

**DIRECTORATE FOR SCIENCE, TECHNOLOGY AND INDUSTRY
COMMITTEE ON DIGITAL ECONOMY POLICY**

Working Party on Communication Infrastructures and Services Policy

**SUMMARY RECORD OF THE FIFTY-FIRST SESSION OF THE WORKING PARTY ON
COMMUNICATION INFRASTRUCTURES AND SERVICES POLICY**

Paris, 17 June 2014

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Held at Château de la Muette, Paris, 17 June 2014

ITEM 1: INTRODUCTIONS AND ADOPTION OF THE AGENDA

[DSTI/ICCP/CISP/A\(2014\)1/REV1](#)

1. The Chair, **Ms. Tracey WEISLER**, opened the meeting and welcomed Delegates.
2. The agenda was **adopted**.

ITEM 2: APPROVAL OF THE SUMMARY RECORD OF THE 50TH SESSION

[DSTI/ICCP/CISP/M\(2013\)2](#)

3. The Summary Record of the 50th session was **approved**.

ITEM 3: STATEMENTS

Oral presentations

i) WPCISP Chair—Presentation of “CISP 2.0”

4. **Ms. Tracey WEISLER**, the Chair of the Working Party, introduced “CISP 2.0”, a new proposed strategy and focus for the CISP, based on opinions and ideas collected from delegates and stakeholders via surveys. She reminded Delegates that the CISP Bureau survey is live until 18 July 2014, and that it has had a 50% response rate so far. **Ms. WEISLER** invited Delegates who had not already done so to complete the CISP Delegates’ survey at the following link: www.surveymonkey.com/s/LLJJKM3 before [18 July 2014](#). She also mentioned that the CISP Bureau would also be surveying all OECD CISP stakeholders this fall to get additional suggestions and input.

5. **Ms. WEISLER** introduced the new CISP Bureau Members as of June 15, 2014. The Bureau is composed by: Mr. Yair HAKAK (Israel), Mr. Akifumi IRIE (Japan), Mr. Nae-Chan LEE (Korea), Mr. Bengt MÖLLERYD (Sweden), Ms. Isabella Maria PALOMBINI (Italy), Mr. Benjamin WALLIS (United Kingdom), and Ms. Tracey WEISLER (United States).

6. The Working Party **noted** the statement.

ii) Update from the OECD Secretariat

7. **Ms. Anne CARBLANC**, Head of the DEP Division, and **Mr. Andrew WYCKOFF**, the Director of STI, from the Secretariat provided the Secretariat statement.

8. **Ms. CARBLANC** provided an overview of recent developments in the CDEP Committee. since the December 2013 CISP meeting. First, the Programme of Work and Budget 2014-2016 was being

finalised. Secondly, the Colombia Review of Telecommunications Policy and Regulation was successfully launched in Bogotá, Colombia the 9 April 2014. Thirdly, the Committee and its Working Parties' working methods would be further discussed in the upcoming Committee meeting 19-20 June 2014.

9. **Mr. WYCKOFF** mentioned that informal networking is a very important part of the OECD's role that could be enhanced through IT tools. Suggested by the development of Massive Open Online Courses (i.e. MOOCs), **Mr. WYCKOFF** proposed a trial of a novel method of working for the December 2014 meeting. This would involve the presentation of a single document by online video, so that delegates could view it in advance. One aim was to reduce the time for OECD Secretariat presentations during meetings, to leave more room for a live discussion. Other potential benefits were outlined in a background document distributed to delegates and placed on Clearspace. Following the December 2014 meeting, this pilot would be evaluated by delegates to determine the future potential of this unique and innovative working method.

10. The Working Party **noted** the statements. With respect to the video pilot, a number of Delegates showed support for this trial, as long as it had minimum cost and was critically assessed following the meeting to evaluate actual experience.

ITEM 4: BUNDLES AND HEDONICS

[DSTI/ICCP/CISP\(2014\)1](#)

i) Triple and Quadruple Play Bundles of Communication Services

11. **Mr. Agustín DIAZ-PINES** and **Ms. Alexia GONZALEZ FANFALONE** from the Secretariat presented the report "Triple and Quadruple Play Bundles of Communication Services". This document discusses triple and quadruple bundles of communication services in selected OECD countries, focusing on regulatory implications and market trends. It also includes econometric estimations adopting a hedonic pricing approach for broadband services.

12. The lead reviewer was **Mr. Jorge INFANTE** from Spain's Regulatory Authority of Communication Services (CMT). First, he commended the Secretariat for tackling such a challenging area for which there was little direct experience. He then pointed out, that, although it is difficult to get information on bundles, quantitative analysis to inform policy makers is part of OECD's work. He suggested that the report covered many different aspects of bundles that could be perhaps separated in different reports. He further noted that the section on "competition implications of bundles", where market delineation is addressed, could be the basis for a separate report. This section, he said, would need to be balanced with the positive aspects of bundles.

13. With regards to pricing methodologies, **Mr. INFANTE** applauded the effort to include bundles in the OECD basket methodology and regretted that only 12 countries were included in the analysis while acknowledging the constraints. Finally, he noted that hedonic regression methodology opens a new road to explore, and it sheds some relevant insights on quality parameters that affect broadband pricing, such as speed. However, he questioned whether this methodology could be considered a substitute to the current baskets and suggested that the approach is complementary to the current pricing methodologies.

14. **Mr. INFANTE** closed his intervention by saying that more robust checks would be needed for the hedonic econometric analysis, and he mentioned that economic experts at Spain's Regulatory Authority are available to help the Secretariat with this endeavour.

15. The Chair opened the floor for Delegates to **discuss** the report. Some Delegates mentioned that the competition aspects of bundles should be further explored in future work. They raised the question of the work load such a report represented for the Secretariat, in particular the hedonic approach and whether there are project "trade-offs" if the Working Party continues this work. Other Delegations welcomed the

use of new tools for price comparisons, such as the hedonic approach, but considered that more data would be needed to have accurate results of the difference of prices among countries. A member of **BIAC** applauded the effort to explore methodologies such as the hedonic approach for pricing and stated that this new area could become one of CISP's "best sellers". However, he said, **BIAC** considered that disclosures and caveats, already included in the document, should be further underscored.

16. The Working Party **discussed** the document, **discussed** next steps, and **agreed** to recommend it for **declassification** through written procedure to the CDEP Committee. The Working Party **agreed** to provide comments before 18 July 2014. Furthermore, the Working Party **noted** that a virtual expert group could be formed if substantial work was needed before declassification of the revised document.

ii) Discussion of Hedonic Work to Date and Upcoming Workshop

Oral presentation

17. **Ms. WEISLER** provided a brief overview of the work to date on the OECD's "Broadband Metrics Checklist" and then discussed future work on hedonics, including a proposed technical workshop. Dates under consideration include a meeting on the margins of the TPRC (<http://www.tprcweb.com>) to be held in Washington in September 2014 and during the week of the meetings of MADE and CISP in December 2014.

18. The Working Party **noted** the presentation.

ITEM 5: MOBILE MARKET DEVELOPMENTS

i) Mobile developments in France

Oral Presentation

19. **Mr. Xavier NIEL**, Deputy Chairman of the Board of Directors and Chief Strategy Officer of Iliad, France, provided a presentation on the evolution of his company (Free) and the importance of competition in telecommunication markets. He said competition leads to more investment, job creation, innovation, but especially the creation of consumer surplus. **Mr. NIEL** mentioned that he feels Free Mobile has been successful as a company since its entry in 2012 to the French mobile market having allowed a return of 7 billion EUR of purchasing power to mobile phone users in that country. A highlight of his talk was his recognition of the Working Party's role in promoting competition in the telecommunication market. **Mr. NIEL** thanked the OECD for providing the necessary tools to create a more competitive environment in the telecommunications sector, and he invited the OECD to pursue its efforts of opening telecommunication markets around the world. **Mr. NIEL** concluded his talk by pointing out that the OECD has a duty to call on every country of the world to render Internet and communication services available and affordable to the vast majority of the population.

20. In response to questions, **Mr. NIEL** outlined some of the largest barriers for a new entrant and stated that it was critical to highlight the benefits for consumers as policy makers assessed competing claims from different market participants. A delegation then asked his view of Net Neutrality, and **Mr. NIEL** replied that Free does not have a formal position regarding net neutrality, but he could personally understand both sides of the issue, as a citizen and as an operator. One delegate asked if Free would consider taking their model to other countries and he replied that this would be under consideration if opportunities arose for further growth and highlighted involvement in the launch of a new venture in Israel. A member of **ITAC** asked whether **Mr. NIEL** could say something regarding his company's strategy on IPv6. **Mr. NIEL** stated that the "Internet of Things" meant that everything will be connected, so IP addresses are a primary need. Thus, he said, it makes commercial sense to invest and to extend the universe of IP addresses by transitioning to IPv6. **Mr. NIEL** said he was proud that Free was one of the largest transporters of IPv6 traffic in the world. Finally, **Mr. NIEL** summarised his role in creating a new type of information-technology school in France, dubbed "42".. With its unique pedagogical approach and

accessibility to all, completely free of charge, he said, “42” is a new approach to the challenge of information-technology skill development.

21. The Working Party **noted** the presentation and thanked **Mr Niel**.

22. *ii) Wireless Market Structures and Network Sharing* [DSTI/ICCP/CISP\(2014\)2](#)

23. **Mr. Rudolf VAN DER BERG** from the Secretariat and **Mr. Brian POTTERILL** from OFCOM (United Kingdom), presented the report “Wireless Market Structures and Network Sharing”, which examines the developments in mobile markets with a focus on recent experience in selected OECD countries that have changed or held constant the number of facilities-based operators, as well as on the initial experience and key questions that have arisen with wireless network sharing. **Mr. VAN DER BERG** said policymakers face a number of issues in promoting competition and the deployment of infrastructure, and one question was the optimal market structure for mobile services (i.e. number of players). **Mr. VAN DER BERG** stated that new entrants, in mobile markets across the OECD area, have promoted competition, applied discipline on prices and spurred innovation. **Mr. POTERRILL** commented that, although many statements have recently been made around trade-offs between investment and competition, this had not been observed in the United Kingdom. He said that, in their experience, competition drove increased investment, including in 4G networks. With regards to network sharing and the pooling of network resources, he said it is a very important factor in the United Kingdom and enabled cost reductions without a decrease in services competition.

24. The lead reviewer was **Mr. Bengt MÖLLERYD** (Post and Telecom Agency, Sweden) who brought to the table four specific questions in order to start the discussion of the report: 1) what is happening in the industry with regards to the transition from voice to data?, 2) how much does it cost to produce one GB?, 3) how much does it cost to operate a mobile site, and 4) what does the operator of the future look like? **Mr. MÖLLERYD** pointed out that data from the Swedish market shows that the revenue the operators receive from mobile voice service is around EUR 230 per megabyte, whereas the revenue from mobile data is around EUR 4. He concluded his review by addressing the cost of towers, and he stated that there is a reasonable commercial case to share such infrastructure among mobile operators.

25. The Chair opened the floor for **discussion**. A number of Delegations including Australia, Canada, Japan, Korea and the United Kingdom welcomed the report and had suggestions for improvement. They said it was timely given discussions in their countries on market structure. Another Delegation inquired whether other countries imposed passive sharing obligations, or was it a result of commercial negotiations among operators. One delegation (France) expressed reservations regarding some aspects of the report and said they would work with the Secretariat to include examples that met their concerns and provide further literature that could be used to expand the analysis.

26. The Working Party **discussed** the document, **discussed** next steps, and **agreed** to recommend it for **declassification** through written procedure to the CDEP Committee. The Working Party **agreed** to provide comments before 18 July 2014.

ITEM 6: “Tour de Table”: RECENT DEVELOPMENTS IN OECD COUNTRIES

Oral presentations

i) Invited presentation: Mexico

27. **Ms. María Elena ESTAVILLO FLORES**, Commissioner at the Federal Institute of Telecommunications (IFT) in Mexico, provided a presentation highlighting regulatory and market developments in Mexico. She started by explaining the recent Constitutional Reform on Telecommunications. She mentioned that the reform has provided the regulator with tools, such as local loop unbundling and the concept of a dominant player (*preponderant*), to tackle competition concerns in the sector. **Ms. ESTAVILLO** highlighted that the scope of the reform is to make existing infrastructure available to new entrants, as well as to provide the means of deploying new infrastructure (e.g. the national wholesale network in the 700 MHz band). Furthermore, in May 2014, **Ms. ESTAVILLO** mentioned that IFT established asymmetric regulatory measures to the incumbents in Telecommunications and Broadcasting sectors.

28. The Working Party **noted** the presentation.

ii) Invited presentation: Netherlands

29. **Ms. Sandra VAN DER WEIDE**, Ministry of Economic Affairs in the Netherlands, provided a presentation on regulatory and market developments in her country. **Ms. VAN DER WEIDE** noted that innovation is taking place very quickly and this poses challenges to regulation, including the issues around convergence addressed by the Ministry of Economic Affairs. She highlighted that the Government took into account three important principles to underline the Ministry's approach: 1) ensuring a level playing field of the Telecommunications market, 2) enhancing cooperation with the European Union, and, 3) providing a platform for a partnership with the Industry through round tables with all sector stakeholders.

30. The Working Party **noted** the presentation.

ITEM 7: THE ECONOMICS OF THE TRANSITION TO IPv6

[DSTI/ICCP/CISP\(2014\)3](#)

31. **Mr. Chris FORMAN**, from the Georgia Institute of Technology, presented the report "The Economics of the Transition to IPv6", which highlights the economic costs and benefits of IPv6 adoption to different players along the Internet service delivery value chain from an economic perspective.

32. The lead reviewer was **Ms. Diane STEINOUR**, National Telecommunications and Information Administration (NTIA), Department of Commerce, United States. She first mentioned that CISP had established a volunteer group on how to measure the economic implications of the transition of IPv6, and how to deal with exhaustion of IPv4 addresses. She said Professor FORMAN had provided a comprehensive literature review on the subject. **Ms. STEINOUR** mentioned that the methodologies presented in the report, in order to assess the implications of transition, are still at an initial stage. Accordingly, in her view, a positive aspect of the report is that it does not present conclusions. She finalised her statement by stressing that future work on the subject would be necessary and suggested a number of potential next steps.

33. The Chair of the Working Party, **Ms. WEISLER**, opened the floor for discussion, and **Mr. Jorgen ANDERSEN**, Chair of CDEP, started by saying that this topic has been discussed for a long time. He reminded Delegates of the Working Party that the main goal is to provide Ministers with information on whether action with regard to IPv6 should be undertaken, in a timely fashion, or whether policy makers are going to wait until the costs of not transitioning to IPv6 become increasingly evident.

34. Some Delegates concurred that further analysis would be necessary. **Mr. Geoff HOUSTON**, Chief Scientist at APNIC and member of ITAC, pointed out that the Internet Community is very concerned about the economics of transition of IPv6, and, thus, will provide a list of technical clarifications to improve the report. **Mr. HOUSTON** highlighted that the exhaustion of IPv4 addresses is a pressing issue, noting that at the beginning of June 2014 LACNIC announced that they had run out of IPv4

addresses joining those regions where this had already occurred. Thus, this issue should be addressed as soon as possible as it may pose future competition challenges. He stated that ITAC strongly supports examining the economics of exhaustion, especially the question surrounding why is there only 3% uptake of IPv6 addresses if IPv4 addresses are virtually exhausted. **Mr. HOUSTON** concluded his intervention by saying that the exhaustion of IP addresses is one of the most fundamental issues facing the Internet today.

35. The Working Party **discussed** the document, **discussed** the next steps and **agreed** to recommend declassification by written procedure to the CDEP Committee. The Working Party also **agreed** to provide input on this report before 18 July 2014.

ITEM 8: PROGRAMME OF WORK AND BUDGET

i) Update on progress for 2013-2014

36. **Mr. Sam PALTRIDGE** and **Ms. WEISLER** provided an update on progress for the current programme of work for 2013-2014. The Working Party is on track to complete all items at its meeting in December 2014 and the powerpoint is available on Clearspace.

ii) “Brainstorming” Discussion of CISP work for 2015-2016 Programme of Work and Budget

[DSTI/ICCP\(2014\)5/REV2](#)

37. **Ms. WEISLER** invited discussion by delegates on projects that could be undertaken to fulfil the next programme of work for 2015-2016, including how this work will contribute to the 2016 CDEP Ministerial and the priorities of the OECD Council. Within the framework of the programme of work, the Chair invited CISP delegates to indicate their preferences regarding the focus of the projects and ideas for detailed work under the headline items, as well as offering views on how to improve the PWB process. **Ms. WEISLER** introduced the issues and policy/regulatory questions that CISP Delegates had indicated high interests in the recent survey (see below).

35. In response to this invitation, Delegates **proposed, discussed and provided further input and direction** to the Secretariat on these topics. Sweden highlighted that in the PWB an item is proposed regarding fibre deployment of networks facilitated by Public Private Partnerships and regional and local initiatives, and this was a key area for future work. Japan indicated that continuing the metrics work of network speed tests and mobile market structures were important areas. Canada highlighted the need to liaise with other stakeholders working on these topics and, by way of example, with regards to Internet Governance, the Global Commission on Internet Governance (GCIG). The United States reiterated the importance of continuing work regarding the economics of the transition to IPv6. The United Kingdom reiterated that much interest was expressed regarding the Economics of Convergence, and stated that further work on bundling would fit in well within the scope of the PWB.

38. **Mr. PALTRIDGE** said that the specific suggestions to enhance the programme of work could be matched with the Output Areas of the PWB for 2015-2016, though choices would need to be made on the timeline, given the Ministerial, in terms of which items were taken in 2015. Furthermore, he noted that the OECD is engaging with other stakeholders working on Internet Governance topics, such as GCIG. In particular, in March 2014 the OECD Secretary General, **Mr. Angel GURRIA**, became a commission member of GCIG. Going back to some of the topics mentioned, as priorities in the survey, **Mr. PALTRIDGE** said they might be addressed as part of these PWB items:

- Net neutrality – could possibly be taken up under **IOR 3.1** “Strengthening an Open Internet to stimulate growth” or **IOR 1.3** “Competitive communication markets traffic exchange and inclusive growth”

- Next generation technologies/infrastructure - could possibly be taken up under **IOR 1.3** “Competitive communication markets traffic exchange and inclusive growth”
- Internet Governance - could possibly be taken up under **IOR 3.1** “Strengthening an Open Internet to stimulate growth”
- Broadband deployment and investment - could possibly be taken up under **IOR 1.3** “Competitive communication markets traffic exchange and inclusive growth”
- Cloud computing - could possibly be taken up under **IOR 1.1** “The Development of the Internet of Things” or **IOR 1.4** “Economic value of convergence”
- Big data and consumer autonomy - could possibly be taken up under **IOR 1.1** “The Development of the Internet of Things” or **IOR 1.4** “Economic value of convergence”
- Network sharing - could possibly be taken up under **IOR 1.3** “Competitive communication markets traffic exchange and inclusive growth”

39. Finally, **Mr. ANDERSEN** commended the enthusiasm of CISP for volunteering work towards the Ministerial, as the products of this Working Party are very important to the Committee. **Mr. ANDERSEN** reminded Delegates that the final goal is to propose actions in order for policy makers to see the Digital Economy as a platform for innovation.

40. The Working Party **noted** the presentation, and **discussed** possible comments to the Secretariat on those topics. The Working Party **agreed** to provide further input and directions on these issues by 18 July 2014.

ITEM 9: OUTLINES FOR DECEMBER 2014 MEETING

[DSTI/ICCP/CISP\(2014\)4](#)

i) Digital Economy Outlook (CISP Chapters)

41. **Mr. DIAZ-PINES** from the Secretariat presented outlines for the Chapters undertaken by the Working Party for the Digital Economy Outlook. The drafts of these Chapters will be presented to the Working Party at its meeting in December 2014 with a view to publication in 2015.

ii) Further work on international mobile roaming

42. **Mr. DIAZ-PINES** from the Secretariat provided a proposal for a new report on international mobile roaming which will be discussed at the next meeting of the Working Party. This work will be used as the basis to report back to the OECD Council in 2015, as requested by Council three years following the Recommendation on International Mobile Roaming (2012).

43. **Ms. WEISLER** opened the floor for discussion and asked Delegations to provide input with regards to the Outlines. The United Kingdom posed the question whether the content of the Outlines would be enough to cover a Working Party session lasting one day and a half in December 2014.

44. **Mr. PALTRIDGE** stated the three chapters that the CISP would be contributing to the Digital Economy Outlook would be distinct documents to be discussed in the December 2014 meeting, along with the document on international mobile roaming. In addition, a session may be considered on hedonics, and a Technology Foresight Forum will be organised by the Secretariat on the topic of “Internet of Things”, subject to the approval of the CDEP Committee. A member from **BIAC** (**Mr. NELSON** from Microsoft) welcomed CISP’s focus on the Internet of Things and commended CISP’s initiative in this area.

45. The Working Party **discussed** the content of the Outlines, and **agreed** to provide written input and direction to the Secretariat on the proposed Outlines by 18 July 2014.

ITEM 10: CISP AND ITS GLOBAL PARTNERS: OUTREACH TO SOUTH EAST ASIA COUNTRIES

46. A decision was taken to carry over this item to the next WP-CISP Meeting in December 2014.

ITEM 11: OTHER BUSINESS

i) Dates for the next meetings

47. The Working Party **agreed** that the date for its next meeting, the 52th session of the CISP Working Party, will take place **9-10 December 2014**. The session will start at 14h30 on the first day.

ii) Other items

48. The Working Party was invited to **raise** any other item. It was mentioned that the ITU will host a meeting on Broadband Indicators 17-19 September 2014

ITEM 12: CLOSING REMARKS BY CHAIR AND BUREAU

49. The Chair of CDEP, **Mr. ANDERSEN**, and the Chair of the Working Party, **Ms. WEISLER**, made closing remarks.

50. **Mr. ANDERSEN** said that CDEP Delegates had indicated a preference that the 2016 Ministerial should address current challenges, such as boosting innovation, growth and employment. He mentioned that although the title of the Ministerial had not yet been decided, one prevalent idea was “Internet as a platform for growth.”

51. **Ms. WEISLER** underlined the importance of the Working Party submitting comments on the reports discussed by the 18 July 2014. In addition, she invited Delegates to put forward projects that they would want to promote in the Committee. **Ms. WEISLER** closed the meeting.

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