

Broadband Developments and the FCC

米国におけるブロードバンド政策:ブロードバンドの発展とFCC

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8月23日、米連邦通信委員会(FCC)計画政策局長のロバート・ペッパー氏をお迎えし、「米国におけるブロードバンド政策:ブロードバンドの発展とFCC」をテーマにGLOCOM特別コロキウムが開催された。以下はその概要である。

Dr. Robert Pepper has been head of the Office of Plans and Policy at the FCC for the past 12 years. Appointed by an FCC Chairman during the Presidency of George Bush Sr., he has served five FCC Chairmen and three Presidents. His long service in such a key policy advisory role is testimony to the high regard in which he is held.

Pepper described the "Perfect Storm" that had engulfed the telecommunications sector over the past year. This combination of negative factors, from the massive over investment in the long-haul market, to the impact of the Enron and WorldCom scandals, the terrorist attacks of September 11, and changing market as mobile minutes grew at the expense of wireline traffic, caused the telecoms market collapse, made it almost impossible to raise new capital and brought catastrophic problems for companies with large debt. Yet while the telecoms sector crashed and the "dot com" boom clearly over, the Internet is still very much with us and continuing to grow both in use and in its influence on society and the economy. Against this background, the bright spot on the communications industry horizon is broadband, it is the next phase in the Internet's development and is expected to drive the telecoms sector's recovery.

The FCC avoids defining broadband in terms of speed, instead claiming it is dynamic and constantly evolving, Pepper lightheartedly saying broadband is "faster than what is available now". Broadband instead is defined as having 4 key characteristics: a digital architecture; based on IP or other multilayer protocols; is "Always On"; and, is scalable. Broadband will impact the traditional transmission industry, in the US worth around \$291billion annually, and the broadcast and content industries valued at over \$340billion/year.

In understanding where America is in utilizing broadband, Pepper explained that the supply side looks

strong. Cable modem services are available to approximately 67% of US households, DSL to approximately 50%, and together they had a combined coverage of more than 80% in 2001. Satellite broadband services are available. Wireless services are enjoying very rapid growth in Wi-Fi, but have seen a significant market failure in fixed wireless (WLL) after billions of dollars investment. Demand is a different picture, 13% of households (around 14.3 million) subscribe to cable modem or DSL. That's 20% of homes with PCs, and 22% of online households. But broadband net surfing, from home and office, accounts for over 50% of online time. The question concerning Pepper and the FCC is if this demand gap represents a success or problem. The adoption rate for broadband compares favorably with those of other technologies, but the US appears to be lagging behind some other, particularly Asian, countries. Question is could the adoption rate be faster?

In considering policies to encourage broadband, the FCC recognizes governments can play a role, but when designing industrial policy they need to be clear what their role is. Governments can provide a significant stimulus as smart buyers of services, using funds available to meet their own internal technology requirements as a means to activate and coordinate demand. But government's main role is to remove impediments and barriers to entry through appropriate regulation. The FCC is trying to create a common framework to achieve this, and a series of rulemakings in broadband wireline and cable access are attempting to tweak the current regime to allow for more open access and to reaffirm the FCC's right to set the rules for broadband rather than see those powers pass to state regulators. Dr. Pepper gave a fascinating and insightful presentation, however the policy he explained was little different from that of a few years ago, and unfortunately seems to lack the political will necessary to significantly change the weak situation of the US broadband industry.

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