

WELCOME



WITH ULTRA-BROADBAND DELIVER THE RIGHT TO COMPETE

Guillermo Alarcon
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..... Alcatel-Lucent 

IS THERE A VIABLE BUSINESS CASE TO CONNECT THE THE UNSERVED AREAS?

CHALLENGES

Expensive last-miles access
Duplication of Infrastructure
Failure of Market Structure
ICT expertise
Low incomes
Funding
Return of investment

SOLUTIONS

Shared Broadband Infrastructure
Leveraging Digital Dividend
More competition at service level
Public Private Partnerships
Wholesale Services

Moving from frequency auctions...to beauty contests

HOW DO YOU USE ULTRA-BROADBAND TO BETTER COMPETE IN THE GLOBAL MARKETPLACE?



Share infrastructure to reduce cost and maximize service coverage



Embrace the coverage needs of the full country.



Distinguish the wholesale and retail business and the related investment needs



Collaborate to make the best use of public assets and private resources

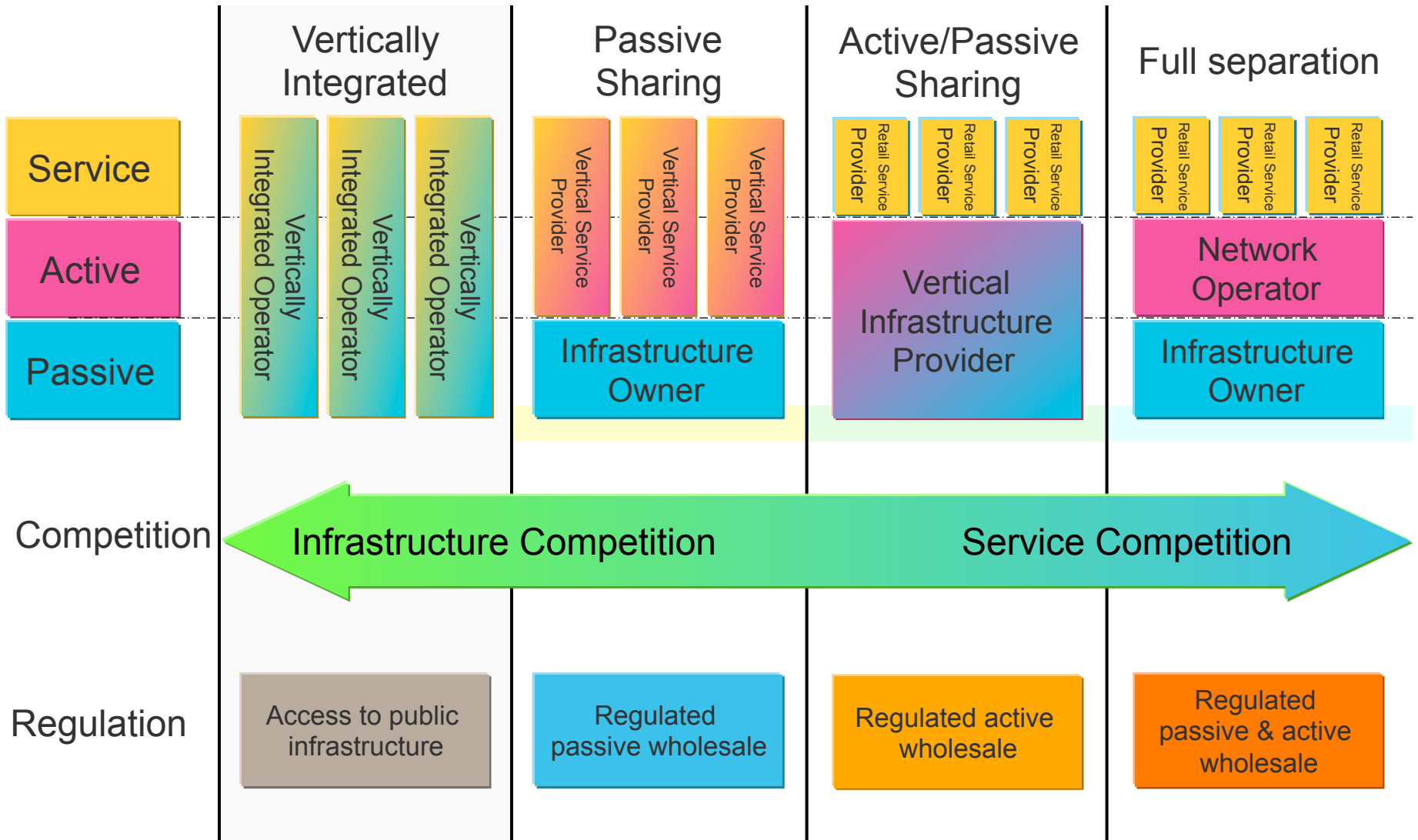
WHERE TO START?

RECOMMENDATIONS FROM MARKET EXPERTS:

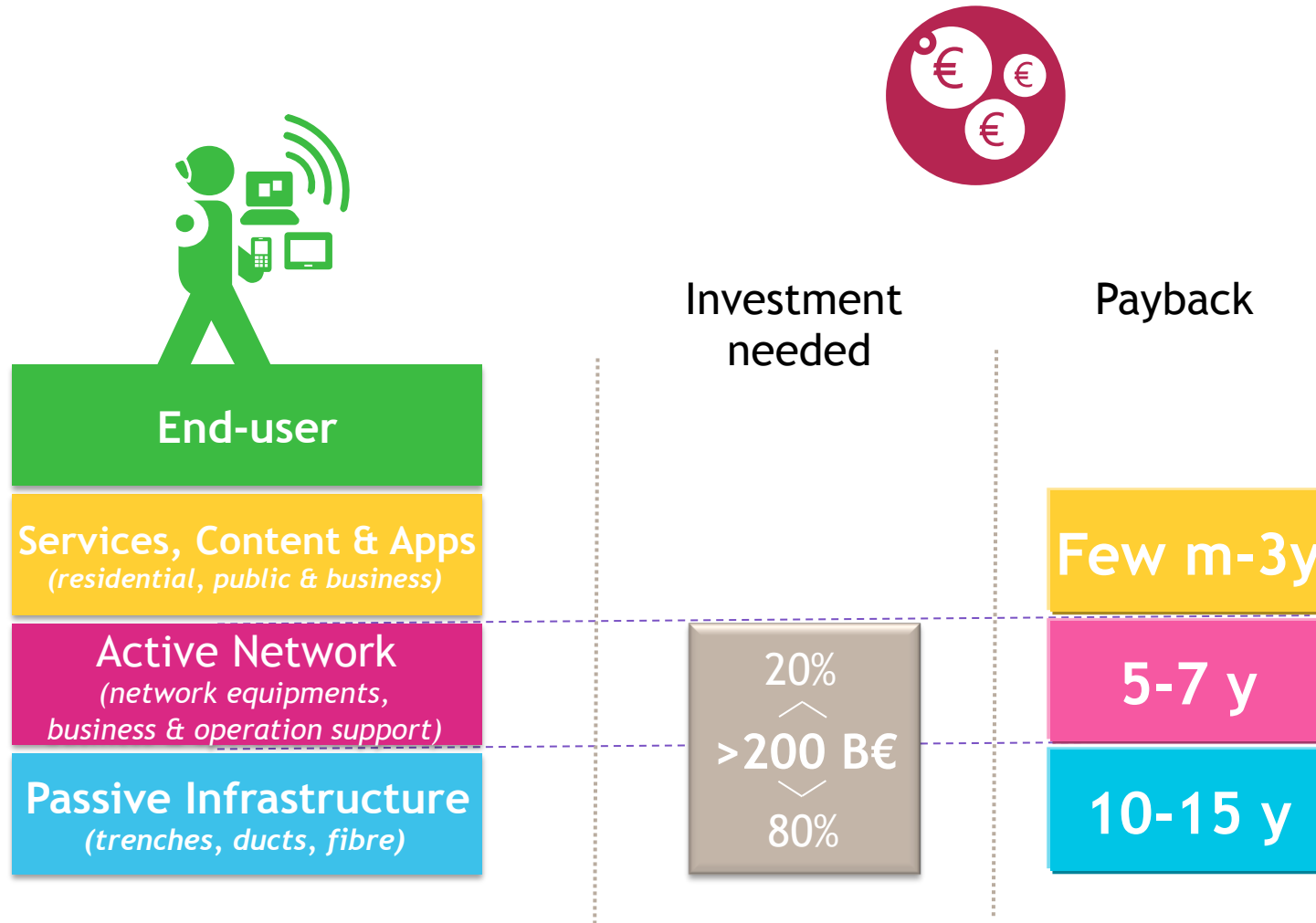
1. **Assess your situation:** coverage, competition, quality?
2. **Set the vision** on ‘one’ priority
3. Look at your **regulatory framework**
4. Study how to **mitigate all non-transferable risks**
5. **Collaborate with a full eco-system** to create a sustainable technical, financial and commercial proposition
6. **See the forest, not the tree:** It is not about “building a backbone” it is about optimizing the full supply side and incentivizing the demand side.



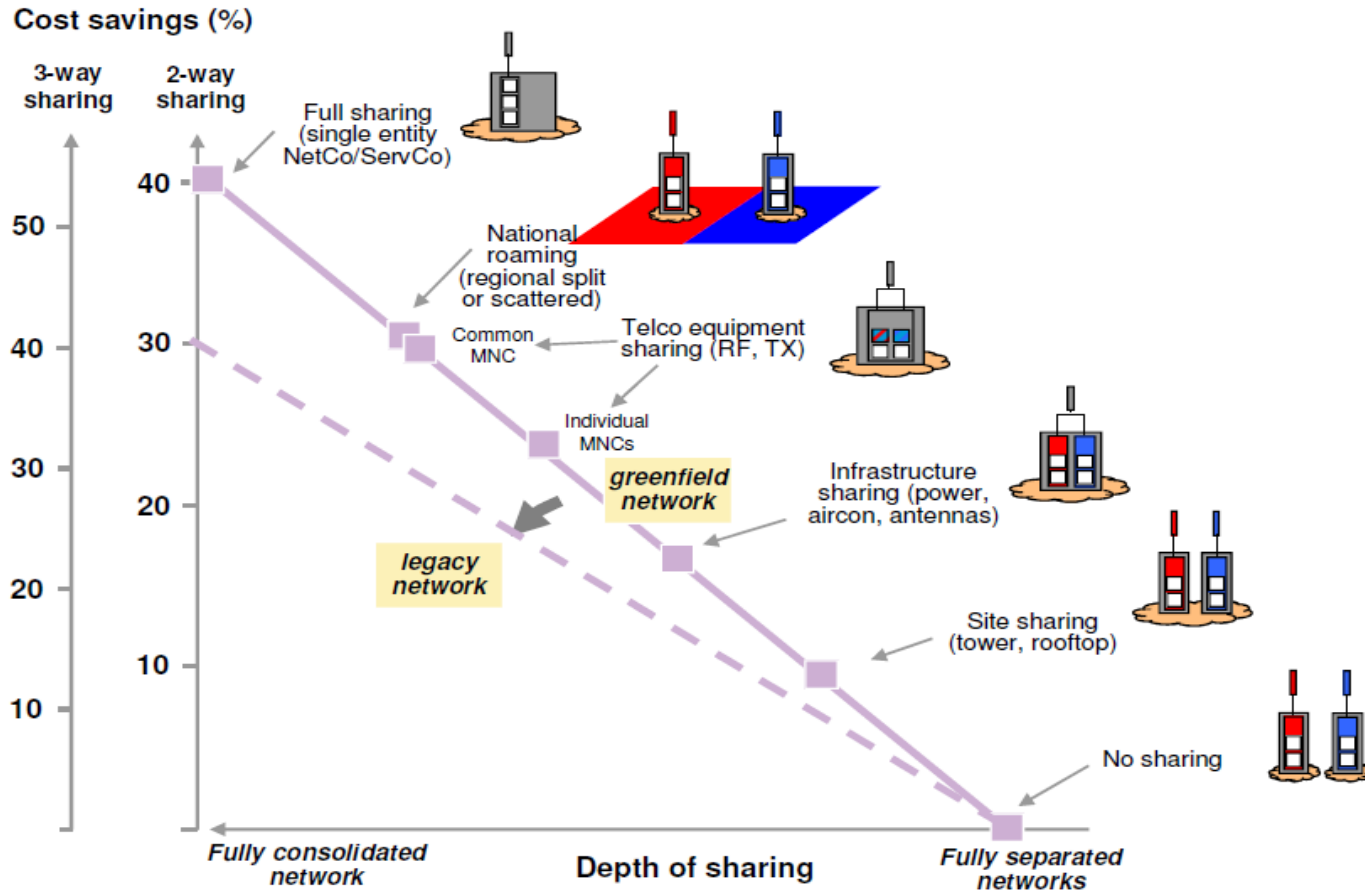
CHOSING THE RIGHT REGULATORY FRAMEWORK IS KEY



DIFFERENT BUSINESSES REQUIRE DIFFERENT FUNDING



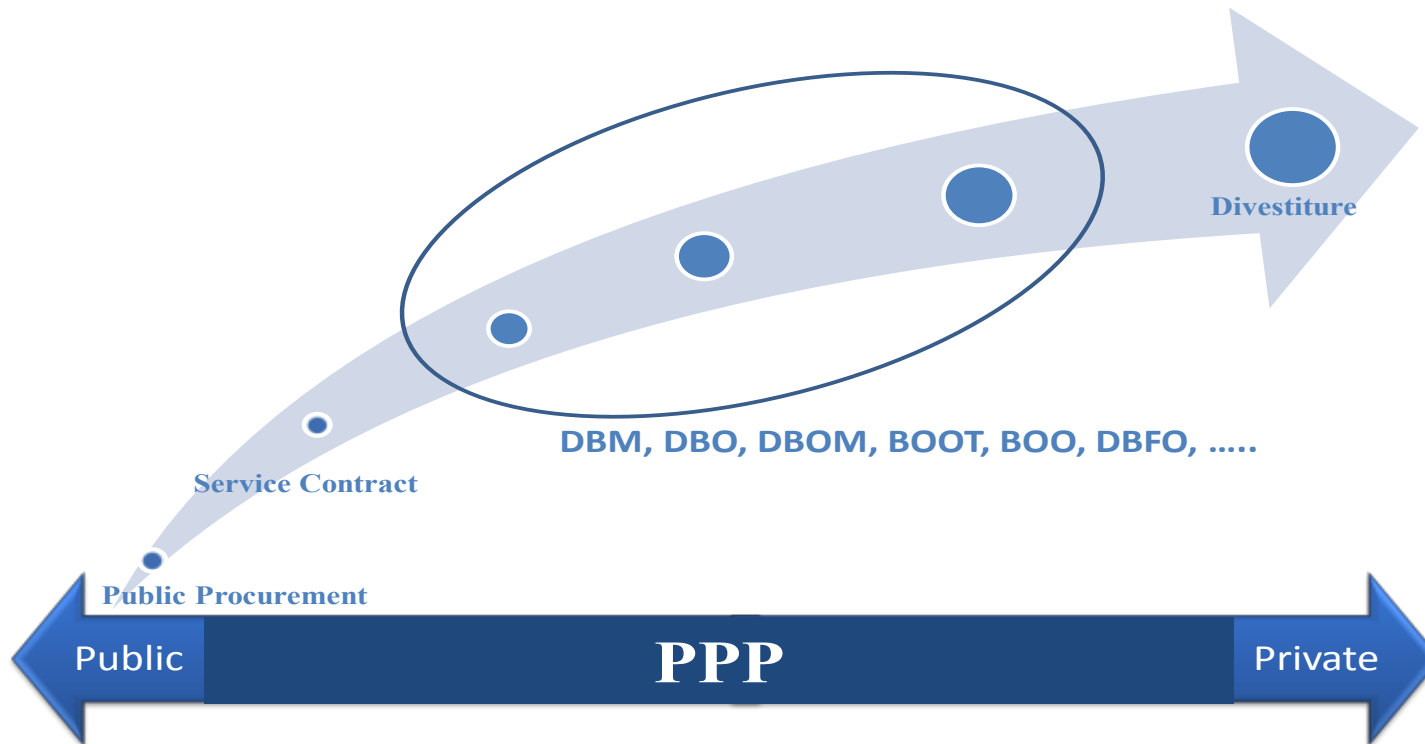
SHARING TO REDUCE COSTS AND WHOLESALE IS THE MOST EFFICIENT WAY TO SHARE INFRASTRUCTURE!



Vodafone source

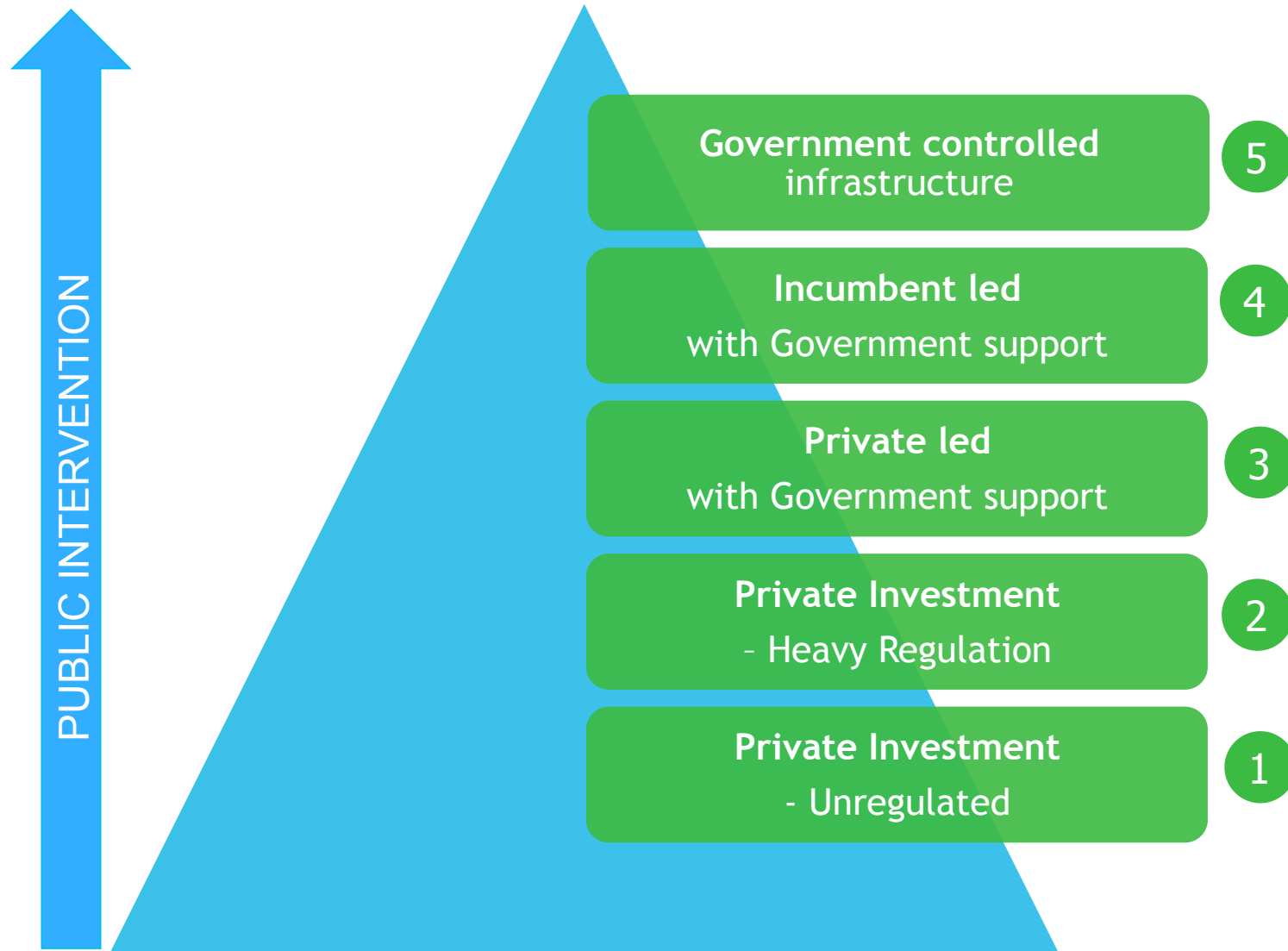
ADAPT PPP MODEL TO RESPONSIBILITIES AND RISKS

Type of PPPs and Risk Sharing



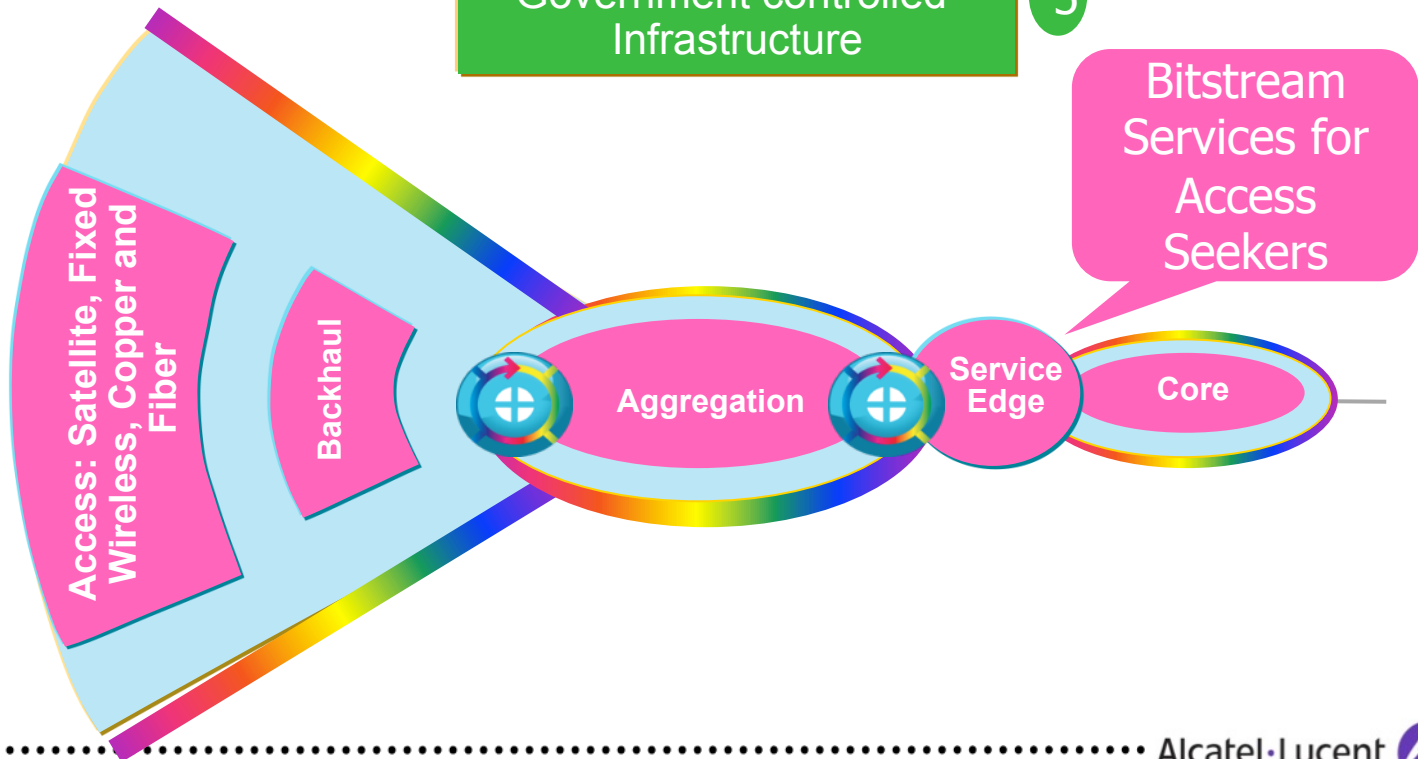
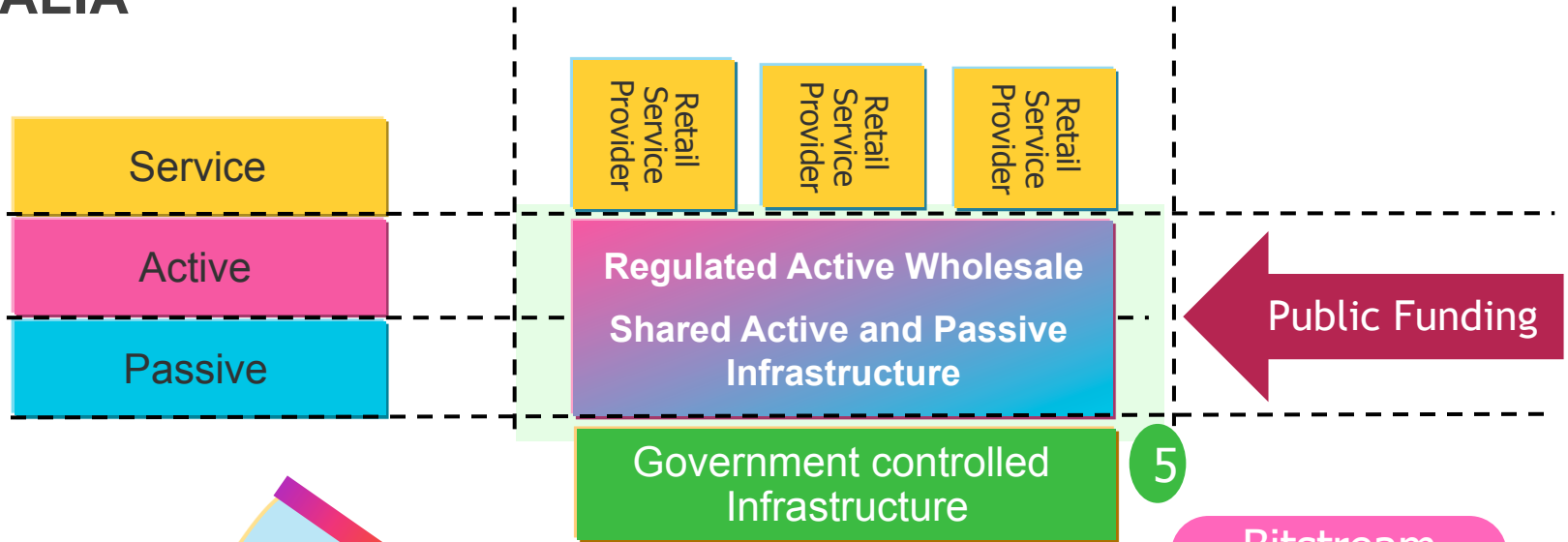
Source: Enrique Moreno de Acevedo Sánchez

GOVERNMENT INTERVENTION MODEL EXAMPLES

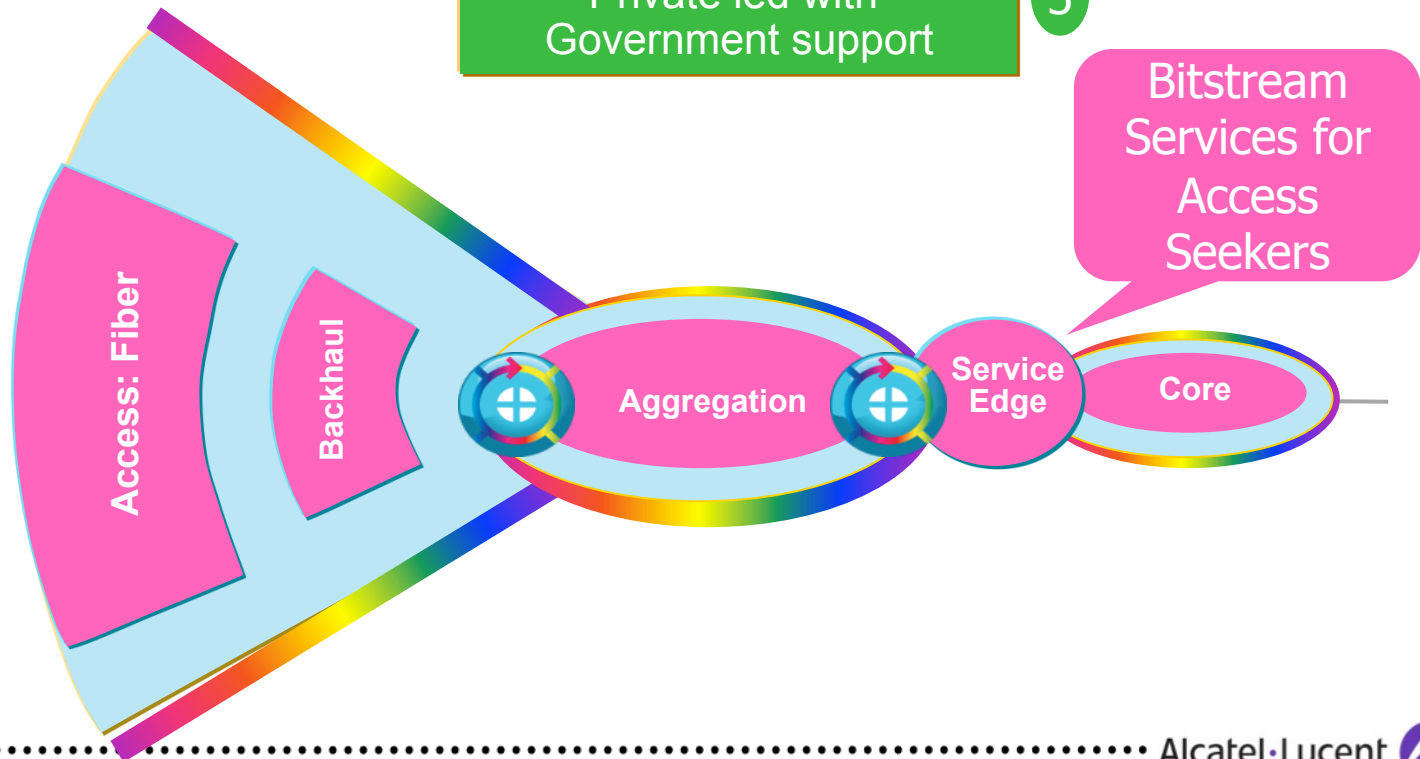
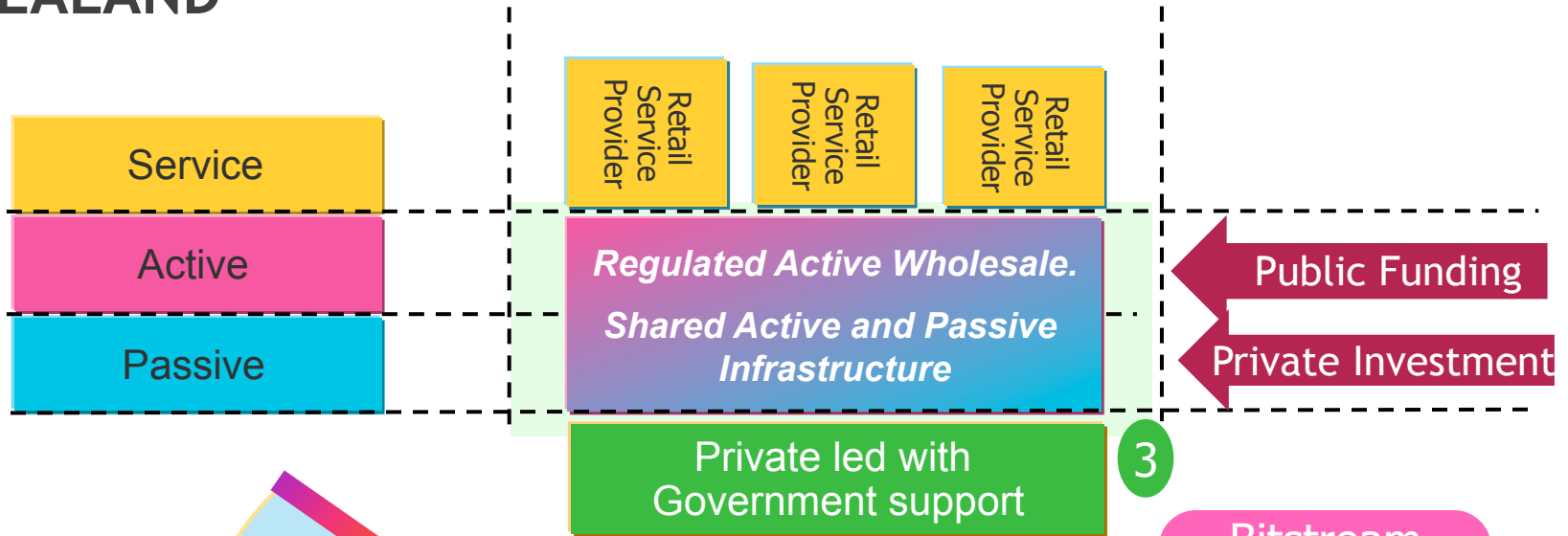


Adapted -ADL Analysis

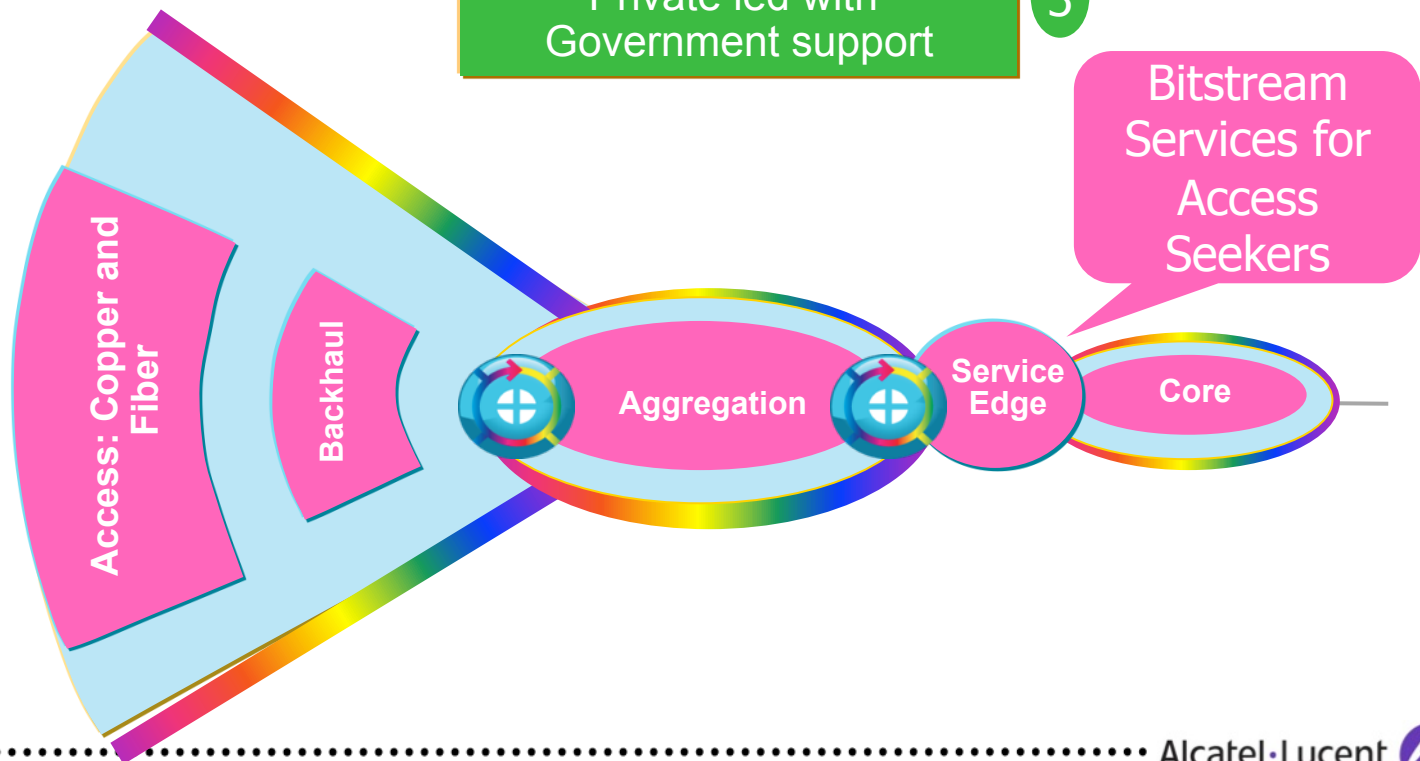
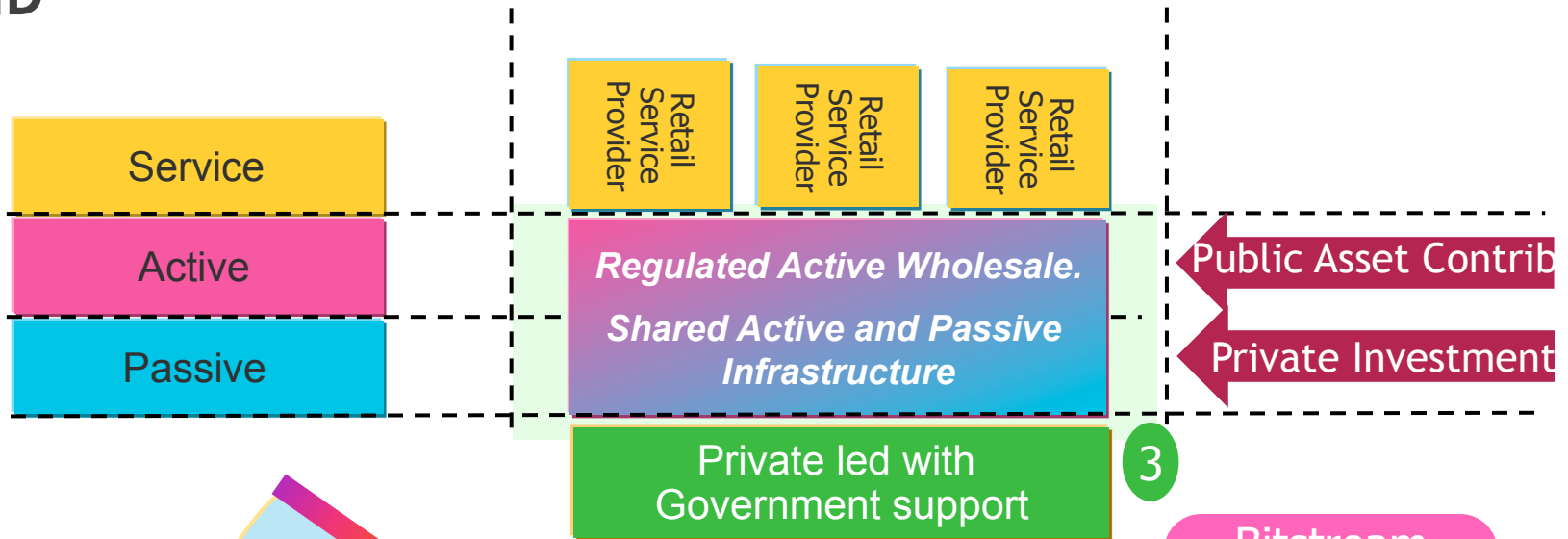
AUSTRALIA



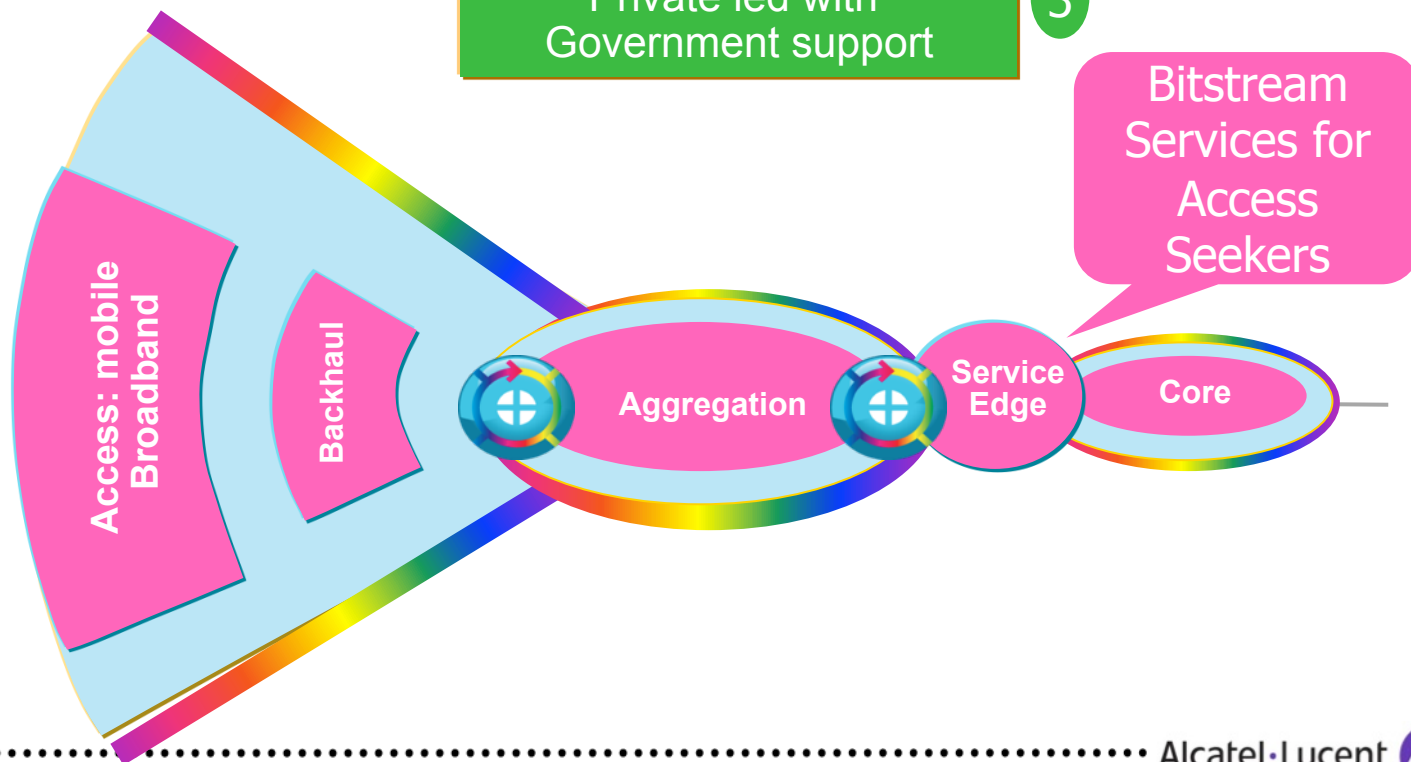
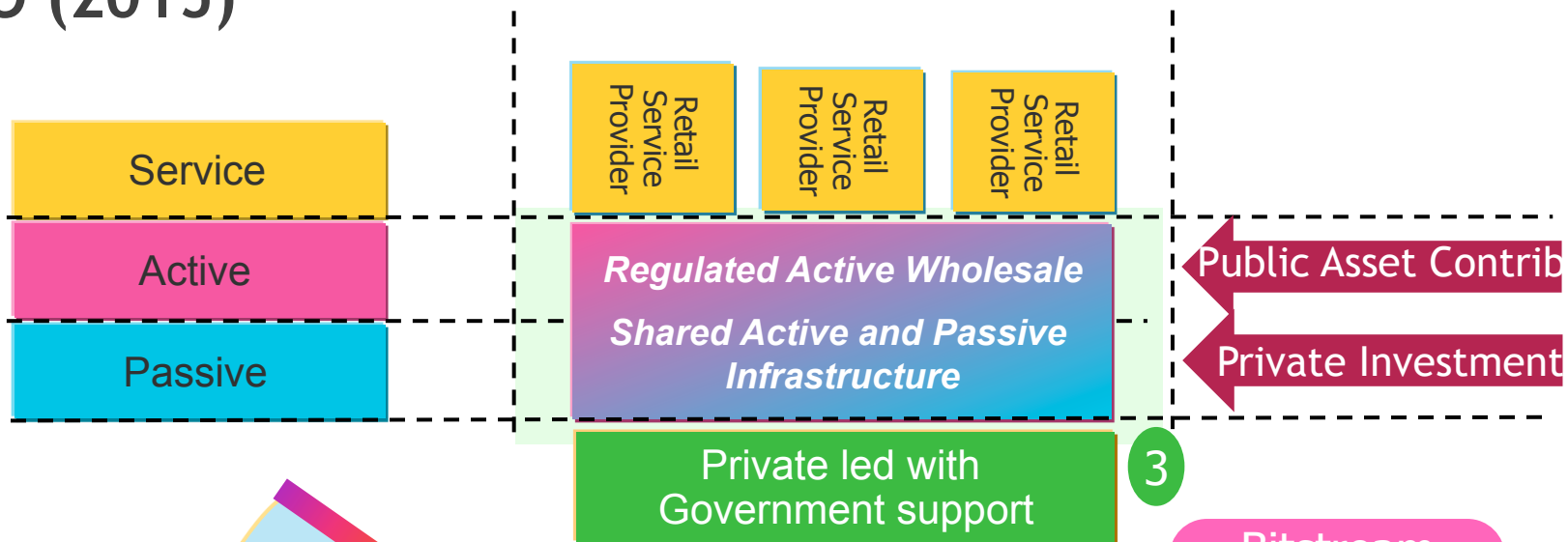
NEW ZEALAND



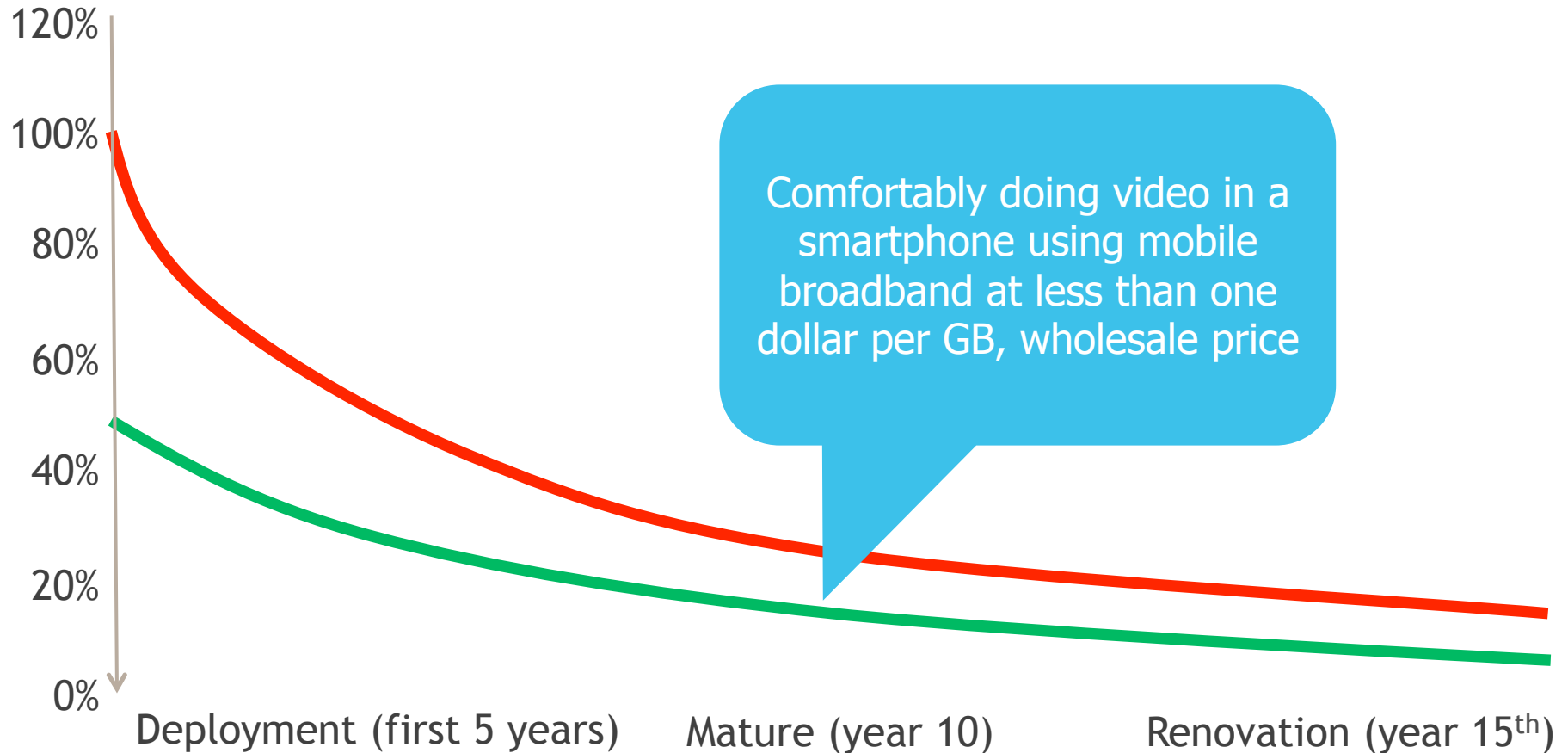
POLAND



MEXICO (2015)



MEXICO HIGHLIGHT: A 1:5 COST ADVANTAGE ENABLES TO BUILD A NEW LTE NETWORK AT HALF THE COST OF EXISTING INFRASTRUCTURE



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M-DIABETES PROJECT IN SENEGAL



Communities

Hospitals

NGOs

Government

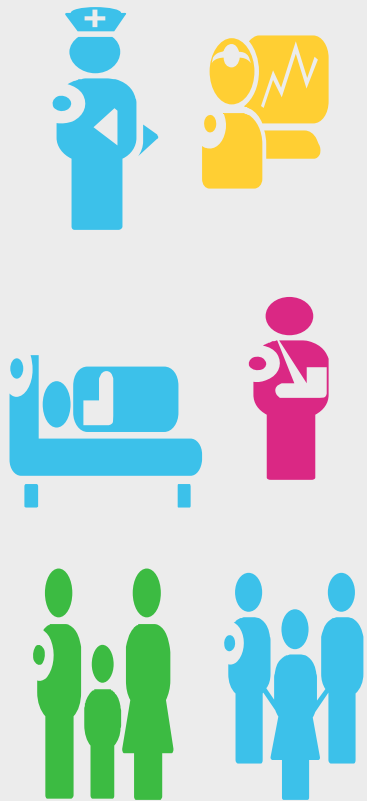
Content Providers



Datacenter Hosted Applications



Service Provider Connectivity



End Users

THE NG CONNECT PROGRAM FOCUS AREAS

ACCELERATE SERVICES, UNDERSTAND IMPACTS, BROADEN LANDSCAPE

Next Generation Broadband is about more than just speed...

Alcatel-Lucent is bringing together stakeholders from traditional and non-traditional industries to:

- Accelerate deployment of new services and devices
- Drive new sources of revenue with new business models
- Broaden the device landscape to consumer electronics and machine-to-machine



Working with the next generation of applications, content and connected devices providers to make the market for LTE based services in 5 target areas

Consumer
Media &
Entertainment

Enterprise
Collaboration &
e-Healthcare

Automotive
Connectivity

Digital Signage

Computing
Experience