



Communications and Digital Economy – Status Report

Minister of Broadcasting, Communications and Digital Media

Week Ending: 8 June 2018

COMMERCIALLY SENSITIVE

Date / /

Seen by Minister Clare Curran Minister of Broadcasting, Communications and Digital Media

Contact details for urgent enquiries:				
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Jane Tier	S9(2)(a)			
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1. Actions from officials meeting

No Officials meeting week beginning Monday, 4 June 2018.

2. Issues requiring your direction

No issues requiring your action.

3. Work Programme Updates

3.1. <u>Telecommunications Relay Service – project update</u>

Moshika Chandra

Consultation with Telecommunications Development Levy (TDL) payers to continue funding the Telecommunications Relay Service (relay service) closed on Monday 4 June 2018. No submissions were received from TDL payers on the continued funding of the relay service or on the proposal to have the next contract for the provision of the relay services outside the Telecommunications Service Obligation framework.

After providing you with the submissions summary report from the public consultation last week, we published the report on the MBIE website together with all submissions received. We intend to provide you with a more comprehensive summary of conclusions from the public consultation prior to the release of the Request for Proposals.

4. Digital Economy: Project Status Update

Project	Updates	Next major milestones
Digital Economy and Digital Inclusion Advisory Group (joint project with DIA)	A successful first face to face meeting of the full Advisory Group was held on 30 May. Progress has been made under each workstream with optimal future states and ideas on how to achieve them taking shape. The Group has agreed to assist with the development of digital enablement funding criteria for the Provincial Growth Fund. Our paper on measuring the digital economy has been provided to the Group. The Chair is continuing to explore the development of a platform for all digital economy and digital enablement funding areas and the formation of the group.	Sub-Groups to continue to work with officials before next Zoom call on 19 June.
	digital inclusion initiatives across New Zealand. MFAT has agreed to consult the Group on the terms of reference for the joint digital economy study that will be undertaken by the New Zealand and Australian Productivity Commissions. This was one of the outcomes of the recent Single Economic Market (SEM) leaders meeting. S9(2)(f)(i)	
CTO (joint project with DIA)	You have agreed the next steps in the CTO selection process and projected timeline and we will work with a sub-Group of the Advisory Group on the shortlisting and selection process. We have provided your office with a draft op-ed to further promote the role before it closes and, with DIA, will be	Applications closed on 3 June. We will provide you with a list of applicants by Friday 8 June.

Project	Updates	Next major milestones
	sending reminders of the closing date over social media. The Advisory Group also promoted the role through their networks.	
	We have received 72 applications so far. 12 applications are from people who applied last round.	
Techweek (19 – 27 May)	Techweek 2018 was a huge success, with over 500 events taking place around the country and lots of media attention. The MBIE run (DIA supported) workshops, <i>Co-create the</i> <i>Aotearoa NZ Digital Strategy</i> , in Auckland, Wellington and Christchurch, were very well received with participants wanting to stay involved. The workshops were an opportunity for attendees to contribute ideas for the development of the new Digital Strategy. This ideas bank will be a resource for the DEDIMAG and the CTO. A number of DEDIMAG members attended the sessions.	We will provide you with a list of the ideas generated at the Co-Create a Digital Strategy events. Further events to be run to cater for demand from participants. This will include the TUANZ FLINT (youth) network. Negotiate funding contract for Techweek 2019 (we will engage with you on this first).
	You participated in a number of successful Techweek events: ShadowTech, Createch, and the High Tech Awards.	Briefing on the outcomes of Techweek 2019.
Response to Artificial Intelligence	As requested, we recently provided a briefing on the recommendations and next steps, and look forward to discussing this with you.	Advice to you on the more detailed implementation plan in July.
report	MBIE has contacted other agencies to get their initial views on the recommendations, and invite them to be part of a joined up process. All have given in principle support to progress the recommendations.	Broader ministerial agreement to implementation plan in August. S9(2)(f)(iv)
	Discussions with the AI forum suggest that their working groups would be a useful way for government agencies and industry to work together on implementing the recommendations.	
	MBIE has recently joined the AI Forum Executive Council. This will provide a useful opportunity for us to keep you informed of developments.	
Business uptake of ICT pilot programmes (tourism, arable farming, and construction)	We continue to work with Digital Journeys and PWC to test a number of experimental approaches. We have developed a process to increase digital capability of trusted advisers as part of regional and industry events and are seeking feedback through interviews with regional tourism organisations and economic development agencies on this. We are also looking for a tourism event to test the above approach to enable us to refine it. We are supporting the Advisory Group in doing a high level scan of the current services offered to small businesses by government that aim to increase digital capability.	Finalised programme content will be available to economic development agencies in July. We will then provide advice to you and Minister Nash on the evaluation of the pilots and next steps for business uptake of ICT. We will engage with the Advisory Group before providing advice.

Project	Updates	Next major milestones
Gaming sector	You recently announced government support for the market study into the current value and potential of the New Zealand gaming sector. This will be funded by MBIE, with input from MCH, Callaghan Innovation and NZTE. We have now agreed the TOR for the study with NZTech and the Game Developers Association, and will shortly sign a funding contract.	More detailed briefing to be provided to you about the study. Report published in December.
GovTech (joint project with DIA)	MBIE and DIA have completed advice on New Zealand activity in GovTech, S9(2)(f)(ii) S9(2)(f)(ii) A briefing and A3 was sent to your office on 7 June as background for your scheduled meeting with other Ministers on Monday 11 June 9am.	Meeting with Ministers Nash, Woods and Shaw Monday 11 June.
Return to IT programme	S9(2)(a) S9(2)(ba)(i) and (ii) S9(2)(ba)(i) and (ii) We are currently reviewing the ToolKit and will send out to the employers aligned to the scheme for additional feedback.	Publication of a "how to" guide in July showing employers how to run return to work programmes for women who have taken a career break from the digital technology workforce.
The New Zealand Tech and Innovation Story	The New Zealand Tech and Innovation Story ('UpStarters') has been well received following its Techweek launch. NZ Trade and Enterprise and NZTech are now working to promote the use of the Story collateral by tech sector firms.	Making the Story resources available to the tech sector to use. Developing materials for use by ministers.
Investor's Guide to the New Zealand Tech Sector	The updated Investor's Guide to the New Zealand Technology Sector (launched during Techweek) has received good press coverage, and we are working with TIN 100 to ensure it is widely circulated. It has also been made available on the MBIE website.	Make updated version of the Investor Guide available widely. S9(2)(f)(iv) If you would like to receive a fuller briefing on the Investors
Digital Inclusion social and economic baseline research	 We have appointed BERL to deliver the research to establish a national baseline for digital inclusion following a competitive tender process. This work will establish an outcomes framework and associated indicators to start to measure and track digital divides. We will: connect this project into the wider work of the Statistics NZ Domain Plan keep you informed of progress with this work, engage the Digital Inclusion Ministerial Advisory Group on this, as well as wider stakeholders such as Internet NZ, the Ministry of Education and Google NZ. 	Guide, please let us know. Research underway as of 1 June. Draft framework expected early July.

Project	Updates	Next major milestones
	If you would like to receive a fuller briefing on the digital inclusion research, please let us know.	
	S9(2)(f)(iv) and 9(2)(b)	

5. Enhancing Rural Connectivity: Project Status Update

Enhancing Rural Connectivity					
 The project comprises the set of work streams addressing rural connectivity (both fixed broadband and mobile). This status update reports areas of progress, identifies new issues that are relevant to the scope of the work streams or that have a significant impact on their progress. 					
Work stream	Progress update Comment				
Marae connectivity (Infrastructure Portfolio/ Broadcasting, Communications and Digital Media Portfolio)	You have indicated you want to see a more high-level, holistic plan for marae, including the necessary phases of infrastructure, uptake and utilisation, to inform policy decisions to be made jointly between yourself and Minister Jones. We have been working on developing advice around the marae S9(2)(b) (ii)	On 12 June you will meet with officials to have a more focused discussion on the project as a whole. On 19 June you will meet with Minister Jones and officials for further discussion. A briefing will be sent to you prior to this meeting. Minister Jones has received an OIA request that captures one of MBIE's earlier marae connectivity briefings in- scope. An update on this is provided			

	S9(2)(f)(iv)	further below in this report – Section 8: Other OIAs consulted on.
RBI2/MBSF Expansion Policy (\$105 million) (Infrastructure Portfolio)	The deadline for bids closed two weeks ago and CIP has received: S9(2)(b)(ii) Once duplicates due to overlapping bids and non-eligible end users are removed CIP will advise the actual number of discrete eligible end users that could be covered. S9(2)(b)(ii)	The CIP Board met on Wednesday 6 June and a report on the \$105 million extension was provided to them by CIP to update them on the outcome of the bid process so far. A joint meeting with you and Minister Jones is scheduled for Tuesday 19 June on the \$105 million expansion. We will provide advice to you jointly prior to this. MBIE is meeting with you on Tuesday 12 June to ensure you are well briefed on progress so far. CIP will not begin commercial negotiations until decisions have been made by Ministers.
	together with recommended options for consideration by the Government in June.	

Responding to Community Concerns (Communications and Digital Media Portfolio)					
Tararua: Seeking improved broadband and greater mobile coverage	Tararua: Seeking improved broadband and greater mobileNo major update this week You met with Connect Tararua, Ron Mark MP and the Mayor of Tararua two weeksYou have asked that Connect Tararua, MBIE, CIP, and the RCG all get together to discuss the location of RBI2				

6. Sector News/Other issues you should know about this week

6.1. Kogan - new MVNO with Vodafone

Kogan, the Australian online retailer who purchased the assets of the former technology retailer Dick Smith, has signed an agreement with Vodafone New Zealand to offer mobile telecommunications services as a Mobile Virtual Network Operator (MVNO). The company said that plan details will be released closer to the launch date.

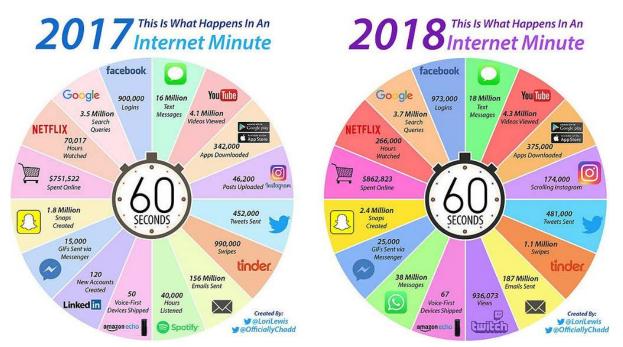
In Australia, where Kogan launched its mobile operations as an MVNO two year ago, it has already gained a few hundred thousand customers, due to its low prices. Kogan offers prepaid plans, with the possibility of buying a 30, 90 or 365-day plan. When the customer purchases a whole year in advance, a mobile plan with unlimited texts and voice within Australia, and 3GB of data costs only AU\$11.80 a month. By comparison, one of the cheapest mobile plans in New Zealand, the Skinny Core Combo, is a 28 day pre-pay plan that offers 200 minutes, unlimited texts to NZ and AU, and 1.25GB rollover data for NZ\$16. With Kogan, a plan with 23GB/month can cost as little as AU\$25.90.

:	3GB data			23GB data	1	
. _4 G	30 DAYS'		365 DAYS'	30 DAYS'	go DAYS'	365 DAYS'
CALLS Standard Calls @	UNLIMITED'	UNLIMITED'	UNLIMITED'	UNLIMITED'	UNLIMITED.	UNLIMITED.
TEXT SMS & MMS @	UNLIMITED'	UNLIMITED*	UNLIMITED'	UNLIMITED'	UNLIMITED*	UNLIMITED'
DATA* Data per 30 days	3GB	3GB	3GB	23GB	23GB	23GB
	\$ 16 [∞]	\$46 [∞]	-\$179" ^{60"} \$143 ^{-60"}	\$ 49 [∞]	\$139 [∞]	\$529 ** \$315 ^{.%*}
	BUY NOW	BUY NOW	BUY NOW	BUY NOW	BUY NOW	BUY NOW works out to be \$25 ⁵⁰ /30 days'
		\$15 ^{.54} /30 days	\$11 ^{.80} /30 days		\$46 ** /30 days	32.5 /30 days

New Zealand has very small number of successful MVNOs. In Australia there are over 30 MVNOs. Together their market share was 11% in 2017.

6.2. Infographic – Internet Minute

A comparison of the major applications used in just one minute across the Internet.



6.3. Enable doubles speed of the 100 Mbps fibre product

As you are aware, at its completion event Enable announced that it would be increasing the speed of its 100 Mbps fibre service to 200 Mbps at no additional cost. Enable said in its announcement that the offer would be available for new orders from 1 July 2018 and it "will work with its retail service providers to ensure as many existing customers as possible are reaping the benefits of the upgraded speed by Christmas."

If Enable's changes are taken up by retail service providers (RSPs) it will a good outcome for consumers. However, it is unclear how RSPs will respond, and whether the wholesale changes will flow through to retail products. RSPs typically set the price of their products on a national basis, smoothing out any differences in the price of UFB services provided by Chorus and the Local Fibre Companies (LFCs). RSPs may be wary of losing the ability to provide a range of speeds at different prices – 50 Mbps, 100 Mbps, 200 Mbps and the 'gigabit' product.

So far smaller RSPs Stuff Fibre and Voyager have committed to upgrading their customers to the 200 Mbps speed.

RSPs faced a similar situation in December 2016 when Chorus increased its entry-level UFB speeds from 30 Mbps to 50 Mbps. Some RSPs complained that Chorus had not adequately consulted them before making the announcement.

6.4. Vocus and Vodafone announced a joint venture to unbundle UFB fibre before 2020

Vocus Group and Vodafone announced on 5 June a joint venture to unbundle the Ultra-Fast Broadband (UFB) fibre network. Unbundling will give Vocus and Vodafone the ability to control the speed and features of their broadband plans and to differentiate their services from other ISPs that get the standard products from Chorus. Vodafone said they could, for example, offer a low latency plan aimed specifically at gamers, and a bandwidth-on-demand product for businesses.

The Deeds of Undertaking under Part 4AA of the Act provide that Chorus and LFCs must provide unbundled layer 1 fibre services on a commercial basis from 1 January 2020 (and from 1 January 2026 in the network funded as part of the second phase of UFB).

Three years after the implementation date for the Bill, the Commission can recommend to the Minister that a regulated, cost-based unbundled service be imposed. This should be an incentive on Chorus to offer fair commercial prices.

Vodafone and Vocus advocated before Select Committee for price regulation of the unbundled fibre services from 2020. They argue that competition is vital for innovation in the supply of services, and that without price-regulated unbundled services, New Zealand will fall behind global leaders in fibre service provision.

For all these reasons our advice to Select Committee was to wait, rather than locking in technology choices and prices by regulation at this time.

We provided you an Aide Memoire with background information about the provisions in the Bill regarding unbundling, a summary of the Vocus and Vodafone plans to unbundle the UFB fibre and the impact of that initiative.

6.5. Network Industry Working Group on the Rugby World Cup 2019

Spark has sent out invitations to telecommunication industry members seeking to establish a Rugby World Cup 2019 (RWC2019) Network Industry Working Group. Spark wants to establish the working group to help the telecommunications industry to work together and identify the sensible things the industry can do collectively to best prepare their networks for the RWC2019. Spark would like the working group to work through the technical details of the service, as they become known, to help enable customers to have best experience when streaming the RWC2019.

Spark has sent out invitations to three initial meetings in Auckland in mid-June to the wider telecommunications industry to discuss the scope of the working group and set out processes for working together effectively. The formal working group itself will be a smaller group of technical and operational people from the telecommunications industry.

7. Briefings (received and upcoming)

Sent to Minister's Office	Title of Paper	Comment or Purpose	Minister's Sign-off	Key Officials
28/05/2018	Ratification of Final Acts of WRC15 and ITUPP 2018; 3414 17-18	Briefing	8/06/2018	John Stewart
28/05/2018	Notes for Opening address at NZART's annual conference; 3514 17-18	Event Brief	28/05/2018	Sophia Enright
28/05/2018	Submissions Summary Report - Public Consultation on Telecommunications Relay Services; 3558 17-18	Briefing	28/05/2018	Andrew Burns

7.1 Briefings sent to the Minister's office

Sent to Minister's Office	Title of Paper	Comment or Purpose	Minister's Sign-off	Key Officials
29/05/2018	Developing indicators for the Digital Economy; 2267 17-18 To seek feedback on the economic activities you wish to monitor in order to measure the contribution of the digital economy to New Zealand's economic growth.		04/06/2018	Kim Connolly- Stone
30/05/2018	The Telecommunications (New Regulatory Framework) Amendment Bill: Impact on Enable.	To provide advice on Enable's concerns with the Telecommunications Amendment Bill.	30/05/2018	Osmond Borthwick
31/05/2018	Supplementary Advice on 100/20 Mbps Service maximum prices in 2019	Aide Memoire	03/06/18	Tim Blackmore
01/06/2018	Recommended additional changes to the Telecommunications (New Regulatory Framework) Amendment Bill; 3629 17-18	Response to stakeholder submissions on Bill reported back from Select Committee	05/06/18	Tim Blackmore
01/06/2018	Impact of Statutory Levies on the broadcasting sector; 3589 17-18	To provide advice on how broadcaster could be impacted by liability for levies under the Telecommunications Act	08/06/18	Filomena Antunes
6/06/2018	Newlands Intermediate School and Code Camp - Gamefroot coding camp 11 June; 3586 17- 18	Meeting note.	11/06/2018	Stevie Jepson
07/06/2018	GovTech meeting of Ministers; 3527 17-18	Brief and talking points.	June 2018	Katherine Silvester

7.2 Briefings due to the Minister's office

S9(2)(f)(iv) & 18(d)

S9(2)(f)(iv) & 18(d)

8. Cabinet Papers (received and upcoming)

Committee and Date	Date Sent	Title of Paper	Comment or Purpose	Key Officials
RECEIVED				
DEV	25/05/2018	Ratification of Final Acts of WRC15 and ITUPP 2018	To seek approval to submit these papers to DEV	John Stewart
UPCOMING	•			
Committee and Date	Date Due	Title of Paper	Comment or Purpose	Key Officials
S9(2)(f)(iv) & 18(d)				
Secondary advice provided on cabinet papers (i.e. telco aspect)				
V/A				

Other OIAs consulted on

Ministerial OIA – SJOIA77 – S9(2)(a)

Due to Minister Jones' office – 6 June 2018

- Minister Jones has received an OIA request which captures the following joint briefing in-scope: 2732 17-18 Marae Connectivity

 Provincial Growth Fund application.
- MBIE is advising Minister Jones' office that the bulk of the briefing be withheld under s9(2)(f)(iv) of the OIA, to maintain the
 constitutional conventions for the time being which protect the confidentiality of advice tendered by Ministers of the Crown and
 officials.
- Marae connectivity is a live proposal that both you and Minister Jones are actively considering. The briefing has not been signed and returned to MBIE and no policy decisions have been agreed to date.
 S9(2)(f)(iv)

MBIE has also recommended Minister Jones' office consult with your office on the proposed release.

9. Meetings – (scheduled and proposed)

Subject	Meeting date	Confirmed / To be scheduled
GovTech meeting of Ministers	Monday 11 June, 9.00am to 10.00am	Confirmed
Select committee Estimates hearing preparations	Monday 11 June, 3.00pm to 3.30pm	TBC
Select committee Estimates hearing preparations	Tuesday 12 June, 4.15pm to 5.00pm	Confirmed
MBIE Officials Meeting	Tuesday 12 June, 8.00am to 8.45am	Confirmed
Rocket Lab CEO, Peter Beck	Thursday 14 June, 8.30am to 9.15am	Confirmed
NZIER CE, Laurence Kubiak	Thursday, 14 June, 9.30am to 10.00am	Confirmed
Estimates Hearing	Thursday 14 June, 10.30am to 11.30am	Confirmed
Meeting with Telecommunications Commissioner	Thursday 14 June, 5.30pm to 6.30pm	Confirmed
Te Huarahi T ka Trust	Monday 18 June, 10.00am to 10.30am	Confirmed
MBIE Officials Meeting	Monday 18 June, 5.00pm to 5.45pm	Confirmed
Hon Shane Jones re RBI2 and MBSF programmes	Tuesday 19 June, 6.45pm to 7.45pm	Confirmed
MBIE Officials Meeting	Monday 25 June, 5.00pm to 5.45pm	Confirmed
Meeting with Clive Elliot QC.	Wednesday 27 June, 8.30am to 9.00am	Confirmed
Meeting with Institute of Directors- Kirsten Patterson, Chief Executive	Wednesday 4 July, 8.30am to 9.00am	Confirmed
Stewart Sherriff 2 Degrees CEO	Wednesday 4 July, 3.30pm to 4.00pm	Confirmed
Spark CEO, Simon Moutter	Thursday 5 July, 9.00am to 9.30am	Confirmed
Rural Women NZ	Tuesday 31 July, 4.00pm to 4.30pm	Confirmed

10. Communications activity (media, speeches, events, etc)

Date	Due to Minister's Office	Торіс	Description	Communications approach	Market sensitive	Key contact
May TBC	ТВС	Return to IT	You have indicated an interest in promoting the Return to IT pilot. There will be an opportunity in February to demonstrate progress with the pilot (e.g. number of applications received) and potentially some applicants successfully placed in roles	Press release (TBC)	No	Sandra Laws Sara Barham
твс	ТВС	S9(2) (f)(iv)	S9(2)(f)(iv)	Press release (TBC)	No	Renee Duffell Jane Tier Jo Williams
11 June	7 June	Newlands Intermediate School and Code Camp - Gamefroot coding camp	You have agreed to attend the Newlands Intermediate School and Code Camp - Gamefroot coding camp.	Brief	No	Stevie Jepson
14 June, 4.30pm to 5.15pm	ТВС	Visit Level 5 CCC Branch at MBIE	You have agreed to visit the CCC Branch at MBIE	TBC (General Itinerary)	No	James Hartley
26 June	19 June	2018 TUANZ Rural Connectivity Symposium	You have agreed to speak at the 2018 TUANZ Rural Connectivity Symposium.	Brief and speech notes.	No	Janelle Whittleston

11. OIAs and Ministerials

11.1 OIAs

Reference	Name	Торіс	Date of letter	Date due Minister's Office	Status
OIA18-036	S9(2)(a)	A copy of every Weekly Report received by you as Minister of Broadcasting, Communications & Digital Media since 1 February 2018	19-Mar-18	3-May-18	Sent to MO: 3-May-18
OIA18-37	S9(2)(a)	Correspondence, papers and briefings regarding: - the Overseas Investment Amendment Bill; and - the appointments of the first eight members of the Digital Economy and Digital Inclusion Advisory Group announced on 16 March 2018	23-Mar-18	16-May-18	Sent to MO: 16-May-18

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Reference	Name	Торіс	Date of letter	Date due Minister's Office	Status
OIA18-67	S9(2)(a)	 Any typed or handwritten notes or facsimiles thereof taken by her and/or her staff or officials at the Minister's Meeting with Facebook Director of Policy for Australia and New Zealand on Wednesday 29 November 2017 Any follow-up correspondence from her and/or her staff or officials regarding the Minister's Meeting with Facebook Director of Policy for Australia and New Zealand on Wednesday 29 November 2017 	20-Apr-18	21-May-18	Sent to MO: 21-May -18
		3. Any messages the Minister has sent and/or received to/from Facebook representatives since 29 November 2017			
OIA18-68	S9(2)(a)	A list of all briefings, reports, aide memoirs, weekly bullets/reports, and memos received by the Minister in her capacity as Broadcasting & Digital Services Minister between 1 April 2018 and 30 April 2018.	1-May-18	22-May-18	Sent to MO: 22-May-18
OIA18-25	S9(2)(a)	Request for documents	27-Feb-18	31 May 18	Sent to MO 30-May-18
OIA18-70 and 73	S9(2)(a)	Information regarding: - A broader digital economy and inclusion network (review) - Digital Advisory Group (review)	20-Apr-18	29-May-18	Sent to MO 28-May-18
OIA18-71	S9(2)(a)	Information regarding: - New Chief Technology Officer role created (review)	20-Apr-18	29-May-18	Sent to MO 28-May-18
OIA18-66	S9(2)(a)	Request for documents	19-Apr-18	18-Jun-18	Being prepared
DOIA1718-1707	S9(2)(a)	Submissions made in response to Public consultation document "New Zealand Telecommunications Relay Services Beyond June 2019"	27-May18		Withdrawn
DOIA1718-1706	S9(2)(a)	For the period between March 2017 to April 2018: 1 .CapTel phones at rent by month (contained in CSD's monthly reports, Section 3 Inventory Summary, Stock at Rent 2. CapTel minutes of use by month contained in TRS monthly report from Sprint to MBIE, Section 2. Call volumes excluding calls to Help Desk 3. WebCapTel minutes of use by month contained in TRS monthly report from Sprint to MBIE, Section 2. Call volumes excluding calls to Help Desk	27-May18	Due to requestor: 25-June-18 Notification of decision: to be advised	Being prepared

11.2 Ministerials

Reference	Name	Торіс	Date of letter	Date due Minister's Office	Status
For update please contact Ministerial Services					