



Subregional Telecommunication Ministerial Forum for
Cambodia, Lao PDR, Myanmar and Vietnam

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ITU Report on
Enabling Environment for ICT Development in
CLMV Countries – Moving Forward

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ATTORNEYS AND SOLICITORS

Presentation overview

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- Regional developments
 - ICT Indicators
 - Infrastructure
 - Market overview

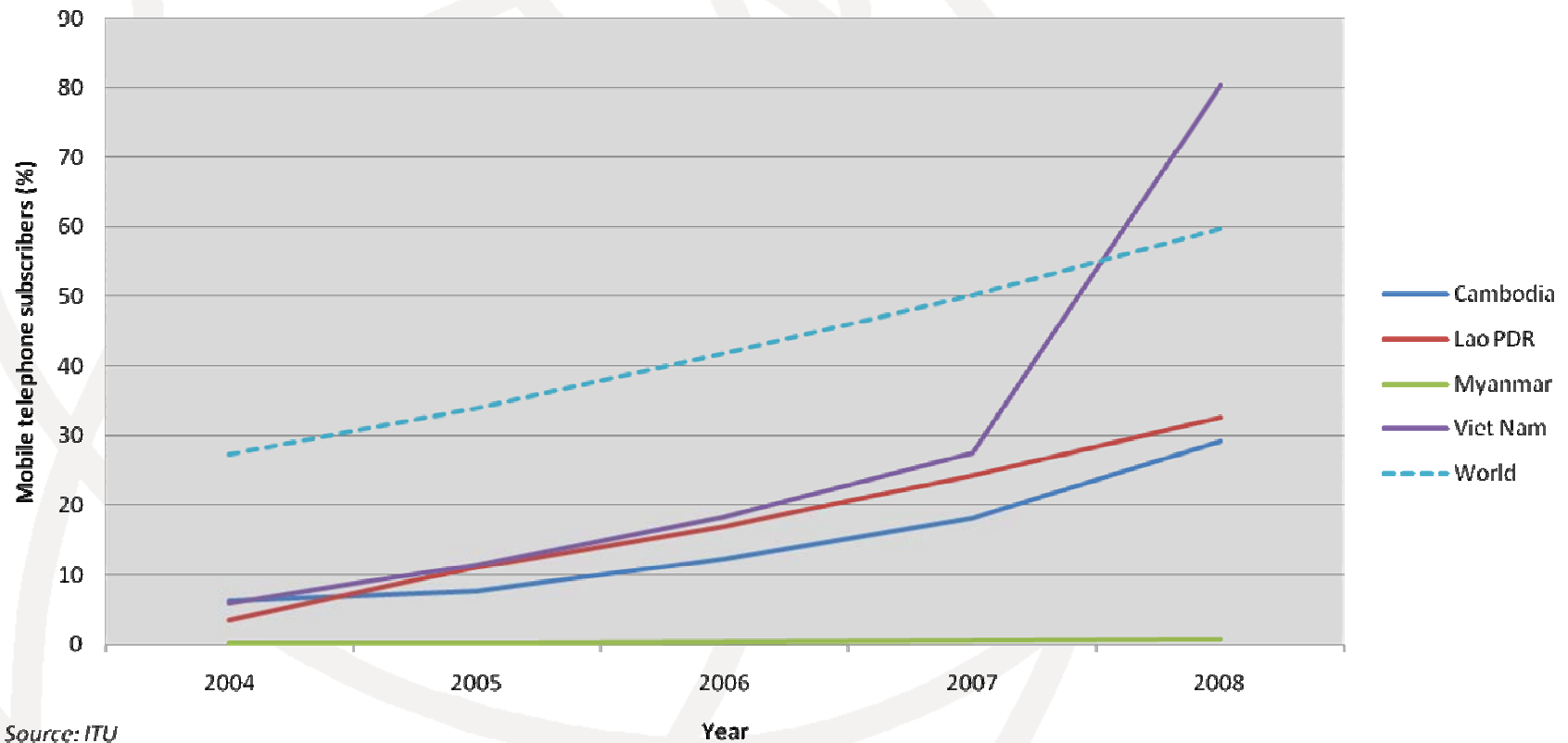
 - Policy, legal & regulatory framework
 - Policy
 - Trade and telecoms
 - Legislation
 - Institutions
 - Regulation
 - Universal access
 - Cybersecurity

 - Measures for consideration

ICT indicators

- Mobile

Figure 2.2 Mobile telephone subscribers per 100 inhabitants,
2004 - 2008

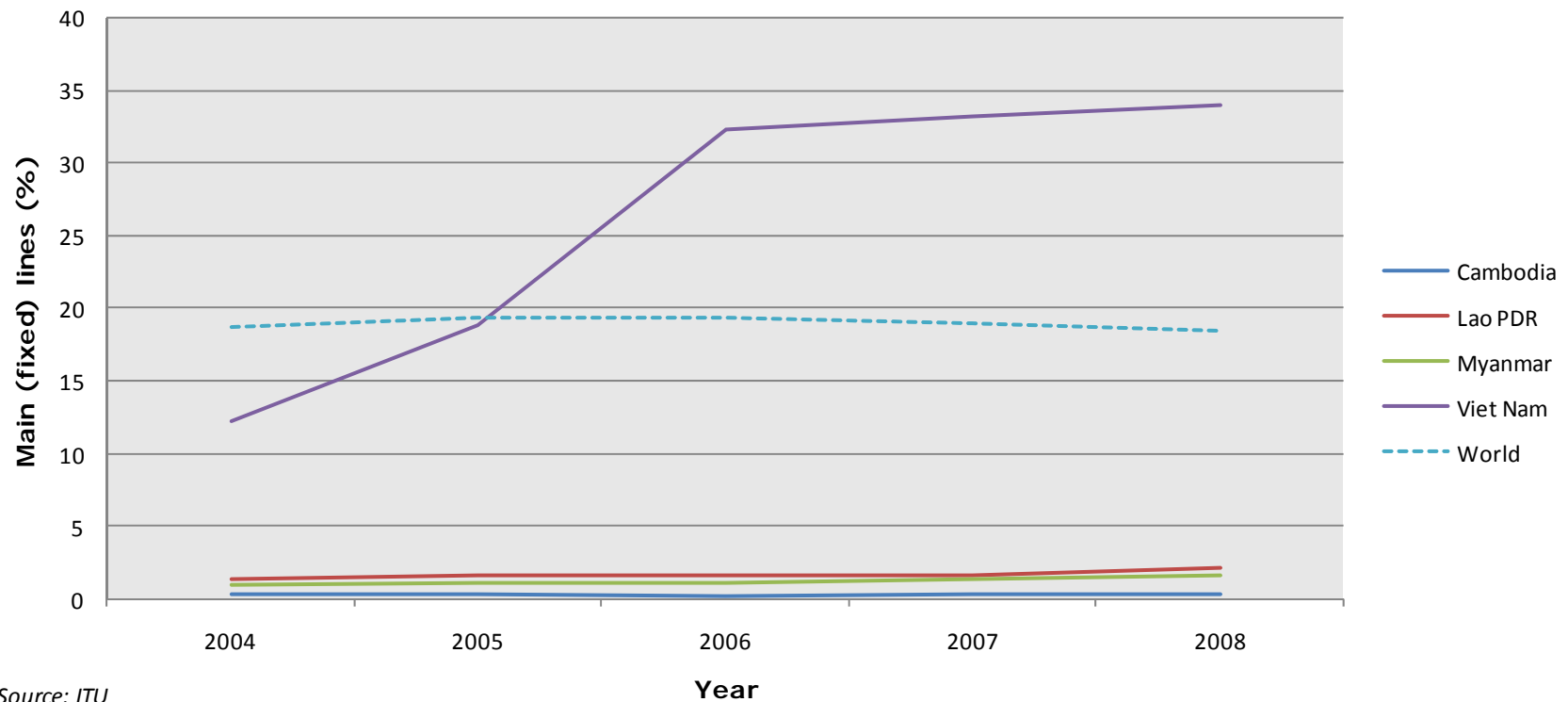


Source: ITU

ICT indicators

- Fixed line

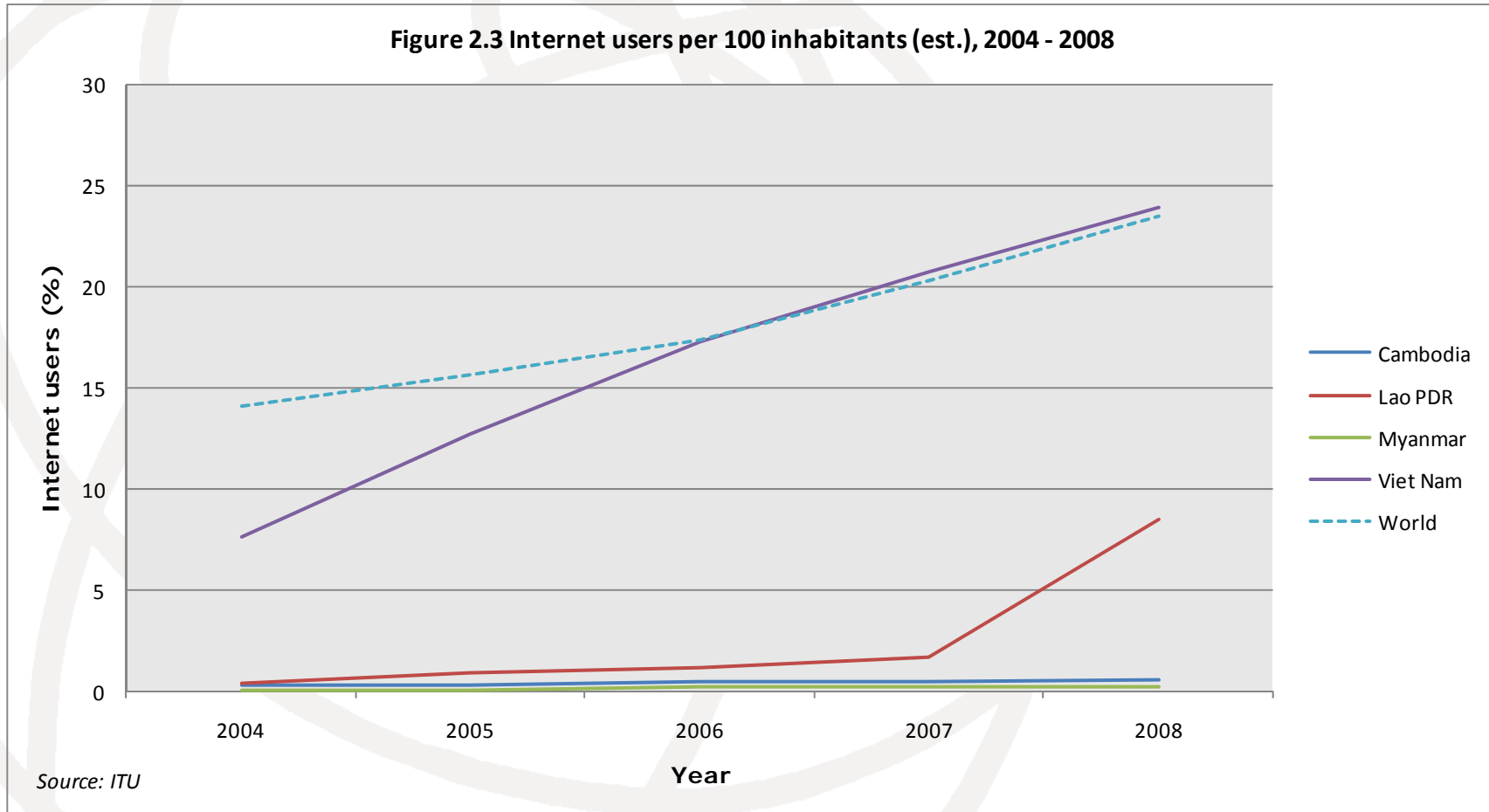
Figure 2.1 Main (fixed) telephone lines per 100 inhabitants,
2004 - 2008



Source: ITU

ICT indicators

- Internet



ICT infrastructure

- 
- International connectivity
 - Undersea cable
 - Satellite

 - Regional connectivity
 - GMS Information superhighway network
 - CLMV cross-border links

 - National connectivity
 - Optical fiber backbone
 - Fixed line access
 - Mobile coverage

Market overview

- Service providers
 - Mobile
 - Fixed
 - ISPs

- Services and technologies
 - Mobile and broadband

- Pricing and affordability

Country	Rank	ICT Price Basket Value	Fixed (% of GNI per capita)	Mobile (% of GNI per capita)	Broadband (% of GNI per capita)	GNI per capita (USD)
Cambodia	29	43.0	17.9	11.2	201.2	540
Lao PDR	26	38.1	8.2	6.1	555.1	580
Viet Nam	20	11.9	3.5	6.4	25.8	790

Policy framework

- National ICT policy as starting point
 - ICT vision
 - National ICT objectives
 - Roles of stakeholders
 - Frames laws and regulations

- Period of transition
 - Process of formulation
 - ICT development needs direction and focus

Trade & telecoms

- Catalyst for ICT liberalization
 - Market access commitments
 - WTO Agreement on Basic Telecoms and Reference Paper
- Challenge of adjustment
 - Implementing WTO commitments
 - Translation into laws and regulations
 - Pressure on investment restrictions

Legislative framework

- Long term foundation for development
 - Conditions for competition
 - Rights and obligations
 - Framework for regulation

- Transformative stage
 - New ICT laws

“Uncertainty vs. Opportunity for change”

Institutional framework

- Key to functional effectiveness
 - Clear legal mandate
 - Separation of policy-making, regulation and operations
 - Adapted to convergence

- Ongoing process
 - Opportunity to reflect best international practice

Regulatory framework

Licensing

■ Basis for market entry

- Transparent
- Impartial
- Simplified
- Convergent

■ Need for major steps

- Standardization
- Simplification

Regulatory framework

Competition policy

- Tool for effective competition
 - Market entry is only once facet of competition
 - Focus on dominance levels field
 - Limits abuse of market power
 - Reduces regulatory burden

- Insufficiently adopted
 - Develop capacity
 - Adopt approach and methodology

Regulatory framework

Interconnection & access

- Ensures connectivity
 - Facilitates market entry
 - Addresses market power imbalances
- More emphasis required
 - Minimal intervention presently
 - Asymmetric regulation

Regulatory framework

Infrastructure sharing

- Reduces costs of deployment
- Promotes efficient use of resources
 - Signaling of support
 - Addressing competition concerns
- Moving in the right direction
 - Climate of growth offers vast potential
 - Need for guidance

Regulatory framework

Price regulation

- Preventing anti-competitive pricing
 - Heavy regulatory intervention
 - Shift to from retail to wholesale
- Lifting the burden
 - Need for clear regulations
 - Asymmetric regulation

Regulatory framework

Spectrum management

- Basis for efficient usage
 - Transparent
 - Systematic
 - Flexible
- Increasing complexity
 - Growing reliance on mobile and wireless
 - Need for more detailed and streamlined procedures

Policy, legal
and regulatory
frameworks

Universal access framework

- Driver of ICT dissemination
 - Shifting of the burden from public to private
 - Market neutral approaches
- Need for institutionalization
 - Establishment of universality funds
 - Public-private partnerships

Cybersecurity framework

- National Critical ICT Infrastructure Protection
 - National policy
 - Institutional coordination
 - Legal framework
 - Monitoring and response
 - Capacity building and awareness

- Progressing forward gradually
 - Developing a national policy
 - Addressing cybercrimes
 - Initiating public-private activities

Measures for consideration

National level

- Accelerate preparation and adoption of national ICT policy, legislation and regulation
- Bring frameworks in line with more liberal trade commitments
- Adapt frameworks to convergence
- Clarify legal mandates and institutional separation
- Adopt simple, transparent and standardized licensing process

Measures for consideration

National level

- Adopt asymmetrical regulation for interconnection and rate regulation
- Introduce regulations supporting infrastructure sharing
- Develop clear spectrum regulations
- Establish and operationalize a universal fund and administrator and initiate PPPs
- Review cybersecurity frameworks and establish a comprehensive national approach

Measures for consideration

CLMV level

- Increase the capacity of ICT institutions in policy, legislation and regulation by
 - supporting training (online and offline) and human resource development
 - organizing opportunities for information exchange
- Promote inter-regional ICT policy and regulatory cooperation

Measures for consideration

CLMV level

- Initiate a study on ICT regulatory harmonization to
 - pool regulatory resources
 - promote foreign and regional cross-border investments

- Conduct cybersecurity joint readiness exercises and peer reviews



Thank you

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