

# INTUG

## Fully connected organisations will flourish

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CMA, London 8-9.ii.2005

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

# INTUG contents

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- ubiquitous networks
- leading the world
- bottlenecks and cash cows
- challenges:
  - operators
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# INTUG what is INTUG?

- members
  - national associations
  - corporations
  - individuals
- activities
  - ITU and WTO
  - OECD
  - APEC TEL, CITEL  
and the European Union

# 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 ubiquitous network society

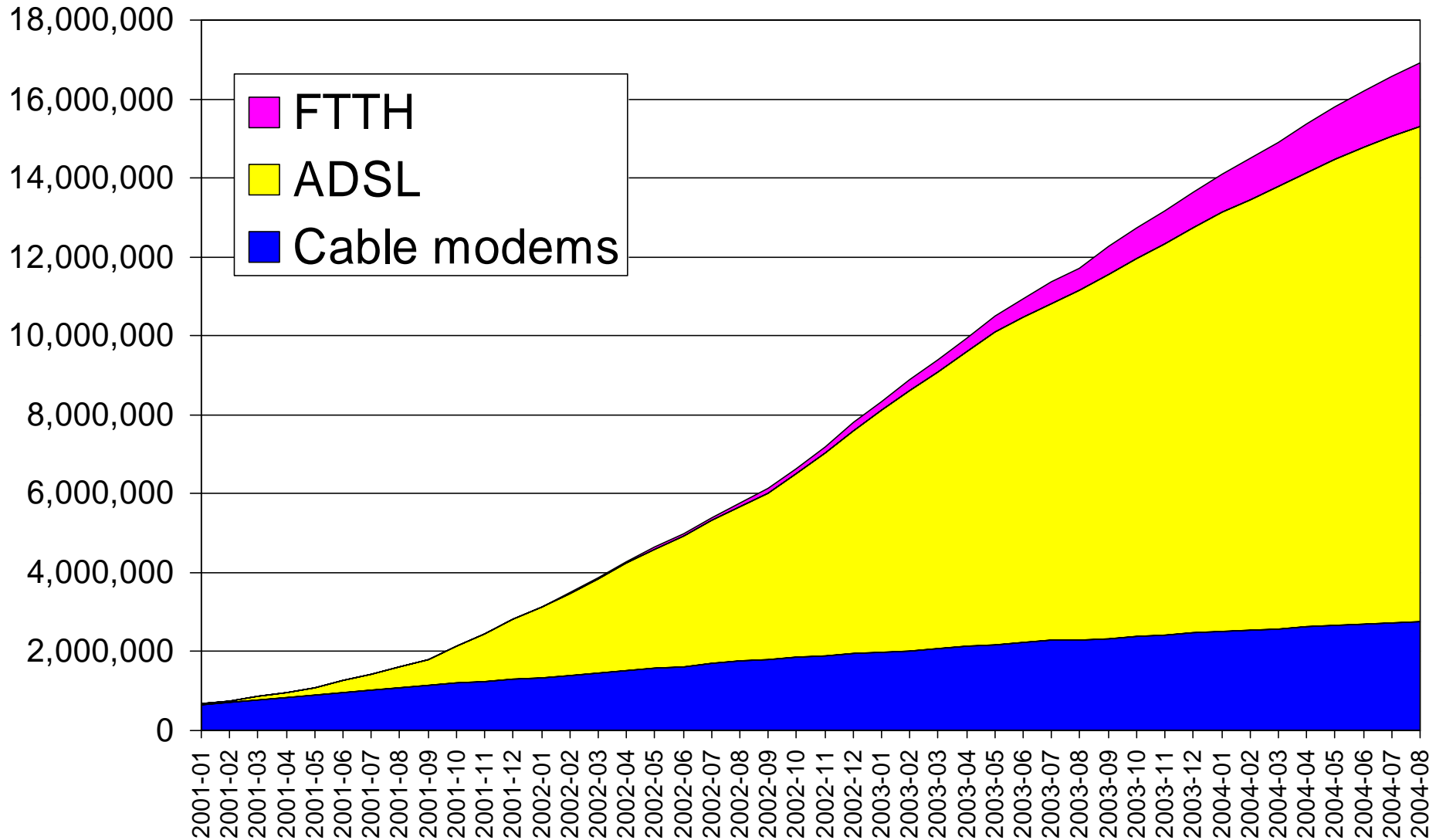
- any device, any network, any place
- government and business policy in Japan and Korea
- a major source of economic growth
- delivered by a competitive market structure
- all operators have multiple networks
- all users have access to multiple operators
- nobody controls bottlenecks
- incremental:
  - addition of new technologies
  - refinement of policies



# INTUG new wine through old bottlenecks

- fixed networks:
  - local loops
- mobile networks:
  - fixed to mobile termination rates
  - international mobile roaming
  - data prices
- regulation:
  - nationalistic
  - not achieving competition

# INTUG Japan



# INTUG residential ADSL offers

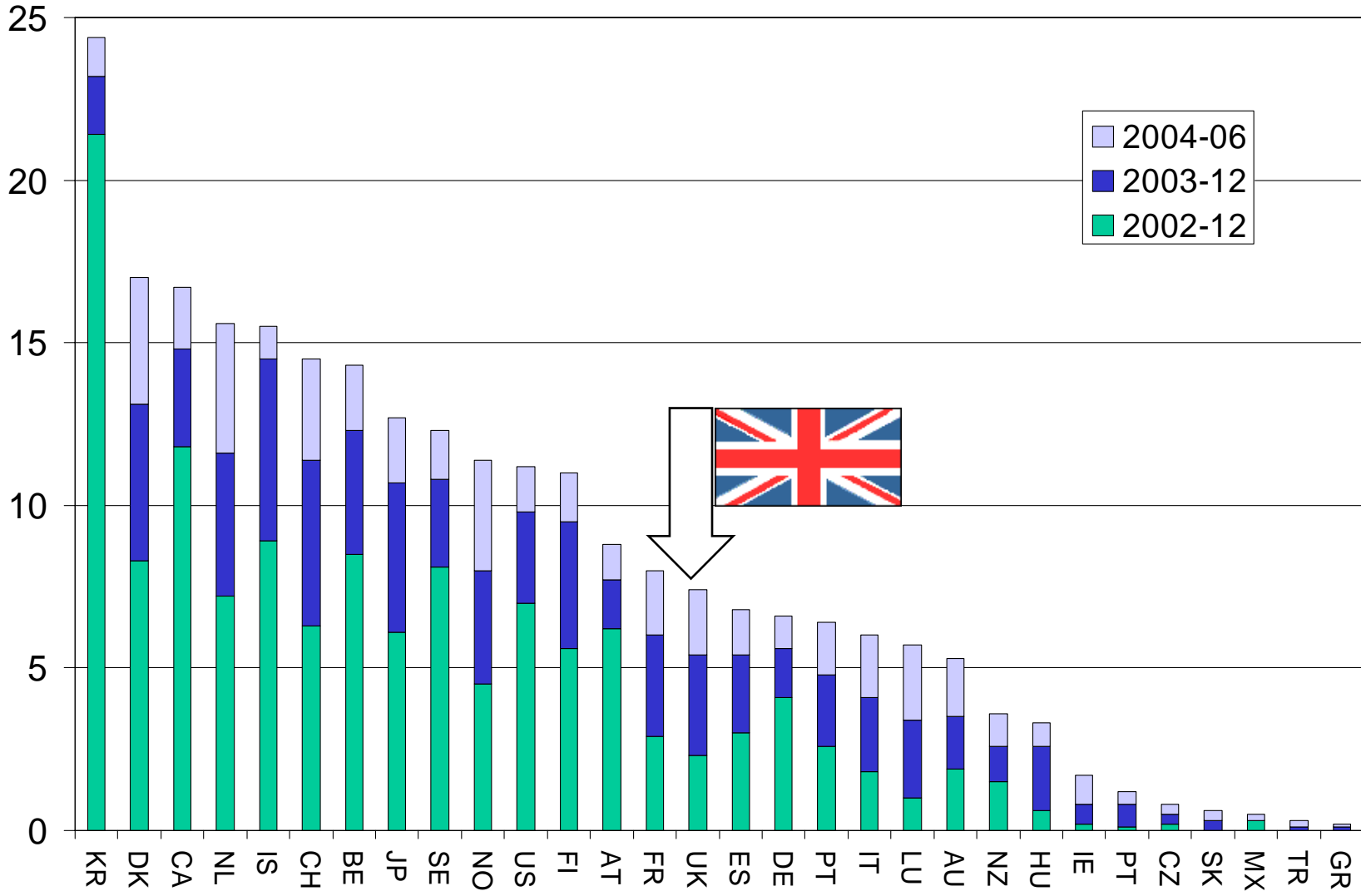
- Hong Kong SAR – HKBN
  - 1 Gigabit/s from June 2005
- Japan - Yahoo! BB
  - 50 Megabits/sec downstream
  - 3 Megabits/sec upstream
  - rent of 802.11g router/modem
  - ¥ 5,000 per month (about £26)
- France - Free.fr
  - 20 Megabits/s downstream
  - €29.99 per month (about £21)

Japan has > 1 Million FTTH lines  
about ¥ 7,000 per month (£36)



# INTUG broadband (per 100 population)

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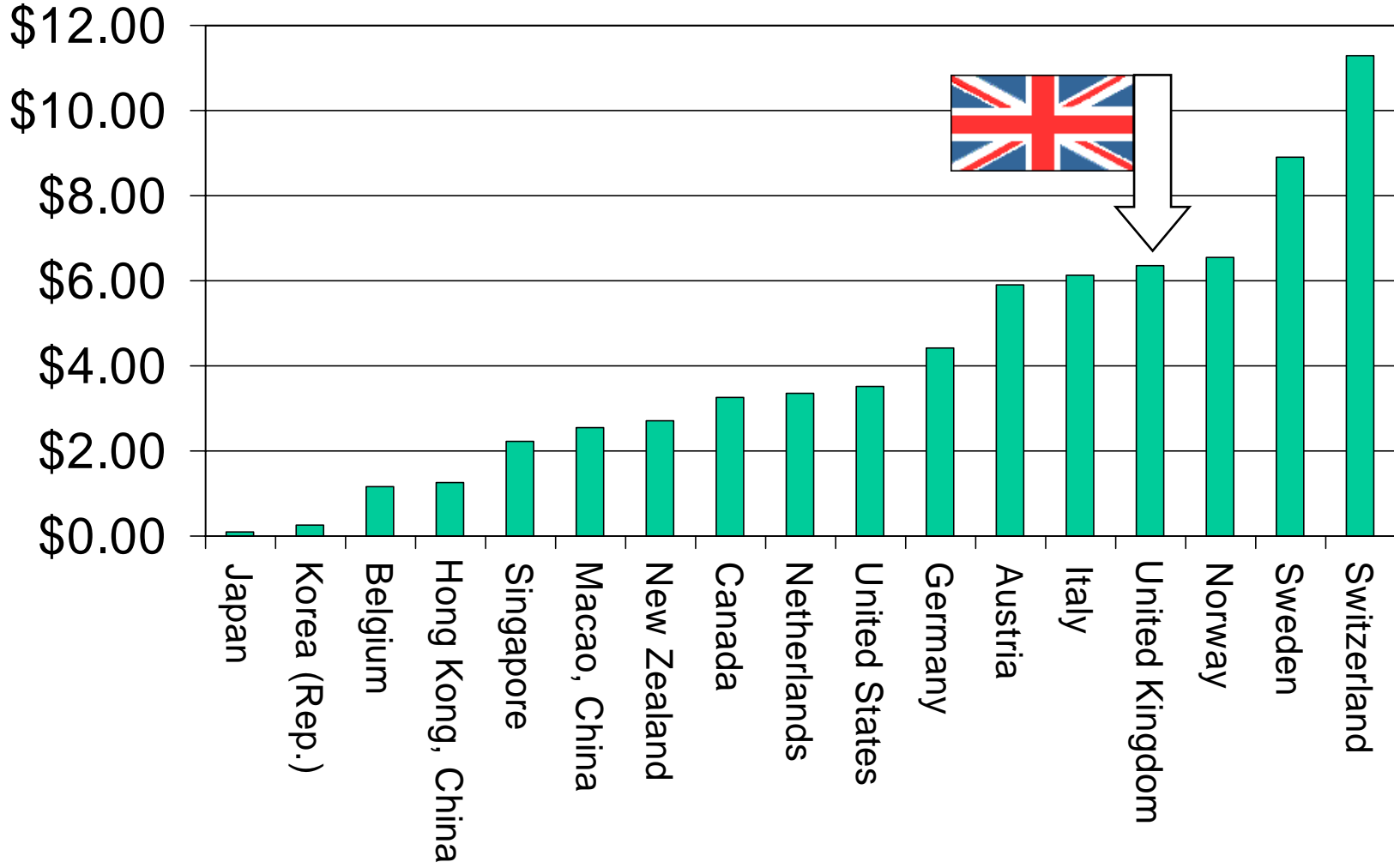


# INTUG

broadband 100 kBits/sec per month

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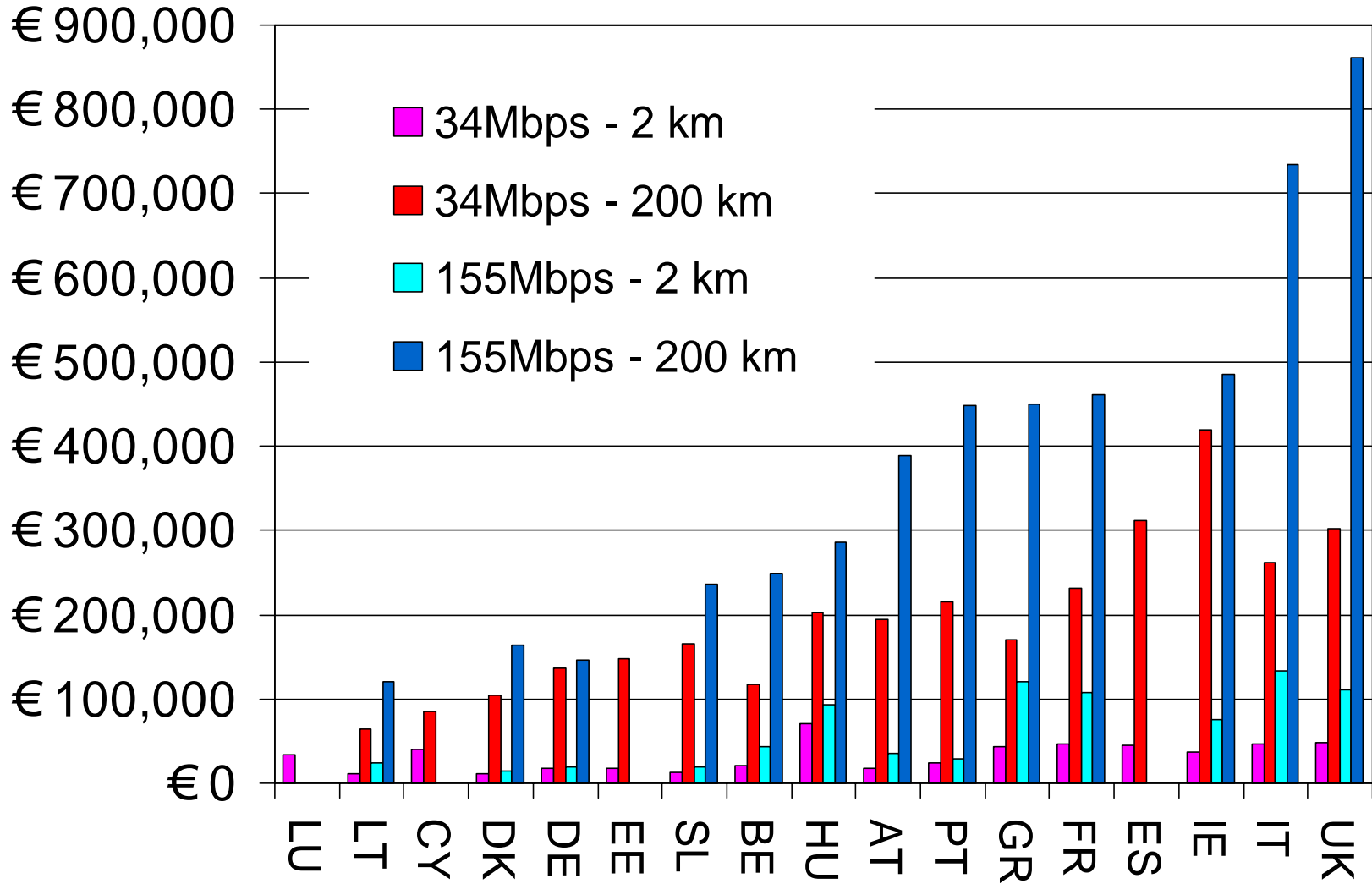
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# INTUG leased line prices

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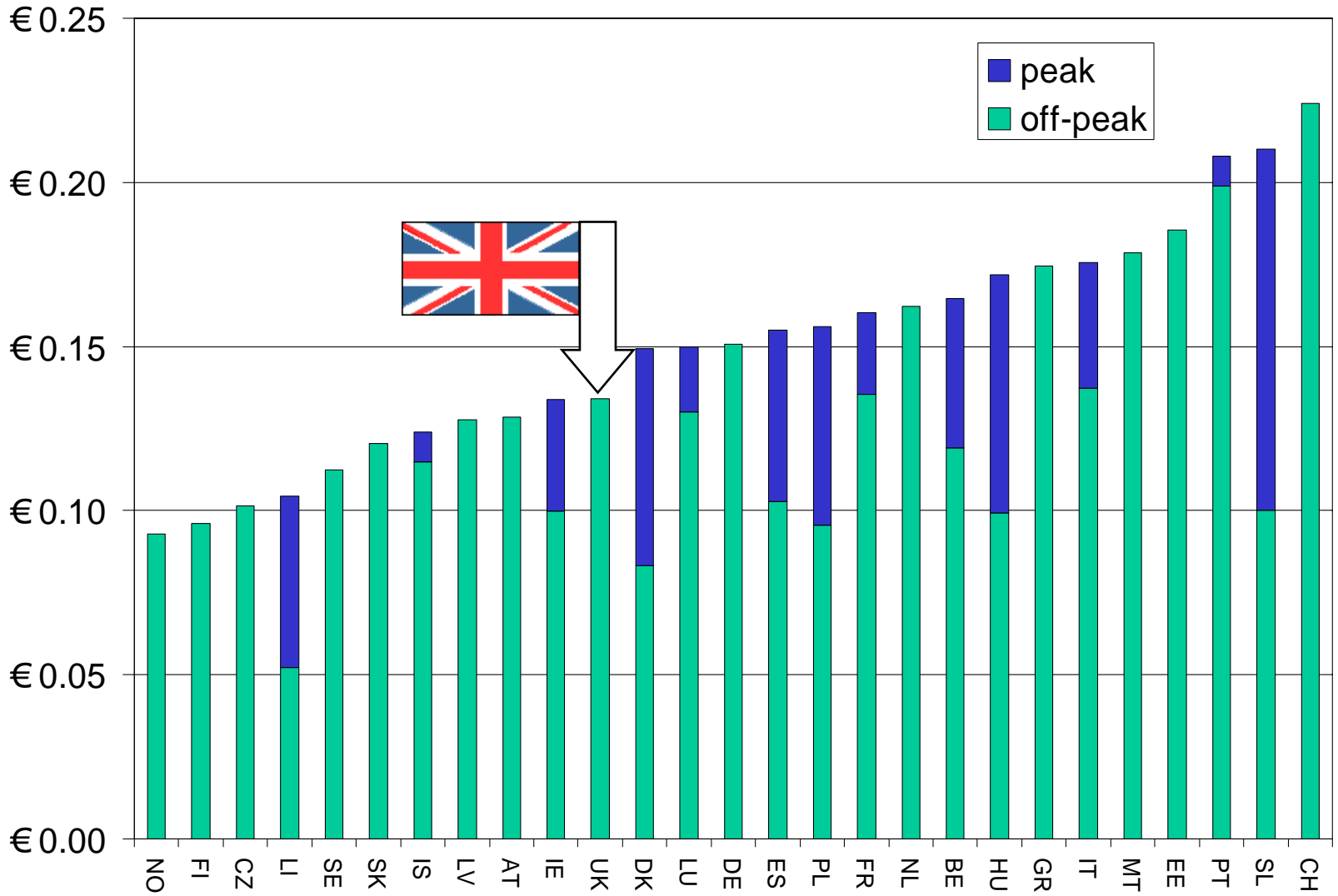
[www.INTUG.net](http://www.INTUG.net)



# INTUG mobile termination rates

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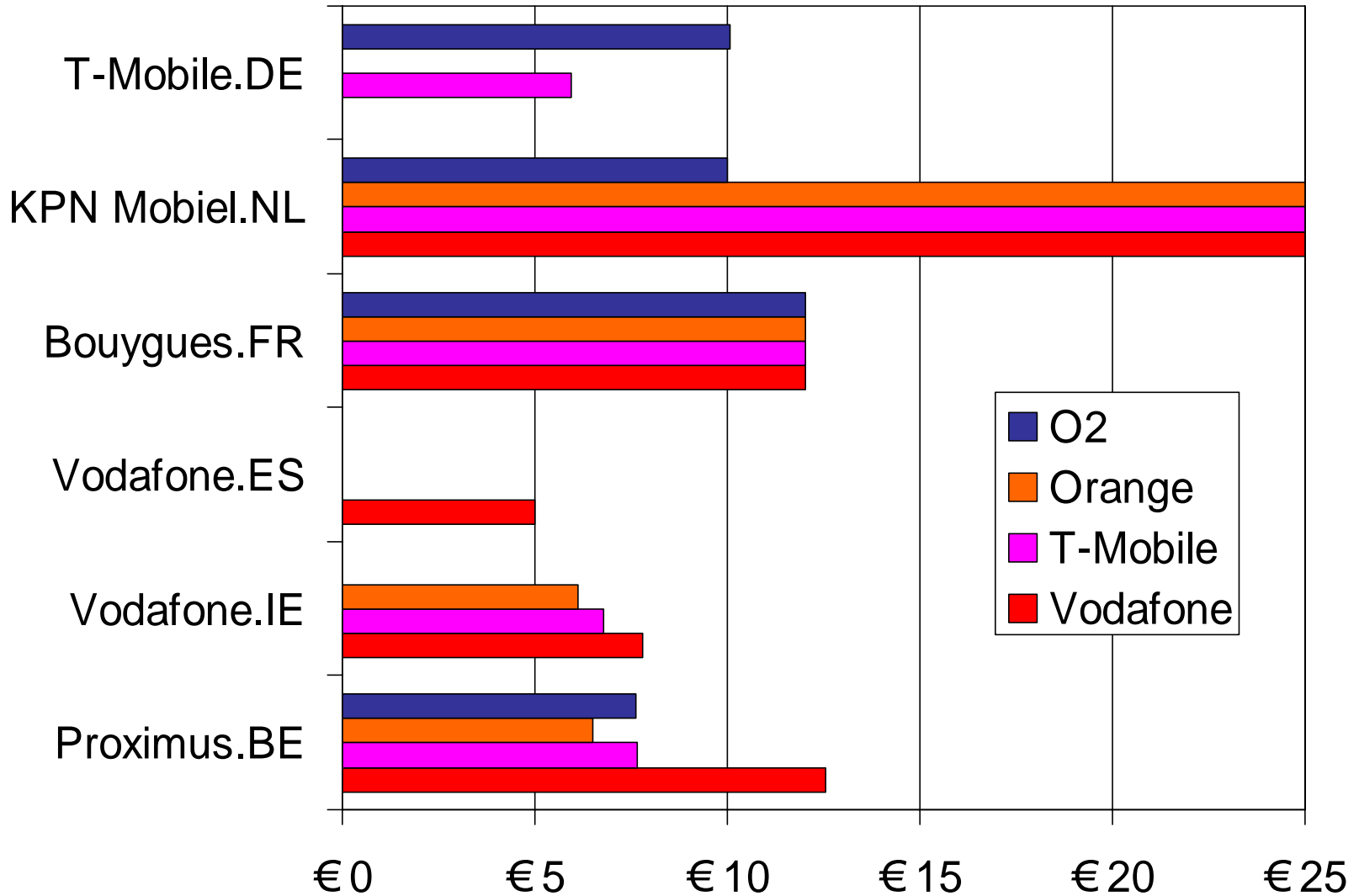


# INTUG mobile data flat rate prices

- Australia
  - Vodafone AU\$49.95 (£21) \*  
limited to 500MBytes
- Japan
  - KDDI JPY 4,200 (£22) †
- United States of America
  - Verizon Wireless US\$ 79.90 (£43) †
  - T-Mobile US\$ 29.99 (£16) \*

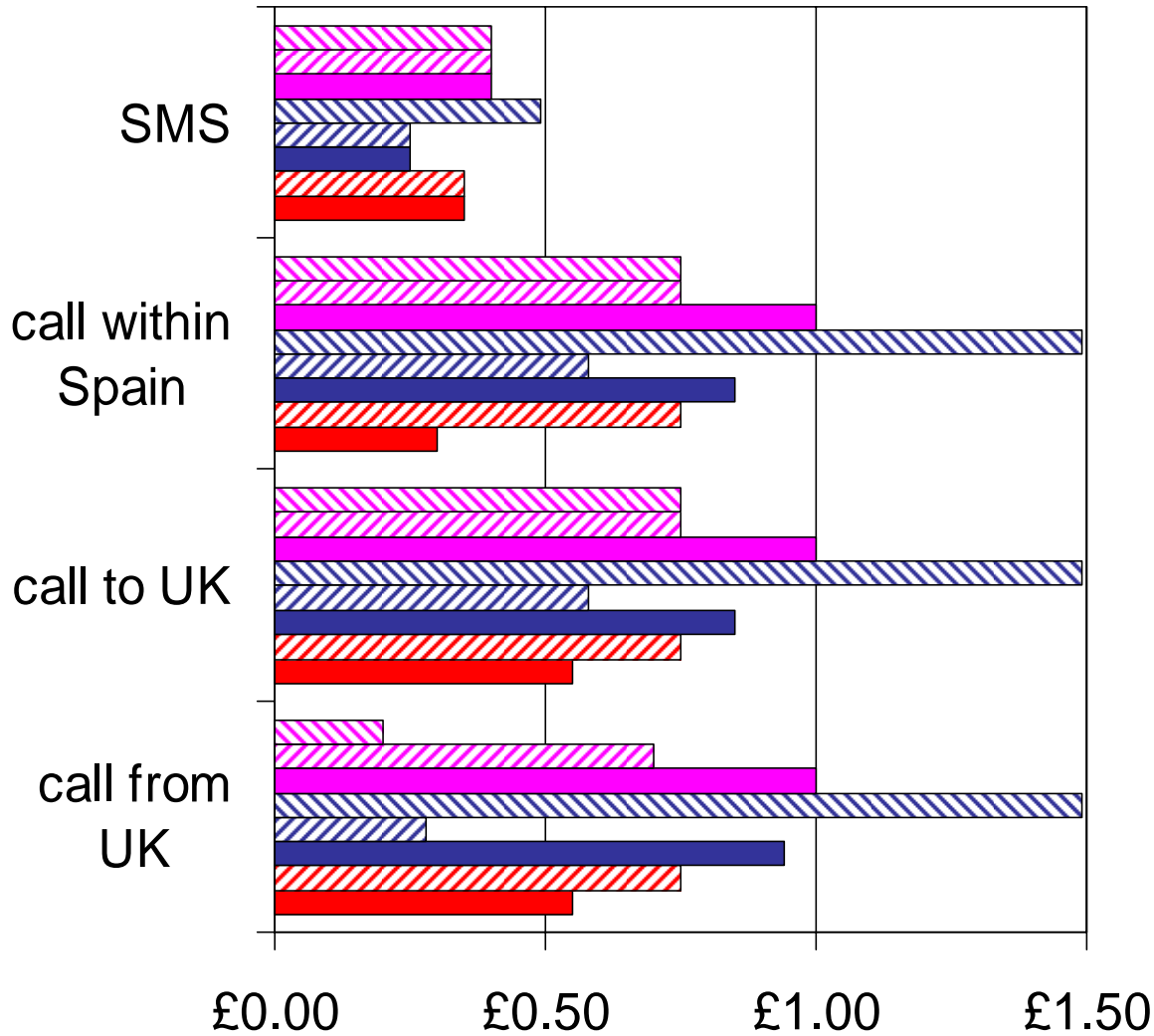
\* GPRS † cdma2000 1X EV-DO

# INTUG data prices for foreigners in UK



# INTUG voice roaming in Spain

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- T-Mobile mtly IO
- T-Mobile monthly
- T-Mobile PAYG
- O2 PaynGo Wild
- O2 monthly ITS
- O2 pay monthly
- Vodafone Leisure
- Vodafone Volume



# INTUG challenges for policy makers

- ensuring European Union and the United Kingdom are “leaders”
- ensuring there is single market and that it is truly competitive
- escaping from “old school” regulation
- being prepared for the next technological wave
- opening up alternative infrastructures (radio spectrum and fibre)
- avoiding anti-competitive bundling



# INTUG challenges for operators

- migrating services to newer and cheaper technologies
- selling services, not technologies
- providing seamless migration for customers
- learning to live without old cash-cows (e.g., per minute voice revenues)
- ending politico-regulatory gamesmanship



# INTUG challenges for business users

- redesigning business processes for ubiquitous networks
- living with your customers making innovative use of communications
- reconciling different approaches in different continents
- getting world-class broadband services in suburban, rural and remote areas

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# INTUG thank you

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