Mobile Wireless Competition Report Notice of Inquiry

FCC Open Meeting
August 27, 2009

Ensuring Competition

- Competition results in significant benefits for consumers
  - lower prices
  - more service options
  - product innovation
- FCC required by statute to report on competition in telecom, media sectors
- FCC actions to promote competition
  - interconnection
  - number portability
  - spectrum auctions
  - merger review

FCC Reports on Competition

- Commercial Mobile Radio Service ("CMRS")
  - 13 reports released since 1995
- Satellite Communications Services
  - 2 reports released since 2007
- Multichannel Video Programming
  - 14 reports released since 1994
- Local Telephone Competition
- Broadband/Section 706 Reports

FCC Reports on Competition

- Opportunity: implement a consistent analysis of competition
  - across Commission
  - across sectors
- Analytical rigor requires a common approach
- Provide foundation for predictable, consistent, and sound policy

Key Elements of a Competition Report

- Data Driven
- Analytically rigorous
- Comprehensive and realistic view of industry
- Identification and examination of relevant market segments for competitive issues

NOI on Mobile Wireless Competition

- First step in pursuing new competitive analysis

- Supplements PN released by WTB on May 14, 2009

- Change in report title reflects new analysis and marketplace realities
  - Old title: "CMRS Competition Report"
  - New title: "Mobile Wireless Competition Report" (includes CMRS)

NOI on Mobile Wireless Competition

- Asks which analytic framework and data sources depict wireless competition most clearly
- Scope includes new market segments
  - Infrastructure
  - Devices
- Seeks comment on how vertical relationships - between upstream and downstream segments - affect competition

NOI Topics

- Analytic framework and data sources
- Market segments, including "edge" markets
- Vertical relationships
- Consumer benefits of wireless
- Spectrum and non-spectrum inputs
- Investment, entry, growth
- New technologies and future developments
- Urban vs. rural comparisons

NOI Seeks Input From…

- Service providers/carriers
- Application and new content providers
- Equipment and device manufacturers
- Tower and backhaul providers
- Consumers
- Software developers
- Analysts
- Academics