



**Trends in
Telecommunication
Reform 2002**
Effective Regulation

**Chapter 1:
Global Trends in
Market Reform**

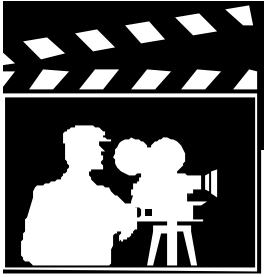
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The views expressed in this presentation are those of the author and do not necessarily reflect the opinions of the ITU or its membership. The author can be contacted at susan.schorr@itu.int.

Rollercoaster

The ICT market soared to dizzying heights in the late 1990s and began a scary decent by mid-2000





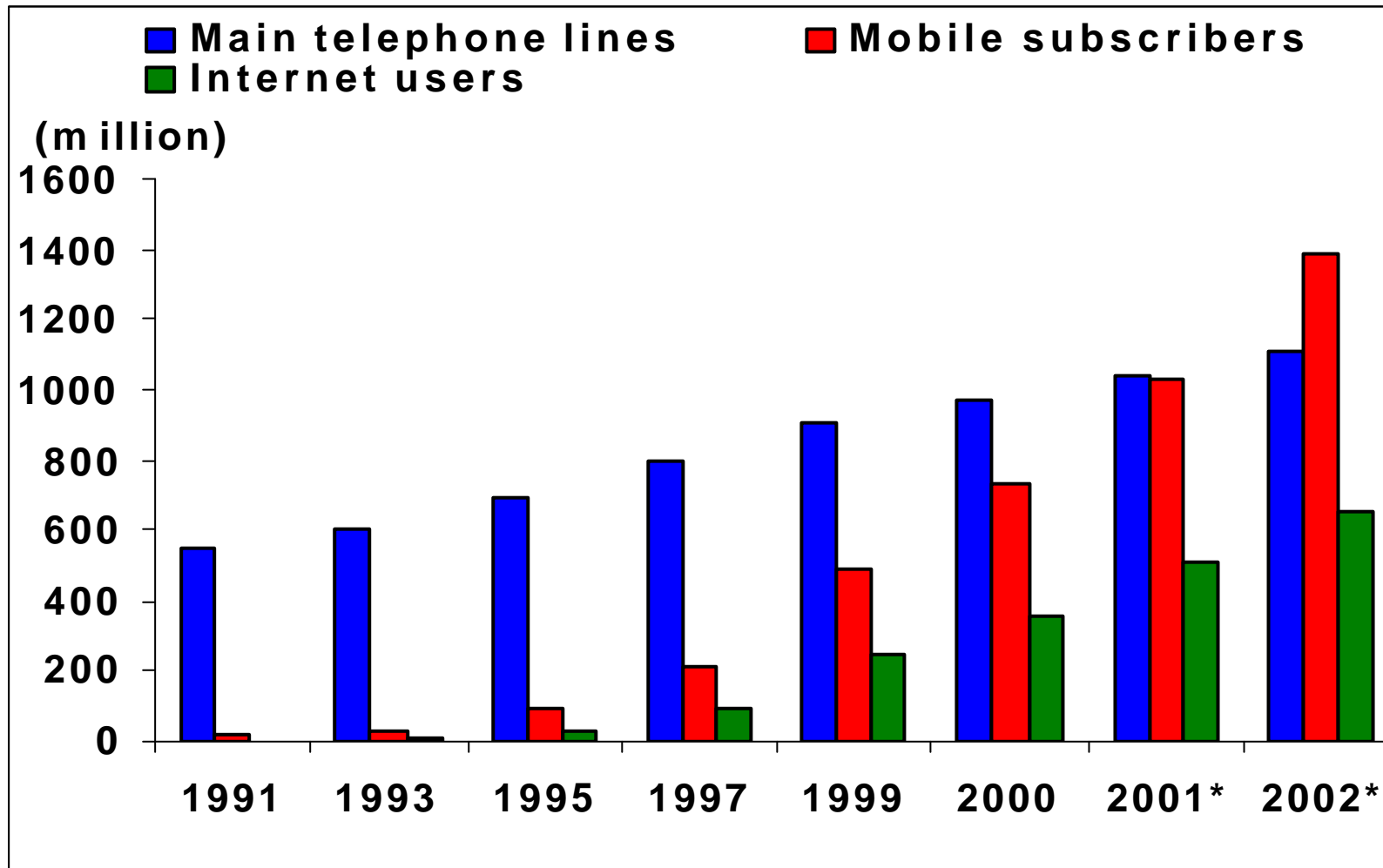
Singing in the Rain

Despite bleak headlines, there are many signs of growth opportunities:

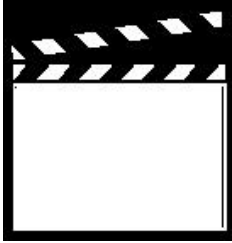
- **Mobile shows no sign of slowing**
- **The internet continues to grow**
- **There are huge untapped markets poised to open**



La Dolce Vita



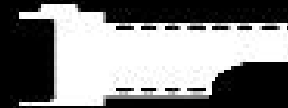
- 2001 Estimation and 2002 forecast
- Source: ITU World Telecommunication Indicators database.



Crouching Tiger, Hidden Dragon

China Offers Huge Growth Potential

- **Biggest Mobile Subscriber Market In World**
- **Only 1 in 10 Subscribe**
- **WTO Commitments Promise New Opportunities for Foreign Companies**

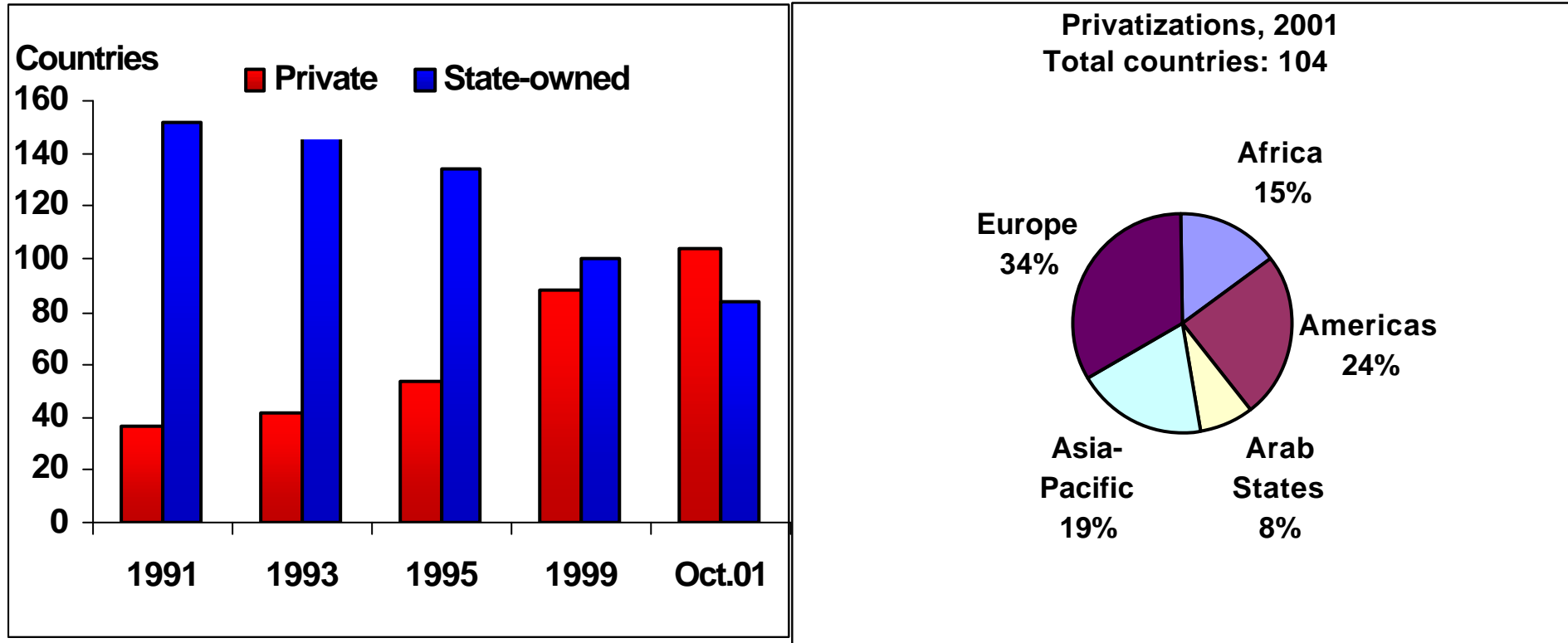


The Majority of ITU Member States Have Now Initiated Sector Reform Initiatives

- ✓ **Majority have already privatized**
- ✓ **Majority have established a regulator**
- ✓ **Majority allow some form of competition in ICT services**



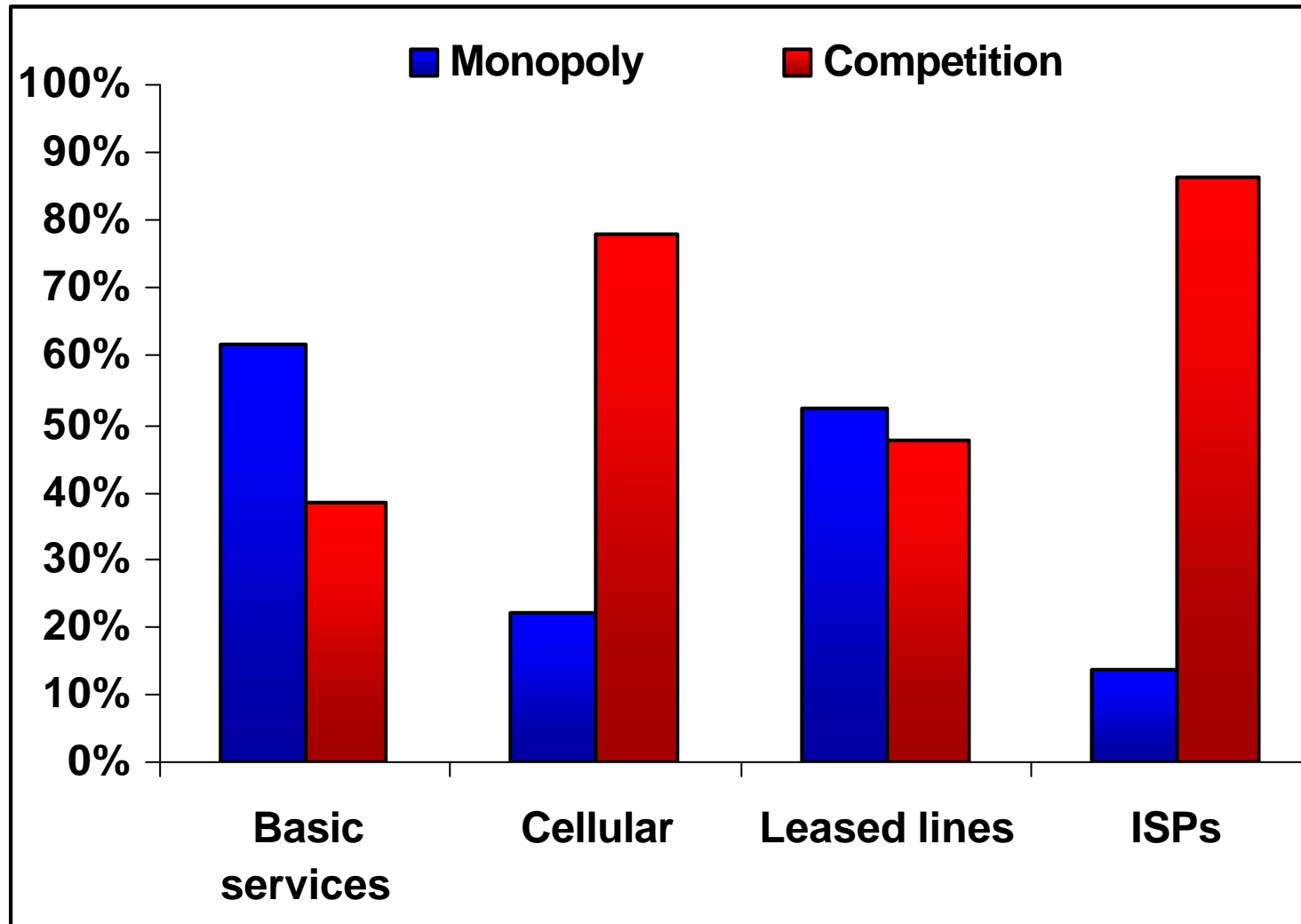
Wall Street



Source: ITU/BDT Telecommunication Regulatory Database

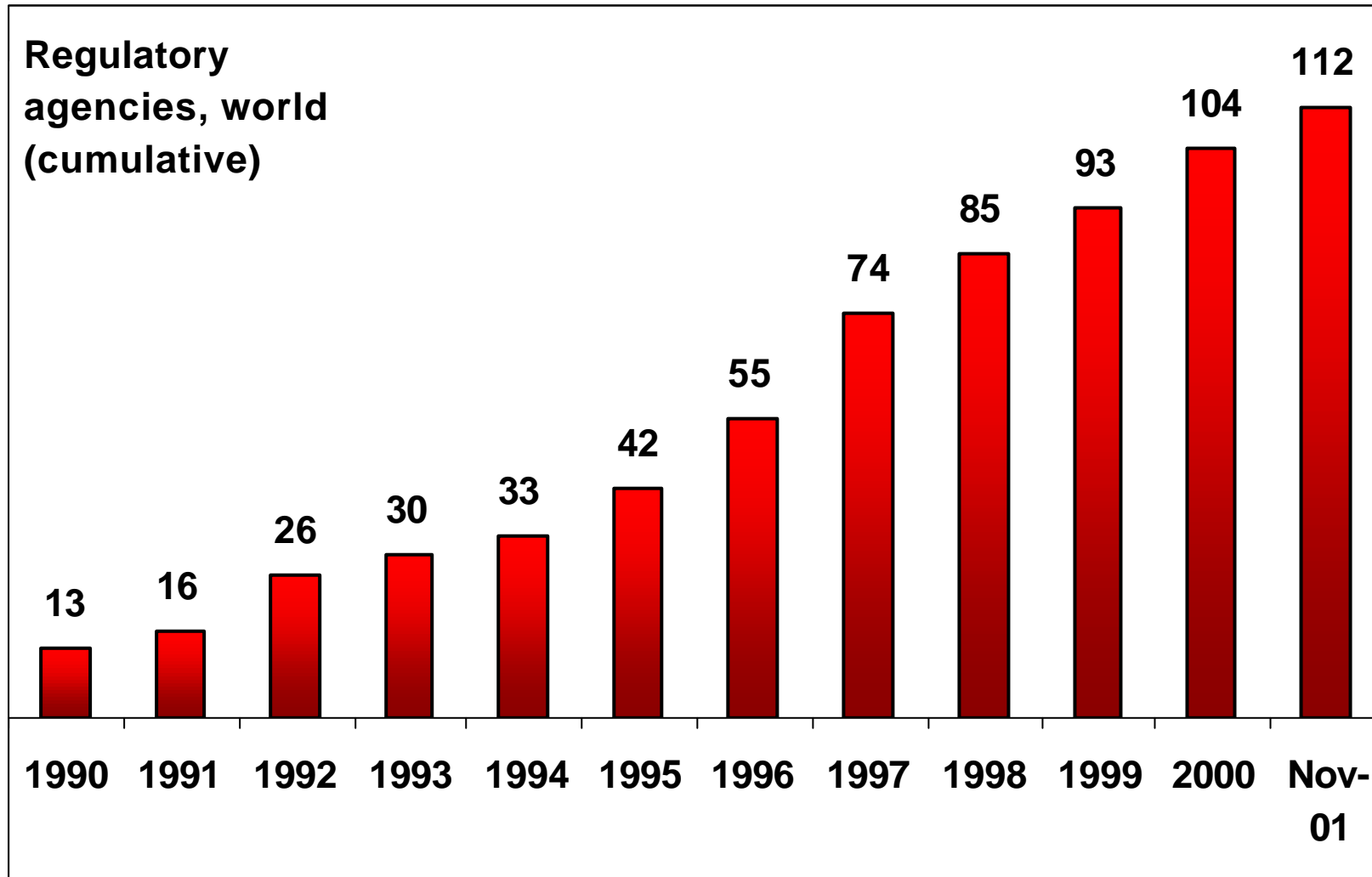


Gladiation



Source: ITU/BDT Telecommunication Regulatory Database

"La Règle du jeu"



Source: ITU/BDT Telecommunication Regulatory Database

Breaking the Waves



- ◆ **Mobile and Internet services are growing everywhere there is competition**
- ◆ **Investor confidence is linked to effective implementation of a fair and transparent regulatory framework**



Mission Possible



- **Coupling Market Reality with Creativity;**
- **Broadened to a Comprehensive Approach; and**
- **Now more than ever, founded on a clear and transparent regulatory framework**



Harry Potter



Regulator's Job Is Like Playing Quidditch

- **Four Different Positions:**
 - Chasers, Beaters, Seeker and Keeper
- **All Players On Broomsticks:**
 - Nimbus 2000, Nimbus 2001, Firebolt
- **Three Different Balls:**
 - The Quaffle
 - The Bludger
 - The Golden Snitch

