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Internet Technical Community Forum

Benefiting from Convergence Issues related to User Choice

OECD June 2008,
Seoul Korea
Future of the Internet Economy



What is INTUG?

- a group representing user views to:
 - OECD, ICC/UNICE, CTO
 - ITU, WTO, APEC TEL, CITEL
- an association of associations:
 - national user groups
 - multi-national corporations
 - individuals, eg academics
- formed in 1974 (Swift, SITA, Reuters)

A catalyst for change

INTUG Links in all Continents





INTUG aims

- effective global reach for broadband and mobile networks via **competition**
- seamless service **interoperability**
- better **value/quality** – informed choice
- **investment and innovation** in services
- **constructive dialogue** for industry, government, civil society co-operation

Internet Economy growth via communication services

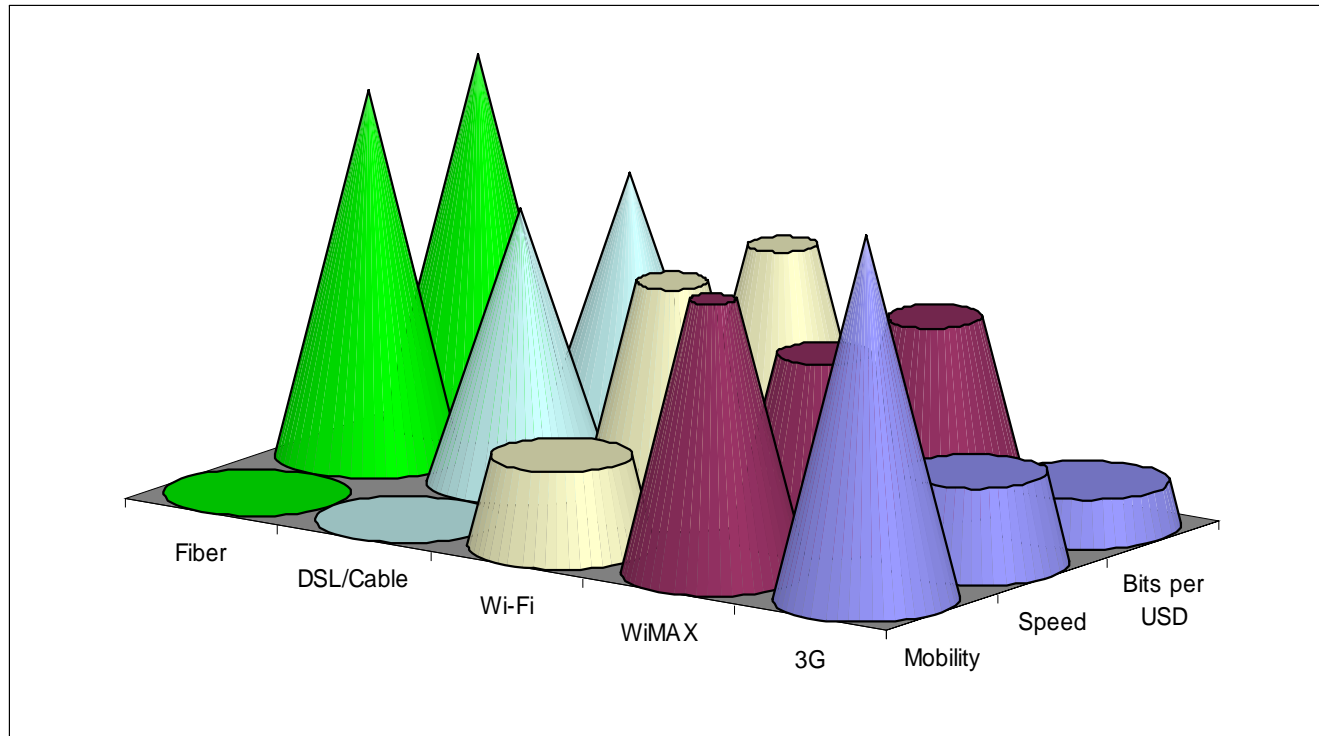


Framing the Questions

- Technology
 - Markets
- Investment
 - Policy



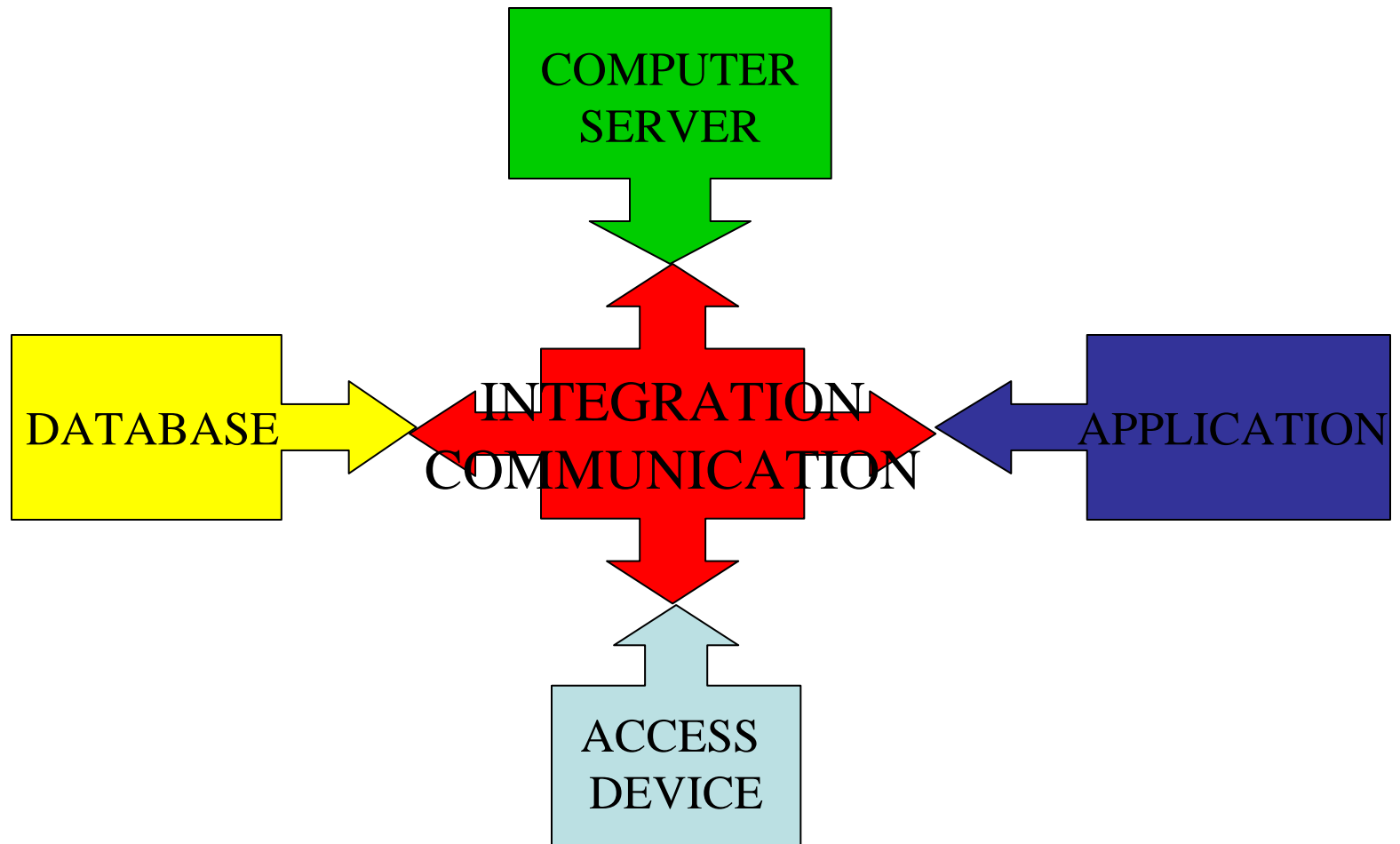
One piece: Technologies for communications networks



Note: Higher cones represent better performance in a given area.

Source: OECD

Other pieces - for the Internet Economy





Consumer world innovation

Work/ Create / Learn



eclipse



PLAYSTATION NETWORK



Play

What telecoms is needed?

Trading



plaxo



myspace
space for friends

You Tube

facebook



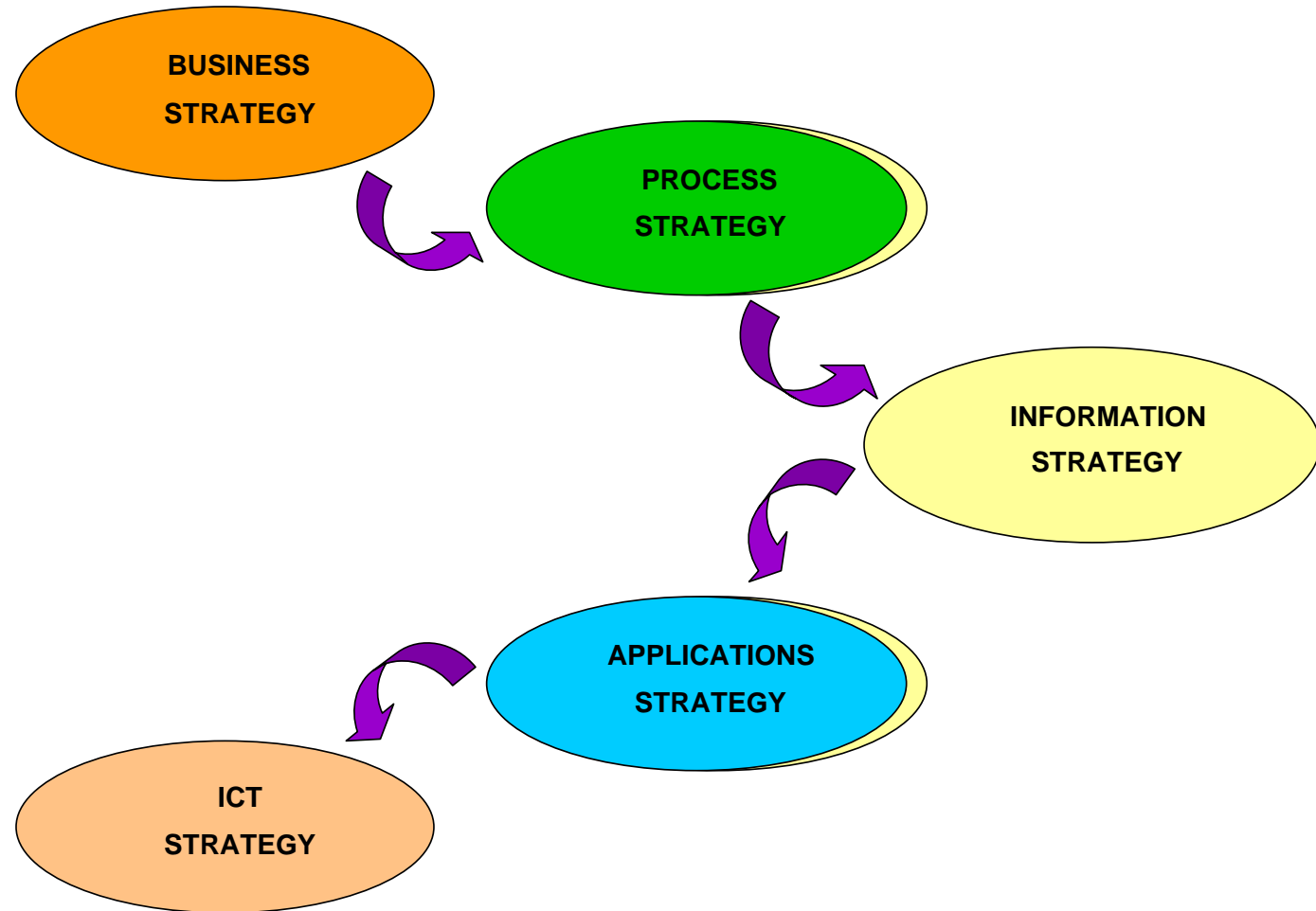
XING

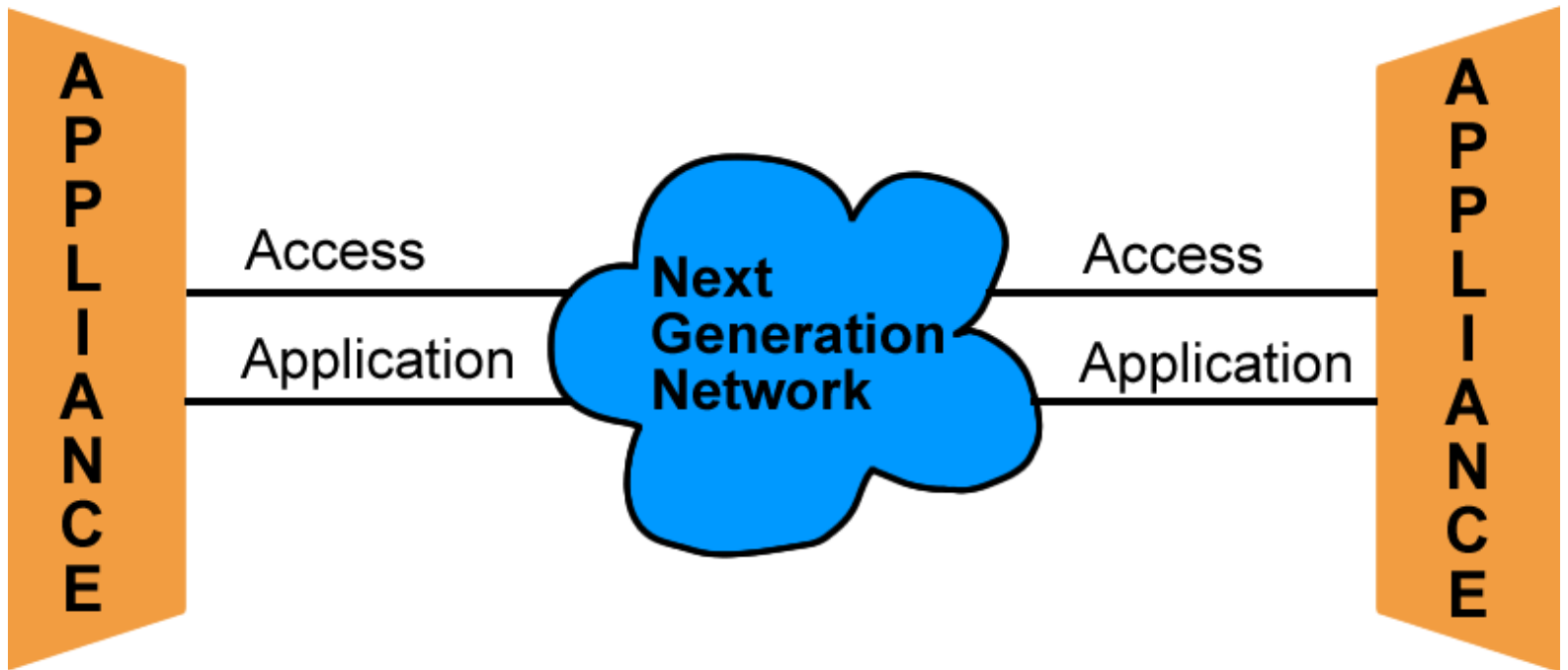
Linked in

Socialising



Business drivers







Universal Broadband Access

- Available “anywhere anytime”
- Seamless fixed-mobile convergence/interoperability
- Symmetrical bandwidth
- Competitive rural, out-of-town, urban connectivity
- Service/content access based on net neutrality

No broadband divide



Broadband Growth 2006-2007

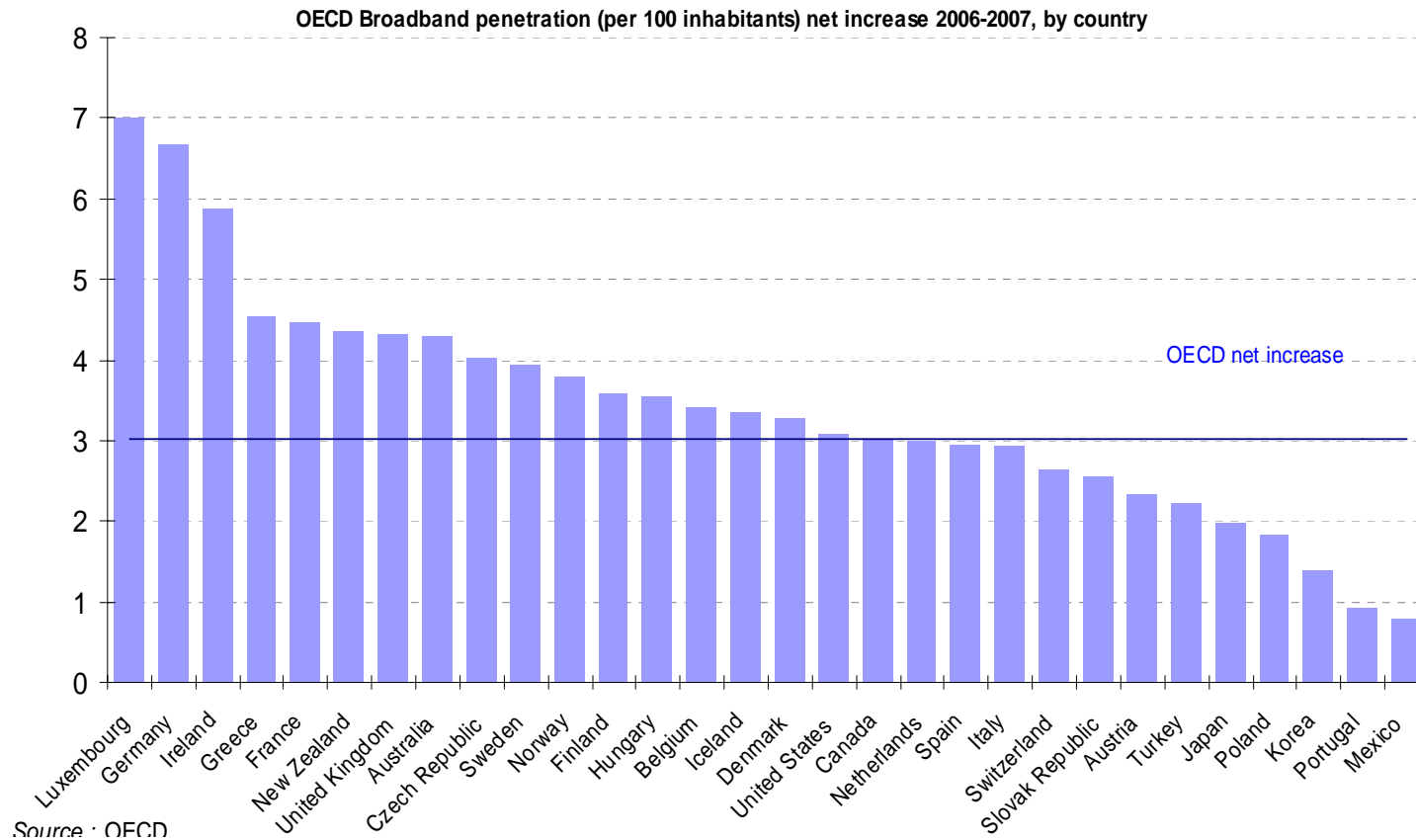
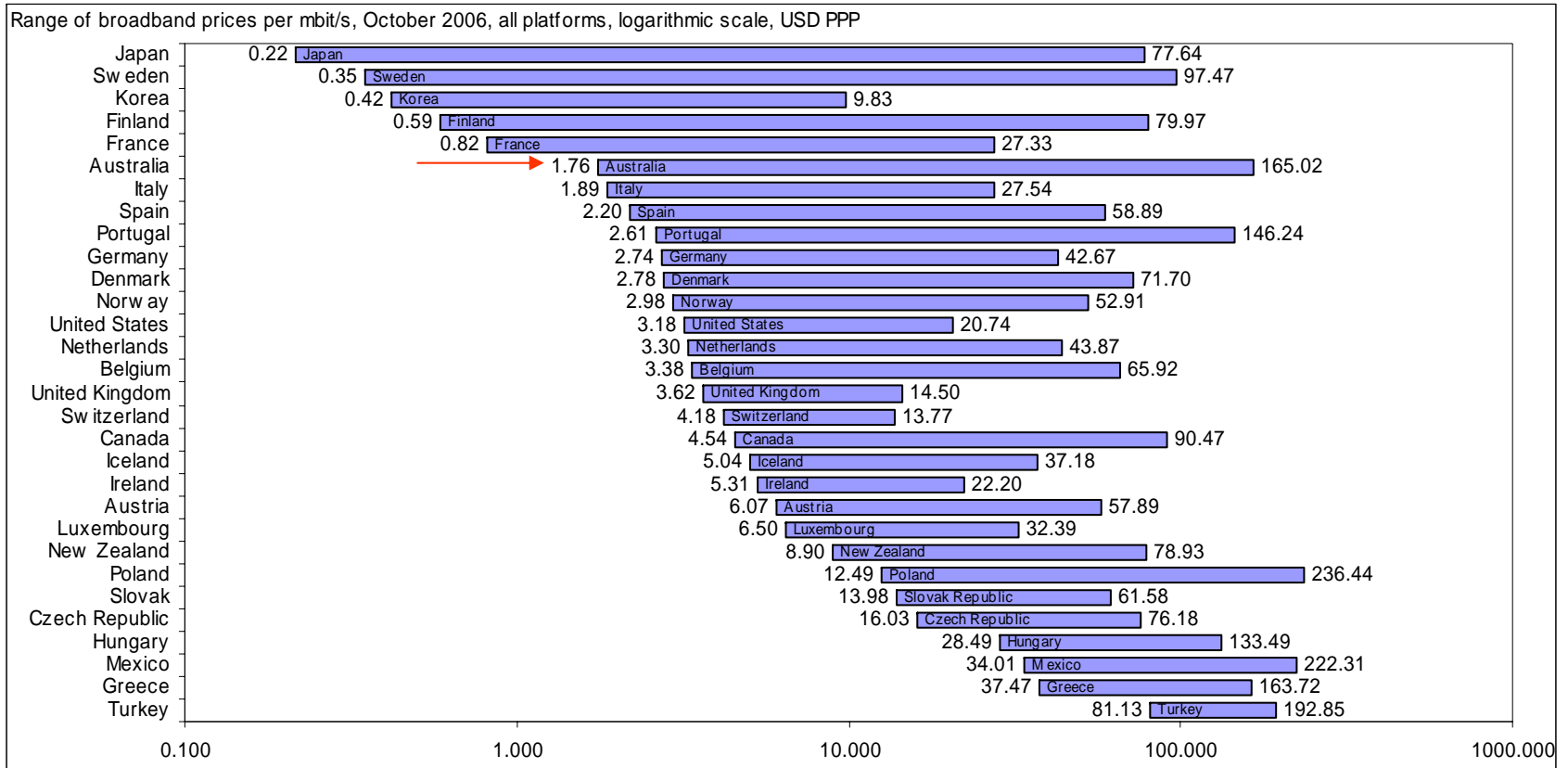




Figure 7.17. Range of broadband prices per Mbit/s in October 2006



Source: OECD



The Future of Voice

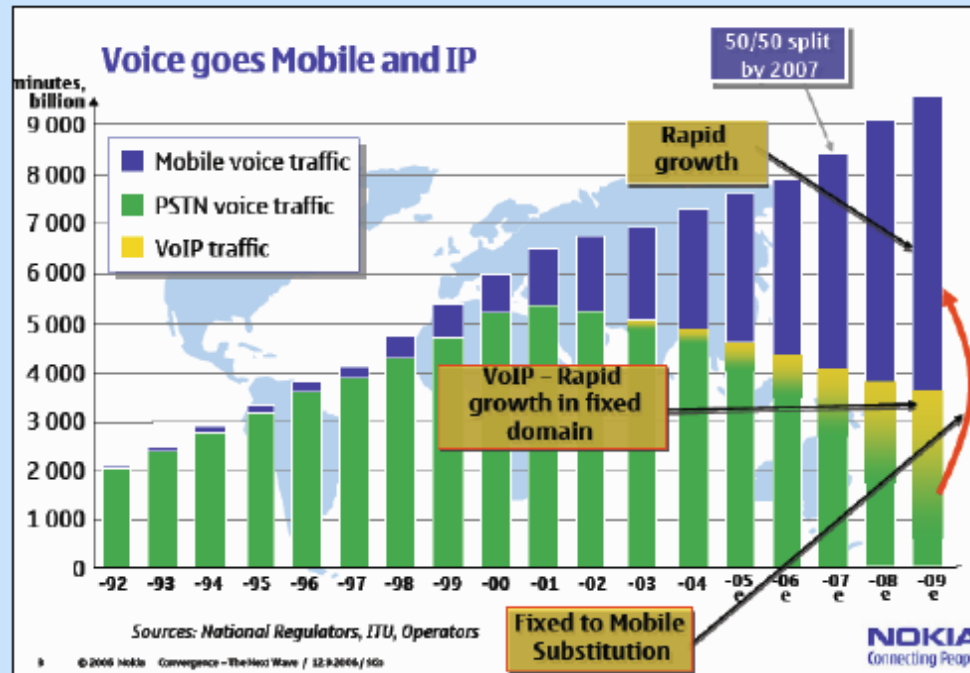
ITU Geneva, January 2007

- The problem of the future - for telcos
- Voice means revenue
- Convergence means challenge

Voice goes Mobile and IP - profits are lower due to competition

Figure 2: The Future of Voice – voice goes mobile and IP

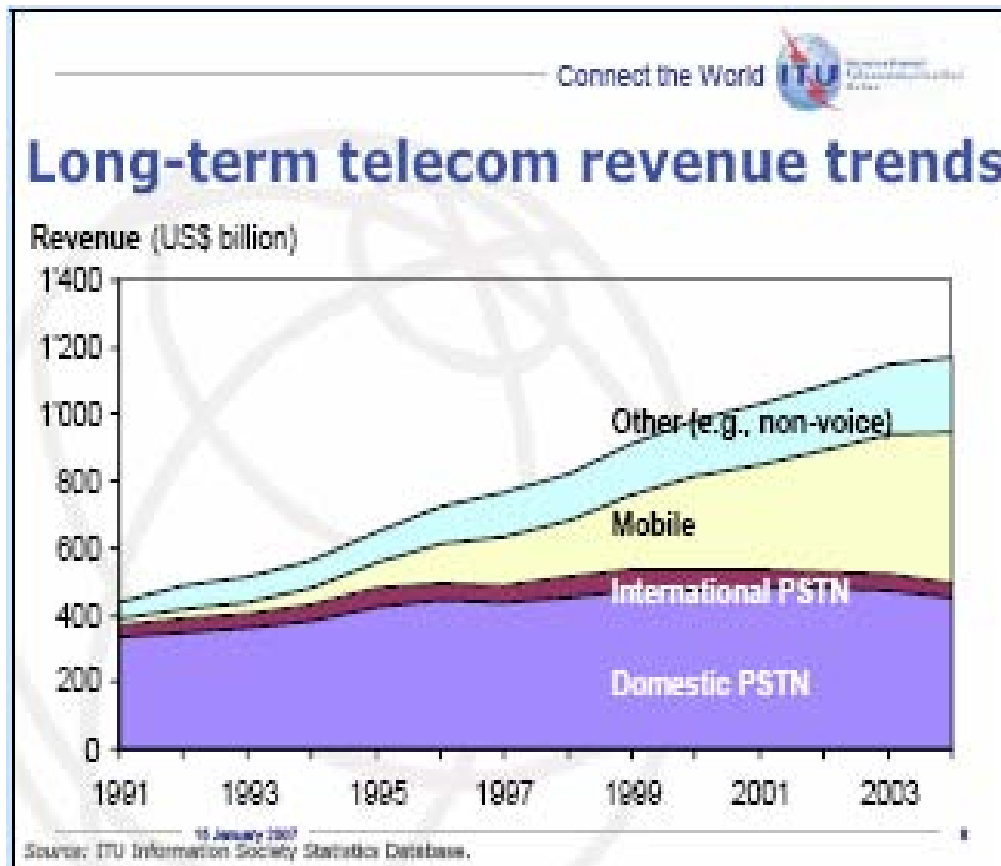
Growth in voice traffic (bn minutes), total PSTN, mobile and VoIP traffic and projected future trend, 1992-2009.



Source: NOKIA, based on data from the ITU, national regulators and operators.

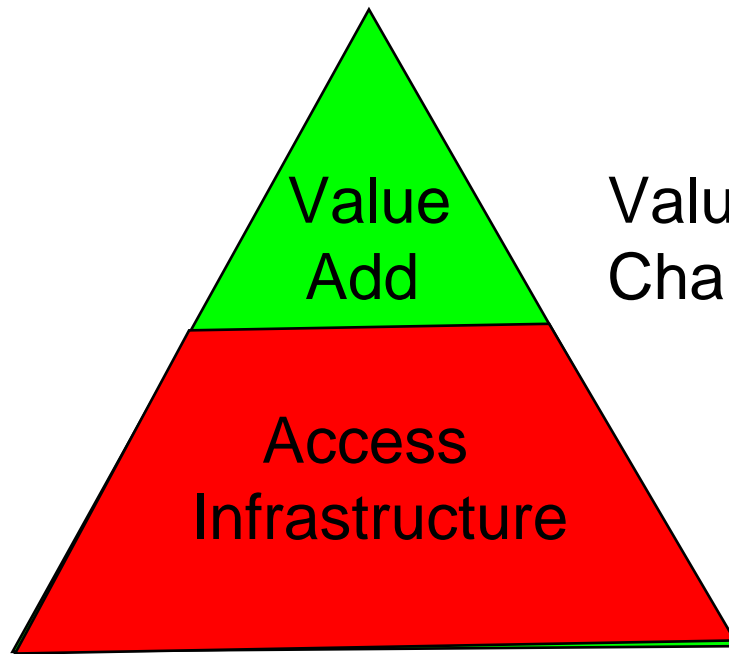


Fixed Voice revenue is declining – highest profits here



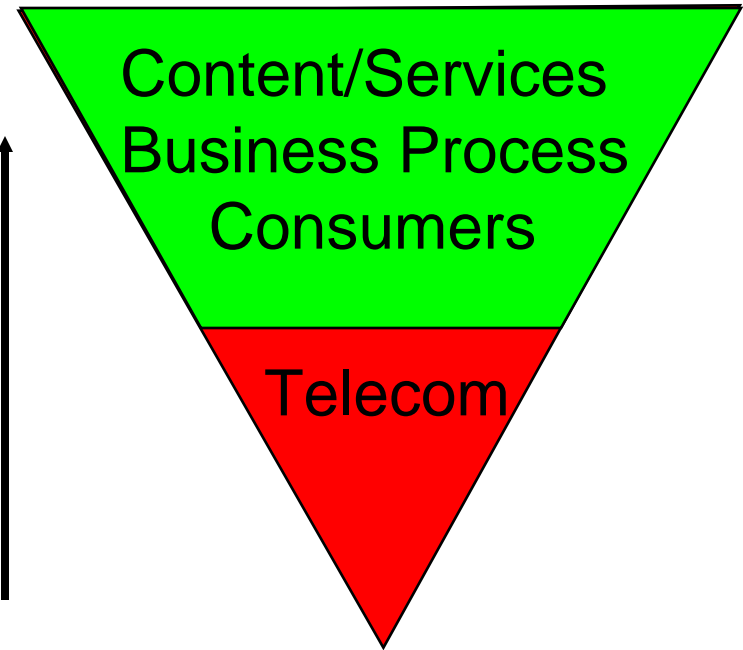


A wider viewpoint



Telecom Growth View

Value Chain



Internet Economy Growth

It's about the future of the Internet Economy



What do users want

- Connectivity – any to any, interoperability, quality of services
- Choice,
- Confidence and trust
- Innovation



How do we get it?

- Competition
- Investment
- Information



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