



National Digital Strategy

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PACIFIC TELECOMMUNICATIONS COUNCIL



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*RAH-
RAH...♪*

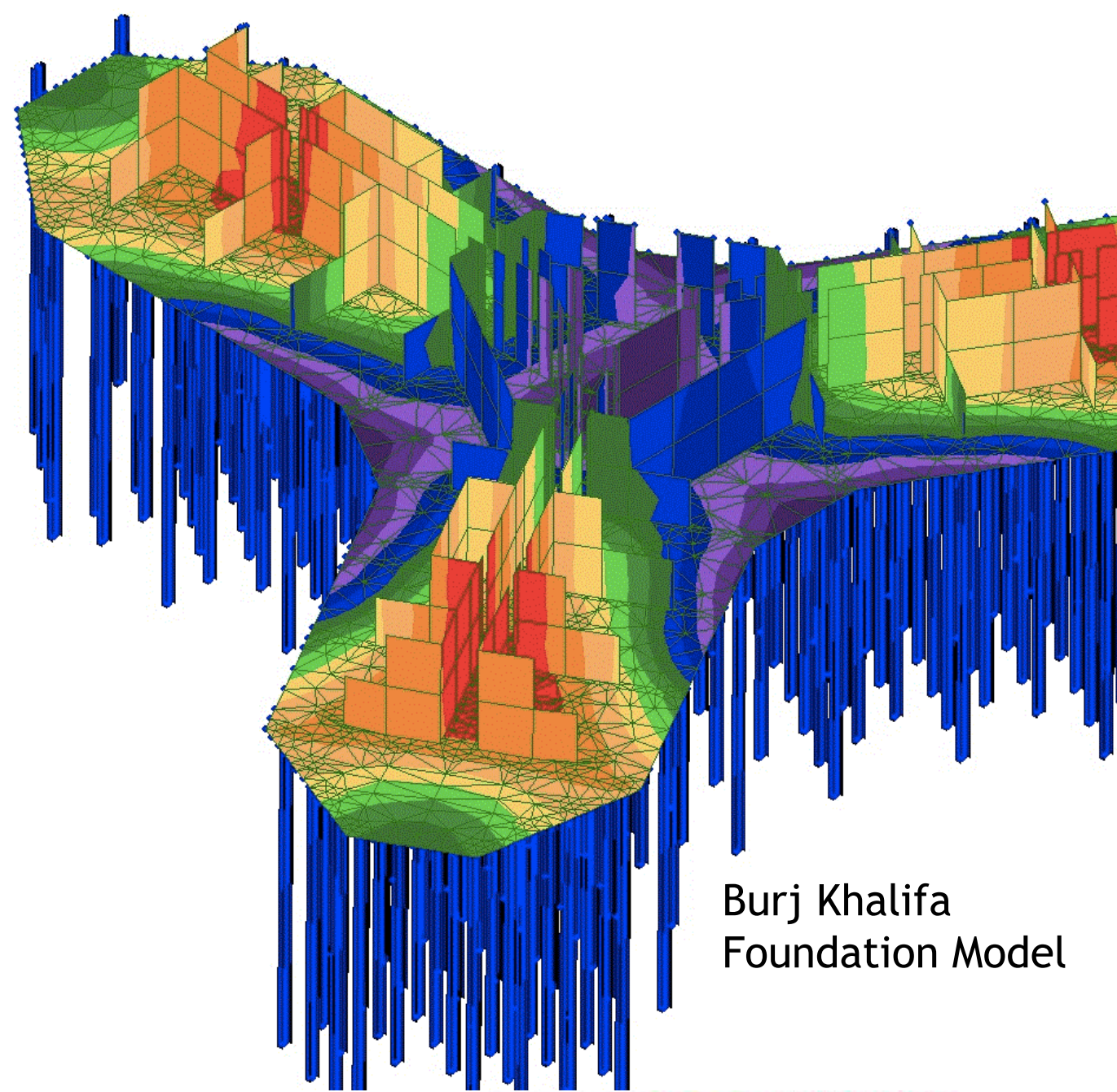




What can and should governments do to accelerate a digital economy?

The higher
you want to build...

...the deeper the
(digital) foundation



Burj Khalifa
Foundation Model



The situation

Policy levers

Opportunities for firms

Topics

The gap
between digital
leaders and
emerging
markets is
growing

Overall digitalization
Policy innovation
Hyperscale platforms
Capital
Skills & business
process

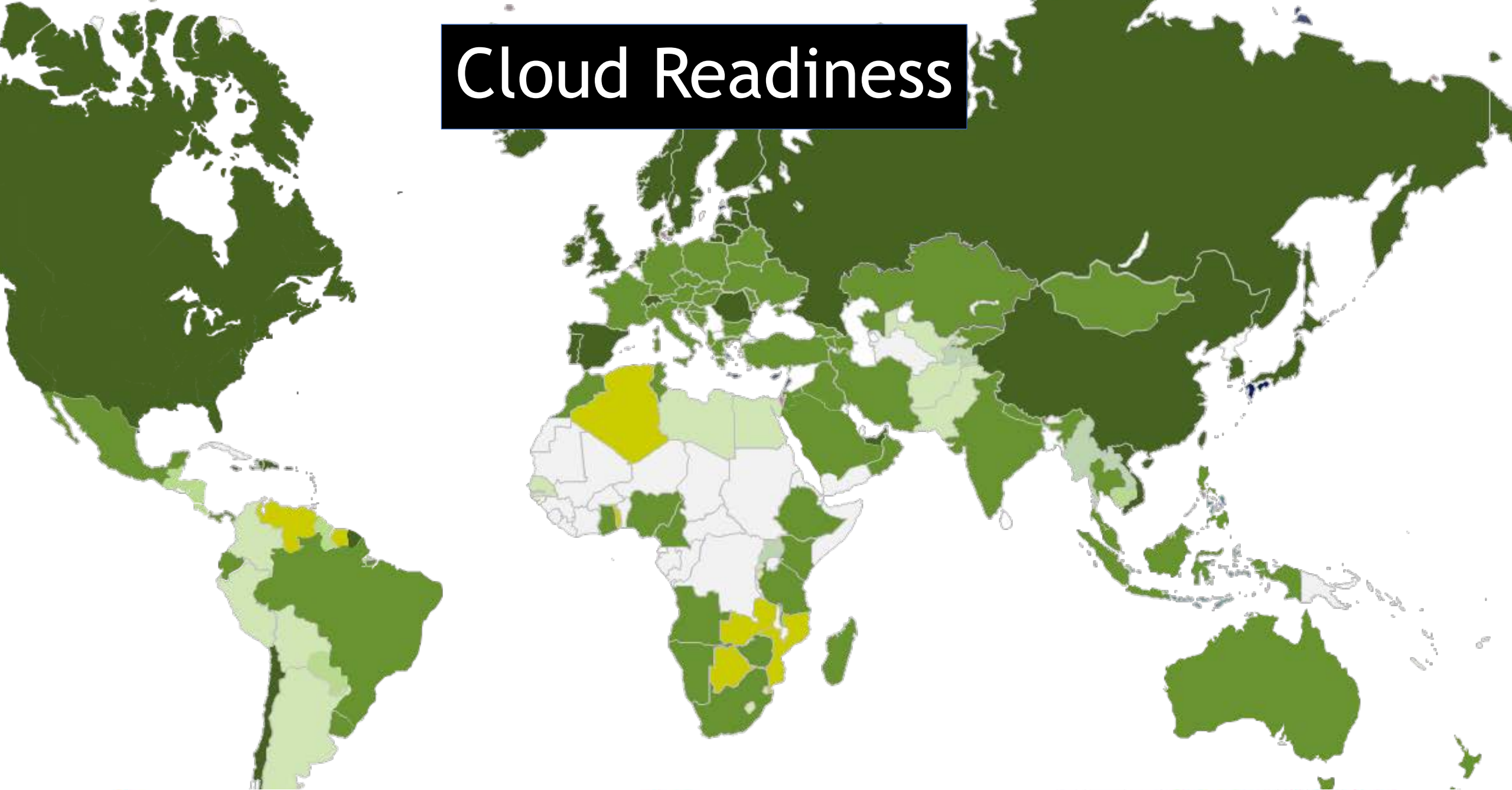
FOMO



A world map where countries are shaded in various colors of blue, green, and yellow to represent different levels of internet usage. Darker shades of blue indicate higher usage, while lighter shades of yellow indicate lower usage. A black rectangular box with the text '% Online' is overlaid on the map, positioned over North America and Europe.

% Online

Cloud Readiness



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Digital Readiness

Common goals



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Digital enablers

- Network infrastructure
- Cloud, IoT, AI
- Common platforms

Analog enablers

- National vision
- Sector policy & regulations
- Business & fiscal climate





95/5 Rule

Policy issues dwarf
technology in
shaping the national
digital agenda

Key policy challenges

- Technology understanding at policy level
- Economic costs/benefits poorly understood
- Addiction to legacy taxation
- High expectations vs. local realities
- “How” is more difficult than “what”



A **TRIMTAB** is a point in a system where the minimum effort causes the maximum effect





Get the plan right

Digital Strategy needs to be fully integrated with national social and economic development objectives



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Fix taxation

“Digital transformation” includes transforming how the national budget realizes revenues from digital





Rethink spectrum

Emerging market
prices for 3G/4G
spectrum were 4-5x
the global average





Innovation Ecosystem

Support incubators,
entrepreneurs, VC

Lower risks for
expansion capital
(bond markets & debt)



Data policy





5G

New
reality of
cloud

Where you are
What you say



Surveillance
State

Social
Compact

Surveillance
Capitalism



Who you are
What you buy

Freedom on the Net

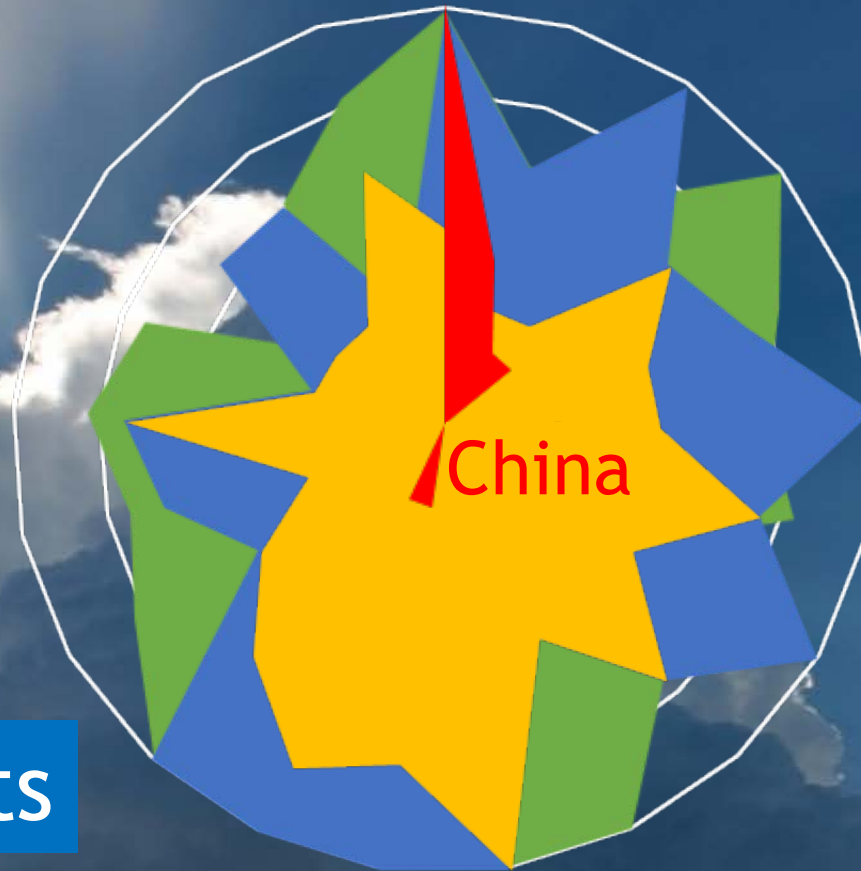
Freedom House 2018

Access

“Shutting down the internet in a state of emergency should be standard practice for sovereign countries.”
China Daily

Content

User Rights



Germany

USA

India

China



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The Splinternet

More cheerfully,

Market opportunities

Governments realize interventions are needed

Keen interest in accelerating infrastructure investment

PPPs are in vogue

Best PPP & investment opportunities (PTC view)

Infrastructure

1. International Connectivity
2. NBN and domestic backhaul
3. Government data centers
4. Edge computing
5. Shared services / cloud
6. Muni fiber and wireless

Best application
& integration
opportunities

Major Platforms

Cybersecurity

Enterprise architecture

Public safety

Data integration

ITS, traffic

Built world / IoT

Smart grid

Smart lighting, poles

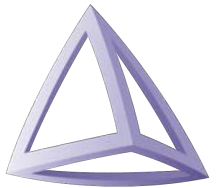
Data analytics/ML/AI

Financial forensics



Closing thoughts

Thank you!



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