E-government & PPPPs for Access to information and Benefits of ICTs for ALL
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Drivers of Global ICT Growth

• Arrival of Information/Knowledge Age
• Global Need to communicate quickly/cheaply
• Mobile / Wireless Technologies
• Internet and broadband – desire to implement national fibre backbone
• Semi-conductor, micro-electronics/IT
• Growing Convergence – drive towards Next Generation of Networks (triple/quad play)
Global Accords Impacting Countries in ICT sector

- MDGs Target of 2015
- WSIS I and II Agenda and Action Plan
- Poverty Reduction Strategy Papers
- Medium-Term Economic Plans/Budgets
- Promotion of Private Sector in Development
- Desire for Technology Transfer
- Need for Human Capacity/Skills
- Need to Compete Globally
National ICT Policies

During 2006 the World Bank conducted a study on ICT4D and found that the following thematic areas were identified in National ICT Policies for 40 countries:

1. e-Government 95%
2. Infrastructure 90%
3. e-Education 88%
4. Legal / Regulatory 85%
5. ICT Industry 70%
6. IT HR Development 63%
7. e-Business 58%
8. e-Health 35%
Globally, ICT spending is estimated at US$3 Trillion

Growing at an average of 8.9% per annum

Representing 6.8% of Global GDP.

ICT Growth has to be a part of a strategic plan which drives an economy

Essential part of Global Market Participation.
Foreign Direct Investment in ICT sector

Private Investment in Telecommunications Projects

Total investment [US$ millions]

Source: World Bank PPI Database
World trends and perspectives

► Wholesale investment boom

► Marine cables are being laid between China and US to provide a connection of 5.12 terabit cable.

► Increasing demand for submarine fibre capacity.

► BT (21CN) & Other major Telcos moving to NGN solutions strategy

► Operators moving to NGN then to IMS.
E-Gov in the Public Interest

• Development of E-Gov is integral for empowering citizens, promoting economic growth and even saving lives
  – Ensuring Universal Access – connectivity for all
  – Portfolio of E-Government Services
    o G2G, G2B & G2C - Social services
    o Online tools for business community
  – Disaster Response Network
    o Meteorological, geological monitoring
    o Early warning systems are vital, and the rapid deployment of robust systems after the event saves lives

• Up to date Innovation and Networks (NGNs)
  – Meeting the growing demand for essential e-Gov/ICT services
  – Encouraging industry innovation
Developing National e-Government operations

- E- Development Initiative
  - E-Customs (on line filing)
  - E-Taxation (on line filing)
  - E-Budget Preparation
  - Gov e-mail services
  - Gov. Web Portal
  - E-Civil Registry
  - E-Business Registry
  - E-Land Registry
  - E-Procurement
  - E-Agricultural Depots
  - E-Commerce
  - E-Education
  - E-Health

Developing for e-Business Services

- Enhanced Cellular
- Music Downloads
- Best Practice VoIP
- IPTV
- Satellite
- Web 2.0
Creating an Enabling Environment

• **Policy and Regulatory Harmonization**
  – Harmonization of policies and regulations
  – Convergence & technology-neutral Licensing
  – Fair and optimal frequency allocation/management
  – Addressing significant market power issues (SMP) and promoting fair competition
  – Ensuring Consumer protection and QoS

• **Building Infrastructure**
  – Maintaining open and competitive markets in infrastructure and services, including Open Access Networks
  – Capacity, now and in the future
  – Infrastructure development - optimum approach
  – Wired & Wireless technologies
  – Facilitating Investments - encouraging PPPP innovation and long-term investment

• **Human Capacity Building and Training**
Addressing Infrastructure Needs

- Capacity and bandwidth needs
- Infrastructure development
- Wired and wireless
  - Undersea optical-fibre cable, terrestrial wireless and satellite links
- Ensuring redundancy and resiliency as networks converge
- Looking ahead to anticipate future demand and requirements
- Facilitating Investments through Public-Private Partnership
  - Creating Regional Body and working with Regional development banks to bring about low cost regional fibre network similar to NEPAD Africa e-commission with group of 22 African countries
  - CTO has facilitated inward investment for Commonwealth Member countries
Under-investment in Developing Regions

Investment in African Telecommunications is far behind all regions apart from Oceania

Africa – USD 12.9 per capita

Oceania – USD190.80 per capita

Investment in telecommunications 2005
High Profitability In Africa

Factors Undermining Investor Confidence

- Inadequate long-term capital
- Unpredictable policy/regulatory environment
- Corruption
- Political instability
- Difficulty in repatriating capital
- Small disaggregated markets
- Non-liquid capital markets
- Difficulties in finding trustworthy partners
- Inadequate knowledge of the continent
- Foreign currency risks
- Shortages of skills
- Inadequate long-term capital
Disparity in Maturity Levels by Region

ICT Maturity Level by Region

- **Africa**: 1 Fully Mature, 2 Advanced, 11 Progressive, 5 Formative
- **Asia / Pacific**: 3 Fully Mature, 3 Advanced, 7 Progressive, 6 Formative
- **Caribbean / Mediterranean**: 1 Fully Mature, 5 Advanced, 5 Progressive, 4 Formative
### ICT MATURITY LEVELS

<table>
<thead>
<tr>
<th>Fully Mature</th>
<th>Advanced</th>
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<tbody>
<tr>
<td>• National ICT Strategy implemented</td>
<td>• National ICT Strategies in place</td>
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<tr>
<td>• Highly efficient ICT operations with low TCO</td>
<td>• action plans in implementation</td>
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<tr>
<td>• Sophisticated infrastructure to deliver e-initiatives</td>
<td>mode</td>
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<tr>
<td>• High accessibility and connectivity</td>
<td>• Efficient ICT operations with</td>
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<tr>
<td></td>
<td>moderate TCO</td>
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<tr>
<td></td>
<td>• Robust infrastructure with</td>
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<td></td>
<td>acceptable bandwidth</td>
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<tr>
<td></td>
<td>• Good accessibility and connectivity</td>
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<table>
<thead>
<tr>
<th>Formative</th>
<th>Progressive</th>
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<tbody>
<tr>
<td>• National ICT Strategy in development</td>
<td>• Recently developed or finalizing</td>
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<tr>
<td>• Very inefficient ICT operations with high TCO</td>
<td>National ICT Strategies</td>
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<tr>
<td>• Very limited infrastructure with low skill level</td>
<td>• Inefficient ICT operations with</td>
</tr>
<tr>
<td>• Limited accessibility and connectivity</td>
<td>wide technical footprint and high TCO</td>
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<tr>
<td></td>
<td>• Inadequate infrastructure with</td>
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<td></td>
<td>low bandwidth</td>
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STRAATEGY MIGRATION PATH

“Laying the Foundation”

“Transforming the Business”

“Utopian Pull”

FULLY MATURE

ADVANCED

FORMATIVE

PROGRESSIVE

Your partner in ICT business and development
National ICT DEVELOPMENT Path

- National ICT Policy
- e-Readiness Assessment
- Benchmarking
- National ICT Strategic Plan
- Integrated Implementation Programme
- Promotion & Awareness
- Monitoring & Reporting
- Continuous Enhancement
- Quick Wins & Fast-Track Initiatives

ICT Governance & Project Management
Communication & Change Management
For E-Gov To Work It Must Be Big & Relevant - Fast!

E-Governance

Public Sector

Community

Private Sector

PARTICIPATION

MILLIONS OF SATISFIED USERS EVERYDAY

E-Government

Citizens expect a lot from EG - IT costs a lot and promises a lot

management of information

delivery of services

pervasive technology

relevant applications

connectivity

sustainability

hardware

training

Citizens expect a lot from EG - IT costs a lot and promises a lot
When is a Partnership not a partnership?

- It just doesn’t follow….
  1. Quantitative terms of tender / procurement are being judged qualitatively
  2. Private contractor does not share in risk of accountability by end-user
- There is no connection between the group providing, the group paying and the group getting

Private Sector  ➔ Solely Contracted ➔ Public Sector  ➔ Solely Accountable ➔ Community

Quantitative Award  ➔ Expert Provider ➔ Must Meet Costs ➔ Adapts Quickly ➔ Qualitative Assessment ➔ Non-Expert User ➔ Must Get Satisfaction ➔ Needs Constantly Change

Cannot mediate quickly enough
The PPPP Framework

- Joining - 1A / 2R / 3W = One Aim; Shared Risk & Reward; Three Wins
  1. Public Sector brokers between Community(People) and Private Sector
  2. Performance-based contracts are judged on end-user satisfaction *(no tenders - now RFP)*
  3. Private Sector is directly accountable to Community end-user *(no value - no pay)*
  4. Public Sector monitors quality and enforces equity guidelines *(good, affordable services)*

*The group getting is the group paying*
International Resources and Mechanisms

- Multi-Stakeholder Partnerships and Multi-Sector Initiatives
  - infoDev
  - Public Private Infrastructure Advisory Facility (PPIAF)
  - Private Infrastructure Development Group (PIDG)
  - Building Communications Opportunities (BCO) Alliance
  - Global Knowledge Partnership
Domestic Resources and Mechanisms

- Private Sector
  - Limited but increasing
- Public Resources
  - Focusing more on policy, capacity
- Universal Access Funds
  - Collective investment within sector
- Public-Private Partnerships
  - New initiatives and strategies
Impact of current Economic crisis on ICT Sector

- **Broadband** – demand is relatively robust & expected to grow by 12% next 12 mths
- **Mobile** – as at Dec 08 4 billion subscribers – expected to continue strong growth in Emerging markets
- **Network equipment** – expect to see decline in demand and postponement in terms of roll out esp Wimax
- **NGN** – Requires substantial investment for deployment of fibre to home- state funding or imaginative funding schemes required to revitalize – some $137bn required over next 5 yrs
- **Satellite** – capital intensive and could be vulnerable but long lead projects are underway
Impact of Current crisis on ICT Sector

• **Overall** --- ‘Uncharted waters’
• **Difficult to predict** –
  – How consumer demand, operators revenue and regulators responses will evolve
• ICT is a vital sector driving Economic growth
• Numerous government have pledged several billions to develop ‘Digital Britain, Australia, Italy, Greece, USA etc…’
• As ICT industry is based on innovation and technological change it will revitalize the industry and enable the global economy to innovate its way out of this crisis
• The crisis represents ‘an Opportunity for the ICT Industry’ with increased engagement by Public Sector
Key Strategies to fuel ICT Growth

- Key strategies should include:
  - Greater coordination across different institutions and programs;
  - Multi-stakeholder partnerships
  - New emphasis on domestic finance
  - Private sector support for applications and content
  - Encouragement of voluntary contributions
  - Nearly all major donors and finance institutions are constantly examining new methods to improve the effectiveness of ICT finance
CONCLUSIONS

• We Are In a Knowledge Age
• Need to help those Countries who are lagging behind
• Numerous Opportunities Exist for ICT Investment
• Developing Economies such as Africa Have Improved Considerably in Last 20 years
• Liberalisation, Privatisation, Competition Offer New Opportunities
• Multi sourcing of funds is possible New Equity, Debt and Venture Funds Available
• Highest Returns on Investment Seen in Emerging markets
• Let’s bring about ‘Digital Access’ to every citizen in the world
Thank You

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