



Enhancing Life

NATIONAL BROADBAND NETWORK (NBN) POLICIES – UPDATE 2015

POLICY & REGULATORY COMMITTEE

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THE NBN IN THE MENA REGION

As part of its Regulatory and Policy Committee's mission, the FTTH Council MENA is committed to strengthening its cooperation with policy makers, governments and regulators in the region in order to positively influence relevant NBN policy development and have a positive impact on broadband deployment in general, and FTTH rollout in particular.

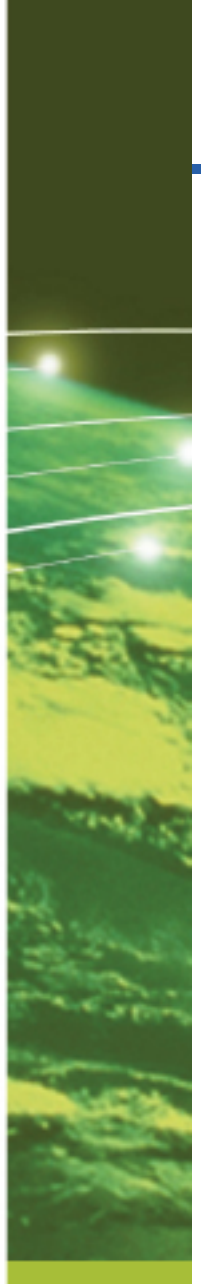
The FTTH Council MENA commissioned this report from Ventura Team back in 2014 to survey the status of NBN policies in the MENA region in order to identify the most effective generic approach to help policy makers, governments and regulators make the right decisions in the matter of NBN policy and accelerate the FTTH deployment.

The P&R committee followed up on the current status and extended the study by an update reflecting the progress in 2015. The full report is accessible for Members at the restricted member area.



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CLASSIFICATION OF NATIONAL BROADBAND INITIATIVES – CHANGES FROM AUTUMN 2014

Formative		Emerging	Implementation	Achieved
Discussions about NBN policy are at an early stage without yet reaching a conclusion or have stalled.		There is a desire for ubiquitous high-speed broadband and policy is developing in parallel with initial investments.	The general strategy is mature and the focus is now on implementation.	The NBN goal of ubiquitous high-speed broadband has been achieved.
Egypt Iraq Iran	Lebanon	Jordan Morocco Bahrain ----->	Oman Qatar (re-purposed)	
Either No NBN Policy (Purely Market Driven) or Informal Policy				
Either there is a) an informal NBN policy directing State controlled operators to invest or b) there has not yet been a serious discussion about NBN policy, or c) the decision is to rely entirely on market activity.				
Algeria Kuwait Libya	Palestine Tunisia		Saudi Arabia	UAE

FTTH COUNCIL NBN POLICY DOCUMENT IS AVAILABLE ONLINE (2015 UPDATE AVAILABLE SOON)

The 2014 Study Defined Key Factors in an NBN Policy

Policy Dimension	Essence of Recommendation
Geography: Competitive v Complementary	Complementary is more efficient
Copper Switch Off / Incumbent Migration	Should be guaranteed
Consistency of Regulation with NBN (especially re pricing)	Aim for high consistency but need not be perfect
Execute either via Incumbent or New NBN Organisation(s)	New focussed organisation(s) preferable as likely to be more effective
Single v Multiple NBN Companies	Multiple companies reduce execution risk
Clear, accountable, stable Governance of NBN	Essential for any endeavour
Degree of Structural Separation	High degree of separation more effective
Government v Private Finance	Signifiant private finance adds discipline
Universal Service Funds (or similar ongoing contractual revenues)	Universal service should be modernised to fit NBN and aid financing