

AUSTRALIAN TELECOMMUNICATIONS ALLIANCE SUBMISSION

To: The Treasury
Re: Economic Reform Roundtable

25 July 2025



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1. AUSTRALIAN TELECOMMUNICATIONS ALLIANCE

The Australian Telecommunications Alliance (ATA) is the peak body of the Australian telecommunications industry. We are the trusted voice at the intersection of industry, government, regulators, and consumers. Through collaboration and leadership, we shape initiatives that grow the Australian telecommunications industry, enhance connectivity for all Australians, and foster the highest standards of business behaviour. For more details, visit www.austelco.org.au.

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2. INTRODUCTION

The Australian Telecommunications Alliance (ATA) appreciates the opportunity to make a submission to inform the areas of priority for reform that the Government seeks to progress as part of its agenda to improve Australia's productivity, build economic resilience and strengthen budget sustainability (Economic Reform Roundtable).

The Albanese Government has declared its vision *"for Australia to become the most connected continent"*.¹ We agree with this vision. We also welcome the Government's recent commitment to redress Australia's flatlining multifactor productivity (MFP), and the recognition of the critical role of innovation and technology to achieve this goal.² Moreover, key national economic strategies rely on the ability of businesses to access the best possible enabling connectivity. For example, the collective objectives of the [Future Made in Australia](#) agenda, [Employment White Paper](#) and [National Science Statement](#) are to harness economy-wide digitalisation to drive economic growth and productivity improvements, and create new high-skilled jobs.

With digital connectivity underpinning almost every aspect of today's economic activity, it will be fundamental for Australia's prosperity, social cohesion, resilience, and national security to continuously deliver on this vision, in the short, medium and long-term. Notably, the importance of, and dependence on, high-quality digital connectivity is set to significantly increase with the rapid proliferation of artificial intelligence (AI), augmented reality, IoT and video sensing, and automation at scale – all innovations that will advance industrial productivity in the Australian economy.

Telecommunications networks share strong interdependencies with other critical infrastructure. They are particularly reliant on the resilience of Australia's energy networks and services, and vice versa.

Similarly, AI will have transformative potential for Australia. However, its pervasiveness and power of transformation is dependent on the availability and quality of underlying networks, both from a connectivity and energy perspective.

All of Australia's connectivity is enabled by digital infrastructure, such as fixed-line and mobile networks, various types of satellite networks, data centres, cloud infrastructure etc. This digital infrastructure requires substantial ongoing and increasing investments to deploy infrastructure: to upgrade to latest technology (including 5G and 6G) for the most transformative applications, which require very high speed, ultra-low latency, and reliability; to further increase reach; and to securely operate and maintain such infrastructure.

¹ Rowland, M.. 2024. [Media release](#); Rowland, M.. 2025. [Address to the CommsDay Regional and Remote Forum](#)

² Albanese, A.. 2025. [Address to the National Press Club](#); Chalmers, J.. 2025. [Address to the National Press Club](#)

3. THE PROBLEM

Investment in digital infrastructure in Australia, especially network infrastructure, is being held back today by three key factors which act to increase risk, cost, and time to deploy, operate and maintain networks:

3.1 REGULATORY COST AND COMPLEXITY

- 3.1.1 The prevailing regulatory frameworks are not directly focussed on national economic growth or productivity enhancement. A lack of focus on these outcomes has resulted in an ever increasing stock of regulatory obligations that are holding back the digital infrastructure sector's long-term ability to attract investment, scale operations, and adapt dynamically to an evolving global marketplace and technological landscape.
- 3.1.2 A significant challenge confronting Australia's network operators and resellers lies in the fragmented and siloed nature of regulatory oversight.³ As a result, despite well-intentioned goals such as enhancing consumer rights, ensuring national security, fostering market competition, and advancing environmental sustainability, the current regulatory ecosystem has led to duplication, misalignment, and, at times, contradictions between regulators and departments.⁴
- 3.1.3 Inevitably, each regulator and Government department tends to prioritise their own legislative remit, institutional interests, and performance metrics, often seeking to maximise perceived effectiveness in isolation. This fragmented approach detracts from the broader opportunity to collectively advance the socio-economic value delivered by the digital infrastructure across the Australian economy.
- 3.1.4 Telecommunications network operators and resellers in Australia are encumbered by an excessively complex regulatory landscape, comprising more than 500 legislative and regulatory instruments, of which around 200 are sector specific. In 2024/25 alone, approximately 20 additional sector-specific obligations were introduced or are in development.⁵ The cumulative cost of complying with these new requirements significantly erodes capital reserves otherwise available for critical digital infrastructure investment. For instance, the *Telecommunications (Customer Communications for Outages) Industry Standard* is projected to cost the industry at least \$117M over a decade, while the *Scams Prevention Framework Act 2025* is expected to impose an additional \$149M burden⁶, together removing \$266M in potential infrastructure investment.
- 3.1.5 While these initiatives are expected to yield consumer benefits, such substantial capital reallocation must be weighed carefully. For context, less than \$300 million in total federal funding across Rounds 1 to 5A of the Mobile Black Spot Program (MBSP) enabled the construction of more than 1,270 mobile base stations through co-investment with industry, delivering more than "162,000 square kilometres of new and upgraded handheld coverage and 245,000 square kilometres of new external antenna coverage. This coverage footprint includes more than 109,700 premises and 8,600 kilometres of major transportation routes in regional areas."⁷ These outcomes underscore the need for greater recognition of the opportunity costs associated with an increasing regulatory burden, particularly in relation to Australia's broader ambitions for digital transformation and productivity growth.

³ Tech Policy Design Institute. 2024. [Map of Australia Tech Policy Stakeholders](#)

⁴ Also refer to: Australian Strategic Policy Institute. 2025. [Recognising the economic potential of digital infrastructure resilience](#)

⁵ For example: [Telecommunications \(Financial Hardship\) Industry Standard 2024](#); updated [Telecommunications \(Consumer Complaints Handling\) Industry Standard 2018](#); updated [Telecommunications \(Emergency Call Service\) Determination](#); new [Telecommunications \(Customer Communications for Outages\) Industry Standard 2024](#); new [Telecommunications \(Domestic, Family and Sexual Violence Consumer Protections\) Industry Standard 2025](#); new [online safety Codes and Standards](#), new [rules](#) under the [Security of Critical Infrastructure Act 2018](#); new [Cyber Security Act 2024](#); new [Scams Prevention Framework Act 2025](#); new [Telecommunications Amendment \(SMS Sender ID Register\) Act 2024](#) and Standard (30/09/25); and additional co-regulatory instruments (i.e. ACMA-registered, enforceable industry codes) requested by Ministerial Directives.

⁶ Excluding the additional costs imposed on other sectors, e.g. digital platforms and the financial services sector.

⁷ Department of Infrastructure, Transport, Regional Development, Communications and the Arts. 2021 (p.44). [Regional Telecommunications Review, A step change in demand](#)

- 3.1.6 In summary, against the backdrop of already high levels of regulation, we are concerned by an increasing tendency to more, overly prescriptive, or impractical regulation, often accompanied by rushed consultation processes and/or unrealistic implementation timeframes. Policymakers and regulators increasingly fail to resist the impulse of imposing new regulations when reform of existing regulations or other non-regulatory measures would yield a better outcome.
- 3.1.7 Too often regulation is either not subject to impact assessments, or such assessment are not being conducted with sufficient rigour, are lacking a holistic approach, and are based on unrealistic impact estimates.

3.2 STATE AND FEDERAL REGULATORY HURDLES TO DEPLOYMENT OF AND UPGRADES TO INFRASTRUCTURE

- 3.2.1 ATA consistently hears from our members of cases where they are being hamstrung by prohibitive planning laws that actively disincentivise network deployment.
- 3.2.2 For example, the deployment of mobile network infrastructure, which may only require a few weeks to construct, can take years to pass the required assessment and approval processes, or to obtain connection to the power grid. Similar bottlenecks are encountered in the rollout of fibre networks.
- 3.2.3 Existing legislation in the *Telecommunications Act 1997*, originally intended to facilitate efficient deployment of infrastructure, has consistently seen its powers diminished under the weight of State-based land access rules, environmental approvals, and heritage laws which are duplicative, inconsistent or impractical. Additionally, the legitimate legal rights of Traditional Owners groups over land access arrangements are complicated by unclear and inconsistent legislation, often resulting in open-ended consultation processes which lack established timeframes to conclude agreements.
- 3.2.4 A salient example of the systemic inefficiencies afflicting Australia's network deployment environment is the Commonwealth-funded MBSP. Despite the urgent need to enhance digital connectivity in underserved communities, many co-funded sites remain mired in protracted cycles of local and State planning approvals. As of July 2025, some applications remain languishing unresolved since as far back as 2019. Even where planning hurdles are cleared, delays persist in securing power connections, with timelines extending up to two and a half years. Several completed mobile sites remain inoperative, awaiting power connection despite active engagement by infrastructure providers with electricity utilities to expedite the process. This is also due to telecommunications infrastructure not being prioritised for power connection in regulation.
- 3.2.5 Similarly illustrative are the regulatory bottlenecks encountered in the rollout of national intercity fibre networks. A major national carrier reports that on a single fibre route, over 3,000 land access activity notices have been issued, alongside 1,128 construction certificates, 1,723 land access surveys, and 171 cultural heritage and environmental assessments. While these regulatory requirements serve important public interests, the absence of coordination across approval bodies has generated excessive delays and costs – ultimately deterring or significantly delaying the infrastructure investment vital for national productivity and technological advancement, including AI.

3.3 UNCERTAIN ACCESS TO AND HIGH COSTS FOR SPECTRUM

- 3.3.1 Spectrum is the prerequisite to the operation of mobile, fixed wireless, and satellite networks. 85% percent of spectrum licences in Australia are due to expire by in the period 2028-30. Given the substantial costs of spectrum overall – operators previously paid a total of \$8.2B (billion!) for the licences due for renewal in 2028-30 – the importance of continued access to this spectrum and other spectrum necessary to support future services at sustainable prices for the viability of these networks cannot be overestimated.
- 3.3.2 As global analysis by the Global System for Mobile Communications Association (GSMA) highlights,

higher spectrum costs lead to lower download speeds and less coverage.⁸

- 3.3.3 Globally, between 2014 and 2023, increases in mobile network operator spectrum asset holdings have seen revenue per licenced MHz decline by 67%, and the ratio of spectrum costs to revenue increase by 63%.⁹ In other words, network operators are paying more to own sufficient quantities of spectrum than previously but are not seeing an appropriate increase in economic return as a result.

4. THE IMPACT

4.1 IMPACT ON MULTIFACTOR PRODUCTIVITY

- 4.1.1 Despite these increases in operational costs for network operators and greater service levels for users (e.g. data availability, speeds, latency, coverage, security), prices for telecommunications services are equivalent or lower than ten years ago (adjusted for inflation), and the share of disposable household spending on telecommunications services has fallen.¹⁰ Over the same period, prices of many other essential services have increased, often substantially. As a result, many network operators generate returns below their costs of capital.
- 4.1.2 Conversely, over the last decade or more, the economic gains from improved telecommunications network infrastructure are not being absorbed by the operators of such infrastructure but by other parties in the economy, i.e. consumers, businesses (including global over-the-top service providers) and Government alike. In other words, despite spending even more on spectrum licences, the deployment, and operation of their networks, network operators are not receiving the benefits of their investments.
- 4.1.3 The diversion of scarce capital to less productive causes, such as excessive spectrum costs, unnecessarily complex deployment rules, and an over-regulated operational environment, takes away from capital that can be spent on investments to improve service outcomes (including speed, reliability, latency, coverage, security) for users. This leads to the Australian economy not benefiting from the most state-of-the art networks.
- 4.1.4 Importantly, funds directly invested into upgrading networks and other digital infrastructure yield a higher economic return than those used to pay for regulation, lengthy and costly deployment, and spectrum licences. The pervasiveness of digital connectivity and its criticality for the productivity of Australia's economy result in a multiplier effect of capital invested in digital infrastructure that will be hard to match by other areas for investment. Not a single sector of our economy would function remotely with the same effectiveness and efficiency, i.e. productivity, without the networks that facilitate digital connectivity.
- 4.1.5 For example, studies have shown that "[t]he GDP benefit of the nbn network between 2012 and 2022 (\$122 billion) equates to 4% of all growth in GDP, and one quarter of annual MFP growth in the period."¹¹ While the roll-out of the nbn network is largely complete, the figures highlight the clear correlation between high-speed, ubiquitous, and reliable connectivity and MFP. This relationship will continue to be relevant or even grow in relevance in the future, for fixed-line, mobile and satellite connectivity alike.
- 4.1.6 The Australian Government itself also acknowledged the importance of telecommunications services on MFP. In 2023, the Bureau of Communications, Arts and Regional Research (BCARR) concluded:

⁸ GSMA. 2025 (p.10). [Global Spectrum Pices](#)

⁹ GSMA. 2025 (p.26). [Global Spectrum Pices](#)

¹⁰ Department of Infrastructure, Transport, Regional Development, Communications and the Arts. 2023 (p.5, p.9). [Australian households and the affordability of telecommunications. Evidence from Household Income and Labour Dynamics in Australia \(HILDA\) data. Working paper](#)

¹¹ Accenture (commissioned by nbn). 2024 (p.10). [The economic and social impact of investment in the nbn network](#)

“The productivity performance of IMT [Information, Media and Telecommunications] has been mixed since the start of the century. Growth was more subdued than the market sector more broadly up until around 2007–08. Since then, IMT has grown more strongly and has outperformed the market sector. This has been particularly noticeable since 2013, with IMT’s MFP growing around 3 times faster than the market average.

For the Telecommunications Services subdivision, BCARR has estimated MFP by assuming that movements in capital services at the IMT divisional level are a reasonable proxy for the subdivision level, given Telecommunications Services was by far the biggest contributor to capital services in IMT.¹²

The results show MFP increased noticeably from around 2013, growing four times faster than the market sector overall. Telecommunications Services drove the relatively strong IMT performance during this period; no other IMT subdivisions grew as strongly.

[...]

The results for individual MFP indicators show that firms operating in industries where telecommunications-related activity is significant have made a positive contribution to the economy more broadly over the previous decade. BCARR estimates that from 2009–10 to 2019–20, total MFP growth for the period was 3.3 percentage points, with IMT contributing around 0.6 percentage points, or 18 per cent of MFP growth over that time – about 2.2 per cent of GDP.¹³

Over the same period, Telecommunications Services contributed an estimated 0.5 percentage points of economy-wide MFP growth, or around 14.7 per cent of total MFP growth. This is a strong contribution from a relatively small sector of the economy and these results should be considered indicative.”¹⁴

- 4.1.7 Importantly, the BCARR notes that the positive effects on MFP from the telecommunications sector rest on the assumption of a relatively constant share of investment and capital income share of telecommunications within IMT.¹⁵ Current returns on invested capital put these assumptions at risk.

4.2 IMPACT ON ENABLING NETWORKS AND CONNECTIVITY

- 4.2.1 The negative impacts of inefficient capital allocation and insufficient investment returns in our sector are real:
- 4.2.2 Australia is not isolated from the evolution of technologies and digital infrastructure in a global economy. Our trading partners are forging ahead with the deployment of state-of-the-art infrastructure, and Australia is falling behind: In 2022, Australia was ranked third out of 30 advanced nations for the number of 5G-connected devices per capita. It is predicted that it will fall to rank ninth by the end of this year. Similarly, Australia is predicted to fall from a 12th to 18th rank in terms of telecommunications capital expenditure by 2025 (in real terms).¹⁶
- 4.2.3 The impacts of a lacking return on investment not only directly impact productivity, they also negatively affect innovation, and resilience of infrastructure. While the effects of inhibited digital infrastructure investment on innovation are difficult to quantify, it is safe to assume that low latency, high-speed, reliable connectivity drive innovation and, conversely, digital infrastructure that is not reaching its full potential acts as a handbrake on such innovation. Similar arguments apply to resilience: for example,

¹² Australian Bureau of Statistics. 2015. [8681.0 - Information Media and Telecommunications Services, Australia, 2013-14](#). The ABS reported in 2015 that ‘Of the \$14.3 billion invested in total capital expenditure by the IMT industry in 2013-14, almost 85 per cent of this is attributed to the Telecommunications services subdivision.

¹³ An industry’s contribution to productivity growth need not be positive. It is possible for a subdivision to make a contribution larger than the whole division of which it is a part, for a period where the rest of the division has made a negative contribution.

¹⁴ Department of Infrastructure, Transport, Regional Development and Communications. 2023. [Telecommunications Services and productivity](#)

¹⁵ Department of Infrastructure, Transport, Regional Development and Communications. 2023. [Telecommunications Services and productivity](#)

¹⁶ Deloitte Access Economics (commissioned by the Australian Mobile Telecommunications Association). 2022 (p. 13). [5G Unleashed: Realising the potential of the next generation of mobile technology](#)

the low latency of 5G and 6G networks combined with greater connection density and speeds can enable enhanced monitoring, forecasting, and warning systems for natural disasters – which are predicted to occur with increased frequency and ferocity. Lower investment in such areas is likely to be synonymous with forgoing maximum resilience.

5. SUGGESTED REFORM

To be able to deliver on the shared vision of Australia being the most (and best) connected continent and to remediate flatlining productivity, Australia needs the enabling capability of world-class digital infrastructure.

To achieve this, we recommend the Government commit to work with industry on a **Digital Infrastructure Strategy** which, at a minimum, addresses the three highlighted areas for reform, and, additionally, examines the critical role the Government ought to play:

5.1 COORDINATED, STRATEGIC, AND FORWARD-LOOKING REGULATION

- 5.1.1 **A coordinated, strategic, and forward-looking regulatory approach in Australia with respect to measures impacting the digital infrastructure sector. This encompasses, but is not confined to, regulatory interventions concerning consumer protections and privacy, online safety, data security, scam prevention, and equitable access and affordability of services.**
- 5.1.2 As an initial step, we propose that the key regulators and departments, including the Australian Competition & Consumer Commission (ACCC), Australian Communications and Media Authority (ACMA), Office of the Australian Information Commissioner (OAIC), the Office of the eSafety Commissioner, Department of Infrastructure, Transport, Regional Development, Communications, Sports and the Arts (DITRDCSA), Treasury, and the Department of Home Affairs, collaboratively develop and maintain a Regulatory Initiatives Grid, similar to the model adopted in the financial services sector.¹⁷ This would involve a continuously updated, biannual publication outlining a 24-month forward schedule of all regulatory initiatives with material implications for the digital infrastructure sector.
- 5.1.3 Such a grid would be expected to deliver significant benefits, including improved transparency around forthcoming regulatory changes, more effective and efficient deployment of regulatory resources, and enhanced collaboration and dialogue between industry stakeholders, departments, and regulators.
- 5.1.4 Ultimately, Australia needs less and better regulation that is technology-neutral (including removing outdated legacy regulation), driven by rigorous and evidence-based analyses of costs vs benefits in an economy-wide context, and an appropriate risk focus.
- 5.1.5 The imperative for reform and a strategic shift toward a pro-growth regulatory ethos is gaining momentum internationally, with jurisdictions such as the United Kingdom (UK), European Union (EU), and New Zealand (NZ) recognising the necessity of such a pivot.¹⁸

¹⁷ Treasury. 2024 [Regulatory Initiatives Grid](#)

¹⁸ In the UK, economic growth has been declared the Government's paramount objective (Department for Business and Trade (UK). 2024. [Invest 2035: the UK's modern industrial strategy](#)), prompting a direct mandate for the telecommunications regulator, Ofcom, to articulate its role in fostering nationwide economic development (Ofcom (UK). 2025. [Open letter How Ofcom contributes to UK growth](#)). Within the EU, regulatory streamlining is considered fundamental to enhancing competitiveness across all industries. The EU's newly introduced *Competitiveness Compass* sets ambitious benchmarks: a minimum 25% reduction in administrative burden for businesses overall, and at least 35% for small and medium-sized enterprises (European Union. 2025. [An EU Compass to regain competitiveness and secure sustainable prosperity](#)). These targets reflect a recognition that, notwithstanding the EU's commitment to better regulation, two-thirds of companies still regard regulatory complexity as the principal barrier to sustained investment (European Union. 2025. [A Competitiveness Compass for the EU](#)). In a parallel move, NZ has initiated a review of telecommunications regulation with the Minister for Regulation underscoring the urgency of reform, remarking that outdated regulatory frameworks impede innovation and elevate costs. The Minister highlighted that regulation effectively functions as a tax on growth in an economy already burdened by high costs, necessitating a renewed

- 5.1.6 Australia must not lag behind, particularly as its principal trading partners recalibrate their regulatory settings to support innovation and economic expansion.

5.2 EASIER AND FASTER DEPLOYMENT OF INFRASTRUCTURE

- 5.2.1 **A clear, harmonised, legislated, and regulator-enforceable land access, planning, and deployment framework that appropriately reflects the critical and essential nature of digital infrastructure.**
- 5.2.2 This includes an overhaul of the Powers and Immunities Regime (Schedule 3 of the *Telecommunications Act 1997* and associated regulations).
- 5.2.3 It also requires a mandated prioritisation of digital infrastructure (including telecommunications networks) for connection to the power grid.

5.3 SPECTRUM POLICY TO ASSIST THE ECONOMY

- 5.3.1 **Spectrum policy that assists all sectors of the economy to benefit from world-class connectivity.**
- 5.3.2 Australia's approach to determining the costs for spectrum should enable efficient investment and must acknowledge that network operators adopt a long-term, holistic view of their entire spectrum portfolios when determining the optimal allocation of spectrum across various technologies, including emerging services such as LEO satellite direct-to-mobile.
- 5.3.3 In addition, Australia's approach must be consistent with regulatory approaches to spectrum management, allocation, and costs internationally. If Australia moves at a slower pace or into a different direction to other, larger global markets, global vendors of infrastructure will be required to supply bespoke products for the Australian market, which will further increase costs for consumers and business.

5.4 A SUPPORTIVE AND INVESTED GOVERNMENT

- 5.4.1 **All levels of Government have a critical role to play in enabling Australia's digital infrastructure sector to redirect its time and resources away from navigating regulatory obstacles, and instead toward investment that enhances national connectivity, and in turn productivity.**
- 5.4.2 This support should allow industry participants greater freedom to prioritise growth, foster innovation, and respond with agility to rapidly evolving market dynamics.
- 5.4.3 The Government's responsibility lies in cultivating an enabling policy environment and strategically employing policy levers to incentivise sustained private sector investment. Decisions made in the coming years will be pivotal in shaping the long-term viability and global competitiveness of the sector, thereby safeguarding Australians' access to high-quality, reliable, and secure digital services and, ultimately, Australia's prosperity.
- 5.4.4 This also requires a critical analysis of the need for additional Government investment in the digital infrastructure sector where such investment aligns with whole-of-Government priorities, is warranted in terms of socio-economic benefits, and private sector investment is likely to remain suboptimal. Such areas for Government investment could, for example, relate to network resilience and public safety.
- 5.4.5 The Government also has a critical role to play in fostering local research and development – with and for the digital infrastructure sector. Local capabilities are not only a driver of productivity and align with

and comprehensive reassessment (New Zealand Government Beehive.govt.nz. 2025. [Government launches regulatory review into telecommunications](#)).

the Government's [Future Made in Australia](#) agenda; importantly, they are of key strategic importance for Australia's technological sovereignty and, consequently, national security.

A coherent national vision is essential – one that integrates regulatory reform, the design of co-investment frameworks, streamlined infrastructure deployment processes, public sector adoption of emerging digital technologies, and, importantly, strategic decisions concerning spectrum pricing and allocation, which remains a fundamental enabler of enhanced network coverage and capacity.

The diligent and timely execution of such a Digital Infrastructure Strategy ought to be a matter of Government priority and be allocated dedicated resources. Given the interdependencies with other critical infrastructure sectors and a regulatory environment that spans a number of Government portfolios, a cross-departmental/agency approach is required, through a dedicated taskforce to support delivery and implementation. The development and execution of *Australia's 2025-30 Cyber Security Strategy* may serve as a template and offer useful insights and learnings.

Given the critical nature of our sector for Australia's prosperity, social cohesion, resilience, and national security, it is important that future Government initiatives with impact on the digital economy remain informed by an ongoing and constructive dialogue with our sector, facilitated by the ATA.

The ATA and its members stand ready to work with the Government, regulators, and other relevant stakeholders to develop a reform package that secures the long-term viability and world-class quality of Australia's digital infrastructure, to ensure Australia's prosperity and security for today's and future generations.

Ends

