

REGIONAL REGULATORY CONFERENCE

**NEXT
GENERATION
REGULATION**

25-26 SEPTEMBER 2017
BUDVA, MONTENEGRO

3G

4G

5G



THE 5TH
GENERATION OF
REGULATION

TRENDS IN
ICT POLICY &
REGULATION

DEVELOPMENT OF NEXT
GENERATION ACCESS
NETWORKS

MARKET ANALYSIS
AND PRICE
REGULATION

NEW CHALLENGES
IN USER PROTECTION

NETWORK SAFETY
AND INTEGRITY

GLOBAL ICT REGULATORY TRENDS

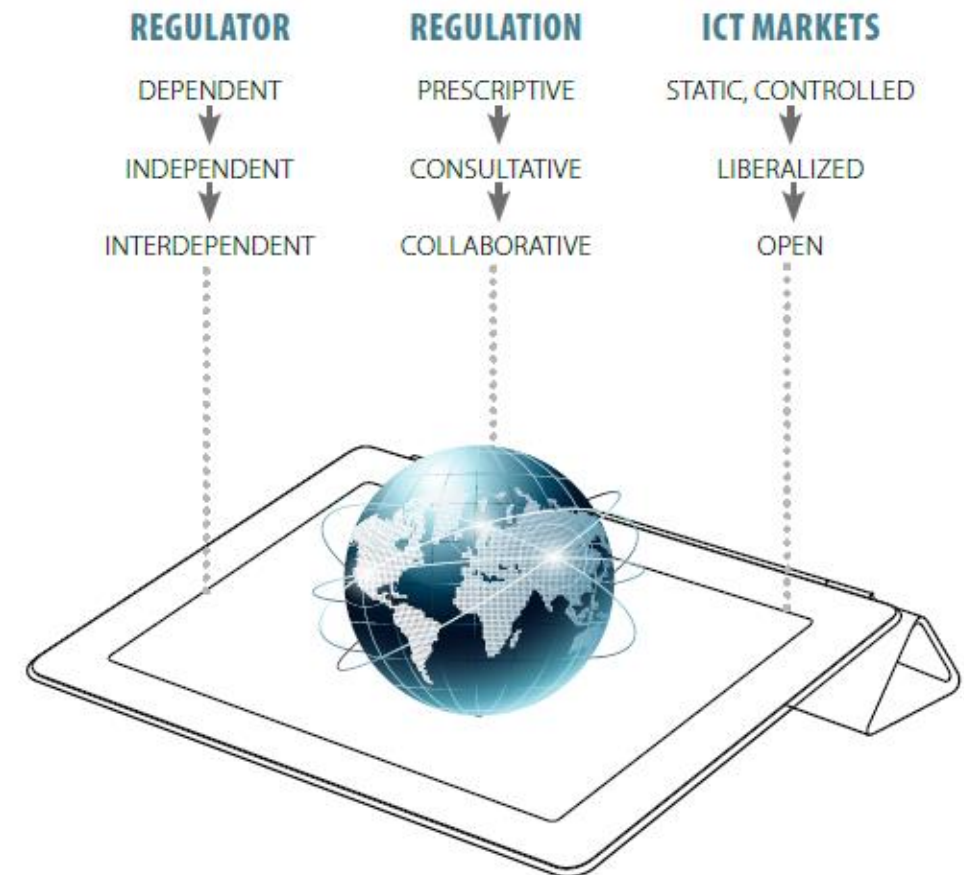
Jaroslav K. PONDER
Head of ITU Office for Europe

Regulation for the digital economy

- Digital economy comes of age
- Regulation serves as the interface between governments, investors, service and content providers, and consumers
- New market realities call for new regulatory approaches and tools
- Challenges and opportunities go hand-in-hand and ICT regulators are under pressure to make the most of it

CHANGING PATHS OF THE ICT REGULATOR, REGULATION AND MARKETS

Source: ITU.



1 - Holistic regulation to support market transformation

- Focus of ICT regulation widens
- Convergence blurs boundaries
- Pace of ICT markets accelerates
- Technology and business innovation drives transformation across the board

Source: ITU.

ICT MARKETS IN A DIGITAL TRANSFORMATION

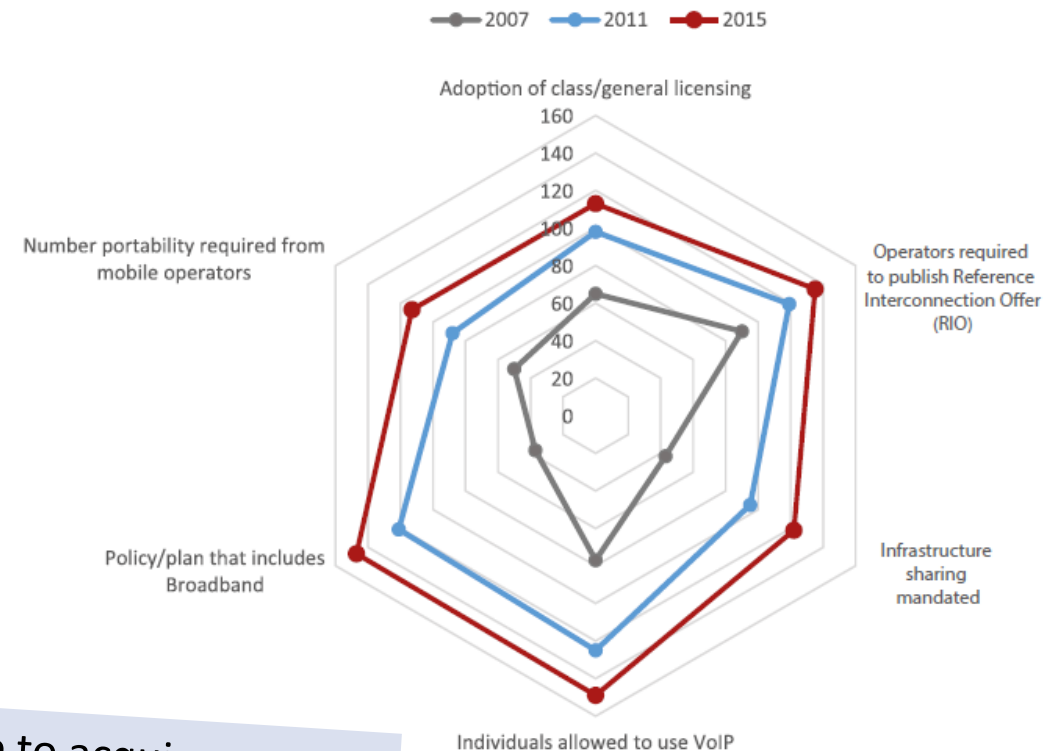


2 - Pace and volume of regulation are increasing

- Core regulatory areas still require attention
- New challenges queuing up to accelerate market movement and pace of regulation
- Compromises and trade-offs along the way
- Seeking consensus about most appropriate regulation... or no regulation at all
- Hands-on vs hands-off

Not enough for ICT regulators to 'go with the flow'. They have to acquire new skills in new areas as newer technologies emerge

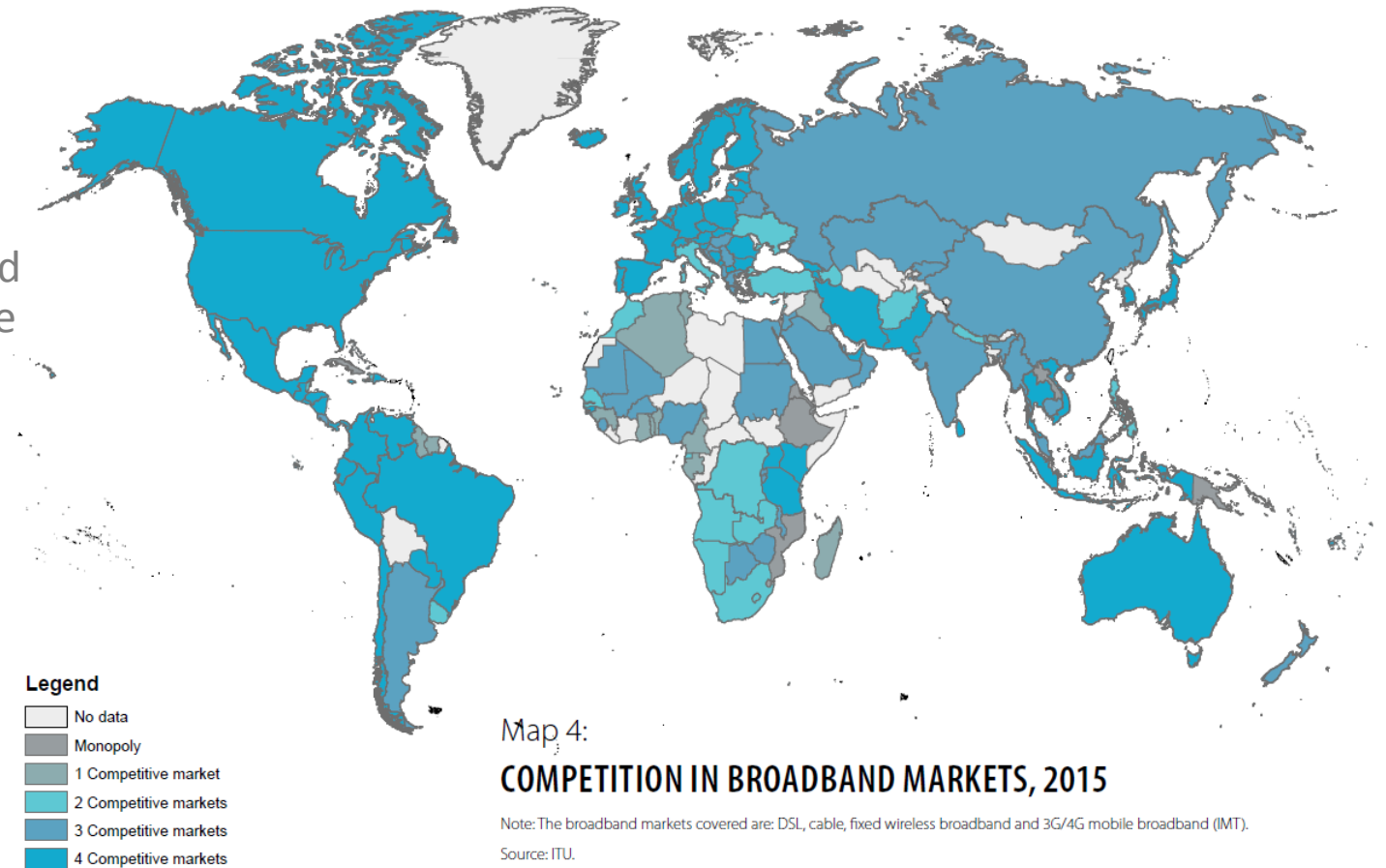
Evolution of regulatory regimes in the ICT sector, worldwide



Source: ITU.

3 - Regulation as an equalizer

- Competition policy and regulatory frameworks helped drive innovation and growth – regulators have at hand a wide array of investment incentives
- Countries that opened up broadband markets saw more rapid service penetration
- Clear and open regulatory frameworks facilitate the adoption and take-up of new services and applications



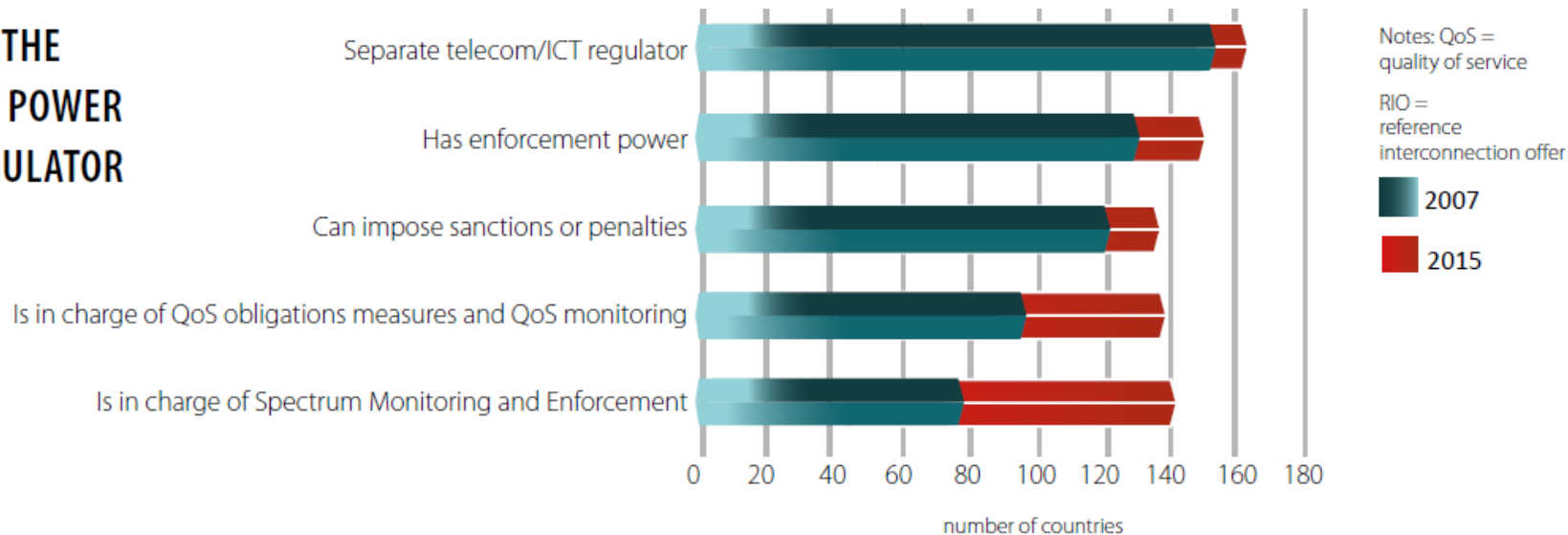
Regulation creates more vibrant ICT markets.
The more opened up the broadband market, the more consumers are connected and more rapidly.

4 - Focus moves to monitoring and enforcement

- Regulatory monitoring over ICT networks reinforced in interconnection, infrastructure sharing, QoS
- OTTs, OSPs have become enforcement priority – without clear rules or specific tools for enforcement
- Issues like taxation of global players and quality of information on social media have given rise to passionate global debate

EVOLUTION OF THE ENFORCEMENT POWER OF THE ICT REGULATOR WORLDWIDE

Source: ITU.



5 - Convergence, divergence

TOPICAL ISSUES AT STAKE AND REGULATORY INTERVENTION

Note: This list is indicative and not exhaustive.

Source: ITU.



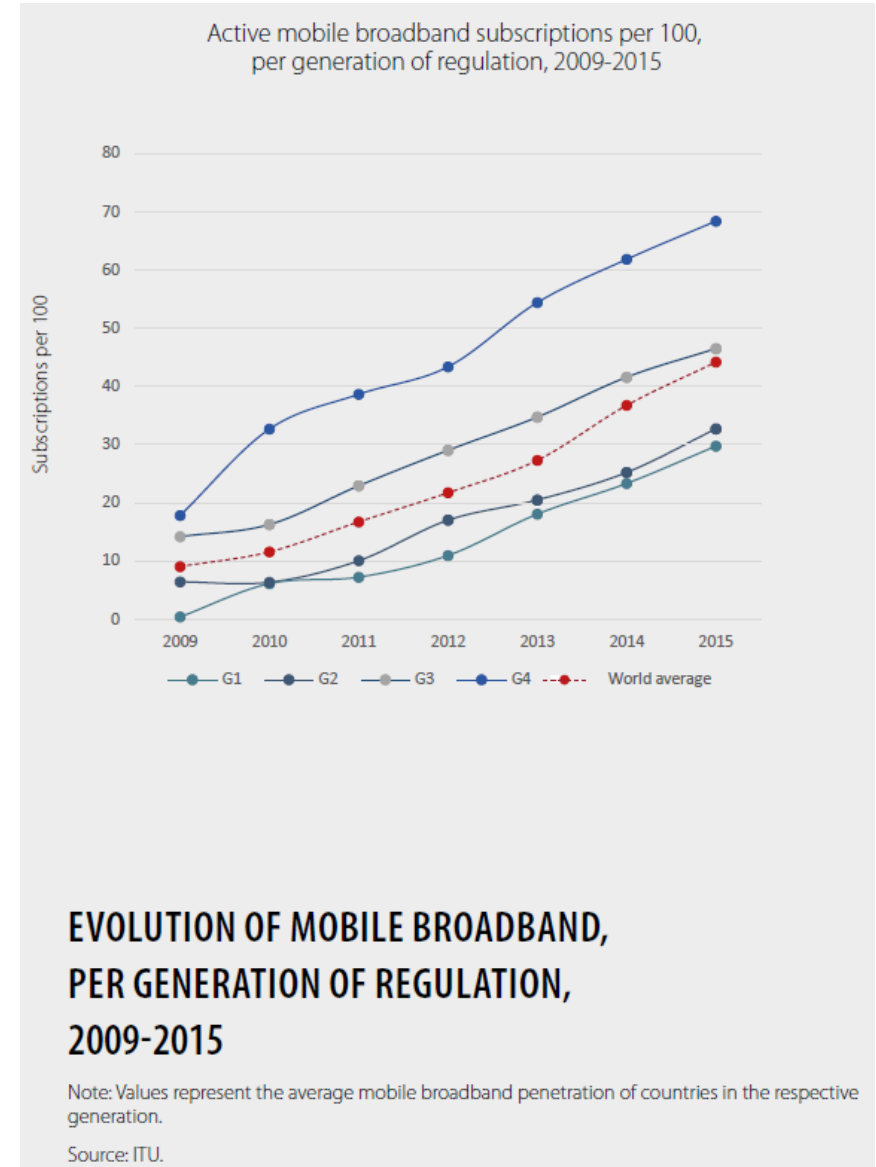
Many ICT regulators have addressed	Some regulators have addressed	Some ICT regulators are looking into	Issues on ICT regulators' horizon
<ul style="list-style-type: none"> • Competition 	<ul style="list-style-type: none"> • Privacy & data protection 	<ul style="list-style-type: none"> • OTTs/OSPs 	<ul style="list-style-type: none"> • Autonomous driving car
<ul style="list-style-type: none"> • Licensing 	<ul style="list-style-type: none"> • Net neutrality 	<ul style="list-style-type: none"> • e/m-applications 	<ul style="list-style-type: none"> • Blockchain
<ul style="list-style-type: none"> • Price regulation 	<ul style="list-style-type: none"> • Spectrum trading 	<ul style="list-style-type: none"> • Digital financial services 	<ul style="list-style-type: none"> • Electronic currencies (e.g., bitcoin)
<ul style="list-style-type: none"> • Interconnection 	<ul style="list-style-type: none"> • Structural separation 	<ul style="list-style-type: none"> • Internet of Things 	<ul style="list-style-type: none"> • Automated Electronic Trading
<ul style="list-style-type: none"> • Number portability 	<ul style="list-style-type: none"> • ICT accessibility 	<ul style="list-style-type: none"> • Cloud computing 	<ul style="list-style-type: none"> • Counterfeiting

- Established regulatory practices in competition, licensing, interconnection etc. converge
- Existing regulation challenged – no clear, single regulatory pattern to follow
- New issues constantly emerging

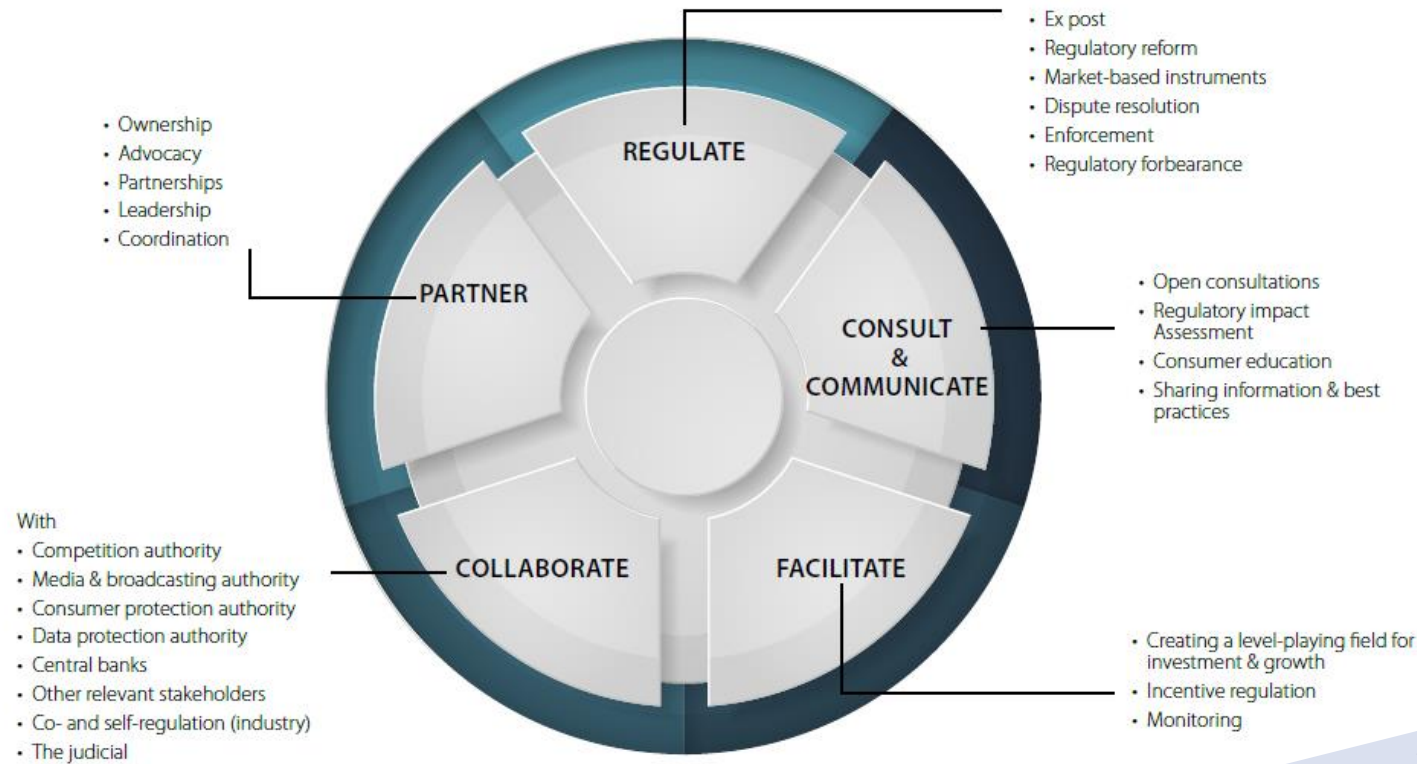
- Regulation in disrupted areas will likely lead regulators off beaten path
- To regulate or not to regulate - and how?
- Global issues needing action from international community

6 - Good regulation has impact

- Good regulation was proven to have positive impact on mobile cellular, mobile-broadband and fixed broadband penetration
- Analysis demonstrates just how crucial the role of good regulatory frameworks is:
- The most advanced countries in terms of ICT regulation, those in the 4th generation of regulation, outperform everyone else by far – with almost 70 per cent mobile broadband penetration in 2015 compared to a world average of 44 per cent
- Countries with less sound regulatory frameworks, those in the 1st and 2nd generation, are falling further behind the world average



7 - Collaborative regulation fast-track for digital economy



THE WHEEL OF COLLABORATIVE REGULATION

Source: ITU.

Tapping the network of regulators from different sectors will be the catalyst to chart the way ahead



GLOBAL ICT REGULATORY OUTLOOK 2017

itu.int/go/outlook17



ICT Regulatory Tracker 2015

#ITUdata

[Tracker by Country](#) [Country Card](#) [Tracker by Region](#) [Comparison](#) [Map](#) [Generations of Regulation](#) [Abo](#)

Select an option

ICT Regulatory Tracker 2015

Cluster	C1: Regulatory Authority	C2: Regulatory Mandate	C3: Regulatory Regime	C4: Competition Framework	Overall Score
Max Score:	20	22	30	28	100
Country					
Afghanistan	13.00	20.00	22.00	16.67	71.67
Albania	18.00	17.00	26.00	21.00	82.00
Algeria	18.00	17.00	18.00	11.00	64.00
Andorra	4.00	9.00	10.00	0.00	23.00
Angola	17.00	20.00	18.00	10.67	65.67
Antigua & Barbuda	8.00	11.50	10.00	15.33	44.83
Argentina	18.00	20.00	23.00	28.00	89.00
Armenia	19.00	16.50	15.00	28.00	78.50
Australia	18.00	19.50	28.00	27.00	92.50
Austria	18.00	16.50	28.00	27.00	89.50

itu.int/go/tracker

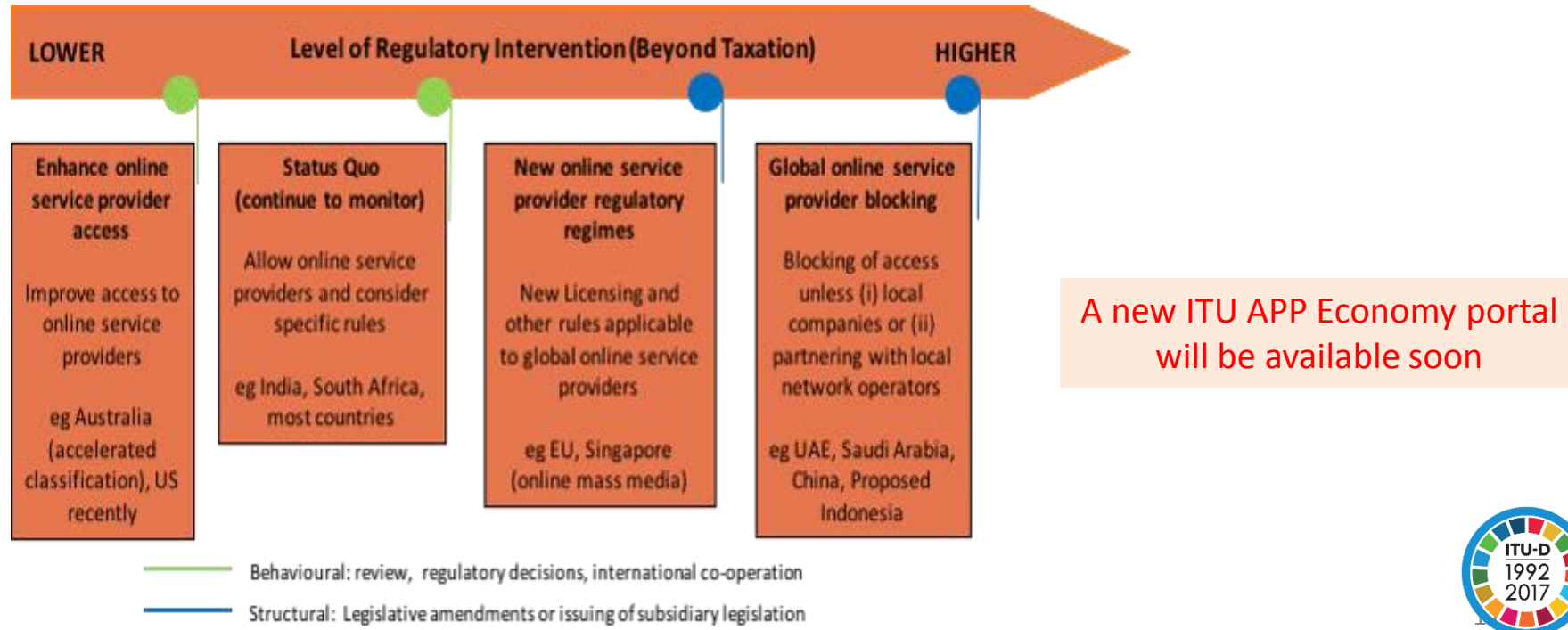


Digital Economy

ITU is working on the App Economy from the point of view of:

- ✓ New Business Models
- ✓ The dynamic perspective of Telecommunicating/ICT regulation in the changing markets and new opportunities
- ✓ Socio-economic impact of the App Economy
- ✓ Region/countries case studies (e.g. Africa)

Continuum of possible regulatory responses on the App Economy





QoS Regulation Manual



A one stop shop reference manual for regulators and market players

- ▶ QoS framework from a technical perspective, drawing from the work done by ITU-T on QoS standardization (ITU-T Study Group 12)
- ▶ QoS regulatory framework and the role of National Regulatory Authorities (NRAs) in addressing QoS
- ▶ Traffic management , QoS parameters and Key Performance Indicators (KPIs)
- ▶ Broadband QoS measurement, examining different measurement tools and platforms. The economic principles for QoS regulation
- ▶ Network neutrality and its regulation worldwide
- ▶ Consumer protection and privacy aspects
- ▶ QoS enforcement
- ▶ Good practices
- ▶ Country case studies

www.itu.int/treg

The screenshot shows the ITU website's 'Regulatory and Market Environment' section. The main headline is 'Global ICT Regulatory Outlook 2017', described as a new landmark publication. Below this, there are sections for 'GSR' (Global Symposium for Regulators) and 'PUBLICATIONS & STUDIES'. The 'GSR' section mentions the 11-14 July 2017 event in Nassau, Bahamas. The 'PUBLICATIONS & STUDIES' section lists various reports, including 'Trends in Telecommunication Reform Series', 'ITU Thematic Reports Series', and 'EUIPO-ITU Report: The economic cost of IPR infringement in the Smartphones Sector'. A 'HIGHLIGHTS' section features the 'ICTEYE' logo. At the bottom, there are 'Events' and 'Links' sections, with an event for the 'ITU Fifth Regional Forum on Inter-connectivity & Reduction of telecommunication service prices and Internet access cost' in Mexico City, Mexico, on 22 September 2017.

To be released in October 2017, free of charge!



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Français

#ICT4SDG

What would you like to search for?

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- Radiocommunication
- Standardization
- Development
- ITU Telecom
- Members' Zone
- Join ITU

LET'S ROAM THE WORLD - ITU International Mobile Roaming (IMR) Resources Portal

YOU ARE HERE [HOME](#) > [ITU-D](#) > [REGULATORY & MARKET ENVIRONMENT](#) > LET'S ROAM THE WORLD - ITU INTERNATIONAL MOBILE ROAMING (IMR) RESOURCES PORTAL

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During the last several years significant policy and regulatory actions have taken place to tackle the problem of high International Mobile Roaming (IMR) service prices at national, regional and international level. The aim has been to reduce what is viewed as excessively high mobile roaming retail prices but also to find longer term solutions to introduce competition in this market.

Recognizing the importance of this key issue, this portal gathers information on all the activities done by ITU in this area as well as about activities and initiatives done by Regulatory Associations, Regional and International Organizations and other stakeholders. It also highlights key findings from ITU Publications, studies, research, ITU Study Groups, and data and analysis on IMR from the ITU ICT Eye.

Following the success of the [ITU Global Dialogue on International Mobile Roaming \(IMR\)](#), that took place at the ITU Headquarters in Switzerland (18 September 2015), as part of the **LET'S ROAM THE WORLD Initiative launched in 2015 by Mr Brahim Sanou, Director of the ITU Telecommunication Development Bureau**, ITU organized the **IMR Consultation Meeting on International Mobile Roaming** held in Geneva from 15 to 16 September 2016. The objective of this Consultation was to bring together Regulatory Associations, Regional and International Organizations, Consumer Associations and Private Sector Associations to discuss and collaborate on defining the building blocks for International Mobile Roaming (IMR) Strategic Guidelines.

RECENT ITU ACTIVITIES ON ROAMING

- A Case Study of ONA: East Africa One Network Area Roaming Initiative - 2016
- ITU-T Recommendation D.97 on methodological

INTERNATIONAL ACTIVITIES/INITIATIVES

[Body of European Regulators of Electronic Communications \(BEREC\)](#)

- BEREC adopts Guidelines on the Wholesale Roaming

Other interesting IMR links

- 'Roam-like-at-home': EU moves closer to ending roaming charges, by ITU News. (June 2017)
- The Republic of Korea moves to scrap monthly mobile service charges - fees which have historically been a key driver for telecoms' industry profitability - due to mounting consumer pressure. (June 2017)
- Finland's telcos are seeking a one-year stay from impending EU-wide roaming charges (June 2017)
- Roaming in Cuba: AT&T is the latest US telco to sign a roaming agreement with ETECSA for voice, texts and data (August 2016)
- Kenya: Safaricom Drops Roaming Charges by Up to 99% (July 2016)
- EU First results of the roaming public consultation (March 2016)
- EU New rules on roaming charges and open Internet (October 2015)
- Bilateral agreement between Belgian and Luxembourg telecoms regulators (April 2015)
- GSMA - GSM Roaming and Coverage Maps
- African Union (AU) International Mobile Roaming Guidelines (September 2013)
- APT Working Group Report on IMR (May 2012)
- Trans-Tasman mobile roaming - joint Australia-New Zealand IMR investigation
- Ofcom's website on IMR for UK consumers

LET'S ROAM THE WORLD INITIATIVE

This initiative was launched by Mr Brahim Sanou,



Let's roam the world

- BDT Director's Let's Roam the World Initiative;
- ITU-D IMR Portal for research, data and analysis related to IMR
- IMR Strategic guidelines coming soon



CELEBRATING
25 YEARS
OF ACHIEVEMENTS



GSR17

11-14 JULY 2017

NASSAU, BAHAMAS



GSR-17

Living in a World of Digital Opportunities





GSR17

11-14 JULY 2017

NASSAU, BAHAMAS



Regulators were invited to identify innovative and collaborative policy, regulatory and business measures needed to lift the barriers and achieve affordable access to the digital world in the following areas:

- **Infrastructure and connectivity:** innovative measures at the international, national and local levels
- **Consumer access:** to ICT services (subscription, plans, platforms and apps) and devices (smartphones, tablets, computed-based, etc.)
- **Market and business opportunities:** market access, sustainable models, cross-sectoral approaches and economic incentives
- **Funding and financing:** private funding, partnerships, public financing and regulatory incentives to support affordability and sustainability in uneconomic markets.





GSR17

11-14 JULY 2017

NASSAU, BAHAMAS



Key themes

- I. Strengthening the regulatory foundation for affordable access to digital services**
- II. Further adapting and scoping incentives for delivering digital services**
- III. Next-generation incentives for affordable digital services**





GSR17

11-14 JULY 2017

NASSAU, BAHAMAS



I. Strengthening the regulatory foundation for affordable access to digital services

Recognizing the transformative power of regulatory instruments for reducing the cost of ICT infrastructure deployment and the adoption of end-user services, we reiterate their relevance and call for strengthening and further streamlining rules and practices. We recall and reconfirm the importance of such measures and incentives, as iterated in the GSR best practice guidelines from previous years.





GSR17

11-14 JULY 2017

NASSAU, BAHAMAS



II. Further adapting and scoping incentives for delivering digital services

Building on the foundation of such widely-recognized practices, we furthermore call for recalibrating current regulatory paradigms for the digital markets of the future keeping in mind that the affordability of digital services depends on multiple factors related to their infrastructure, cost, resale and provision.

Governments and regulators should do more to address the affordability and use of digital services by promoting policies and regulatory measures





GSR17

11-14 JULY 2017

NASSAU, BAHAMAS



III. Next-generation incentives for affordable digital services

We believe it's important that today's fast-evolving markets – rich in innovative digital technologies, products and services – continue to thrive and grow.

We further reiterate that an open, collaborative approach to regulation can go a long way towards addressing affordability of digital services.

Regulators from all sectors where digital services have become available need to cooperate proactively.





GSR17

11-14 JULY 2017

NASSAU, BAHAMAS



GSR17 Best Practices Guidelines

Consultation and BPG Available at:
<http://www.itu.int/en/ITU-D/Conferences/GSR/Pages/GSR2017/GSR-17-Consultation.aspx>





GSR18

Geneva,
Switzerland



Theme:
**Exploring new
regulatory
paradigms
in a digital
economy**

Dates: 9-12 July 2018

