

Mark Williams

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SUMMARY

Mark Williams is an economist with 20 years of experience in the economics, regulation and strategy of the telecoms, media and technology (TMT) sector. This has covered a range of specialist areas including regulation, litigation, cost modelling, spectrum, restructuring, financial analysis and business strategy.

Most of Mr. Williams' experience has been gained as a consultant working in the TMT practices of leading economic consulting firms. He also spent six years as a senior economist in the Global ICT team of the World Bank in Washington, DC. He joined BRG in 2016 to lead the TMT practice.

Mr. Williams has advised major European telecoms operators and regulators. Outside of Europe, his client work has included projects in the Middle East, South Africa, Indonesia and New Zealand. In addition to advising telcos and media companies, he has advised governments, regulatory institutions and international organizations on regulatory and policy issues in the ICT sector. He has also supported clients during litigation and arbitration cases in the UK and overseas. This has been focused on the telecommunications sector, particularly in areas related to regulatory decisions.

EDUCATION

MSc, Quantitative Development Economics
M.A., Politics and Economics

University of Warwick, 1996
University of Oxford, UK, 1995

PRESENT EMPLOYMENT

Managing Director, Berkeley Research Group, London, 2016–present

PREVIOUS POSITIONS

Partner, Deloitte LLP, 2011– 016
Senior Economist, World Bank ICT Group, 2006–2011
Consultant and Manager, Frontier Economics Ltd. London, 2000–2006
Consultant, National Economic Research Associates (NERA), 1998–2000

PROFESSIONAL EXPERIENCE

Economic consulting

Regulation

- **Vodafone (UK):** Study into the impact of Physical Infrastructure Access (PIA) on sector development in Europe.
- **BT (UK):** Study into BT efficiency and the efficiency factor included by Ofcom in the BCMR price control.
- **BT (UK):** Response to Ofcom's consultation on the revision of BT's cost allocation methodology.
- **Vodafone (UK):** Mobile call termination economics and cost modelling.
- **Telecom Italia:** Market review in fixed line (wholesale and retail) markets, USO cost modelling.
- **Telefonica (Spain):** USO cost modelling.
- **Avea (Turkey):** Cost modelling and preparation of regulatory accounts.
- **Telefonica (UK):** Analysis of numbering strategy as part of non-geographic numbering consultation.
- **Ooredoo (Qatar):** Market review and advisory support during competition regulation consultation.
- **Croatia Telekom:** Cost modelling and margin-squeeze.
- **Chorus (New Zealand):** Access network cost modelling as part of regulatory consultation.
- **Turk Telekom:** Regulatory risk analysis and regulatory compliance strategy.
- **Hong Kong telecommunications regulator:** Competition guidelines for tariff approval, cost of capital.
- **Netherlands telecommunications regulator:** LRIC cost modelling for interconnection and MDF access.
- **Telkom Indonesia:** Regulatory consultation on sector restructuring, infrastructure-sharing and competition regulation.
- **Telkom South Africa:** Introduction of transfer pricing, local loop unbundling, call termination, LRIC/CCA modelling.
- **Multichoice:** Development of regulatory strategy for the business across Africa.
- **Bahamas Utility Regulator:** Design and implementation of retail price-controls for the incumbent telecoms operator and on Universal Service funding.
- **Safaricom:** Competition regulatory analysis, MTR cost modeling.
- **Vimpelcom (Global):** Competition regulatory implications of mobile infrastructure-sharing.

Litigation, arbitration and competition investigations

- **Freshfields/confidential client:** mobile market value modelling as part of expert report in arbitration case.
- **Dentons/confidential client:** expert report on regulatory accounting and audit standards as part of arbitration case.
- **Belgacom:** Financial modelling and margin-squeeze analysis into broadband whole and retail products.
- **Telkom Slovakia:** Margin-squeeze analysis as part of European Commission regulatory investigation.
- **Telkom South Africa:** Margin-squeeze analysis and regulatory compliance.
- **Telkom South Africa:** Expert advice on call termination as part of regulatory litigation.
- **Multichoice Africa:** Expert competition advice during regulatory enquiry into Pay TV in Kenya.
- **Government of Slovenia:** Economic modelling of telecommunications sector as part of litigation.

Strategy, infrastructure and investment

- **Istanbul municipality:** municipal fibre-optic broadband network, design and business plan.
- **Ooredoo (Kuwait):** Mobile broadband costing and profitability, pricing strategy.
- **Ooredoo Group:** Network cost modelling and broadband profitability.
- **GSMA (UK):** Support during development of GSMA organisational strategy and purpose.
- **Vodafone (Turkey):** Fibre-optic cable rollout strategy.
- **Arik International (London):** Five-year business plan for international airline based in Nigeria.
- **Vimpelcom (Group):** Business strategy for Soft-SIM development.
- **Telkom (South Africa):** Wholesale/retail strategy and restructuring.
- **IFC (Washington DC):** Financing of EASSy project (\$250m) - fiber-optic submarine communications cable along East Coast of Africa.
- **Burundi (Government):** Design and implementation of the national backbone network financed and operated through a PPP.
- **Rwanda (Government):** Design and implementation of IRU contracts (US\$10m), design and management of the national fibre-optic network (US\$100m).
- **World Bank broadband and fibre-optic cable strategy:** Design of the World Bank strategy for core broadband infrastructure in Africa.
- **Malawi (Government):** Design and implementation of a fibre-optic cable to connect Malawi to Tanzania through northern Malawi, financed and operated as a PPP.

Spectrum

- **Telefonica (UK):** Liberalisation of 1800MHz GSM spectrum for use for broadband services.
- **Vimpelcom (Group):** Advised on the design of the 3G spectrum auction in Pakistan.
- **Telenor:** Advised Telenor on the design of the mobile spectrum auction in Bangladesh.
- **Government of South Africa:** Study into spectrum valuation as part of government spectrum policy.
- **Government of Kuwait:** Restructuring of the telecommunications sector, setting up the regulatory authority and issuing another mobile licence.

Economic Impact

- **Mobile Operators Association (UK):** Study and report into the cost and benefits of expanding the mobile network footprint in the UK.
- **Scottish Futures Trust:** Economic impact of broadband development in Scotland.
- **Multichoice Africa:** Economic impact of Multichoice's business in Kenya, Zambia, Malawi, Nigeria.
- **European Space Agency:** Led analysis of economic benefits of widespread roll-out of broadband networks across Europe on behalf of the European Space Agency.
- **Arik International:** Economic impact of the airline business in Nigeria and the West Africa region.

PUBLICATIONS

- 1) MWC (2015 and 2016) – Ministerial Programme.
- 2) Africa - ICT infrastructure in Africa: Authored major World Bank publication, *Africa's ICT infrastructure: Building on the Mobile Revolution* (published 2011).
- 3) "Africa Infrastructure Country Diagnostic (AICD)" chapter on ICT. World Bank (2009).
- 4) "Advancing the Development of Backbone Networks in Sub-Saharan Africa", in Information and Communications for Development: Extending Reach and Increasing Impact, World Bank (2009).
- 5) *The future of the fixed line operators*, MENA conference in Sharm el Sheik, Egypt (2010).
- 6) "Broadband for Africa: Policies for Backbone Networks", World Bank (2008).
- 7) "Reform of telecommunications regulatory frameworks in developing countries", in Telecommunications Law and Regulation, Oxford University Press (2008).
- 8) "IDA at work: Impact of the International Development Association on the ICT sector", World Bank (2008).
- 9) "Connect Africa", Kigali Rwanda, keynote speaker (2007).
- 10) "Interconnection regulation", World Bank training seminar, Ramallah (2007).
- 11) "Upgrading Information Infrastructure", in Unleashing India's Innovation, World Bank (2007).
- 12) "Advanced ICT Services in Africa What should governments do about it?" seminar on MSc in Telecommunications Policy, Strathclyde University (2007).

- 13) *"The Relationship between Mobile Telecommunications Infrastructure and FDI in Africa"*, in Vodafone Policy Paper Series No. 2, Vodafone (2005).
- 14) *"Regulation of interconnection under the New EU Framework: Implications for regulators and operators in Africa"*, IIR Conference; South Africa (2005).
- 15) *"Network externalities in telecommunications: Theory and application"*, ITU Regional Tariffs Group, South Africa (2005).
- 16) *"Valuing and Financing the Universal Postal Service in a Liberalised Market - Lessons from a Developing Country"*, 13th Conference on Postal and Delivery Economics, Antwerp, Belgium (2005).
- 17) *"Regulation of tariffs in the Telecommunications and Energy industry"*, Regulatory seminar, St. Andrew's University, UK (2005).
- 18) *"Margin squeeze test: how and when to apply it in the retail broadband services market"*, 13th Conference of the International Telecommunications Society, G. Houpis and M. Williams (September 2002).
- 19) *"Margin squeeze test for broadband services"*, Presentation to meeting of EU telecommunications regulatory group (2002).
- 20) *"Pricing of Regulated Utility Services"*, MSc Course, City University, London UK (2002).
- 21) *"Access to Bandwidth: Implications for rural users"*, Rural Development Commission (1999).