



Public Sector Broadband Procurement Study

**Broadband Workshop
and WPIE Meetings
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Three approaches among responding countries

- **Denmark, France, Greece, Italy, Japan, Korea**
 - National strategies and/or strong regional co-ordination
 - Government involvement at national level
 - Application in government services, healthcare, education...
- **Canada, Finland, Sweden, United Kingdom**
 - National goals but regions given implementation autonomy
 - Working on expansion
 - Varying use in government services, healthcare, education...
- **Austria, Belgium, Turkey**
 - National strategy not yet developed, little government involvement
 - Limited application in government services, healthcare, education...

Trends in demand development and aggregation

- **Public procurement can be a demand leader** ... through online public services as tools for demand development.
- ... **Though emphasis is on the private sector** to develop infrastructure and supply telecommunication services.
- **Wide range of features procured** ... from basic network infrastructure to full broadband services.
- ... **And clear priorities in application** to education, healthcare and government services (SMEs, justice, disaster response).
- **Clear benefits to consolidation** ... as aggregation gathers critical mass and economies of scale in new markets.
- ... **Address difficulties at regional level** stemming from high investment requirements and low market incentives.

Short performance record

- **Aggregation**

- Leads to greater value for money and availability of access.
- Has been successful in encouraging rollout in rural areas.
- No quantified examples of aggregation benefits reported.

- **Regulation**

- Main concern is encouragement of demand and competition.
- National carriers still dominate markets.
- Competition rules may be difficult to interpret at a local level.

- **Administration**

- Some difficulty in countries with complex national-local balance.
- Decentralised activities complicate funding / contract co-ordination.