

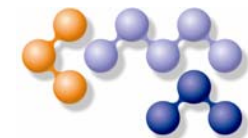
UK experience in furthering consumer needs in the telecoms sector

Carolyn Kimber
Chairman
CMA

TRA Bahrain
2nd May 2007



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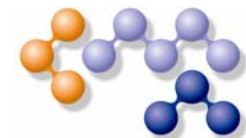
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The next 40 minutes

- **Who is the consumer?**
- **What does a consumer need?**
- **How are their needs met in the UK?**
 - **EU, UK Regulation, Communications Act, Ofcom**
 - **Free Market Power**
- **Ofcom Consumer Panel**
- **CMA**



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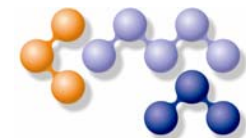
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Who is the consumer?

- **Citizen**
- **Domestic user & SMB**
- **Enterprise user**



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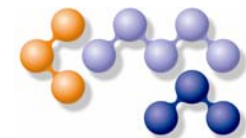
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The needs of the consumer

- **Protection**
 - **Choice**
 - **Price**
 - **Privacy**
 - **Fraud**
 - **Quality of Service**



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How are these needs met?

- **Role of the EU**
- **UK Regulation**
- **Communications Act**
- **Ofcom – converged regulator**



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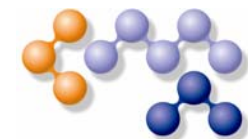


Role of EU

- **Framework Directives**
 - **Framework Directive**
 - **Access Directive**
 - **Authorisation Directive**
 - **Universal Service Directive**
 - **Privacy Directive**



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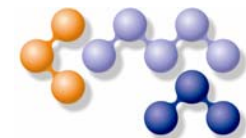
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UK Regulation

- **Communications Act 2003**
 - **The Creation of Ofcom**
 - **A Converged Regulator**



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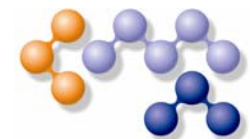
Ofcom's Statutory Duties under the Communications Act 2003:

" 3(1) It shall be the principal duty of Ofcom, in carrying out its functions;

- (a) to further the interests of citizens in relation to communications matters;**
- and**
- (b) to further the interests of consumers in relevant markets, where appropriate by promoting competition"**



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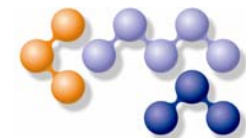
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Ofcom's six specific duties

- **optimal use of the electro-magnetic spectrum**
- **a wide range of electronic communications services - including high speed data services – to be available throughout the UK**
- **a wide range of TV and radio services of high quality and wide appeal**
- **plurality in the provision of broadcasting**
- **protection for audiences against offensive or harmful material**
- **protection for audiences against unfairness or the infringement of privacy**



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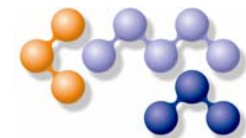
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The Ofcom consumer focus

- **Ofcom Consumer Panel**
 - 11 members
 - Independent of Ofcom
 - Covers
 - Domestic consumers
 - SMBs



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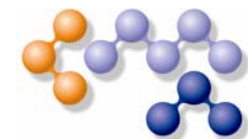
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Other regulatory bodies

- **ICSTIS**
- **Advertising Standards Agency**
- **OTELO**
- **Internet Watch Foundation**
- **ISPA**



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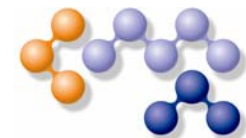
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The enterprise consumer's needs

- Limitations of consumer panel
- Ofcom's approach to enterprise users
- Need for an independent business user organisation



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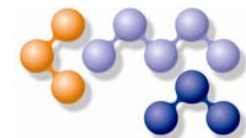
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Communications Management Association

- Representing the user needs of the business community
- Founded nearly 50 years ago
- 1200 user members
- Objectives
 - Influence policy
 - Inform members



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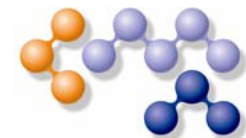
CMA

Shaping the Business of Communication

- **A highly respected Association of Professionals from across enterprise, industry and public sector**
- **Totally independent, without supplier bias**
- **A registered Charity**
- **Run by the members, for the members**



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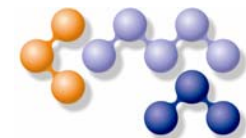
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CMA's activities

- **Staff and volunteers**
- **Seminars and workshops; Conference and Survey**
- **Regulatory Affairs**
- **INTUG**



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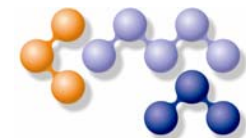
CMA Annual Survey



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COMMUNICATIONS IN BUSINESS

2006

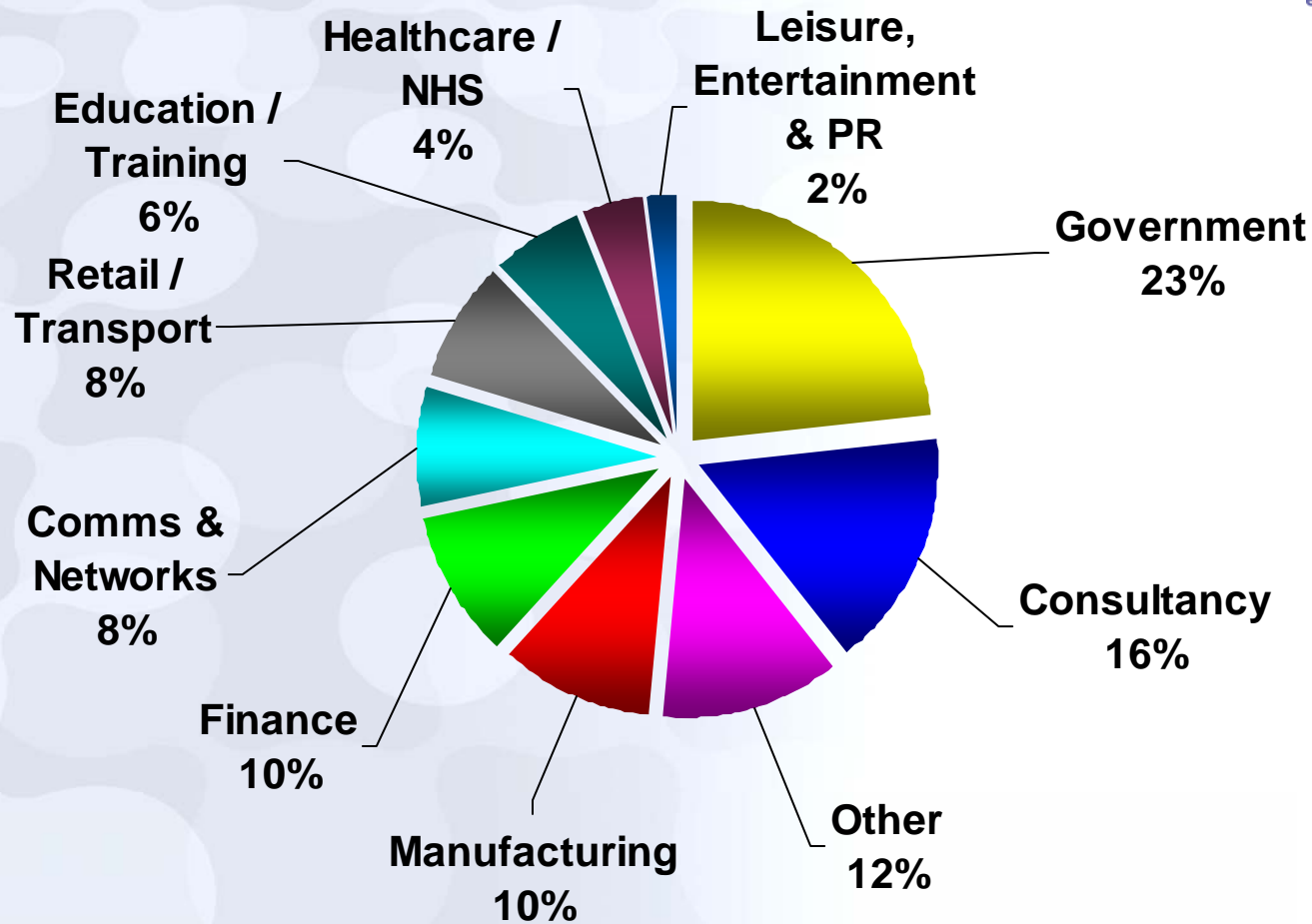


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Profile : Main line of business



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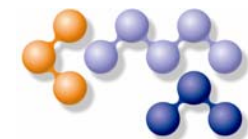
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Profile : Key facts

- **74% are from organisations of more than 500 employees**
- **78% are from organisations which have turnovers in excess of £10 million per annum**
- **78% of organisations spend more than £500k per annum on communications & networks**

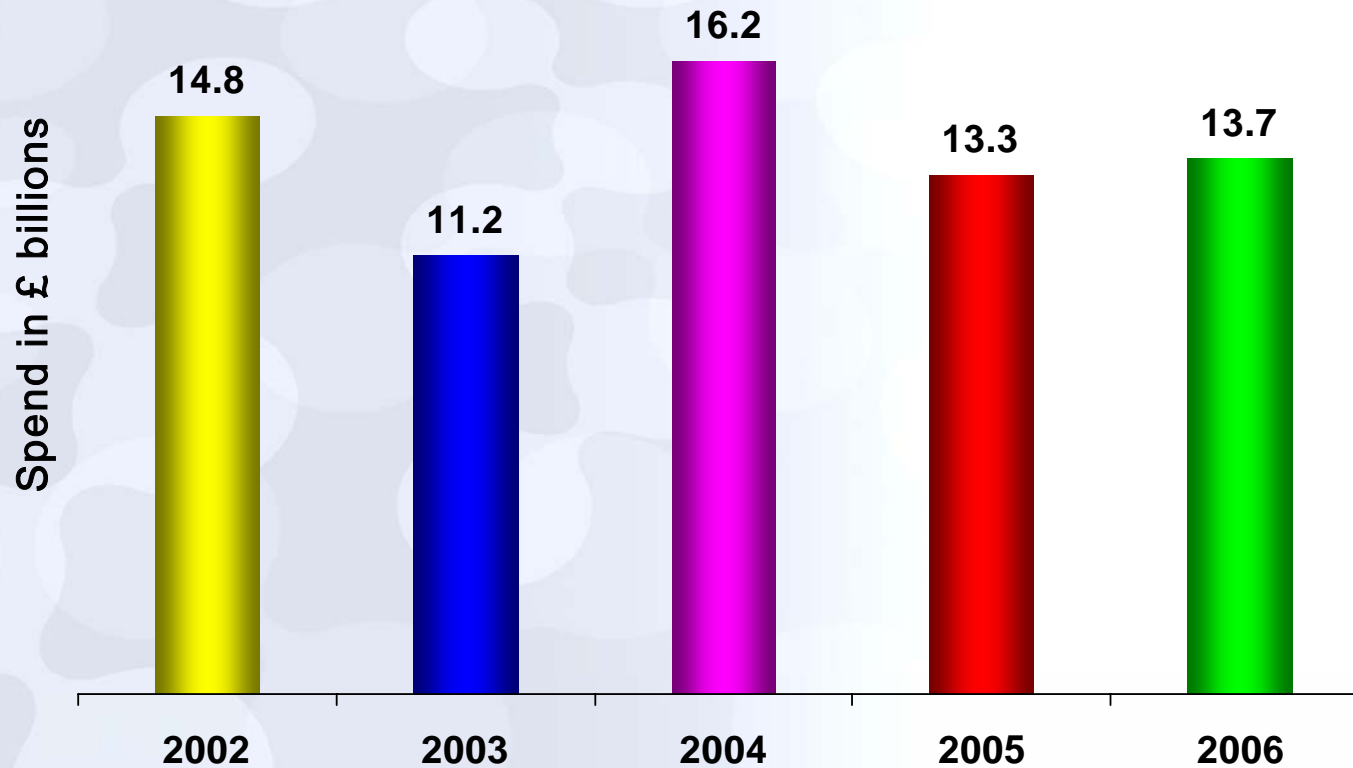


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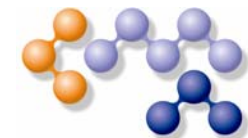


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Estimated annual spend on Comms & Networks (£ billion)



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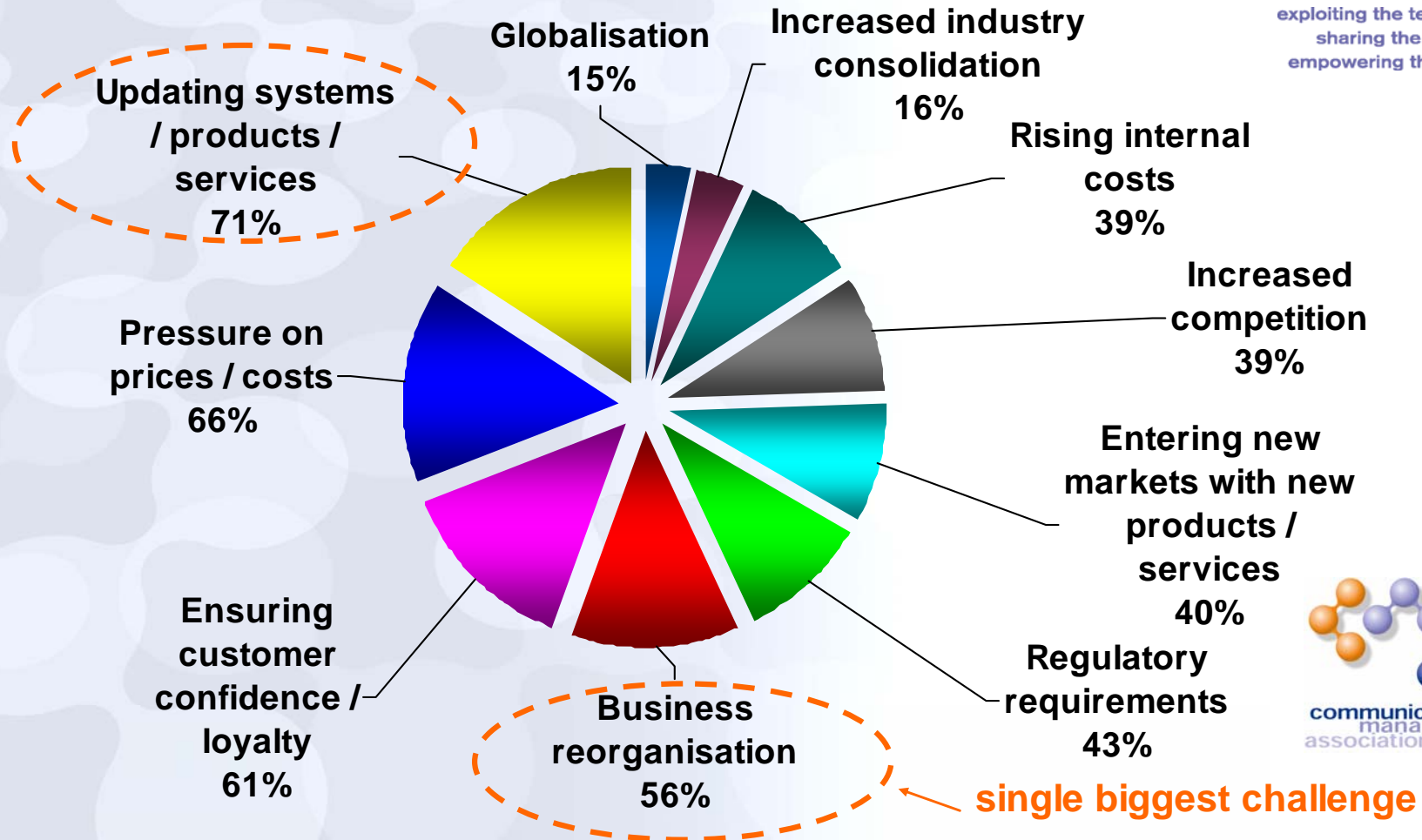


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Challenges : for the Business in the coming year



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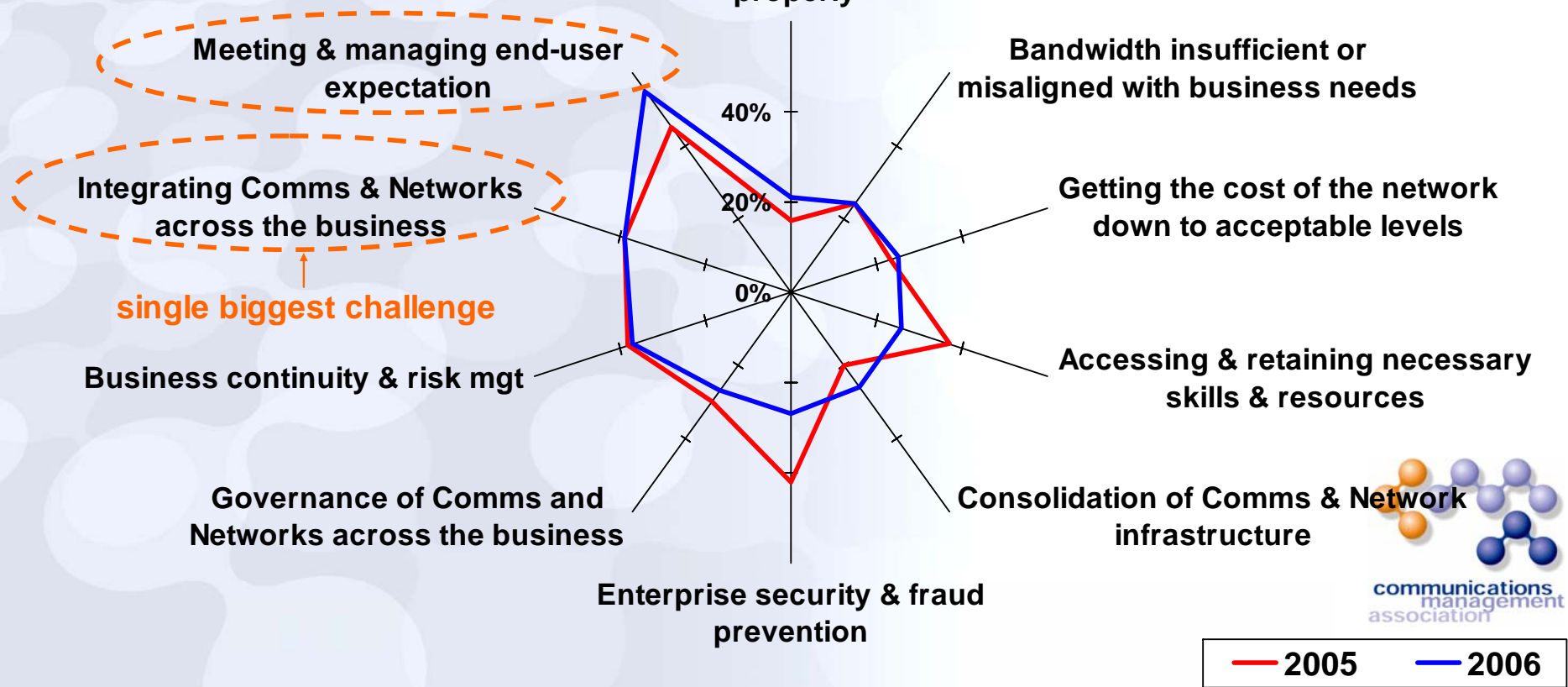
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Challenges : for the Communications & Networks function



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Getting applications to 'work properly'

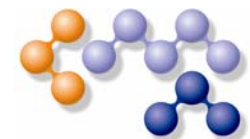


Communications in Business : Key Messages

- Enterprise strategies mainly focused on **maximising revenue** and **improving the customer experience**
- Communications and networks is a **key enabler for business** and spending on IP keeps going up
- VoIP and enterprise mobility are **main drivers of convergence**
- **BUT**....the same old issues remain: customer service, performance, billing, pricing, account management...



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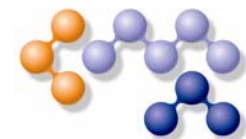
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THANK YOU

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