Report of
ITU Asia-Pacific Regional Meeting of Consumer Societies

November 6-8 2001
Mumbai, India

ITU Asia-Pacific Regional Meeting of the User Groups and Consumer Societies of the Telecommunications Sector
Mumbai, India, 6 - 8 November, 2001

Contents

Session One: Opening Session

All present were welcomed to this, the third in a series of annual conferences organised by the ITU aimed at representatives of consumers and users of telecommunications in the Asia-Pacific Region. On this occasion, ITU had worked with Consumers International (CI) to organise the event. The hosts IUCI (Internet Users' Community of India) and NMIMS (Narsee Monjee Institute of Management Studies) were thanked for their generous support and hospitality.

Mr. Vijay Mukhi, Founder, IUCI, welcomed all the participants on behalf of IUCI and Dr. H. H. Mankad, Director General, NMIMS, extended the hospitality of NMIMS for the efficient conduct of the meeting.

The guest speaker, Mr. Ravi Kant of the Telecommunications Regulatory Authority of India (TRAI), underlined the great importance of consumer organisations:

- Helping to shape the sector legislative framework;
- Providing feedback to regulators on real consumer experience (based on research, not just "gut feel" from either consumer group or regulator);
- Spotting patterns among complaints;
- Expressing consumer needs from convergence, so that it develops not simply in response to market forces.

The need for technical understanding was recognised, and the fact that regulators can help consumer organisations in this area. Mr. Kant closed with the memorable phrase "eternal vigilance is the price of consumer supremacy".

On behalf of the ITU the opening remarks were made by Mr. K.K. Gunwardana:

a) the prime goal of ongoing sector reform is to speedily orient the sector to respond to the needs of the market, in particular the vast un-served majority – in size amounting to nearly 90% of the market - yearning for affordable service
b) to accomplish the goals of sector reform, rules and regulations need to be updated to keep abreast with the expectations of the market, and to enable benefiting from new technology
c) new technologies abound with features are driving horizontal convergence of network and terminal infrastructure
d) these technologies are also driving the decline of per line investment cost, in particular that of the access networks
e) the diurnal usage per line has increased by over two fold to 60 minutes over the recent past.
f) analysis of annual reports of several operators shows that despite decline of revenue per line the return on investment per line is on the increase and investment costs are recovered within about 3 years
g) the increase of local call charges under Tariff Rebalancing therefore seems to be unjustifiable and needs review
h) to counteract these market distortions detrimental to the consumer and the global society, the National and International entities involved in sector reform need to move away from the beaten track to recognize not only the vendors and operators but above all the consumer – the most important stake holder of the sector

Session Two: Mutual introductions

All present introduced themselves. A list is provided at Annex 1. Present were:

a) A representative of a CI member consumer organisation from each of 10 countries of the region: Fiji, Hong Kong, India, Indonesia, Macao, Malaysia, Nepal, Papua New Guinea, South Korea, Vietnam.
b) Two representatives of Indian telecoms/internet user groups.
c) Two staff of CI's Regional Office for Asia and the Pacific (ROAP).
d) Two staff of ITU's Asia-Pacific Regional Office, plus an ITU consultant.
e) Three delegates involved in Telstra's Consumer Consultative Council, their attendance supported by Telstra (Australia).

A message of support, with three papers [20, 21, 22], was received from Ewan Sutherland of INTUG (International Telecoms Users Group, www.intug.net) who was unable to attend. For part of the time, observers were present from Indian telecoms companies and from NMIMS.

Mr. Chirag Unadkat of IUCI was confirmed as overall meeting Chairman, with the following as session Chairmen:

- Mr. Alexandre Ho
- Mr. Gunaseelan Thuraisamy
- Mr. Ron Cameron
- Mr. Sothi Rachagan
- Mr. Mataiasi Labati

Session Three: New technologies - new opportunities

Papers and presentations [1,7,19] brought out some of the opportunities and potential pitfalls offered by new technologies, including:

a) Growing demand for internet leading to bottlenecks in the local loop – particularly in view of the increasing daily usage per line, which has been seen to increase from 30 minutes to 60 minutes over the last 3 years [7].

b) High charges for internet use are unnecessarily holding back further growth. Falling investment costs per line (from IP technology and shorter local loops) and rising usage (concentrated on off-peak periods) strongly suggest that usage charges should be lowered rather than raised – capacity has no shelf life.

c) New technology offers opportunities to overcome the bottlenecks in the local loop, for example using xDSL (Digital Subscriber Line) technology, which provides high bandwidth capacity over existing copper loops [18].

d) Next Generation Network (NGN) technology [18] offers generic features and opportunities for introduction of the technology

e) Flexibility of interoperation of NGN technology with PSTN enables retention of the latter till the investment is fully amortised [18].

f) The critical mass necessary to justify investment in Next Generation Networks is falling, and depends on the current investment costs of the PSTN

g) Mobile phones have great potential to provide widely available affordable telecoms access, if suitably priced – but problems may arise with service quality and roaming prices [1, 22].

Discussion focused on the following areas:

i. With the removal of regulatory barriers, the potential of Voice over Internet Protocol (VoIP) services to drive down costs. There might be a lower quality of service [19] (though the quality of existing internet telephony services could quite easily be improved). Any risk to existing operators' revenue streams should not be allowed to stand in the way of the public benefit of cheaper services.

ii. The possibility of deploying Next Generation Network technology to provide multimedia information service -that has immense potential to enhance productivity and mitigate health and environmental hazards, thereby increasing total system demand and the likelihood of viability.

iii. Measures to overcome barriers to mobilizing capital, in particular to develop sparsely populated rural areas, such as:
    a. shaping government policy and regulation so as to attract investment.
    b. setting up cooperative societies or consumer-owned operating organisations for provision of rural telecom services.

Session Four: A changing market

Far-reaching global social trends which foster telecoms demand include [16]:

a) Global television – feeding aspirations for higher material living standards;
b) Labour mobility – leading to the need to stay in touch;
c) Wider trading opportunities;
d) General economic development.

In parallel, historically disadvantaged groups such as ethnic minorities, people with a disability, and in some countries women, are increasingly demanding equal treatment. Where available, telecoms and especially the internet can immensely support their efforts. Correspondingly, those in power may resist the spread of telecoms to these groups. Overall, however, the trend is towards ever-greater demand.

Consumer organisations have a vital part to play in getting right the type and degree of their participation in the sector reform and the regulatory process.

Issues raised in discussion include:

i. The internet contributing to broader exposure to the arts and literature, as a counter to increasing media concentration;
ii. How the elderly and other excluded groups may benefit from the internet, directly or indirectly.

The presentation on pricing comparisons [24] emphasised:

I. "Price rebalancing" with liberalisation is not a foregone conclusion; prices have never been "balanced".

II. Consumer organisations have a valuable role in clarifying complex price offers to consumers.

III. Useful comparisons employing baskets of consumption corresponding to typical usage patterns can be derived from simple ones (employing only single prices such as installation, and/or the monthly fixed charge).

IV. Such comparisons may raise awareness of relative national price levels and related pricing issues among national governments and/or regulators.

V. Consumer organisations, when addressing price-related issues, should consider the following questions:

a) Who is responsible for approving/reviewing/setting prices? (what does the law say?)
b) If a regulator has been delegated the price-setting function, how are prices set? (i.e. what criteria are used, price caps etc.)
c) Where does a consumer or consumer representative find prices? – e.g. website (service provider or regulator), publication such as telephone book or special leaflet.

Discussion focused on how best to make meaningful international comparisons of prices, issues including:

a. Straight US$ or PPP conversions;
b. Difficulty in fixing a sensible typical usage pattern to base comparisons on;
c. Need to relate prices to incomes to assess affordability;
d. The percentage of household expenditure devoted to telecoms is normally around 1% to 3%, but in India can be as high as 30% (though this is thought to indicate a resale operation). The trend is upwards in advanced economies, and in Korea has reached 15%-20%.
e. Importance of detecting trends (by regularly repeating comparisons) and of making reasonable projections;
f. Relation to revenue per line and usage per line per day and consequent . influence on return per line on investment

Customer surveys in South India clearly demonstrate the importance of limiting rises in rentals, and of justifying them by improved quality and increased inclusive call allowances. There is a case on affordability grounds for differentiating tariffs by customer group [12, 13].

Session Five: A changing industry

Discussion of industry structure [2, 6, 9] brought out such points as:

1 The risk of cartel behaviour where there are only a few players in the market.

2 Having a lot of competitors does not mean there is real competition.

3 Tariff complexity (especially in the mobile sector) can cause great consumer confusion. There is an opportunity for consumer societies to offer guidance on what packages suit what usage patterns. However, it is not possible to say that consumers are worse off if on average prices are going down and service is improving.

4 Undisciplined competition has led to complex interconnection arrangements and roundabout routings, especially on the internet. Neutral interchange points would be desirable, such as exists in other industries (e.g. air travel, banking).

5 Interconnection issues are important but difficult for consumer organisations to tackle [9]. They are an area where mutual support may be of value.

6 Very poor or very small economies face particular difficulty in sector reform as the market may be too small to attract investment [14, 15]. However it is still worthwhile to open markets [19].

7 The profitability of investing in telecoms infrastructure in rural areas is often under-estimated.

Session Six: How consumer and user groups can contribute

Presentations from Australia [18], India [3], Hong Kong [2] and Indonesia [8] contributed a wealth of practical experience and food for thought. Points of special interest emerging included:

1 How Australian consumer consultative arrangements have evolved, and continue to adapt to changing conditions.

2 The growing difficulty of getting consumers interested in consultation processes.

3 Telstra’s long-term support for consumer consultation.

4 Long time scales may be needed to achieve results through consumer consultation.

5 Important outcomes have been achieved in Australia that would not have occurred without consumer consultation.

6 The Indian Citizens' Telecoms Charter is a valuable tool for improving service levels, in spite of local difficulties in implementation.

7 The continuing need for consumer protection even in a sophisticated competitive telecom environment like Hong Kong, where cartel behaviour has been observed in the mobile sector and consumer complaints become ever more complex. “The first casualty of war is truth” (misleading advertising).

8 The predatory pricing paradox whereby lower prices are deemed to be against consumers' interests because they are anti-competitive.

9 Telecoms is 4^{th} in rank for complaints received by the Indonesian consumer organisation – after housing, transport and electricity.

10 How worthwhile results can be achieved even with limited resources by imaginative approaches such as the “million signatures” campaign in Indonesia.

Discussion focused on:

a) The need for government and/or (indirect) industry funding for effective and independent consumer representation.

b) The need to convince government of the political benefits and industry of the commercial benefits of providing such funding. This is especially hard to achieve given a move in many countries towards more “light touch” regulation and self-regulation.

c) The need for national regulatory and competition authorities actively to involve representative consumer bodies in policy debate – noting that some countries have no culture of consultation.

d) The importance of empirical measurement to monitor the success or otherwise of sector reform initiatives.

e) The merits of separating infrastructure from service provision in the interests of stimulating competition.

f) The important distinction between ownership and market structure in sector reform.

g) The merits and drawbacks of private ownership - examples were given of public safety failures attributed to private ownership.

Session Seven: Influencing internet growth

Presentations brought out points such as:

1 Great variability of costs of internet access among developing countries, but with internet access remaining unaffordable by most ordinary people (even in countries where it is cheapest) other than in public access facilities like cybercafes [3, 16].

2 Internet usage patterns during the day are such as to use mainly spare capacity. They do not require additional investment and therefore should be charged for only at a low rate [3].

3 In many developing countries (India in particular), the needless use of international capacity to deliver services that could be handled domestically - which would both improve service and lower costs [23].

4 Establishment of Asia-Pacific regional internet exchange points being hindered by rivalry among several countries, each wanting to be the regional hub.

5 Lack of national internet exchange points because of shortsighted perception of commercial interest by operators. Neutrally managed co-ordinated exchange points are needed.

6 The high taken up of electronic commerce in Korea, demonstrating its huge potential but also the risks to consumers that go with it [11].

7 The existence of the Global Internet Policy Initiative (GIPI - www.gipiproject.org) and its interest in expansion in Asia was noted. Participants should be aware of and might want to co-operate with this initiative, which aims to influence the development of legal frameworks which foster internet growth and access.

Main discussion points included:

1 The underlying causes of differing internet access costs included both sector competitiveness and scale economies. This needs more investigation.

2 Consumer groups should lobby their national regulators in support of establishing neutrally managed national and regional internet exchange points.

Session Eight: Conclusions and actions

The conference concluded that all present largely shared a common vision of consumer needs in telecoms, and of the advantages of consumer group involvement in telecoms policy processes. International collaboration could significantly help to achieve shared goals. It was especially important to provide support for the consumer groups in poorer countries, as they had a responsibility to uphold the interests of large numbers of potential telecoms consumers, but were often not adequately resourced for this purpose.

Co-operation with business telecoms user groups at both national and international levels should also be constructive, although there would inevitably be differences of emphasis between groups representing business and residential consumers.

CI immediate actions

CI ROAP will by 30 November circulate to its members for comment in draft, and by 10 December finalise, a programme of work relevant to the telecommunications sector, under the familiar headings of:

i. The right to basic needs
ii. The right to safety
iii. The right to be informed
iv. The right to choose
v. The right to be heard
vi. The right of redress
vii. The right to consumer education
viii. The right to a healthy environment

The near-term actions listed at 3.2 below are likely to be reflected in the CI ROAP work programme. CI also plans to produce a handbook to support its members in dealing with telecoms policy issues, and to carry out further training in the field for more members.

a. CI ROAP will also devote its next newsletter (due end of December) to telecommunications topics.

b. CI ROAP will work towards equipping all its members to use the internet as a collaborative tool. This will call for both adequate physical facilities and certain new competencies.

c. Some of the work items likely to be proposed will be capable of completion by CI members alone or with support that can be provided by the CI ROAP office, while other items will need or would benefit from outside support, for example from the ITU. Funding will be sought to enable CI ROAP to support its members in this work programme.

d. CI ROAP will write to ITU in support of improving its sensitivity to consumer concerns, with particular reference to the forthcoming Global Regulatory Colloquium. It will also provide guidelines for effective consumer representation (how to be a watchdog, not a lapdog).

ITU immediate actions

1. ITU will carry out improvements to the consumer part of its website as suggested by the meeting, so as to make it more user-friendly, to meet the requirements of:
a) people who are new to internet use (e.g. very simple interfaces, clear error messages, avoid jargon)
b) robustness to poor network performance (e.g. off-line and email alternatives to web browsing)

2. ITU will provide suitable database software to enable expansion of the website to become a repository for information from all the countries involved.

3. Medium term, ITU will also make available a tariff comparison model which can take as input the tariff data supplied by CI members and produce meaningful international comparisons.

4. ITU will produce a final report of the conference and circulate it to all present, and also to other interested parties.

5. ITU will make available the services of a co-ordinator to help keep the continuing programme of collaboration on track between now and the next meeting (envisaged for third quarter of 2002).

Priority and near-term actions

a) It was agreed that a shared top priority was making telecoms service available and affordable in the poorer countries and regions. Actions in support of this goal include:

b) sharing knowledge and understanding from a consumer perspective of technical and other advances which can allow service to be provided at lower cost

c) sharing tariff information so that everyone is aware of "best practice" pricing across the region

d) sharing information on the approaches adopted in different countries to improving service provision to rural areas, with assessment of successes and failures.

e) The following specific near-term actions were agreed:

   i. Assembly for analysis of a run of recent annual reports from telecoms operators in all countries involved.-with assistance from the ITU if necessary

   ii. A review by CI ROAP members of work already carried out relevant to telecommunications policy.

   iii. Regular collection of fixed and mobile tariffs from all countries in a standard format, suitable for entry into the database to be provided by the ITU, so that comparisons can be made and trends followed.

   iv. Collection of the basic telecoms policies and relevant legislation from all countries.

Other actions

Many other desirable actions were identified, including those listed below.

Making consumer consultation more effective, for example by:

   i. Identifying the legal status of consumer consultation in telecoms policy processes in each country, with a view to making consumer consultation on policy and tariffs a standard practice (both in the law and in actuality) throughout the region. This should also cover the need for central funding (by government or, indirectly, by the industry) of consumer representation.

   ii. Education in telecoms matters of consumer representatives and consumers themselves.

   iii. Sharing ideas on ways of generating enthusiasm for consumer participation in consultative processes.

   iv. Improving understanding of approaches to sector reform, for example by:

      a) Devising measurements for assessing (in broad terms, including social effects) the effectiveness of policy measures intended to introduce and maintain sustainable competition in telecoms.

b) Producing a summary of relevant experience of different approaches to telecoms privatisation, liberalisation and structural reform, with results.

Guiding poorer countries with experience from richer ones, for example by:

i. Drawing on experience in Australia (codes of practice and/or customer charters) and elsewhere, to compile a list of ethical standards of treatment for customers for telecoms services.

ii. Drawing up a “ladder” of service standards that consumers could reasonably expect at different stages of telecoms development, to guide consumer organisations in choosing sensible goals for their lobbying.

iii. Continuing collection and sharing of data among all countries, in particular:

a) Regular collection of usage data (direct from telephone companies where available, otherwise from user surveys) so as to identify usage trends and consumer profiles. Such data are of special value in discussions of tariff levels.

b) Supplementing ITU tariff comparison methodology by incorporating information on income levels so as to permit assessment of affordability (looking a percentage of household income or expenditure that is, or needs to be, devoted to telecoms).

c) Collection of internet quality of service data, which might be obtained directly from ISPs, or by continuous automatic measurement of users’ internet quality of service, with central reporting. Such data could support calls for local or regional internet traffic exchanges.

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Annex 2: List of papers and presentations

Abstracts, papers and Powerpoint presentations (Ppp) are being made available at the conference website http://www2.itu.or.th/consumer/cgi-bin/see_papers.cgi (registration required).

1 Bae, Jang Hwan: *Research on consumers' dissatisfaction with the mobile phone service in Korea (abstract)*
2 Cameron, Ronald: *Critical issues affecting Hong Kong consumers and potential consumers (paper and Ppp)*
3 Chowdary, T H: *The citizens's charter for telecom and information services in India and the internet dial-up access charges (Ppp)*
4 Deshpande, Shirish: *Current problems in the telecom sector in Mumbai (abstract)*
5 Gunaseelan, T: *Critical issues in telecommunication industry in Malaysia (abstract)*
6 Gunaseelan, T: *Is there too much competition in Malaysia? (paper)*
7 Gunawardana, K K: *The key drivers of affordability of service: what the consumer should know (Ppp)*
8 Hadad, Tini: *Consumers' participation in the Indonesian telecommunication industry (paper)*
9 Ho, Alexandre: *Competition and consumer implications of interconnection in Macao (abstract, paper and Ppp)*
10 Iyer, Shobha: *Chennai Telephones (abstract)*
11 Jaiok, Kim and Bae, Jang Hwan: *A Study on Consumer Protection for Electronic Commerce (paper and Ppp)*
12 Jayaraman, C M: *Consumer attitudes towards telecom services in Tamil Nadu (paper)*
13 Jayaraman, C M: *Telecom at cross roads: for a better tomorrow? (paper)*
14 Kaki, Nason and Ain, Paulus: *Papua New Guinea - Telecommunication Background (paper)*
15 Labati, Mataiasi: *The Telecommunications Industry in Fiji (paper)*
16 Milne, Claire: *Social change and new patterns of telecom demand (Ppp)*
17 Milne, Claire: *Costs of internet access in developing countries (Ppp)*
18 Morsillo, Robert, LeBlanc, Maureen and Brown, Ewan: *Consumers in Australian Telecommunications – Industry & Regulatory Models (abstract and Ppp)*
19 Phan, Do Gia: *Telecommunication and consumer's perspective in Viet Nam (paper and Ppp)*
20 Sutherland, Ewan: *The business user and the residential consumer: at one or at odds? (paper)*
21 Sutherland, Ewan: *Least developed countries (paper)*
22 Sutherland, Ewan: *Telecoms regulation: a user perspective (Ppp)*
23 Unadket, Chirag: *Conserving International Bandwidth For Better Internet Connectivity*Withers, Bill: *Pricing and consumer choice? (Ppp)*
25 Gunawardana, K K, *NGN Technology – features and opportunities for benefiting from the technology (Ppp)*