ICT REGULATION AND SOCIAL MEDIA

REGIONAL SG3RG-AFR

Cotonou , Bénin , 8 – 9 May 2012

Makhtar FALL
RME /IEE / BDT
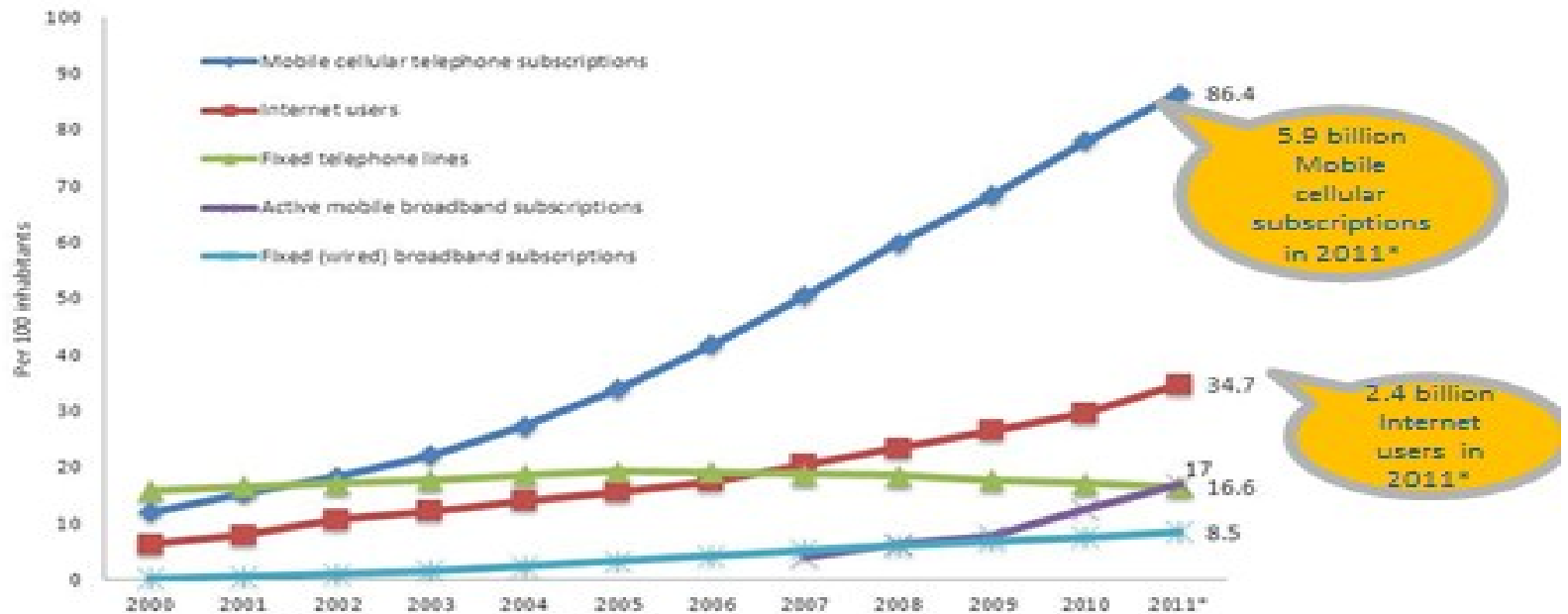
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Agenda

- Market and Regulatory trends
- Broadband Regulatory and tariffs Environment
- New media: what makes them social?
- Regulation of new media
- Future challenges

Global ICT developments, 2000-2011

*Estimate
Source: ITU World Telecommunication /ICT Indicators database

Broadband Penetration

*Estimates
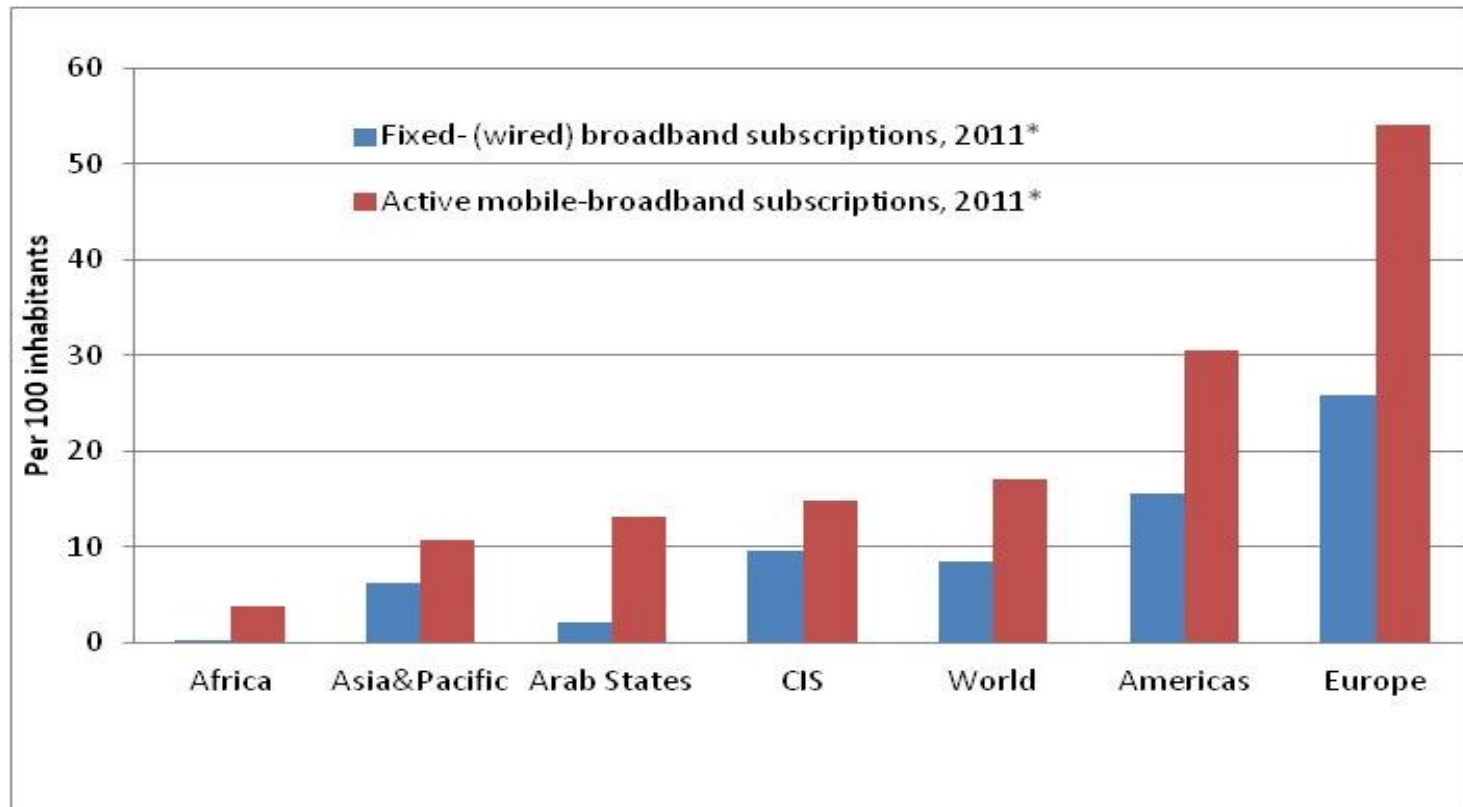
Source: ITU World Telecommunication/ICT Indicators database

Strong growth in mobile & 3G telephony

Global Mobile BB Subscribers

- Mobile BB subscribers
- 3G % mobile

Millions

Year	Value
2003	0.5
2004	1.7
2005	3.2
2006	5.6
2007	8
2008	11
2009	15
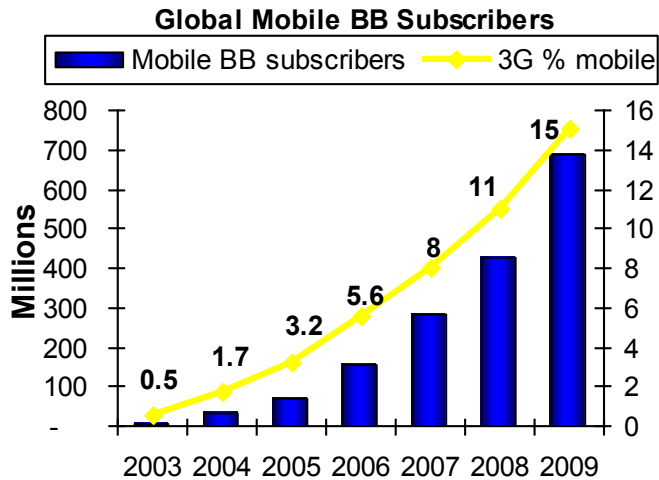
Mobile subscribers (total & 3G) 2007-2014

- 3G
- Other

Year	Total
2007	3'413
2008	3'909
2009	4'587
2010	'024
2011	5'567
2012	5'842
2013	6'179
2014	6'456
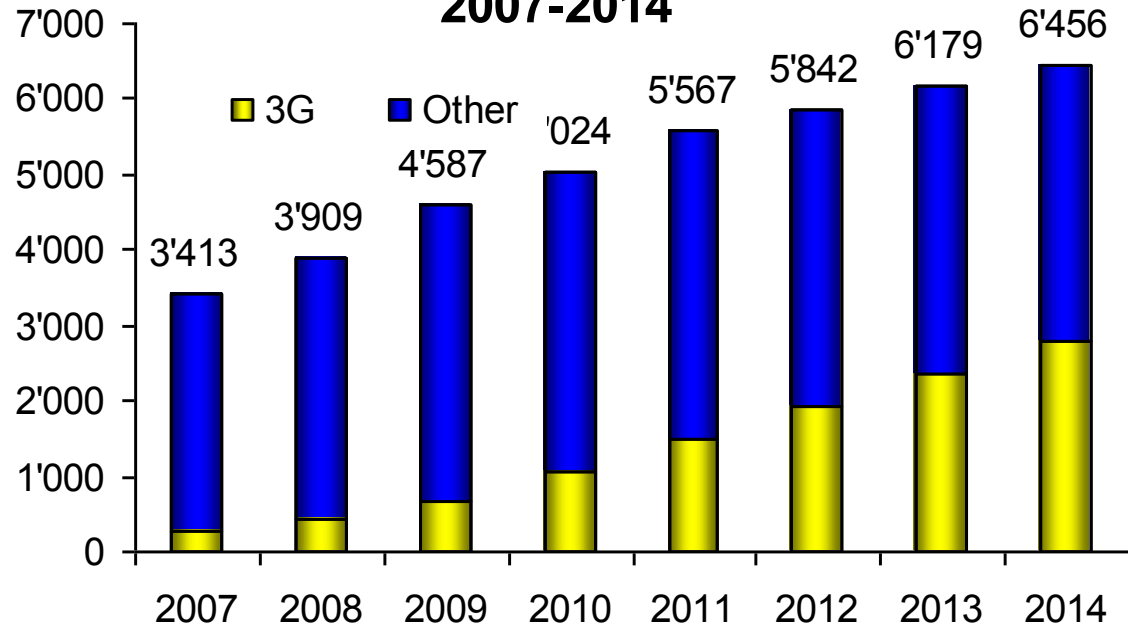
5 bn total cellular subscribers, 1 bn mobile broadband subscribers in 2010.

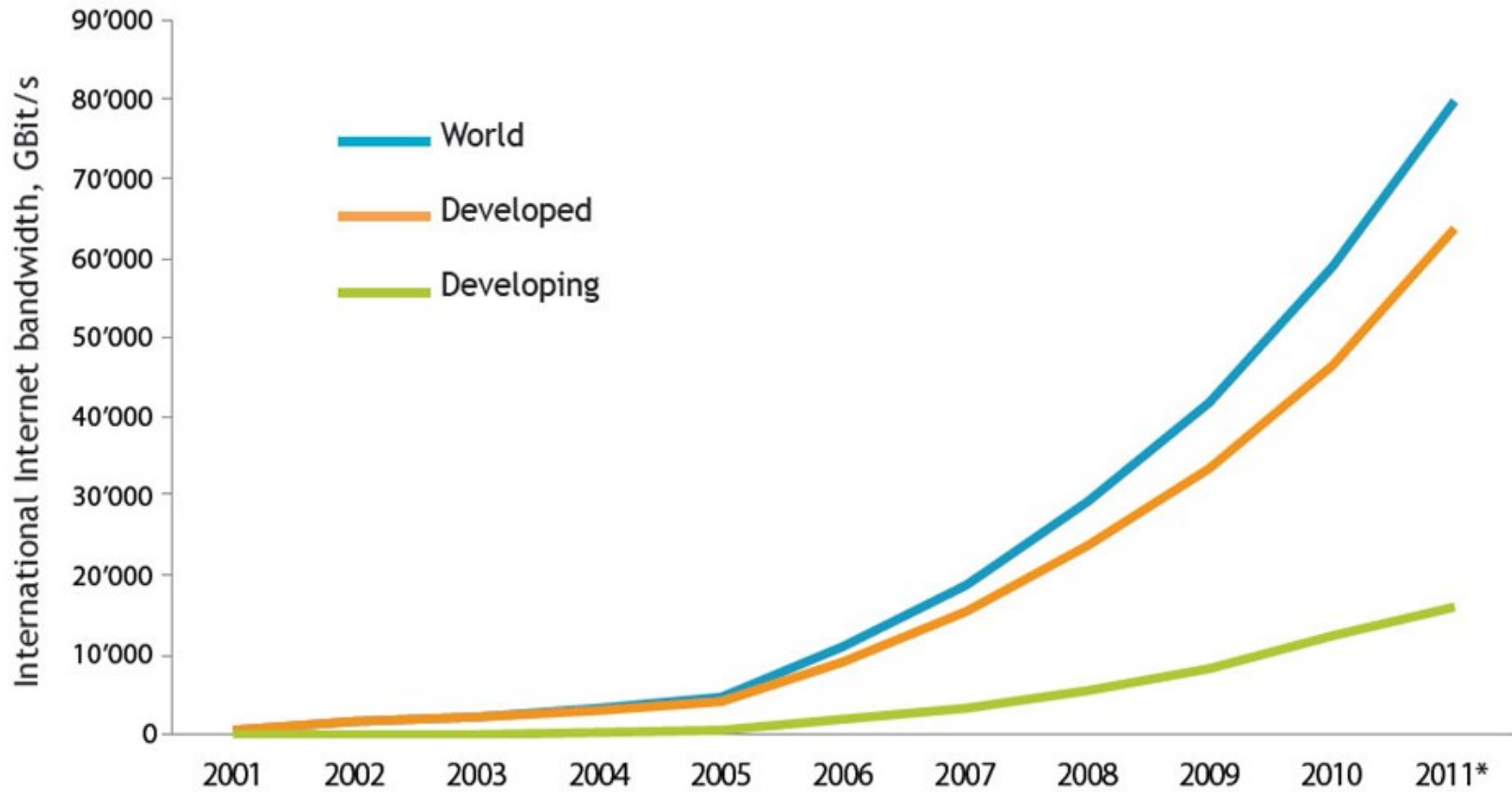6.5 bn total cellular mobile subscribers, of which 43% 3G in 2014.

Source: ITU (left); Morgan Stanley, Ovum (right).

Bandwidth growth
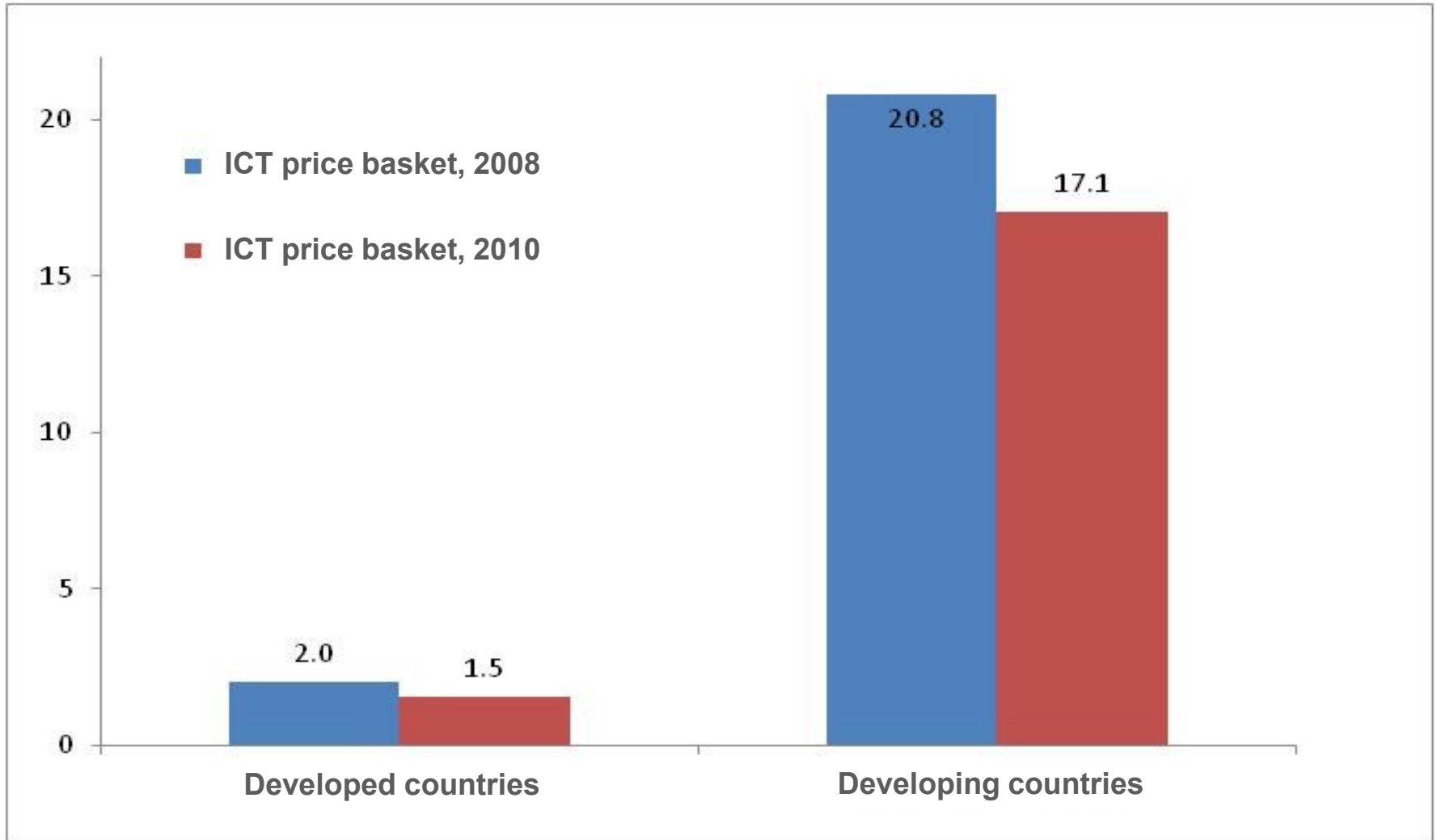

Note: * Estimate
Source: ITU World Telecommunication/ICT Indicators database

Developing countries pay more

Mobile cellular sub-basket
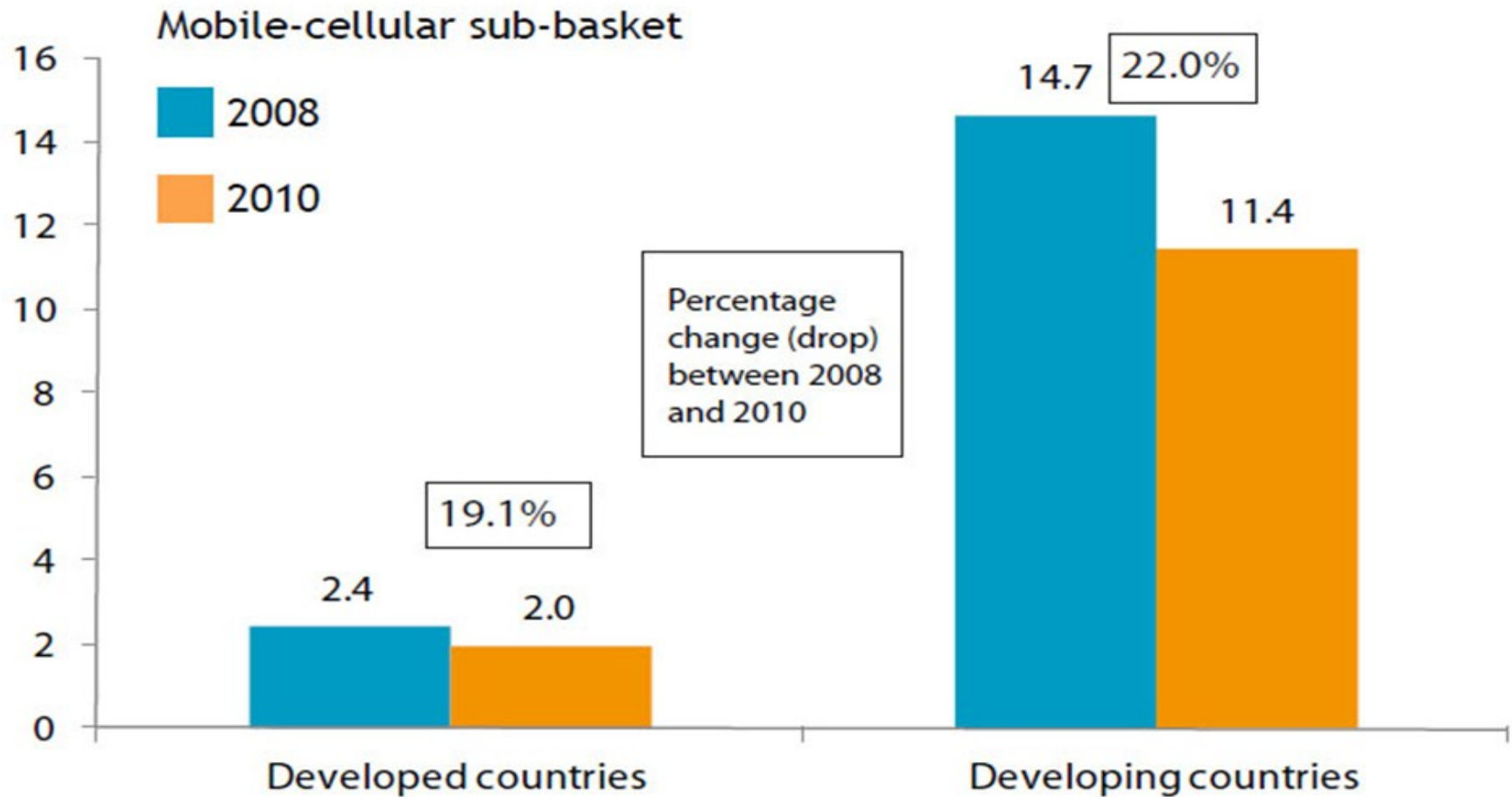
Fixed broadband sub-basket

Fixed-broadband sub-basket

- 2008
- 2010

Percentage change (drop) between 2008 and 2010

Developed countries: 2.4 — 1.5 — 35.4%

Developing countries: 234.9 — 112.2 — 52.2%
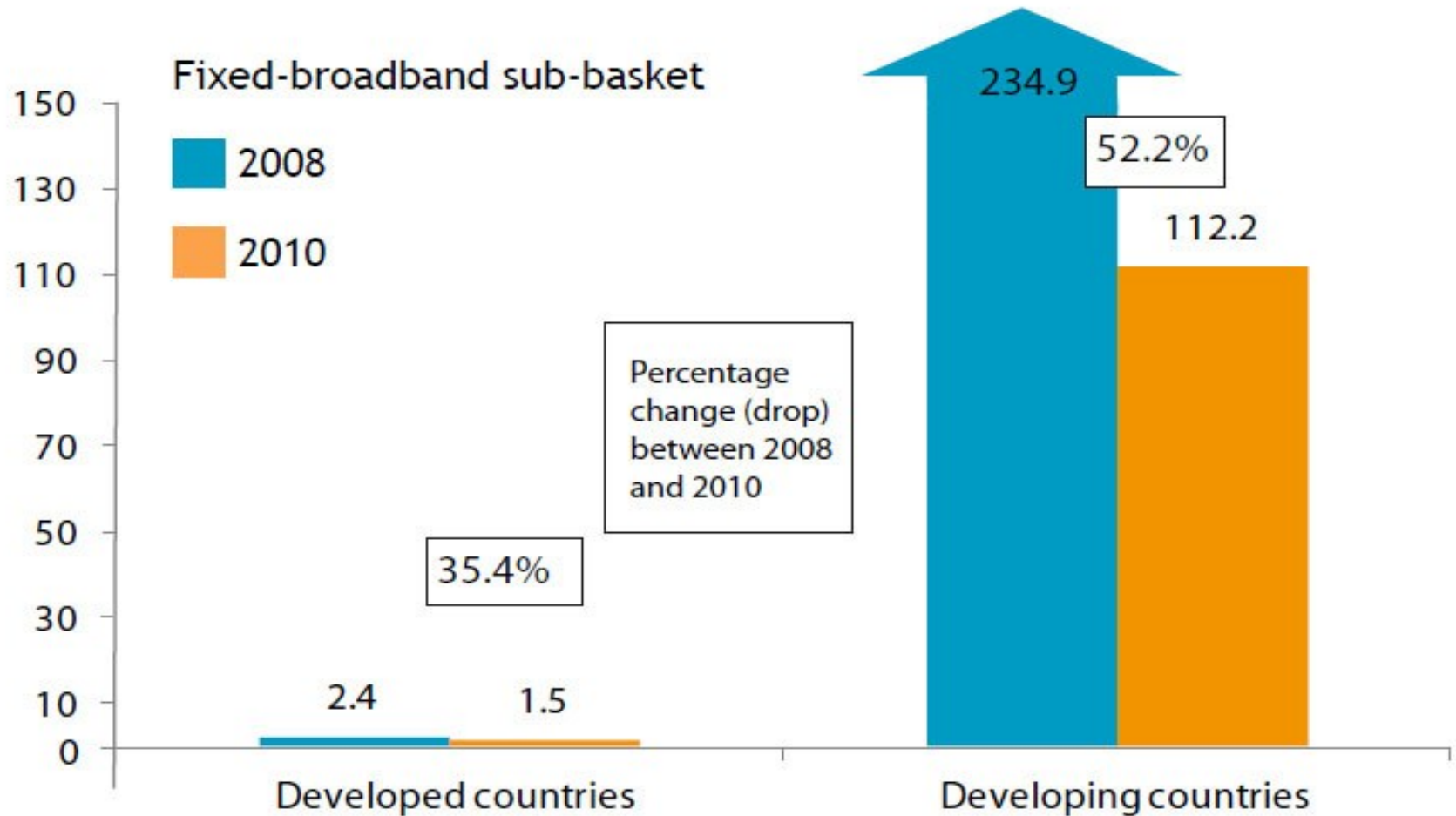
Fixed broadband prices are decreasing but are the still the highest

Smartphones

Mobile broadband enabled phones installed base, 2011-2015*
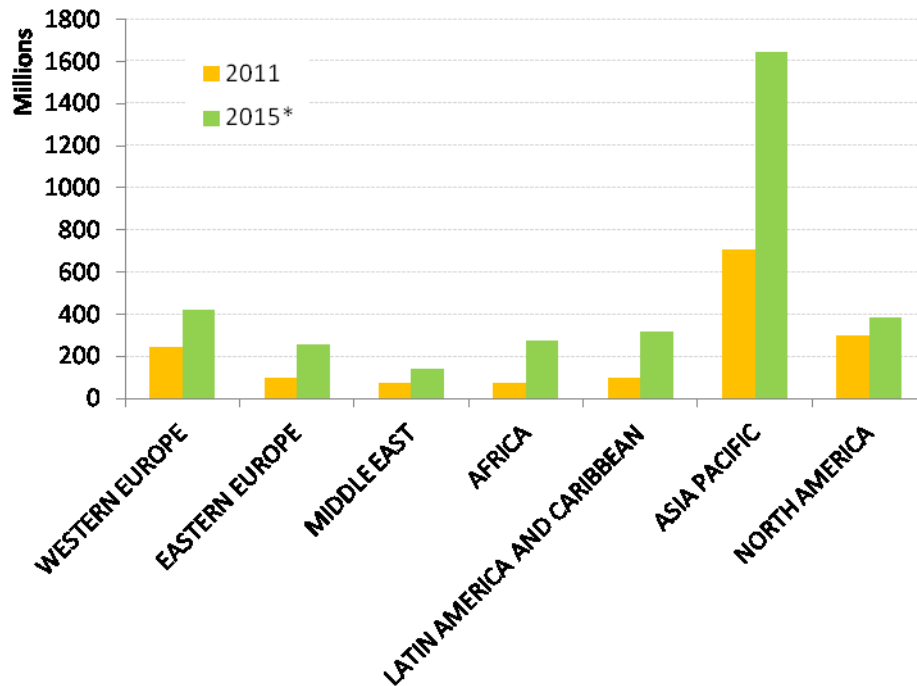
- How fast are smartphones becoming a primary mobile access device around the world?

- Is it fair to forecast that, given the feature functionality richness of smartphones, they are on the way of becoming a universal mobile access tool?

- Marked differences across regions regarding smartphone diffusion

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Smartphones

Mobile broadband enabled phones as proportion of total mobile installed base, 2015*
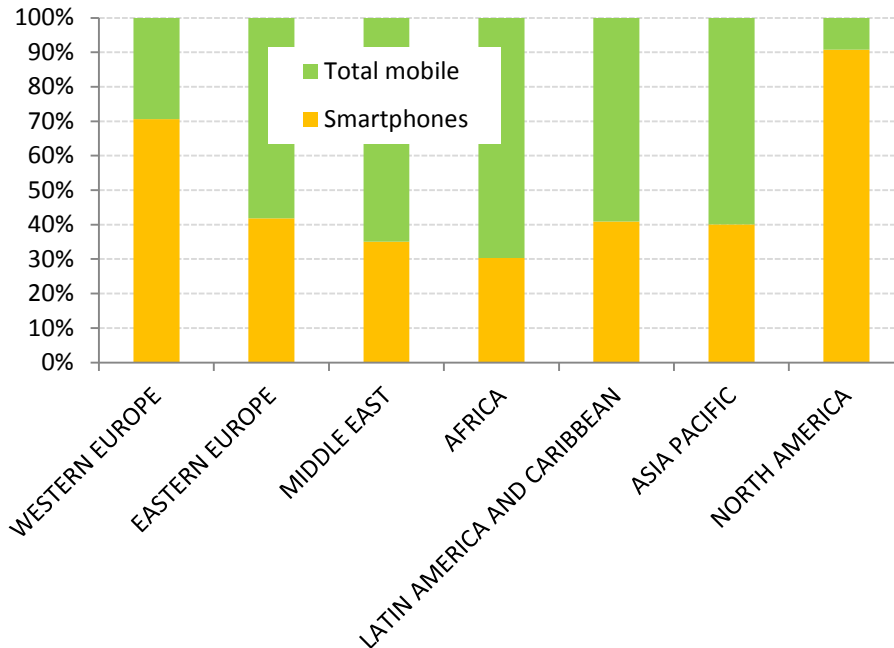
- Despite the strong growth, only developed countries are expected to have 70% and higher smartphone penetration

- Throughout the developing world, penetration is not expected to surpass 40%

- High prices for services are likely to remain a major barrier to greater smartphone adoption

- Regulatory reform must be pursued to unlock the full potential of new technologies & services

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The Broadband Challenge

Ambitious but achievable targets

The Broadband Commission has set four clear, new targets for making broadband policy universal and for boosting affordability and broadband uptake:

☐ *Target 1: Making broadband policy universal*. By 2015, all countries should have a national broadband plan or strategy or include broadband in their Universal Access / Service Definitions.

☐ *Target 2: Making broadband affordable.* By 2015, entry-level broadband services should be made affordable in developing countries through adequate regulation and market forces (amounting to less than 5% of average monthly income).

☐ *Target 3: Connecting homes to broadband.* By 2015, 40% of households in developing countries should have Internet access.

☐ *Target 4: Getting people online.* By 2015, Internet user penetration should reach 60% worldwide, 50% in developing countries and 15% in LDCs.

www.broadbandcommission.org/Documents/Broadband_Targets.pdf

Broadband policies and plans

Interactive B - Tool

90 governments adopted or are planning to adopt a national Broadband policy, strategy or plan

| National Broadband Plan | Pricing | Competition | Universal Access/Service | E-Stats | **Full Screen** |
| Definition | | | Universal access/se/vice | | **More Options** |

Countries having included broadband in the definition of universal access/service

- Dial-up Internet access as part of universal service definition
- Broadband as part of universal service definition
- More than one category applies

www.itu.int/ICTEye

The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the ITU
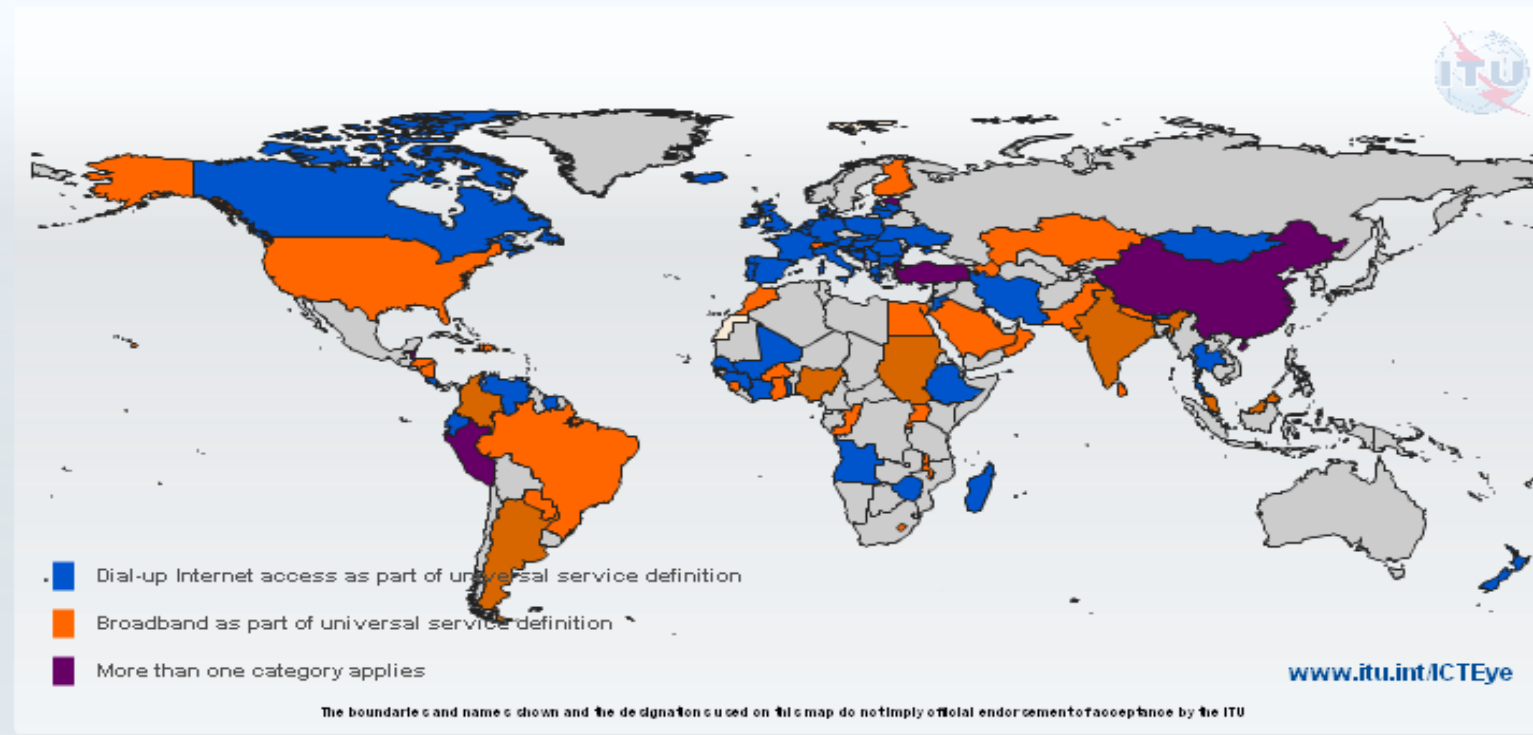
New media: what makes them social?

- Interactive, one-to-many or many-to-many communication
- User-generated content
- Augmented reality
- Beyond time and distance
- Accessible through various platforms (PC, phone, game console)
- Helps build skills, create networks
- Beyond the primary use, new media can serve as learning and working tools
- Are likely to become the identity system of the web
- Are likely to offer new business models

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designed by rikard.andresen@gmail.com

The Netherlands
6.30m
45%
42%
18%

Russia
26.06m
56%
62%
46%

Canada
11.72m
54%
43%
26%

UK
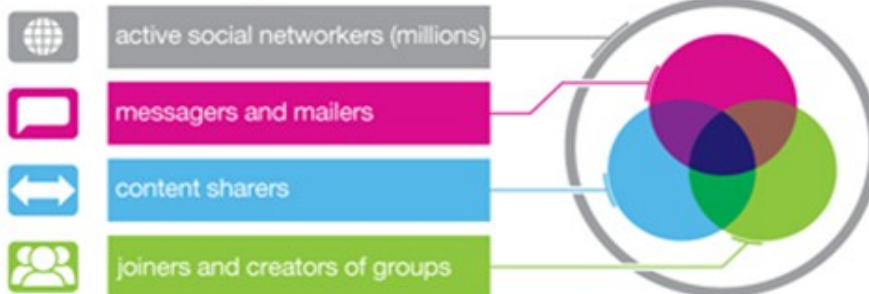19.27m
44%
40%
28%

Poland
12.03m
48%
46%
26%

Japan
13.66m
16%
16%
8%

Germany
18.81m
47%
38%
32%

China
155.29m
47%
53%
34%

USA
114.55m
51%
51%
20%

South Korea
10.93m
23%
33%
11%

France
15.92m
57%
45%
28%

Italy
12.66m
38%
49%
36%

Hong Kong
2.56m
39%
56%
33%

Philippines
14.43m
60%
73%
46%

Mexico
12.80m
52%
63%
37%

Spain
10.10m
47%
45%
36%

India
35.08m
50%
64%
49%

Malaysia
11.50m
54%
63%
41%

Indonesia
18.93m
57%
66%
52%

Brazil
33.49m
54%
51%
34%

Singapore
1.96m
48%
57%
32%

Australia
7.05m
50%
48%
27%

Global Map of Social Networking 2011

Behaviour Types:

- 🌐 active social networkers (millions)
- 💬 messagers and mailers
- ↔️ content sharers
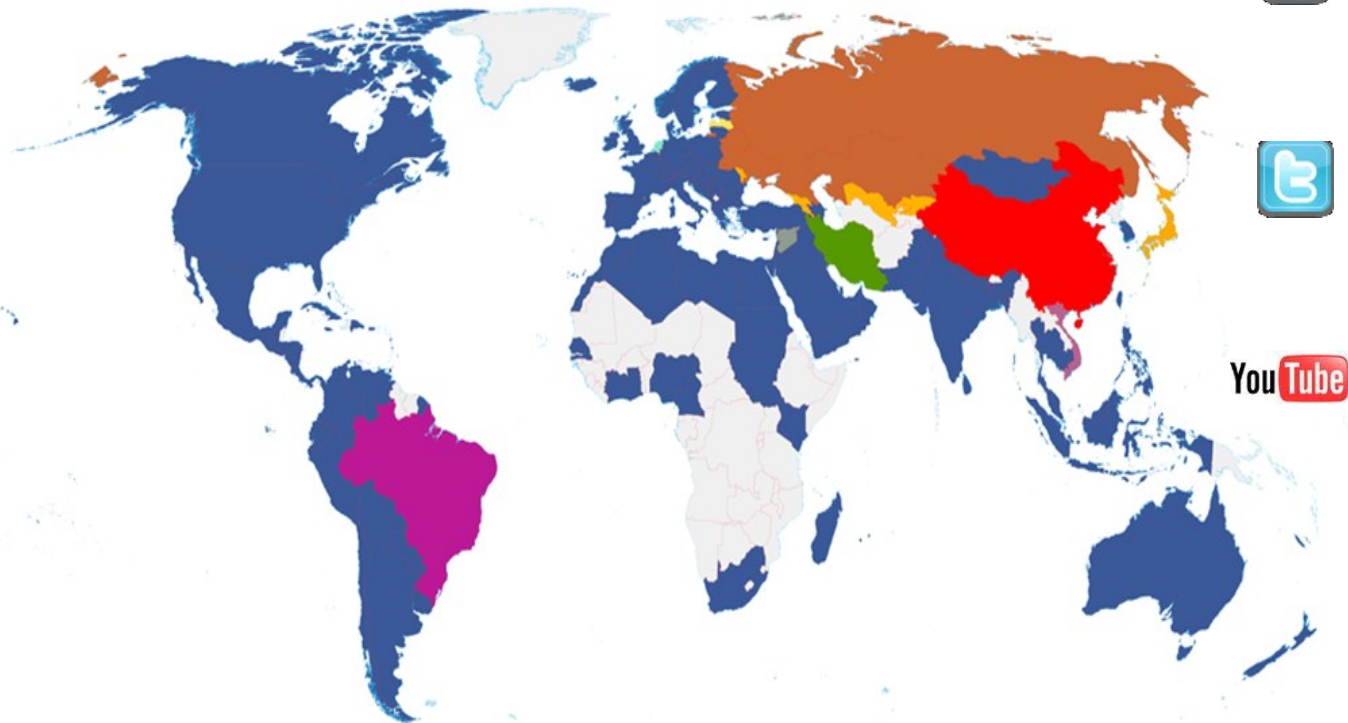- 👥 joiners and creators of groups

globalwebindex

The most detailed study on the consumer adoption of the internet ever compiled:

PC /// Mobile /// Tablets /// TV sets /// Gaming
100K+ surveys a year /// 3 waves a year /// 36 markets

Find out more /// www.globalwebindex.net/
mail /// globalwebindex@trendstream.net

Social networks in the world and Web applications

845 million active facebook users

More than 2350million registered users

More than 60 hours of videos received every minute on Youtube

Facebook · V Kontakte · Odnoklassniki · Draugiem · Hyves · Zing · Mixi · Orkut · QZone · Maktoob · Cloob

www.vincos.it

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Regulation of new media

- Policy shift:
  - from regulating infrastructure & services towards regulating content
  - from sector-specific towards cross-sector regulation
  - Self-regulation alternatives
- No regulation "footprint" in new media for now
- To regulate or not to regulate?
- Who has jurisdiction over new media?
- What balance between "too much" and "too little" regulation with regard to content?
- New issues: privacy, identity management
- Forward-looking approach is key

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Effective Regulation

Effective regulation may include:

- ➤ Clear and transparent policies, such as competition policy, regulatory processes and procedures, developed based on cooperation, collaboration and consultation with all ICT stakeholders

- ➤ Innovation-oriented regulation, which seeks to generate market and development opportunities;

- ➤ Trans-sector focus to ensure through the application and removal of regulation that the multiplier effect of ICT across all sectors are fully realized.

Call for new regulatory models

1) Promotion of competition, innovation and growth by identifying adaptive and targeted regulations, a new ladder of regulation

2) Need for different degree of regulations (heavy to light touch)?

3) Next generation regulation to foster access and adoption of broadband and access to broadband applications and services for all.

4) Redefining universal access and service to extend universal service beyond network deployment only, thus aiming at providing access to the digital world to all based on sustainable business models (in the area of, for example, education, e-health and new media.)

Regulatory challenges

1) How to ensure that the benefits of broadband are available to everyone – reversing the digital divide and not exacerbating it?

2) What role do governments have in promoting broadband connectivity, but also applications and content?

3) Who should attempt to mitigate the unforeseen aspects of the Information Society?

4) How can stakeholders in different countries cooperate to help guide the development of new media?

5) What role is there for self-regulation?

6) How do individuals who are now exposed to, and experiencing, the Information Society learn to maximize its benefits while handling the immense power that these new technologies have unleashed?
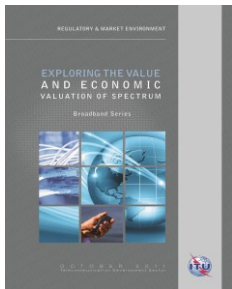
ITU Reports
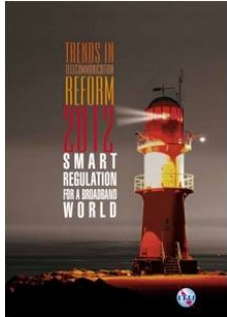
Trends in Telecommunication Reform 2012 : Smart Regulation in a broadband world

Coming soon!

- Setting national broadband policies, strategies and plans
- Open access regulation in the digital economy
- Strategies for financing universal broadband access
- The regulatory landscape for mobile banking
- Broadband Enabled Innovation
- Intellectual Property Rights in today's digital economy
- Confronting The Social Media Regulatory Challenge
- e-Waste: whose responsibility?

Broadband Thematic reports in 2012:

- Regulation of global broadband satellite communications
- Exploring the value and economic valuation of spectrum
- Understanding the impact of broadband on national and global economies
- Broadband services pricing

www.itu.int/ITU-D/treg/publications/index.html

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www.itu.int/broadband

Futur events

- 13th Forum on Telecommunication/ICT Regulation and Partnership in Africa (FTRA 2012), Libreville (Gabon), 18 to 20 June 2012

- 12th Global Symposium for Regulators (GSR), Colombo, Sri Lanka, 2-4 October 2012;

- Third Meeting of ITU-D Study Group 1 : Enabling environment, cybersecurity, ICT applications and Internet-related issues, 10-14 September 2012, Switzerland, Geneva ;

- ITU- T SG3 meeting, 03-07 Sept 2012, Moscow (to be confirmed);

- The World Conference on International Telecommunications (WCIT), Dubai, UAE, from 3-14 December 2012.

Useful resources

- Global Symposium for Regulators (GSR) 2010: www.itu.int/gsr10

- Trends in Telecommunication Reform 2010/11: Enabling Tomorow's Digital World

- ITU-infoDev ICT Regulation Toolkit: www.ictregulationtoolkit.org

- Broadband Thematic reports in 2012: www.itu.int/ITU-D/treg/publications/index.html

- BDT website: www.itu.int/ITU-D

- Broadband Commission for Digital Development www.broadbandcommission.org