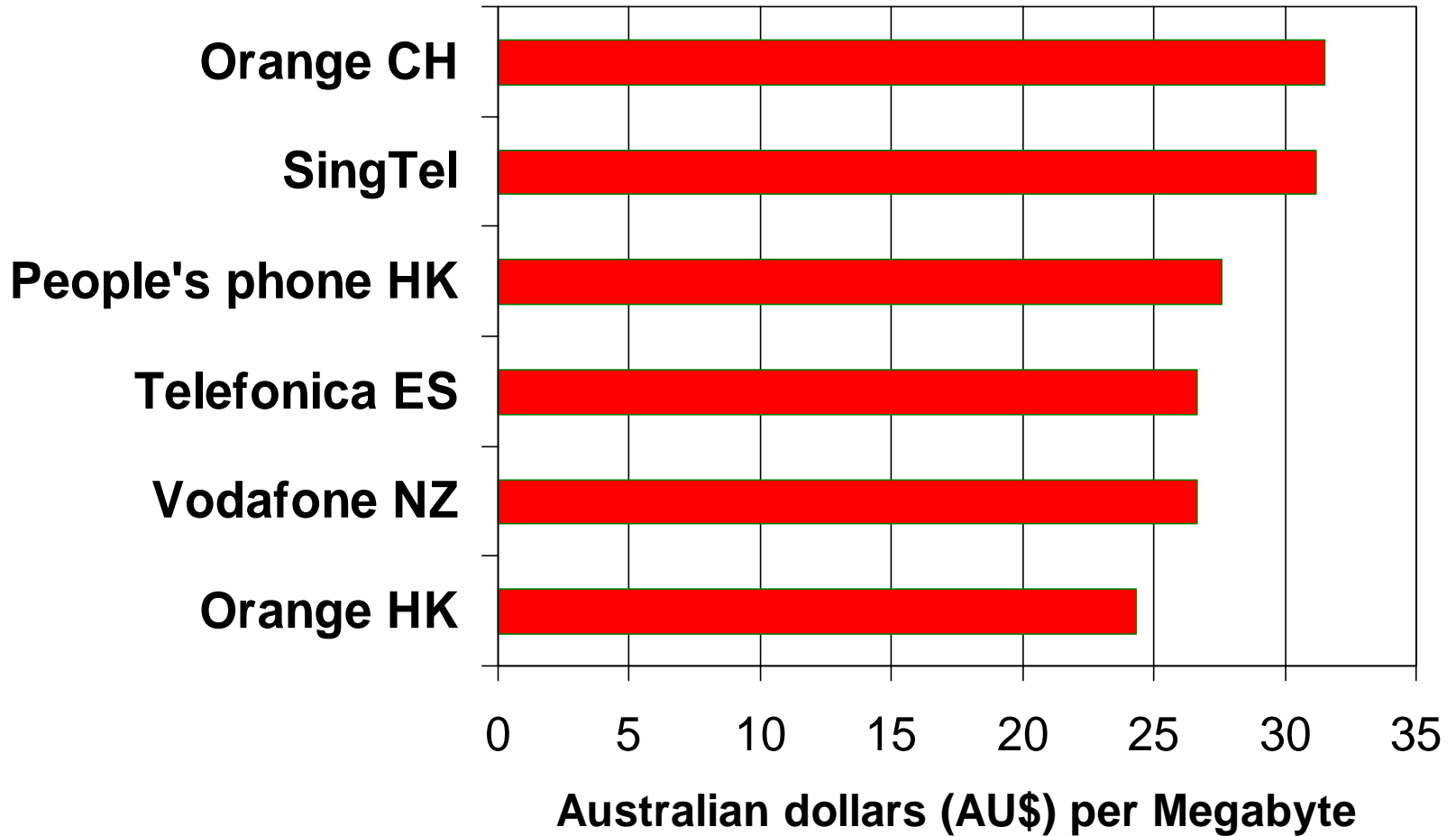
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INTUG data roaming in Australia

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AU\$ 1 = NOK 5.16

INTUG *change your behaviour*

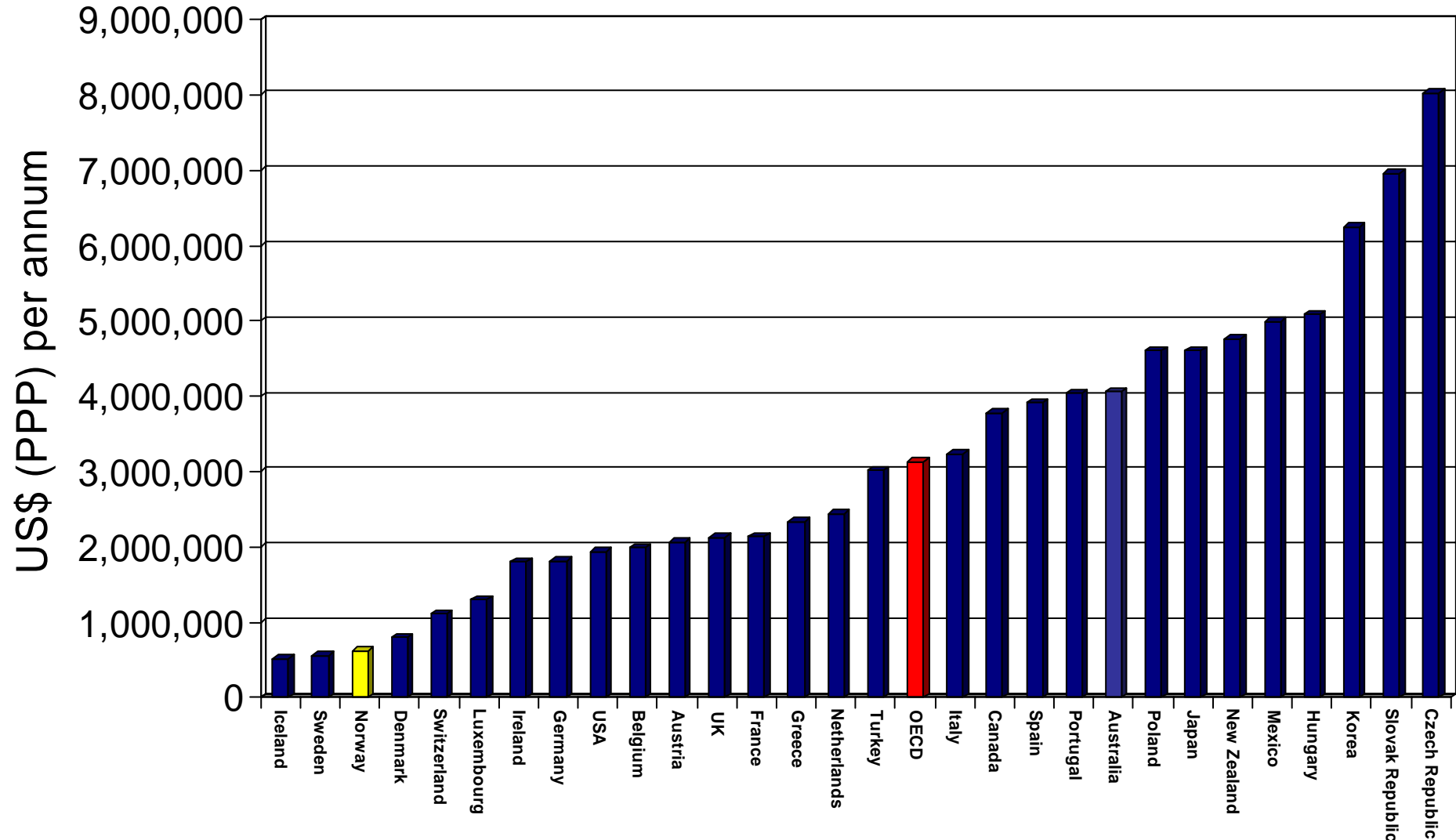
- use a calling card on a fixed line
- take the called identity and call back on a fixed line
- set your “away messages” to say send me electronic mail
- read your mail regularly

provide Internet and telephone access for visitors

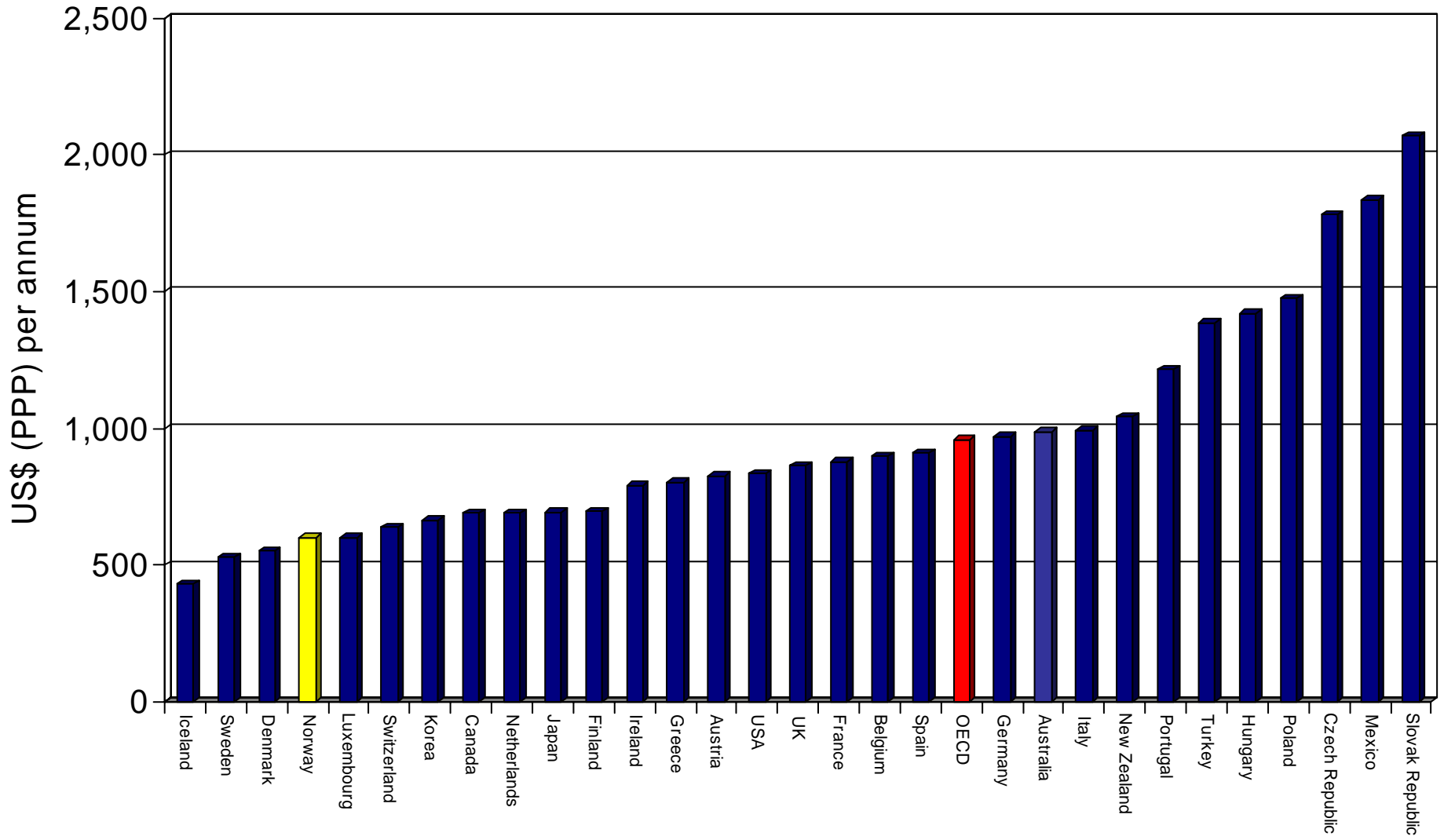
INTUG benchmarking

- Norway is in a reasonable position in traditional services
- especially considering the geography
- what about the future of broadband?
 - xDSL
 - 3G
 - Fixed Wireless Access
- is telecommunications providing all that is needed for the future of the economy?

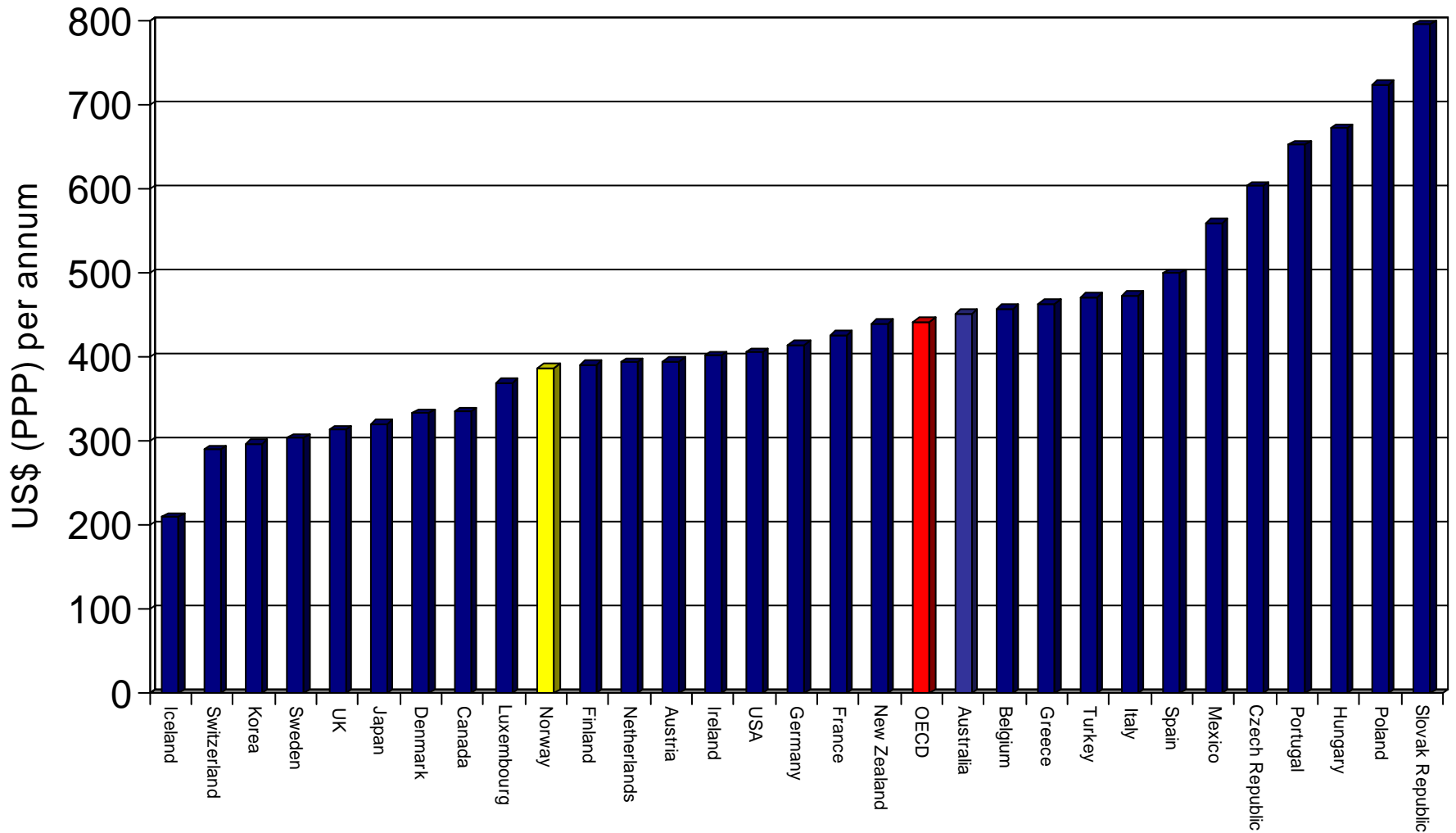
INTUG leased line charges (2Mbps)



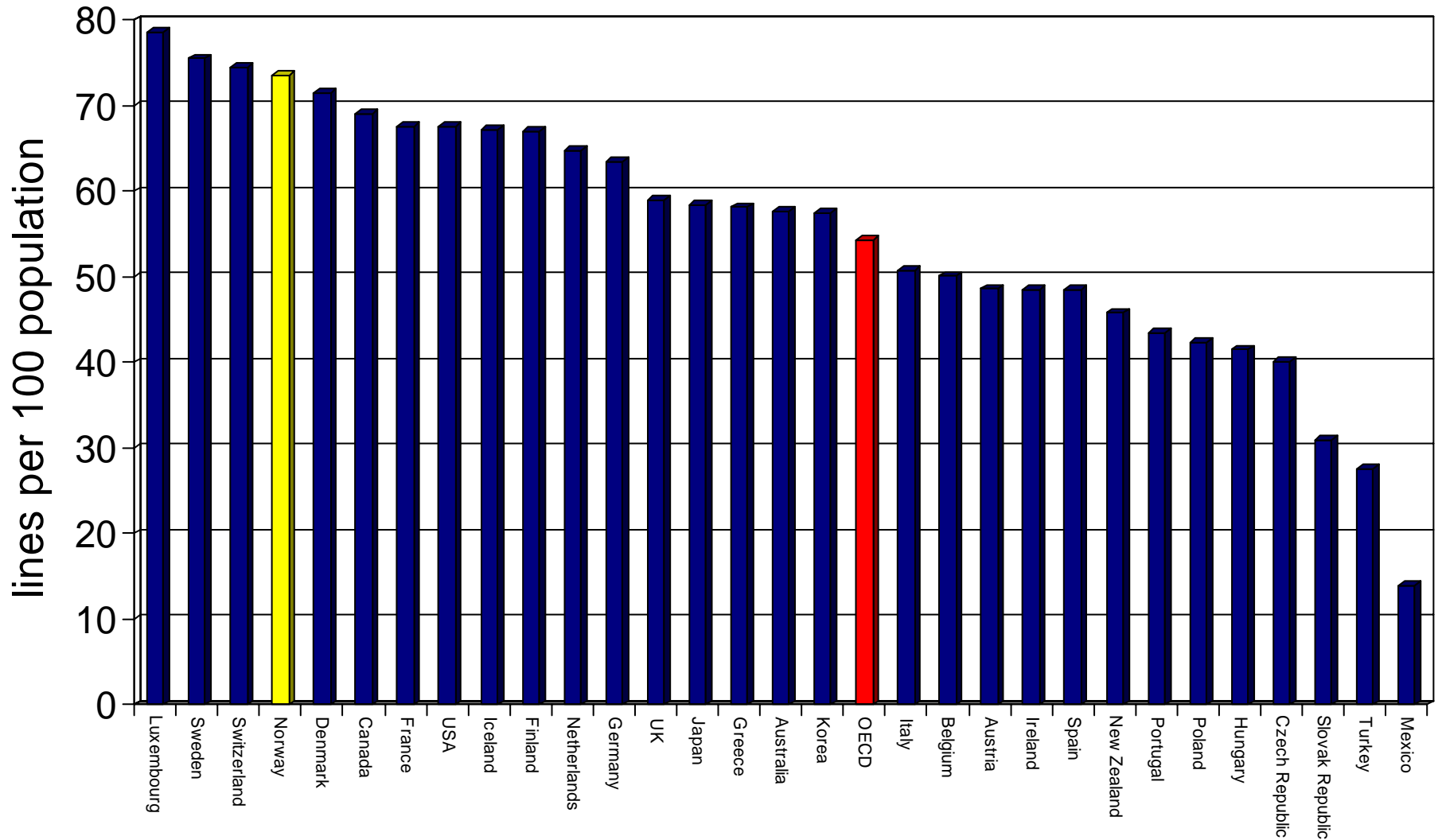
INTUG basket of business charges



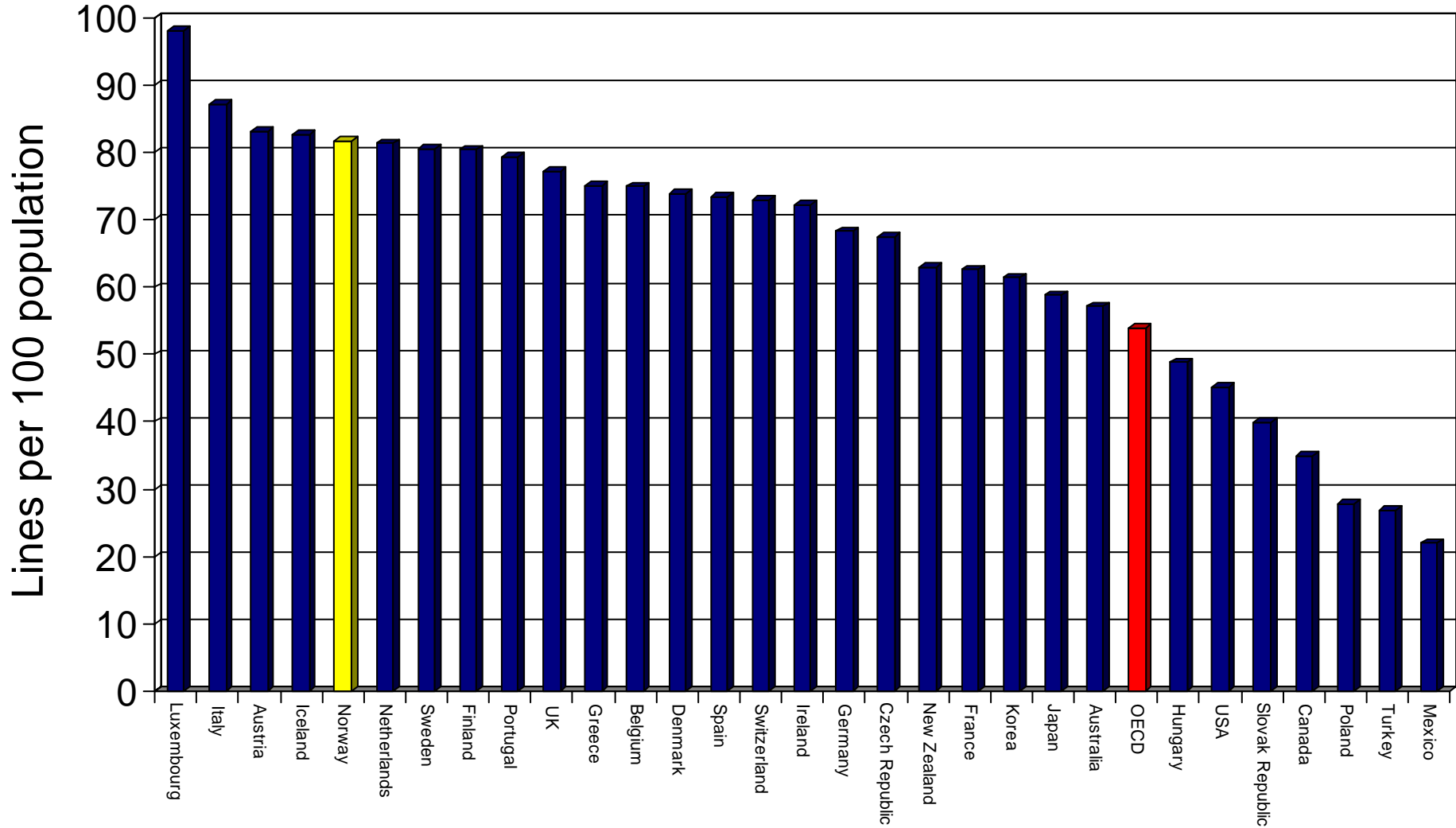
INTUG basket of residential charges



INTUG telecommunications channels

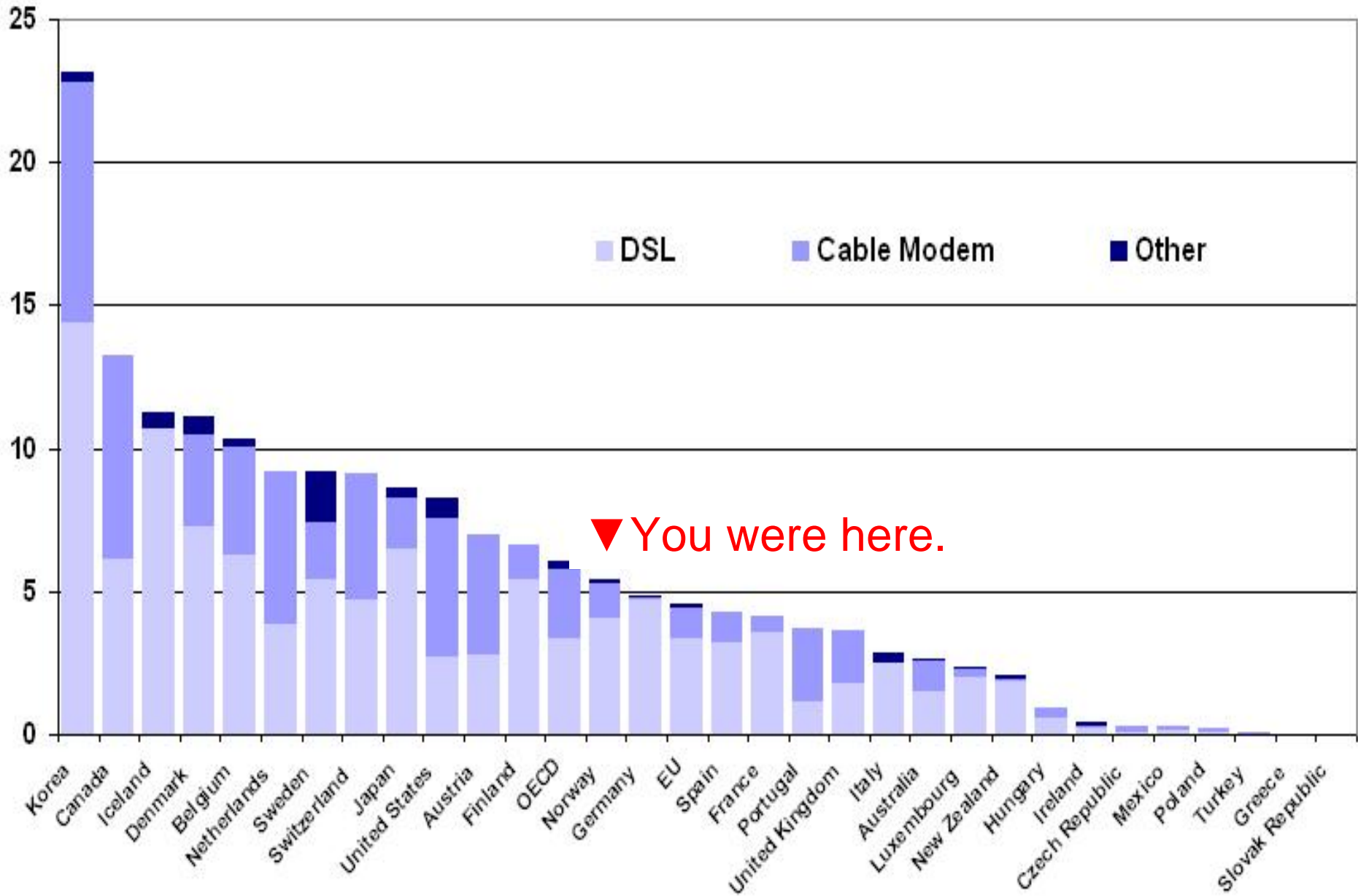


INTUG mobile penetration



Broadband access in OECD countries per 100 inhabitants, June 2003

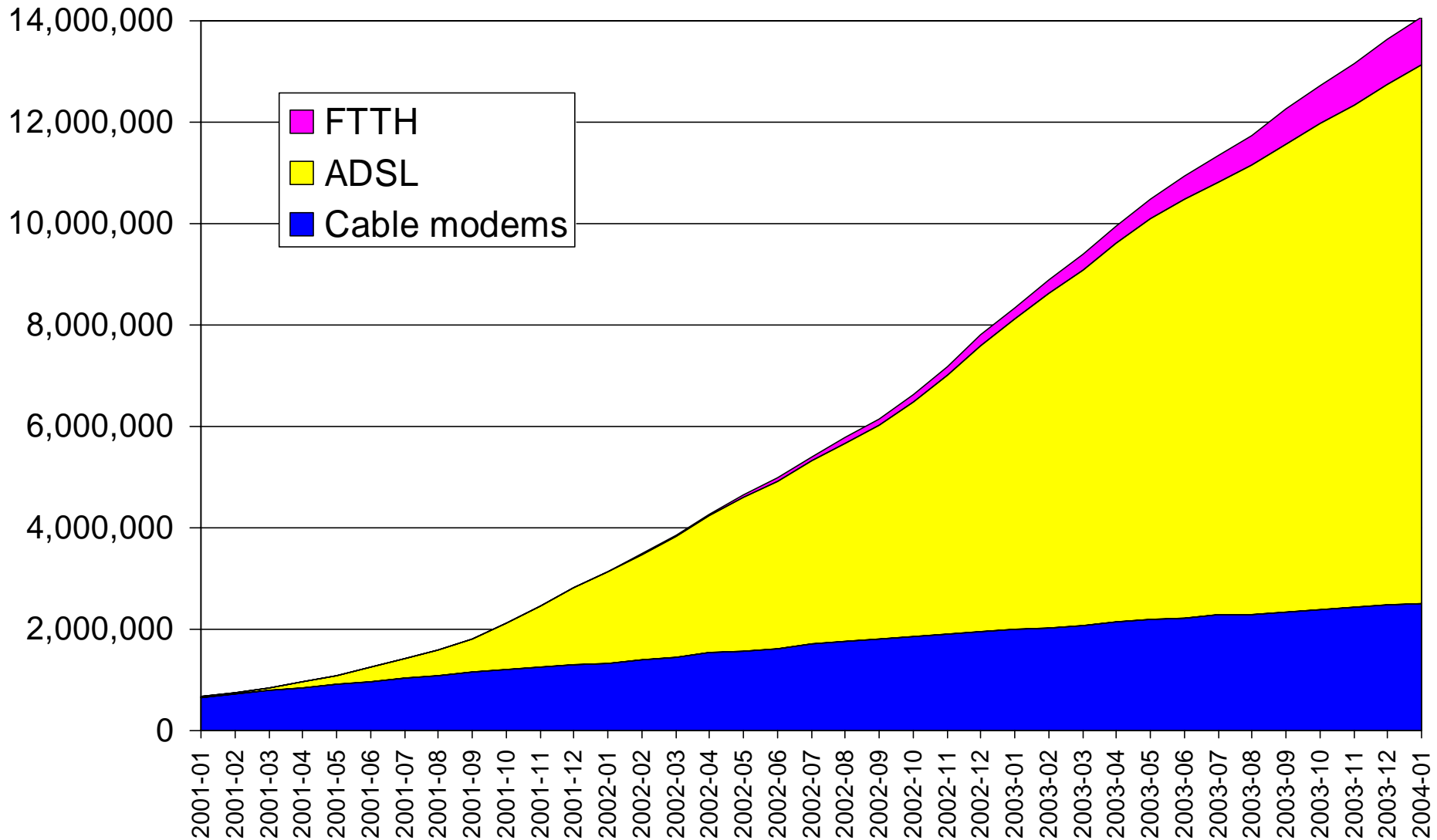
Source: OECD



INTUG Japan/Korea/China

- Korea is the world leader:
 - saturated Q4 2002 10Mbps for about US\$ 25
 - moving to Video DSL
 - and on to Broadband Convergence Network
- Japan is chasing very fast
- rapid diffusion in Asia of:
 - innovative technologies
 - business models
- China is growing rapidly
- India is getting organised

INTUG Japanese broadband



INTUG some monthly charges

- Yahoo! BB ADSL

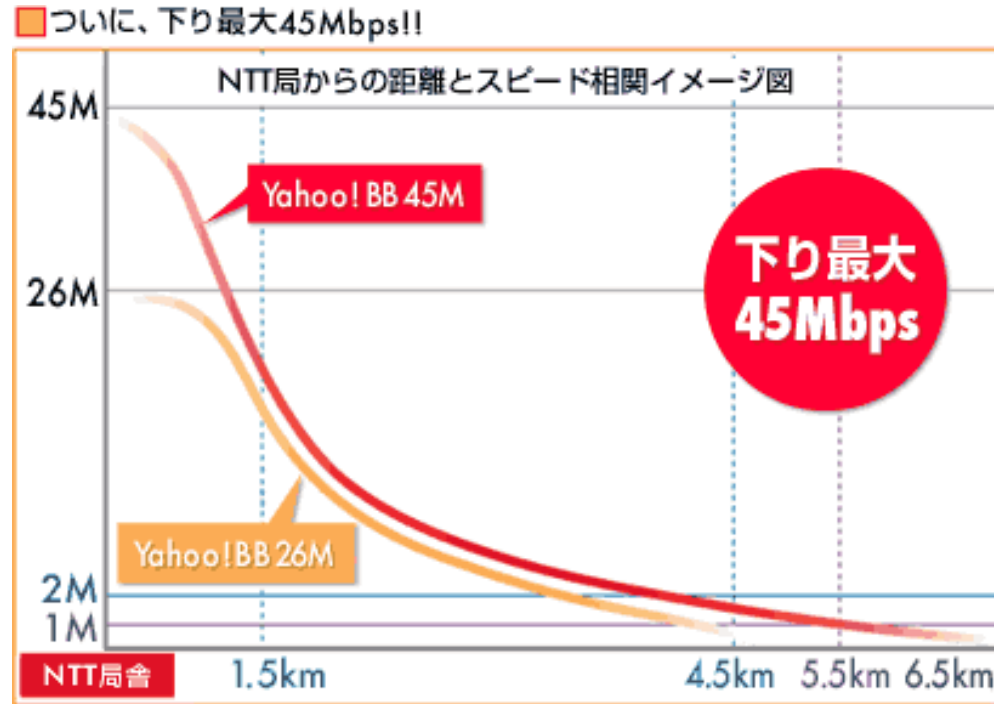
- 45Mbps ¥ 3,938
- 26Mbps ¥ 3,838
- 12Mbps ¥ 3,538
- 8Mbps ¥ 3,138

- eAccess + InterQ

- 40Mbps ¥ 3,880
- 8Mbps ¥ 3,680

- Tokyo Electric Power Company (TEPCO)

- 100Mbps FTTH ¥6,480



NOK 1 = ¥ 15.46

INTUG mobile data; Japan & USA

- KDDI Au Win in Japan
 - cdma2000 1X EV-DO
 - ¥4,200 monthly unlimited
 - up to 2.4 Mbps downlink and 144kbps or more uplink (best efforts)
- Verizon
 - “national” cdma2000 1X coverage
 - US\$ 79.99 monthly unlimited
 - 40-60kbps, bursting to 144kbps
- AT&T Wireless
 - “national” GPRS/EDGE
 - US\$ 79.99 monthly unlimited
 - 100-130kbps, bursting to 200kbps

USD 0.14 = NOK 1 = ¥ 15.5

INTUG conclusions

- problems of
 - too little competition
 - too many politico-regulatory games
- closing the policy loop:
 - input to policy debates
 - input to regulatory debates
 - input to commercial debates
- pursuing world class performance, not just the best interests of market players
 - benchmark against the best

INTUG thank you

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