National Digital Strategy

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PTC’20
ISDN!  MIS!
"Digital” Whoa.
What can and should governments do to accelerate a digital economy?
The higher you want to build...
...the deeper the (digital) foundation
The situation
Policy levers
Opportunities for firms
The gap between digital leaders and emerging markets is growing.
Digital Readiness
Common goals
Analog enablers
- National vision
- Sector policy & regulations
- Business & fiscal climate

Digital enablers
- Network infrastructure
- Cloud, IoT, AI
- Common platforms
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.
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
New reality of cloud

Surveillance State

Who you are

Surveillance Capitalism

What you buy

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

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
Public safety
ITS, traffic
Smart grid
Data analytics/ML/AI
Enterprise architecture
Data integration
Built world / IoT
Smart lighting, poles
Financial forensics
Closing thoughts

Thank you!

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