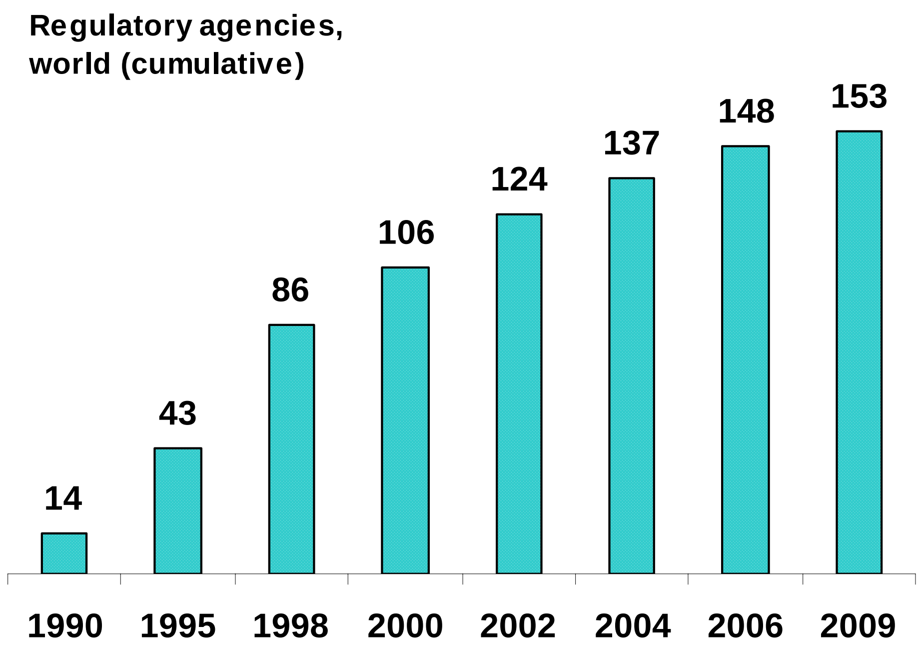
Global ICT Regulatory and Market Trends Overview

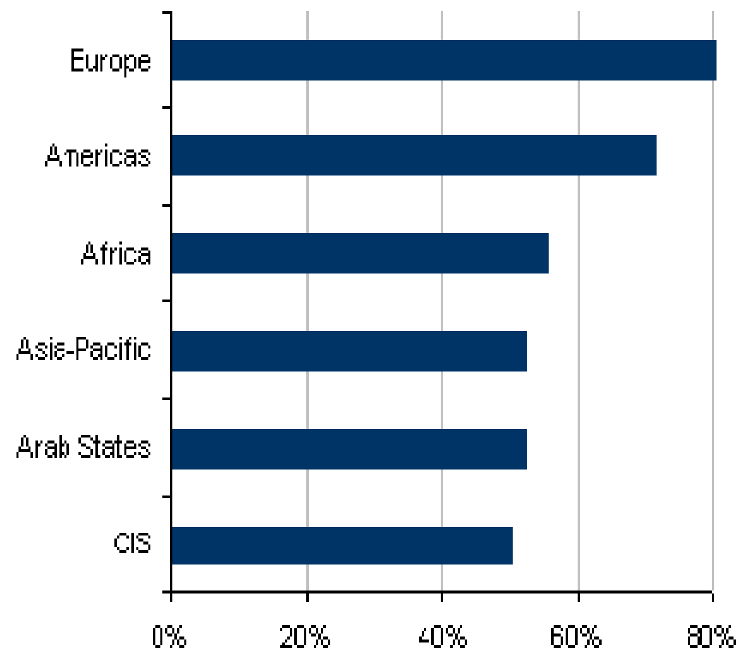
Nancy Sundberg
Regulatory and Market Environment Division
BDT, International Telecommunication Union

1st wave of regulatory reform

Growth of Regulators, worldwide 2009

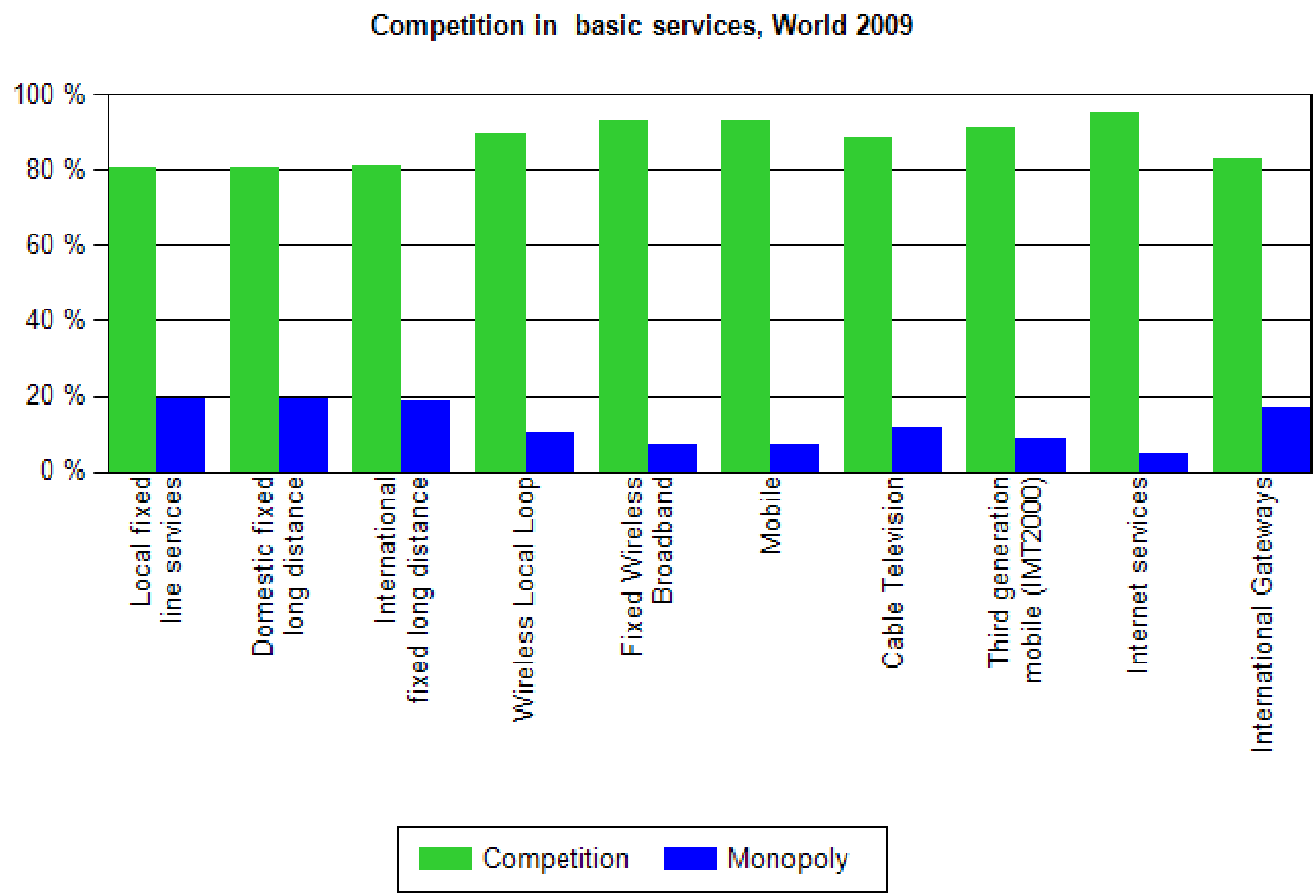


Privately-owned fixed-line incumbents in %, by region, 2009



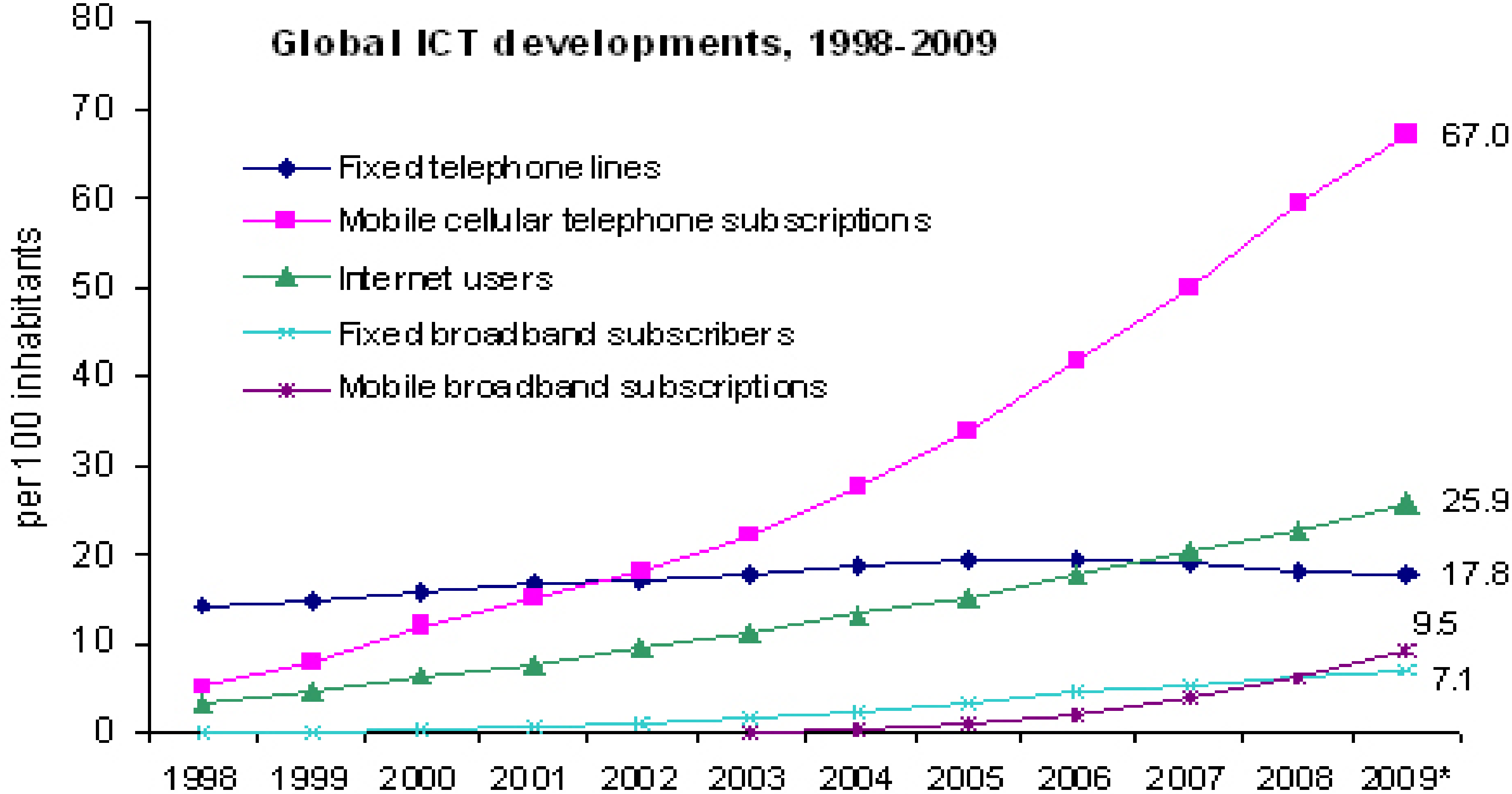
Source: ITU Telecommunication Regulatory Database

Competition in selected services, 2009



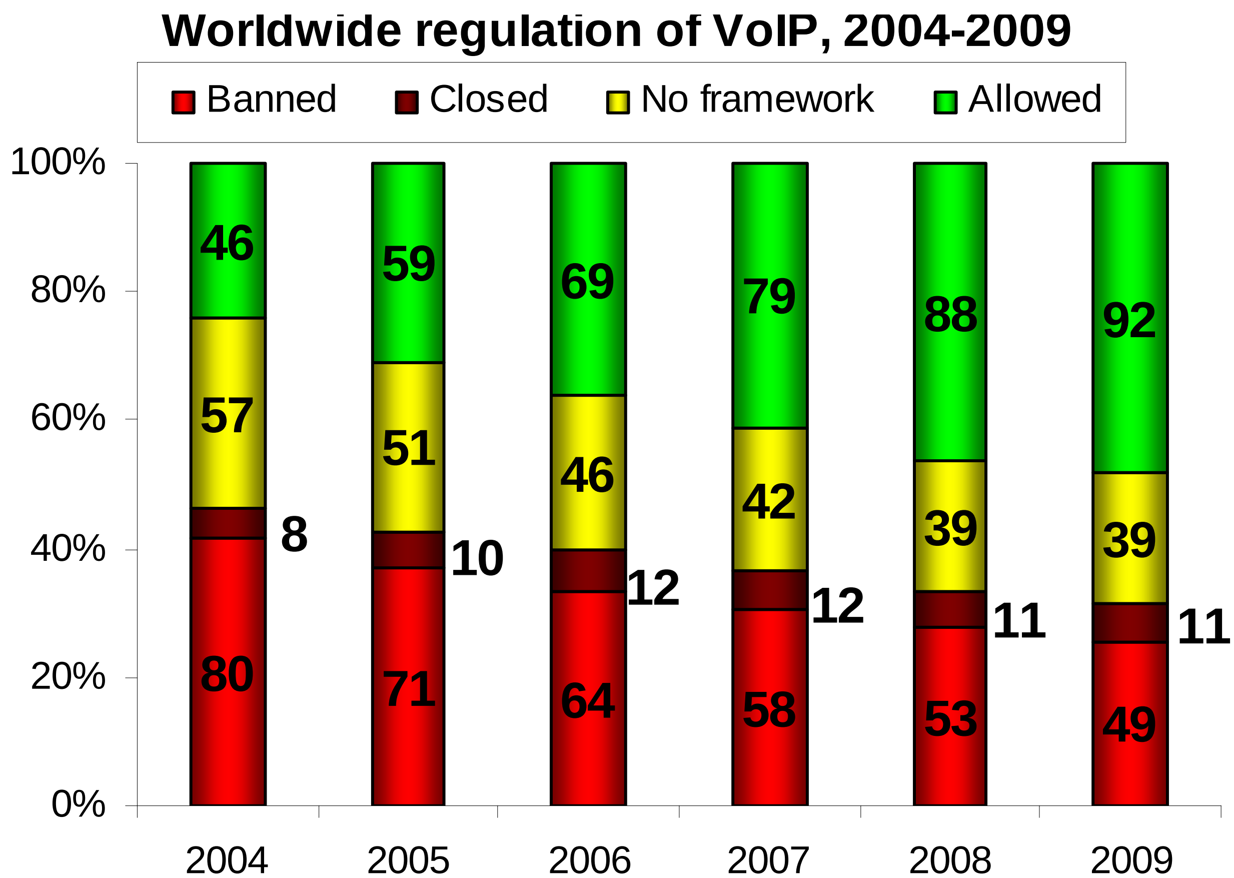
Source: ITU Telecommunication Regulatory Database (right chart)

Global telecom market on the move



Source: ITU World Telecommunication/ICT Indicators Database (left chart) and ITU Telecommunication Regulatory Database (right chart)

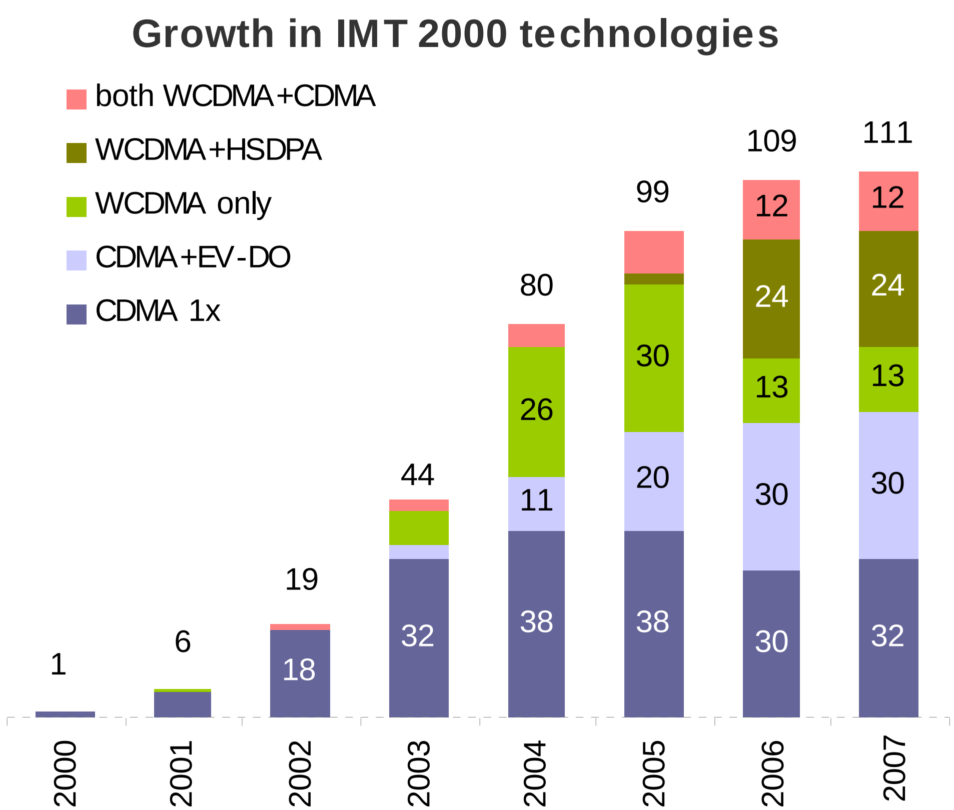
Status of VoIP regulation in the world, 2004-2009



Source: Source: ITU World Telecommunication Regulatory Database

Data are available for 191 countries. 'Closed' means only wholesale VoIP is permitted or VoIP is restricted to the incumbents only. All data are for year-end, except mid-2009.

IMT on the rise



Growing variety of:

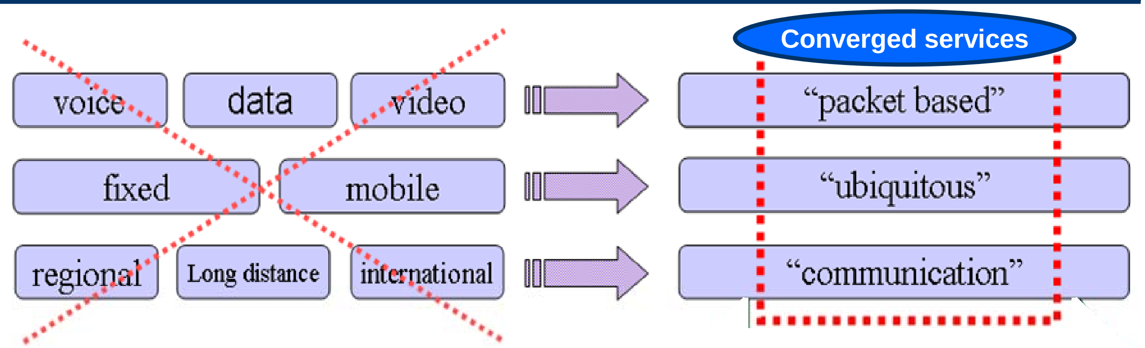
- Technologies
- Operators
- Commercial IMT networks
- Business models (MVNOs, operators sharing network elements, etc.)
- Service offers such as financial services (m-banking)
- Subscribers
- Networks coverage
- Cheaper handsets

Source: ITU Trends in Telecommunication Reform 2007: The Road to NGN

Network convergence

Transition from PSTN to all-IP

Drastic change in market structure (paradigm shift)



From intermodal competition to intramodal competition

- Network convergence enables convergence of services.
- With the shift to NGNs, the distinction between network infrastructure, technology, and the services and applications
  that are delivered is increasingly blurred

2nd wave of regulatory reform

Efficient and independent regulator with extended powers
- From separate telecom & broadcasting regulatory institutions towards converged regulatory institutions

- **Licensing**
  - From service-specific licenses towards general authorizations, unified & class licences
  - From technology-specific towards technology-neutral licences

- **Spectrum**
  - From administrative approach towards flexible spectrum allocation practices (sharing, trading, etc.) to create new access networks that deliver both voice and broadband cost-effectively

- **Network & bottleneck facilities**
  - From exclusive ownership towards passive & active infrastructure sharing
  - Open access to network and bottleneck facilities (fibre backbones, LLU)
  - International gateway liberalization

- **Universal access & services**
  - From fixed-line voice towards broadband universal access

- **Flexible, transparent & simplified procedures**
  - Facilitate market entry
  - Stimulate innovation