



Broadband for Norfolk

February 2010



Broadband for Norfolk

- UK Mobile Market overview: key facts
- Public Policy: the action plan
 - A Digital Agenda for Europe: a robust digital agenda
 - Digital Britain: plans for UK's digital future
- Mobile Broadband: what is it?
 - UK market trends
 - Heading towards full mobile broadband



The UK is the most important mobile market in Europe

- **Largest by revenue**
 - Mobile accounts for over 50% of UK telecoms revenues
 - Mobile retail revenue grew 9.4%
 - Mobile now represents 40% of voice call volumes
- **Only market in Europe with 4 major mobile groups represented**
 - T-Mobile, Vodafone, France Telecom, Telefonica
 - 3 UK a new challenger
 - 25 retail and service only providers e.g. Virgin mobile, Tesco Mobile
- Govt & regulatory policy viewed as a key EU bell-weather that has delivered a competitive market.



Public Policy: a Digital Agenda for Europe

- **2005: the “*i2010 - A European Information Society for growth and employment*”** a strategic framework for a comprehensive and competitive digital economy across the EU. ICT a promoter of growth, inclusion and employment. The plan has been implemented in all Member States through national strategies.
- **2009: a renewed focus on the Digital Agenda**
 - European Commission published a „*digital competitiveness report*“, showing the “*strong progress*” made by the EU digital sector since 2005.
 - EC adopts Guidelines for broadband networks; public funding for broadband networks
 - EU2020 strategy; the Digital Agenda announced as a key initiative to deliver on the EU's future strategic objectives.
 - Digital Dividend: an EU wide timetable to ‘switchover’ to digital TV (2012), & the release of spectrum for next generation mobile/wireless services
- **2010:** new Commissioner for Digital Agenda. Mandate to ensure Member States meet high-speed broadband rollout/access and Digital Dividend strategies

Public Policy: Digital Britain

- **2009: UK Digital Britain action plan launched. Report makes the following recommendations on broadband delivery**

- Next Generation broadband delivery to >90% coverage by 2017.
- ‘Broadband for All’ universal service commitment of 2Mbps by 2012, to be delivered via fixed or mobile services
- Broadband funding by a ‘charge’ on all fixed copper lines from 2010, a re-direction of funds from the Digital Switchover Help Scheme & Strategic Investment Fund, other public & private sources
- Spectrum release for next generation broadband services; convert 2G to 3G services, & Digital Dividend spectrum assignment
- Ofcom: new responsibilities to monitor infrastructure investment models

- **2010: ‘Digital Economy’ agenda will feature General Election campaigning**

- Conservatives; commitment for UK wide super-fast broadband by 2017
- Liberal Democrats; next generation broadband essential for digital inclusion and prosperity

UK market trends

- **Customer demand for true internet on the move**
 - Smart-phone device ownership now 20%, but 50% of total on-line time (Dec09)
 - UK mobile online usage: 60 million hours (Dec 09)
 - Social Networking dominate: Facebook dominates UK mobile internet use
 - UK market 'most competitive' in EU top five countries (CSS Insight, Jan10)
- **Compelling content**
 - New devices from Apple and Google, with use friendly app redefining customer expectations
- **Technological evolution to improve the customer experience**
 - Industry preparing for next phase of mobile networks
 - Transformation from cellular to mobile broadband
 - **T** Long Term Evolution (LTE) will allow truly mobile broadband



Heading towards full mobile broadband

- **EU Policy: Liberalisation of spectrum**

- EU policy has re-cast spectrum use from TV type services to mobile broadband (e.g. exploiting Digital Dividend)
- EU policy will seek alignment in Member State in the assignment and delivery of 'Mobile Broadband' services. (i.e. spectrum use; timeframe for rollout; investment models/funding)
- Long Term Evolution technology will use the Digital Dividend spectrum. It will support next generation mobile technologies, providing high speed internet access, use spectrum efficiently, and contribute to reducing the 'digital divide' from a larger network footprint

- **Network infrastructure**

- **T** Consolidation in network ownership to support surge in mobile data