Future of Voice customer issues

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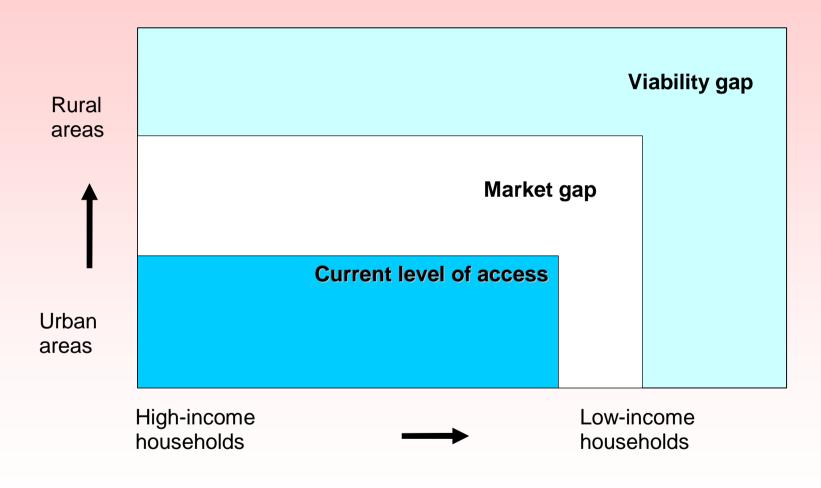
Introduction

- Introduction
- Monopoly is almost gone
- Brands and fashions
- Corporate networks
- Information asymmetry
- Consultation asymmetry
- Conclusions





Gaps in the supply of voice





Corporate networks

- Buying power is good for Virtual Private Networks in core locations
- Weak on the geographical periphery
- Regulatory uncertainty over global MPLS networks
- Little or no buying power on:
 - cellular termination rates
 - cellular data rates
 - trans-national cellular services



Mobile operator footprints

	KPN	Orange	T-Mobile	Telefónica	Vodafone
Belgium	Υ	Y			
France		Y			Υ
Germany	Υ		Υ	Υ	Υ
Italy					Υ
Netherlands	Υ	Υ	Υ		Υ
Poland		Y	Υ		
Spain		Y		Υ	Υ
Switzerland		Υ			
UK		Υ	Υ	Υ	Υ
USA			Y		Y

Mechanisms for redress – UK

- Office of Communications (OFCOM)
- Independent Committee for the Supervision of Standards for Telephone Information Services (ICSTIS)
- Office of the Telecommunications Ombudsman (OTELO)
- Office of the Telecommunications Arbitrator (OTA)
- Advertising Standards Authority (ASA)
- Department of Trade of Industry (DTI)
- Members of Parliament (MPs) and also of the Scottish Parliament and the Welsh and Northern Ireland Assemblies
- county courts



International roaming

- Problem identified in mid-1990s
- Complaint made in 1999 to EC
- Several botched attempts at remedies
- Bitter rearguard effort to resist EU Regulation
- Roaming charges abolished by:
 - Celtel in East Africa (summer 2006)
 - Celtel across Africa for GPRS (autumn 2006)
 - 3 (HWL) across its footprint (January 2007)

Information asymmetry

- More complex services
- Less clarity in marketing
- "up to", "free" and "including"
 - ADSL 2+
 - HSDPA
- UMA but are all networks at the same rate?

Directory service: Can I connect you to that number? No mention of the charge.

Multiplay in France

Brand name	Free.fr	orange.fr	Club Internet	Alice
Price per month	€29.90	€39.90	€29.90	€29.95
Technology	ADSL2+	ADSL2+	ADSL2+	ADSL2+
Voice free to countries	28	France	41	24
Television channels	93+VOD	?	50+PVR	40-150
Company	lliad	France Telecom	Deutsche Telekom	Telecom Italia

Telecom Italia also offers a supplement of 4 hours of calls to some countries: Algeria €18.95, Czech Republic €13.95 and Syria €23.95.



Consultations of whom?

- Widespread practice of consulting on proposed policies
- Yet documents are incomprehensible to the public, only understood by experts
- A magic circle of operators and regulators:
 - symbiosis or capture?
 - where is the democratic oversight?

The intervention of "civil society" appears just to be more experts interposed into the policy process. Whom do they represent?



Spitting on telephony

- Years of work on spam has achieved ...
- An increase in spam
- Now we face Spam on Internet Telephony
- No policy responses
- No implementation successes
- No hope of containing the tide of filth and criminality

Conclusions

- For many voice is ubiquitous and "free"
- For most it is still not available or expensive
- Markets are often still highly concentrated
- Consumer protection is weak in many countries and requires considerable support and development
- Information asymmetry is getting worse
- Closed circle of technocratic "consultations" must be broken

Thank you

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