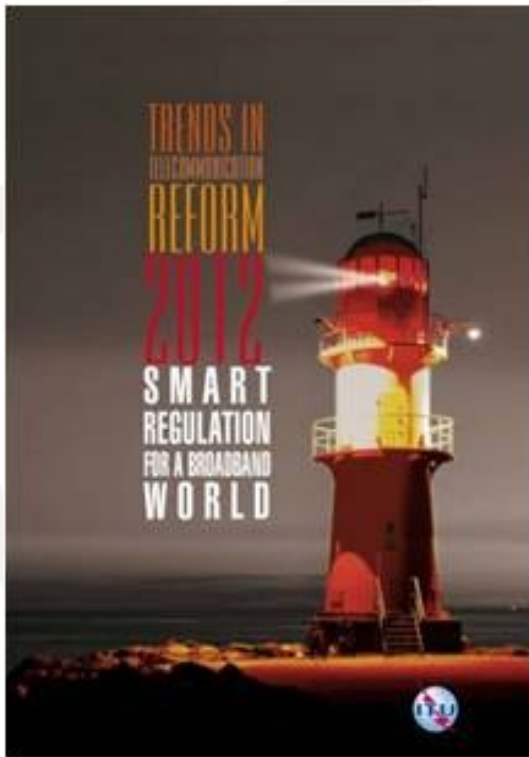




Setting National Broadband Policies, Strategies & Plans

Dr Bob Horton
Senior Telecommunications Expert



11th Global Symposium for Regulators
"Smart Regulation for a Broadband World"
Armenia, Colombia, 22 September 2011

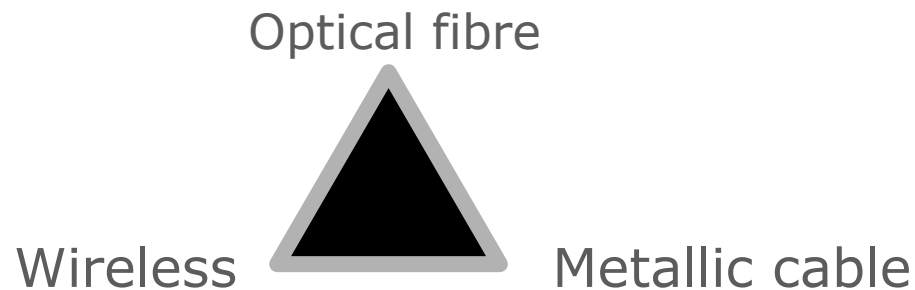




THE CASE FOR COMPETITION

- *A Reprise*

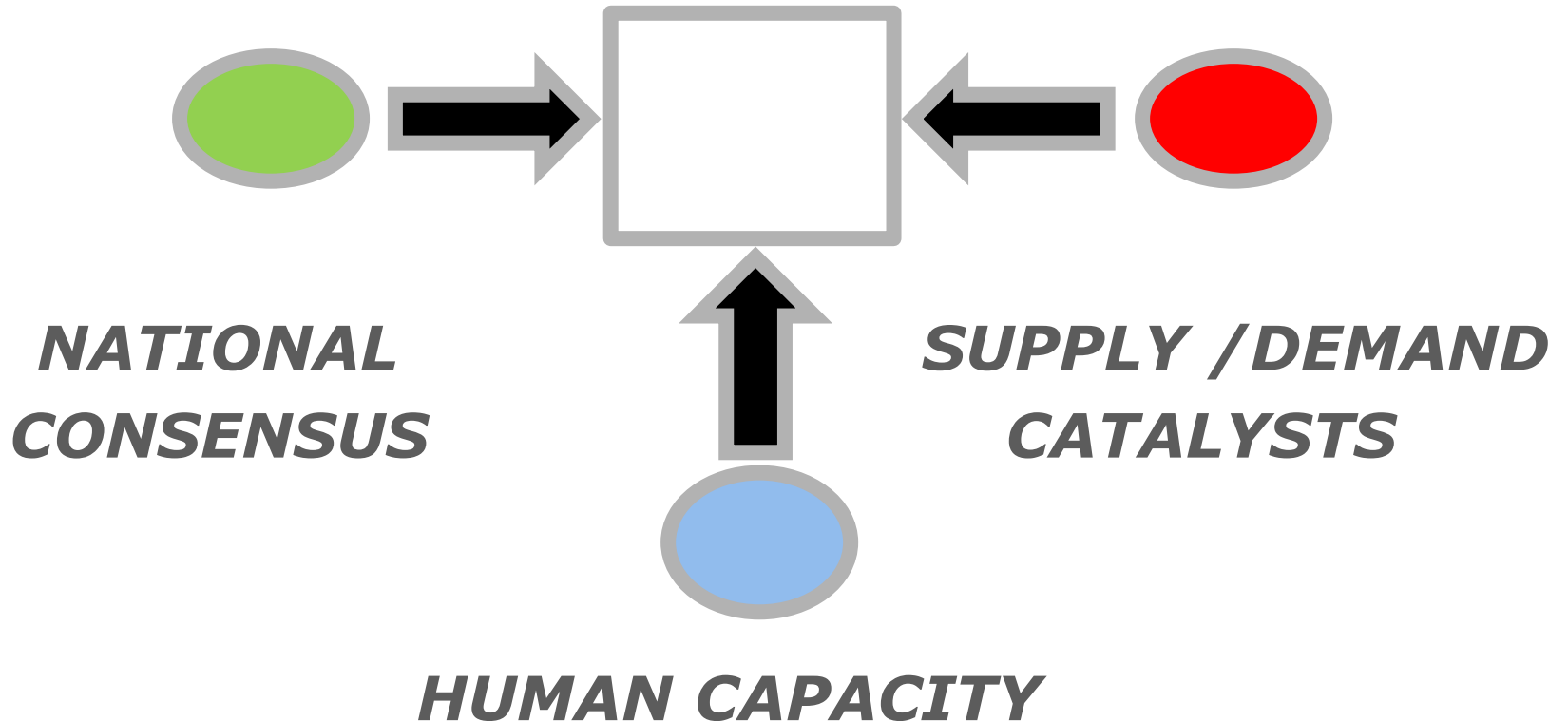
- *Service Provider competition*
- *Inter-Platform competition*





BROAD POLICY CONSIDERATIONS

POLICY CANVAS





SELECTIVE EXAMPLES

COUNTRY	Summary comment
UNITED STATES	Economic stimulus program
Republic of KOREA	Holistic character
JAPAN, SWEDEN, ESTONIA	Other long range thinkers
NEW ZEALAND	Greater intervention
AUSTRALIA	A bold step forward
DOMINICAN REPUBLIC	Broadband to rural areas
ARGENTINA; BRAZIL; FIJI; HONG KONG, CHINA; PAPUA NEW GUINEA	Mini-Case Studies



ELEMENTS OF NATIONAL PLAN

- main characteristics

- ❖ different goals
- ❖ evidence for decision making
- ❖ means for implementation
- ❖ entities involved
- ❖ industry structure and regulation
- ❖ models of financing
- ❖ cross-sectoral considerations
- ❖ top down vs bottom up targets
- ❖ attitude to technology



DECISION TREE

Six Levels of Decision Points

**6. INDUSTRY
STRUCTURE**

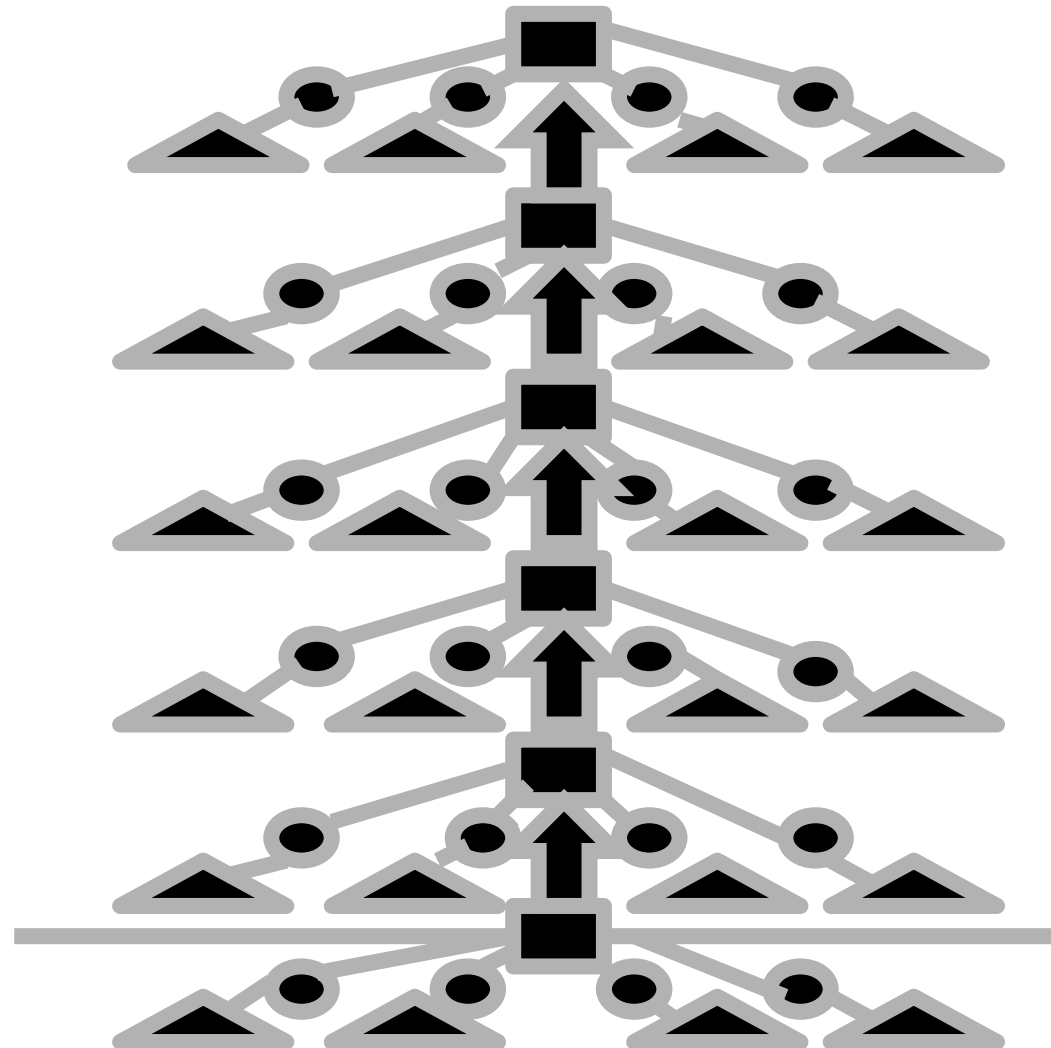
5. INVESTMENT

**4. REGULATORY
SUPPORT**

**3. FORM OF
REGULATOR**

**2. GOALS &
TARGETS**

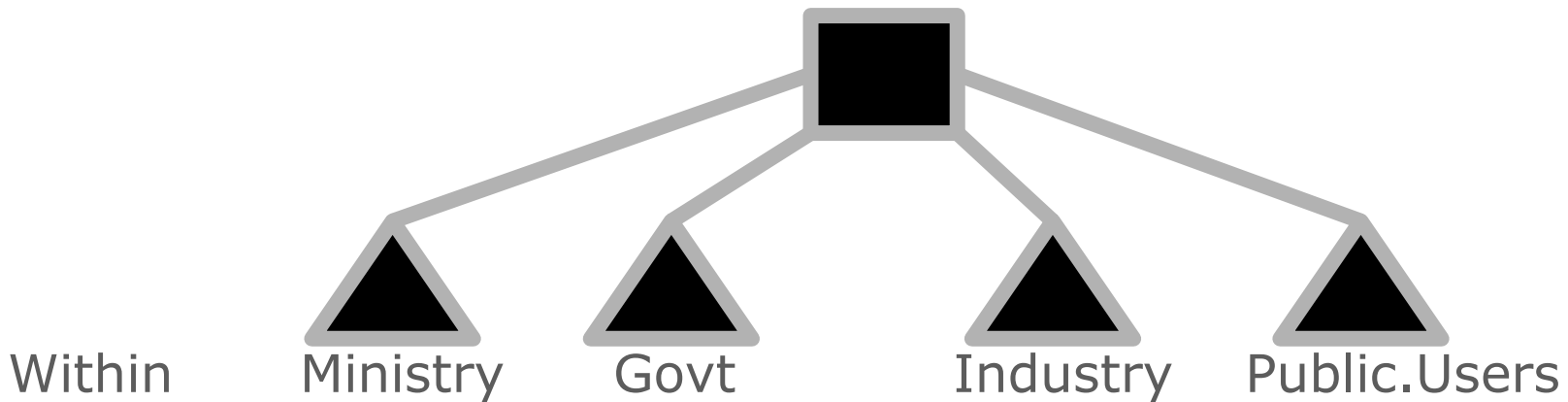
1. FOUNDATION



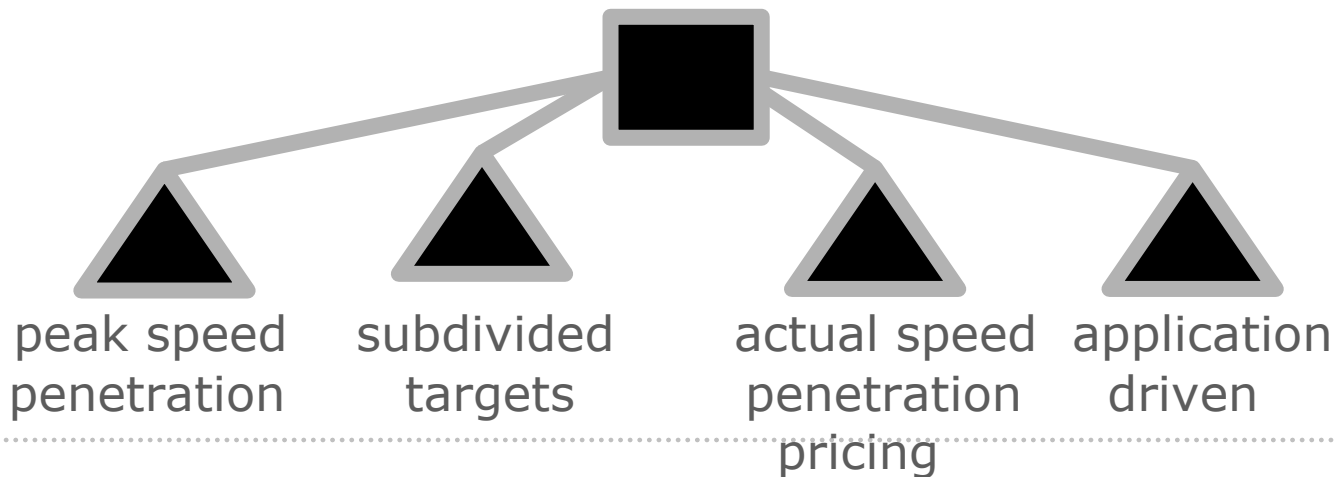


LEVEL 1 : FOUNDATION

Degree of Consultation *plus cost benefit analysis*



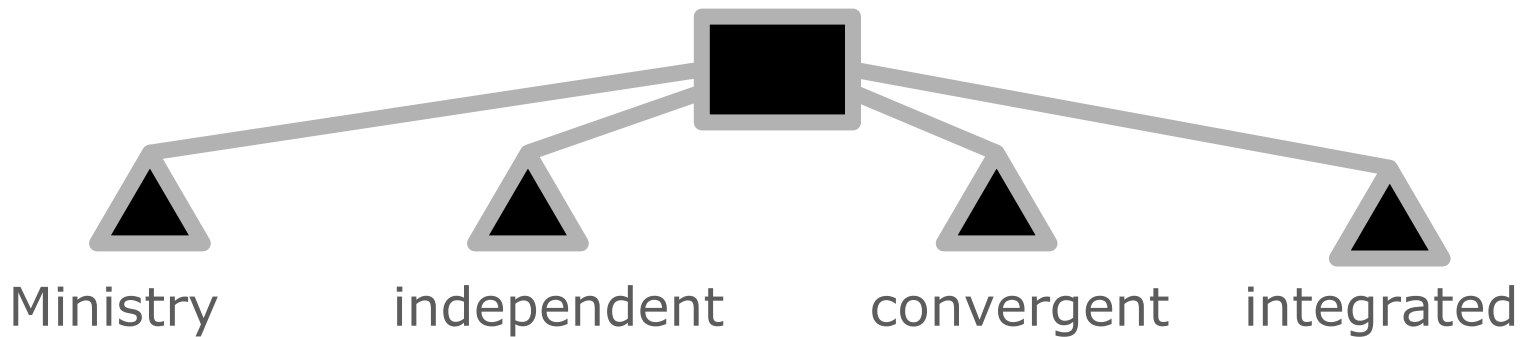
LEVEL 2 : GOALS, TARGETS





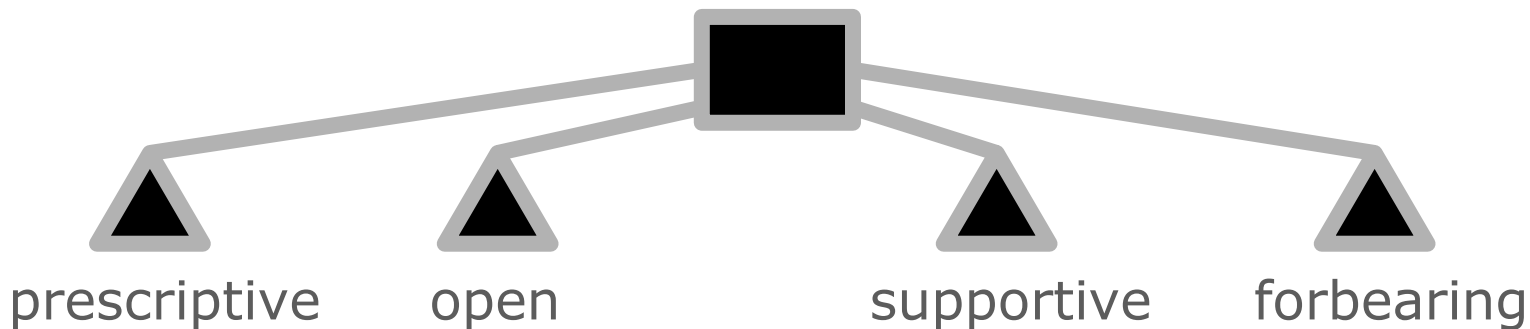
LEVEL 3 : REGULATION

Institutional Form of Regulation



LEVEL 4: REGULATORY SUPPORT

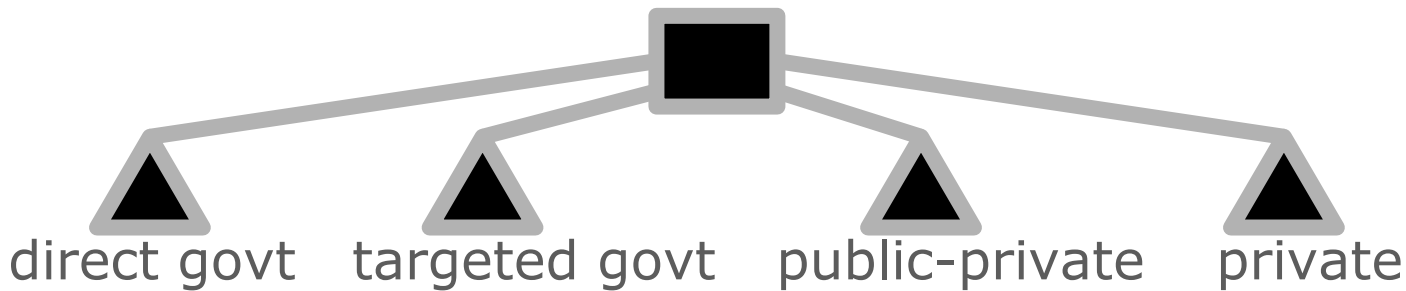
Regulatory Support Mechanisms





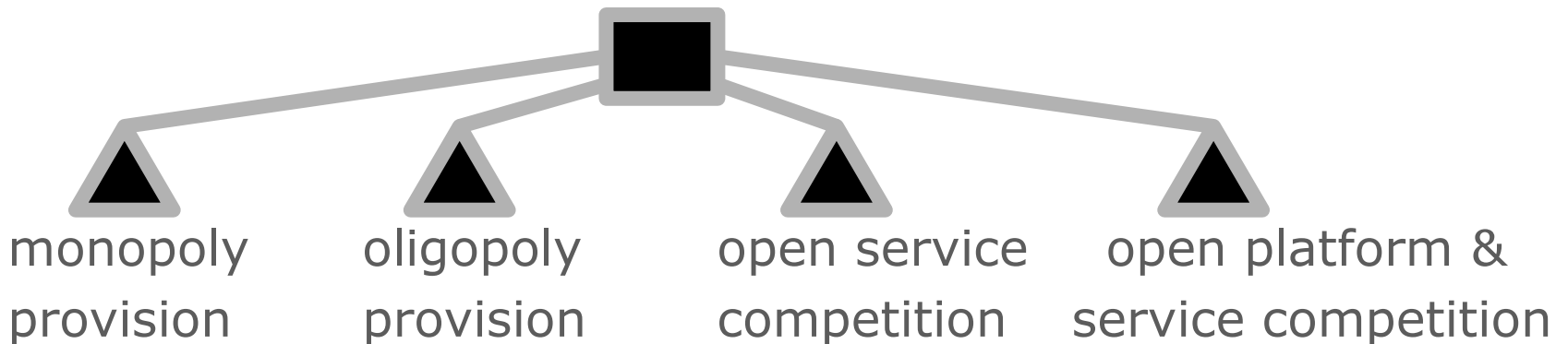
LEVEL 5: INFRASTRUCTURE INVESTMENT

Investment Choices



LEVEL 6: INDUSTRY STRUCTURE

Structure Envisaged





BEST PRACTICE OBSERVATIONS

DECISION LEVEL	DEVELOPED COUNTRIES	DEVELOPING COUNTRIES
6. Industry Structure	Open platform & Service Competition	Limited platform & Open SP Competition
5. Investment	Public-private Partnerships	PPPs plus more Govt non-financial in-kind. Human resource dev.
4. Regulatory Support	Extend beyond FO. Use of UAS, ROW, spectrum	Greater reliance on radio technology, forbearance, plus UAS,ROW,spectrum
3. Regulatory Form	Independent, converged or integrated	Same but probably more integrated
2. Goals & Targets	More sophisticated	Same
1. Foundation	Inclusive of all stakeholders	Same but augmented with HRD



CURRENT IMPLEMENTATION

DECISION LEVEL	COUNTRIES AND THEIR GREATEST FOCUS at present
6. Industry Structure	Korea, Japan, Germany, The Netherlands, USA, UK, Hong Kong China
5. Infrastructure	Brazil, Australia, New Zealand, India, Canada, Cyprus, Egypt, Greece, Ireland, Indonesia, Norway, Nigeria, Portugal, Russia, Algeria, Uganda, Botswana
4. Regulatory Support	Fiji, Dominican Republic, France
3. Regulatory Form	Papua New Guinea, VietNam, Sri Lanka, S Africa
2. Goals & Targets	EU, Colombia, Afghanistan, Bulgaria, Austria, Belgium, Denmark, Ecuador, Finland, Ghana, Italy, Luxembourg, Malta, Romania, Hungary
1. Foundation	Korea, Japan, Chile, Croatia, Spain, Czech Rep, Slovak Rep, Estonia, Latvia, Poland, Slovenia, Taiwan China, Thailand, Samoa, Singapore, Oman, Saudi Arabia, Argentina, Honduras, Kenya, Malawi



A PARTING SUMMARY

- Opportunities offered by broadband

- A National Broadband Plan is as much a social contract as a call to develop an industry base*
- Addressing infrastructure solutions , penetration and access is not sufficient*
- A Plan needs to also address skill acquisition, training and competence to use the access*
- A Plan should lead to a stronger foundation to the three pillars of effective government, private investment, and a more active citizenship*