

The Broadband Stakeholder Group (BSG) is the UK government's leading advisory group on broadband. It provides a neutral forum for organisations across the converging broadband value-chain to discuss and resolve key policy, regulatory and commercial issues, with the ultimate aim of helping to create a strong and competitive UK knowledge economy.

The BSG attempts to add value to the policy debate on broadband whether by publishing evidence based reports or by bringing together its sponsors to speak with one voice issues affecting the sector.

### **BSG work programme 2015/2016 – Key themes and issues**

2015/16 is likely to be dominated by strategic discussions about the model and structure of the telecoms sector with market consolidation taking place against the backdrop of Ofcom's Strategic Review of Digital Communications, the EU's Digital Single Market proposals and the start of the EU Review of the Regulatory Framework for Electronic Communications. These discussions will be accompanied by further details and specifics on the newly published Digital Communications Infrastructure Strategy from the new Government.

In light of this, the following issues and themes will be the key areas of focus for the BSG in 2015/16. We identify these issues as much for their policy relevance as their interest across the BSG Executive and the opportunity they provide for the BSG to add value to the debate.

#### **1. Effective policy and regulation to support private sector investment**

As industry seeks to deploy infrastructure capable of ultrafast speeds it is essential that private sector investment is commercially viable in as large a part of the country as possible – particularly as the Government is pressing for higher capacity and coverage from both fixed and mobile sectors. This is likely to cover:

- Views on how best the market can support the superfast broadband roll-out in the last 5% of UK premises
- Driving the debate on lowering the costs of network deployments and upgrades, looking at the Electronic Communications Code, permits, wayleaves and other barriers
- Develop an industry-wide position the transposition of Directive 2014/61/EU on measures to reduce the cost of deploying high-speed electronic communications networks
- Continue to contribute to the debate on non-infrastructure issues (e.g. digital inclusion, skills, demand)

## 2. Exploring SME's requirements for broadband connectivity and economic impacts on infrastructure

Building on our previous work on understanding micro and small businesses' connectivity requirements (reports and survey published last year), the BSG will:

- Complete and publish study on small businesses' connectivity requirements

## 3. Internet Protocol Television (IPTV) - Infrastructure challenges and public policy implications

The BSG's, and others, work on bandwidth demand illustrated the importance of video content in driving usage. It seems timely to consider what the broadband infrastructure implications, rather than the desirability of, are of mass linear broadcast being deployed over the broadband network. This will comprise a new work-stream consisting of several covering:

- Infrastructure challenges of both fixed and mobile broadband in delivering IPTV
- Consumer expectations with regard to privacy, data protection and watershed
- Convergence and broadband-enabled services

## 4. Exploring competition at the retail and infrastructure levels

Following recent market developments and the opportunity provided by a new CEO of Ofcom, new UK Government and change of EU Commissioners, it is appropriate to explore whether the level of competition in the UK market – be that at Layer 0, 1, 2 or 3 – remains the most efficient.

The BSG would be acting as a forum arranging a series of workshops or a one-off event. We are considering producing an outcome from these workshops (or event) with one option being a short paper from an external facilitator, another being a collection of essays.

## 5. Open Internet and industry self-regulation

Regardless of the outcome of the Telecoms Single Market/Connected Continent package the issue of net neutrality within the EU is unlikely to subside. The BSG will:

- Undertake a review of the Code following the completion of the EU TSM package
- Convening the Open Internet Forum regularly to discuss with Government and Ofcom the latest developments and policy positions
- Continue to facilitate work on both the Open Internet Code and the Code on Traffic Management transparency

## 6. Ongoing engagement and input to policy and regulatory developments as they arise