

From Pipe Dreams to Reality

BSG Seminar

Matt Yardley, Analysys, 9 July 2007

1 Overview

In this presentation we will consider what NGA means for the ‘ladder of investment’ principle that has been supported by European regulators to date. We will explain why NGA raises specific challenges for alternative operators, and also how particular technology choices may impact potential wholesale products that incumbents including BT may offer, and which issues need to start being addressed now in order to encourage NGA deployment.

We will move on to discuss how trends in consumption of ‘rich media’ is impacting the telecoms market, and consider how NGA may support these trends in the future.

We will discuss at a high level the potential investment required for NGA and the potential for direct and indirect funding models in supporting this investment, together with expectations for a funding ‘gap’. We will also briefly discuss some public sector initiatives across the UK that may result in the deployment of NGA infrastructure, and discuss how these initiatives may impact NGA decisions of operators.

2 Presenter

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