

○ INTERVIEW WITH PAUL BUDDE

Liz Fell, Freelance journalist

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Budde came to live in Australia from the Netherlands. After completing a marketing degree at the Netherlands Institute of Marketing (NIMA), he set up his own marketing company in 1978, developed an interest in new media, particularly videotex, and began applying his marketing skills to provide business plans for several public and private online services. He was also involved in a videotex trial on Europe's first cable TV service.

Since his arrival in Australia in 1983, Budde has expanded to become a global publisher of online research reports and he now offers consultancy services around the Asia Pacific. His early consultancies included: a marketing report for Telecom on implementing Viatel; developing Telebank for the Commonwealth Bank; advising on Telstra's electronic Yellow Pages; establishing intranets for Lend Lease and for TAFE NSW; and designing Skytex for TIAS, the Qantas, Australian Airlines, Ansett joint venture.

Since the mid '90s Budde has launched several initiatives aimed at encouraging electricity utilities to enter the telecoms infrastructure market and promoting links with local councils, especially in regional areas. In early 2000, he set up his well-attended monthly roundtables on topical issues, and earlier this year organised a trade mission to the Netherlands for Australian and New Zealand companies.

Budde was a Foundation Director of the former Service Providers Action Network (SPAN) and is a member of the Australian Information Industry Association (AIIA), and the Australian Telecommunications Users Group (ATUG). He is also involved with interactive services associations in the Netherlands, the US and the UK.

Budde and his wife, Louise Budde, a BuddeComm director, have based their company at Bucketty, a small inland bush community 100 kilometres north of Sydney. However, freelance journalist Liz Fell interviewed Budde for the TJA in early October in his new Sydney harbour front office.



Paul Budde

TJA: Let me begin with a question I've wanted to ask for many years. Why did you leave the Netherlands and come to live in Australia?

Budde: Lifestyle. That was the only reason. The Netherlands is an absolutely lovely country and I go back every year, but it was a lifestyle issue and the space that you've got in Australia. It's not just a matter of physical space, as in nature, but it's also in people's minds because you don't live on top of each other as you do in some European countries. So I did a business trip in 1982, looked at various countries and various places in Australia, and Sydney was an easy decision.

TJA: What were you doing before you arrived in 1983?

Budde: I was running my own company in the Netherlands. I had five years of experience in Europe with videotex, the predecessor of the Internet, so I brought that to Australia. Actually one of my first customers was Telecom Australia who were setting up a public videotex system, and basically I wrote a business plan and helped them set that up.

TJA: What was the business of the company when you first established it in the Netherlands?

Budde: I studied marketing, so when I started my own company it was actually a business assisting companies with marketing services and things like that. However, at the same time in 1978, I came in contact with Prestel, the videotex system developed by British Post. I thought that there were interesting marketing aspects to the videotex technology, so I became involved with that, and my interest in telecommunications grew from there. My marketing company over time basically changed totally into a new media or telecommunications company.

TJA: I think the Netherlands was one of the first European countries to introduce cable TV. Did that provide opportunities for your combined new media knowledge and marketing skills?

Budde: Yes, the Netherlands had a very high level of cable television penetration, something like 80 percent at that time. It's now 96-98 percent. At that stage there were some trials in Columbus, Ohio, looking at interactive television over cable. We actually had a large Dutch publisher, VNU, who wanted to test if that was possible, and so in 1980-81 I became involved in the first interactive cable television trial in Europe where we had 90,000 households in the Netherlands.

TJA: Were the cable systems in the Netherlands privately owned at that stage?

Budde: No, they were all set up by the electricity utilities, and that fed into my later interest in setting up UtiliTel here. The Netherlands is a very densely populated country and they didn't allow antennas on the roof because they were regarded as ugly, so cable was established as a utility instead of providing free-to-air television.

TJA: Did you find consultancy work on new media when you arrived in Australia?

Budde: Yes. Videotex for me was a great starter because it was in its heyday. We, that is, Paul Budde Communications, set up the first Telebank system in Australia for the Commonwealth Bank. It was the largest telebanking system in the world when it was launched in 1986.

TJA: What was your role?

Budde: We set up the business plan, had meetings with strategic people within the bank on why we should do it, and basically designed the service including the sort of content that should be on it and what it should look like. Obviously there were experts in engineering and graphic design to implement the system.

TJA: I first encountered you at telco press conferences, but I don't think you were actually working as a journo. Were the press conferences a way of gaining inside information?

Budde: No. I get this question quite often: what are you? You have to be either this or that, a journalist or a consultant. I've thought a lot about it. I am a person who has very strong opinions about the way telecommunications operates and how to implement policies and strategies. The combination of my knowledge of the telecommunications market and my own beliefs makes me the person that I am in my commentary, in my analysis, and in my opinions. There's a crossover between the journalistic elements and the analytic or consultancy elements so I'm a mixed bag in that respect.

TJA: Surely attending press conferences or events would have been an excellent opportunity for you to meet key people, ask questions and learn about the industry?

Budde: I think that was true in the early days but, to be honest, I go to very few press conferences these days because I feel strongly that people are not providing the information I'm after. If you think back to the 1980s, you got better information out of a press conference than you are getting now with these polished PR events.

TJA: Perhaps the CEOs and managers were more honest in the 1980s?

Budde: Yes. I think people in the industry were more honest in those days.

TJA: And most of those allowed to speak publicly were engineers rather than pumped up salesmen...

Budde: Or lawyers!

TJA: Yes, lawyers too. How did you build up the research publication side of your business?

Budde: Actually, the publication side was by default...

TJA: Yet your web site says you have established 70 publications!

Budde: Yes, and it happened by default! When I was in the Netherlands, videotex was a new item, and very few people had any idea what I was talking about, so I used to write down on a sheet of paper what was happening with Bildschirmtext in Germany, Prestel in the UK and so on. Here in Australia, I got a call from Richard Farrington, whose company IPI was a reseller of publications, and he suggested that if I put a header and a footer on my sheet of paper, I could sell it as a newsletter. That's how the first newsletter started.

TJA: And you now produce 70 online research reports for different markets around the world. Does that number include reports that have the same content but are translated into a different language?

Budde: No. We have an army of researchers. We have 15 senior researchers in full-time jobs, and another 20-30 stringers or people around the world who help us. These days 80 percent of the sales of our research reports comes from overseas. We have reports on 170 countries, so you can find a report on mobile in Mongolia or pay television in Bhutan.

TJA: In terms of revenues, are the sales of the research reports generating more than the consultancy side of your business and the roundtables you organise?

Budde: When I came to Australia in 1983, 80 percent of my business was basically consultancy related to videotex services and 20 percent was publications. Now it's 20 percent consultancy and roundtables and things like that, and 80 percent publications. That's a total turnaround over that period of time.

TJA: Do you still see BuddeComm as a telecommunications company?

Budde: Well, that is changing too. Digital Media is where the company's growth is in terms of research. Our digital media reports are our best-sellers, and those are reports about where telecommunications and the media are crossing over. In digital media, I even include e-health and tele-education.

TJA: You are keen to note on your web site that you are independent, which is a rubbery word these days! How do you establish this independence?

Budde: I think independence is something only my customers or readers and listeners or viewers can judge. I can say it, but that doesn't mean anything unless the people who are listening judge me as such. If I did something that undermines my independence like taking money then that would obviously compromise my independence.

TJA: So it's an ethical position?

Budde: Yes, totally.

TJA: Do you allow yourself to hold shares in Telstra or any of the other telcos?

Budde: No. I don't and I would never do that. I have no shares in telecommunications companies.

TJA: Does your research data come from your staff asking questions of corporate management or is it almost all from annual reports and public documents?

Budde: The research reports are mainly by my senior analysts though I look at them obviously. The data comes from a variety of sources.

TJA: But the data are only as reliable as your analysts/researchers, so I assume that to be seen as independent they need to be mindful of their ethics too?

Budde: Absolutely. I manage by example in the office and with the researchers. I share my beliefs with them, and they can take them on board or not. If they don't agree, they won't stay with us.

TJA: Moving to the consultancy side of the business where you organise events such as the recent trade mission to the Netherlands, did that involve payment from those who accompanied you?

Budde: No, I didn't charge them for anything and they didn't pay me. People paid for their own trip. That was an ethical issue for me.

TJA: It must have required a lot of organisation! Was it essentially a marketing venture for BuddeComm?

Budde: No. I'm a strange animal. My company is selling reports all over the world and making money which means that side of my business is secure. So I now have the luxury of doing certain things that relate directly to my own interests. I love the Netherlands and I love Australia so I was therefore prepared to put in some time and money to make the trip work. It gave me a good feeling.

TJA: Beyond that significant and, I understand, successful event, you have also established UtiliTel and a Wholesale Industry Group (WIG). Let's start with UtiliTel: who are the members and what is your role?

Budde: Well, back around 2000, it became clear that facilities-based infrastructure competition had not got off the ground. Optus had basically withdrawn from its cable rollout and didn't want to extend it any more. So I looked at the market and thought that an alternative for infrastructure competition could be the electricity utilities. That came from my Dutch experience in the '80s that I mentioned earlier. So I sent out an email to the electricity utilities and essentially all of them came to a roundtable. In fact, the first roundtable ended earlier than I expected because from the very first moment everybody agreed facilities-based telecoms infrastructure was an important issue to discuss. The fact that it still exists as UtiliTel is an indication that it has worked.

TJA: How does it operate?

Budde: It's run 'my way', which means it's not an official organisation and it's not registered. Basically it's a group of people from within utilities, the managers in charge of telecommunications, who are interested in what can be done to support telecommunications infrastructure competition. At the same time, I launched what I called a 'missionary campaign' where I visited altogether 50 local councils around Australia to talk about their involvement in the broadbanding of their communities.

TJA: Was it easy to secure co-operation from the local councils?

Budde: Yes and no. I always met with people who were interested so I didn't have to do a hard sell. And I think they started to understand that people in their council area wanted broadband, and that broadband was not really provided in a way that happened in other countries. I argued that because the councils had a strong role in infrastructure they should look at broadband, not to run a telco business but to facilitate infrastructure in their communities. Could they make towers or ducts available, for instance? It turned out to be quite easy to link up the utilities and the councils so they could start talking. And there are some real success stories: ETSA in Adelaide has rolled out their fibre to the home network and linked most of the council buildings; and Ergon Energy in Queensland is the same story.

TJA: How would you describe your role in the UtiliTel venture?

Budde: I am the facilitator. I bring people together, organise meetings, facilitate discussions between the utilities and telcos or councils or each other, and organise functions such as a visit to Adelaide to show what ETSA is doing or to Perth to see Western Power's fibre to the home network. The beauty of the utilities is that they don't compete with each other so, unlike the telco market where it's very difficult to get Telstra to sit down with the rest of the industry, it's very easy for the utilities to sit together and share their plans.

TJA: How much do you charge the utilities for your services?

Budde: There are ten utilities involved and they each pay me \$7500 per annum for organising the meetings and running UtiliTel.

TJA: And if BuddeComm prepares industry reports or organises special roundtables do they pay separately for these?

Budde: Yes.

TJA: UtiliTel made an Expression of Interest in the Federal government's Connect Australia funding. Did you write that submission?

Budde: No. I'm the facilitator. But we had this opportunity to look at input from the utilities into Broadband Connect, so at that stage the utilities themselves employed a consultant, Carl Gazia, and he actually wrote that submission.

TJA: Did the utilities gain anything from the Broadband Connect funding?

Budde: All the money went to OPEL, but there is an opportunity for the utilities and also the newer Wholesale Interest Group to work with OPEL. If a utility has a bit of cable in a regional area, for instance, then OPEL is open to discussions on this while this is impossible with Telstra.

TJA: Moving to the new Wholesale Interest Group or WIG, was the Broadband Connect Infrastructure Program the stimulus for setting up this group?

Budde: Yes. When the Minister announced it in 2006 I sent around an email asking whether people wanted to discuss it and received replies from 100 companies, including some councils.

TJA: And as the facilitator of this group do you receive fees for your services?

Budde: Nobody pays me money as a facilitator, but if we have a meeting then they would pay \$195 for coming, including lunch, room hire, having coffee and things like that, so I'm not making money there.

TJA: I see that the group's ten Wholesale Access Principles were sent to the Expert Task force on the open access broadband network with the idea they could be accepted as guidelines. Was it difficult to gain consensus on these principles?

Budde: When the group first came together in 2006, the issue they immediately wanted to talk about was how they could interconnect with each other, and what were the rules and regulations for interconnection. It's a huge morass when you actually try to sort it out, and each company was different, of course. If I am Nextgen and I want to talk to Optus it's different from talking to Primus. So to actually come up with a set of principles that everybody agreed would make it much easier for companies to start talking to each other, we formed work groups. One was a group of company experts who sat down and drew up these principles, which then went to the whole group so everybody could comment. Eventually the principles were given to the Communications Alliance to incorporate in what they are planning to do with open networks and things like that.

TJA: Yes. I wondered whether this activity actually overlapped with the role of the Communications Alliance?

Budde: No. The Communications Alliance was a participant in the Wholesale Industry Group from day one, as were ATUG and the Department of Communications.

TJA: During this pre-election period, I must admit that I've found the debate rather like a political stage show on the subject of broadband, featuring rhetorical claims about different fibre to the node network plans. Do you see a need for a much more rational debate and a broader telecoms policy that addresses longer-term goals?

Budde: Yes. I find the weakest point in Australian telecommunications politics, and the policies in particular, is the total lack of vision or the lack of a blueprint. It's all about handing out five million dollars here and five billion dollars there, but there's no blueprint. It's absolutely critical for us as a country to have a blueprint for what we are planning to do.

TJA: Does the lack of a blueprint mean that, for example, there is no policy framework yet for fibre to the home as a long-term goal?

Budde: Not yet. The key reason is that the Government, when it decided to privatise Telstra, actually gave Telstra a lot of freedom and didn't provide the right regulatory regime that would move us to fibre to the home. Basically, if you are talking about fibre to the home as the end goal, you need an open network facility so that people can have their e-health, tele-education, entertainment and so on, and you need to start working out your policies and strategies for that goal.

TJA: Meanwhile, I understand that Telstra and a few others, including utilities, are rolling out fibre to new sites and getting nearer and nearer to domestic premises.

Budde: Yes. I think fibre to the node is an evolutionary process and that fibre to the home will flow on. If you look at it from an evolutionary point of view, we can have ADSL2+ now – fibre to the exchange then ADSL-copper – and in the meantime fibre is rolled out to the node. That will be okay for the next couple of years, then we can have VDSL and, for the majority of Australia, that will be okay for the next four or five years. At that point of time, when we've got fibre to the node, it's only the last 300 metres where the copper needs to be replaced by fibre, and that next stage will happen on an 'as needed' basis. If you have a densely populated area, you might have fibre to the home earlier than if people are scattered and VDSL is going to do a good job. So it's not absolutely necessary for all that to happen at the same time.

TJA: How are telcos like Primus, who are reliant on Telstra Wholesale, reacting to the idea of leaving their DSLAM investment stranded in Telstra exchanges?

Budde: The Primuses of the world are not worried if they can move from the current environment to a fibre network that is based on an open network as long as they have access to the network and can deliver their services. The DSLAMs will be a stranded asset anyway as they move to fibre, and they can't stop the future just because they have a stranded asset. What is important for the telcos is to have a regime that actually guarantees that if they move from the DSL environment to fibre they can still make money out of that environment.

TJA: The issue of an open access network raises the thorny issue of Telstra's vertical integration and the whole debate on structural separation again.

Budde: Yes. Structural separation has become a loaded word even though it can be done voluntarily and in about twenty different ways, as long as the outcome is an open network where

everybody, on an equivalent basis, can use the underlying infrastructure for whatever purpose they want.

TJA: The pre-election conditions have not really provided a space for any thoughtful debate on the impact of structural separation.

Budde: No, and the T3 legacy that forms part of those conditions means the Minister legally cannot threaten Telstra with structural separation because in the prospectus, under Australian law, neither she nor the Government can do anything until 2009. But 2009 is only a year from now, and we need a year to actually change the situation. If we can get through the current year and work towards 2009, I think we will have a good solution under either party. Remember, both British Telecom and Telecom New Zealand were privatised, and they're both now operationally separated.

TJA: Did you agree with the privatisation of Telstra?

Budde: I actually don't mind it as long as the right legislation is put in place around it. I'm not saying I was in favour of it because I think there is national interest at stake in a telecommunications network that is essential national infrastructure so it made sense for the Government to hold onto a share. But that's not strictly necessary if you have good legislation. The problem is that we don't have that good legislation.

TJA: In your submission to the Coalition government's Expert Task force that is currently assessing proposals for an open access broadband network you say that because of the importance of this infrastructure for the nation 'it is highly likely that broadband access will be free in the future'. This sounds to me like a pipe dream!

Budde: The way I address this issue is that I can see within the next five years we will need a much better e-health system: electronic records, video monitoring facilities for old and ill patients at home and that sort of thing. If the health care system can save \$30 billion over ten years from e-health, and 3,600 people die every year because we don't have it – incidentally those are official government figures and not my data – then there is a clear need to build fibre to the home networks or an equivalent service. The problem is that the people who need e-health most are the people who are chronically ill and can't afford to pay.

TJA: So who pays?

Budde: Who pays for the roads? The Government, of course. Ninety percent of the roads in Australia are free: only five percent, or less probably, are toll roads. So you could have a free broadband connection in your house. Now that's not to say that your entertainment will be free, but you would have access to services like e-health and tele-education that benefit our society. And smart meters for energy are the next thing for UtiliTel by the way. They are talking about smart meters.

TJA: But they have been talking about them for what seems a long, long time!

Budde: Yes. I've never been wrong in my predictions, but I have been out on the timing!

TJA: Video entertainment is, of course, the most widely known of these bandwidth-hungry applications. Do you see IPTV as taking off?

Budde: Absolutely not. We don't have good quality broadband in Australia so we are therefore limited in video quality and video quantity in what we can see. What we are doing is taking an old technology, linking it to a new technology, and thinking that people will use it.

TJA: Do you see Telstra generating revenues as a successful content provider?

Budde: No. They are 'big pipe' operators. At one stage I had a discussion with Telstra's Ted Pretty [former Managing Director, Technology, Innovation & Products] who said, 'Paul, do you want us to be in big fat pipes?' And I said, 'No Ted, I want you to be in big fat intelligent pipes.' What's the difference? I want Telstra to invest in value-added infrastructure: data centres, billing, management, network. That's how they can make the money, from the infrastructure side, not the content side.

TJA: In your blog, you write that Communications Minister, Helen Coonan, 'inherited a messy telecoms portfolio' and that 'most of the problems that we are currently encountering would have been totally avoidable if the government had acted properly in the first place, during their first eight years in government'. Isn't that sheeting home the blame to Richard Alston?

Budde: It is a mixture, because one of the reasons, which I've already mentioned, is that the policies before T3 were not corrected therefore we have a problem now.

The reality of that policy is that legally Telstra have promised in the prospectus there won't be any changes to the legislation before 2009.

TJA: That's interesting, but surely to suggest Minister Coonan has not helped to create the 'mess' is rather too kind? Do you need to stay on good terms with her?

Budde: No, no, no. I don't have to. The situation as I see it at this moment is that both Labor and the Coalition have a good grasp of where we need to go. I can live with the broadband plans of both of them. Yes, they need a lot of massaging but, in principle, we are walking forward not backwards.

TJA: In the letter that you recently wrote to Minister Coonan (See insert), what was the CEO dinner you refer to? Was it a fund raiser organised by the Liberal Party?

Budde: No, no, no. That was a BuddeComm activity. I invited the Minister to talk to 20 CEOs of telcos, not vendors and not lobbyists. And the Shadow Minister will do that too.

TJA: Do you select these CEOs?

Budde: No. I send out notices, and they can all come but obviously not everybody does.

TJA: Who went to the recent CEO dinner?

Budde: Well, I don't want you to write them down.

TJA: Then I don't want to know right now! Where was the dinner?

Budde: Here in Sydney at the Observatory Hotel, which is my roundtable venue.

TJA: In your letter to the Minister¹ you write about using telecoms legislation 'to draw a line in the sand'. Does that refer to something the Minister said at the dinner?

Budde: No, there was no formal speech. The dinner was a situation where, in an informal way, everyone could discuss issues around the table. The Minister was really informal, saying, 'OK, guys, tell me what I have done wrong or whatever'. It was a really open discussion in that respect.

TJA: Was Telstra there?

Budde: No.

TJA: So why did you write a letter of apology to the Minister saying Telstra's behaviour is a 'complete disgrace' and 'a source of embarrassment' and that you are sorry that she 'had to bear the brunt of such personal attacks'.

Budde: I am a participant in the telecommunications industry, and I don't like the way Telstra is behaving itself. I have a passion for this industry. I like the people, and we have a good story to tell. We are not weapons of mass destruction!

TJA: In the letter you write, *inter alia*, that Telstra's conduct is 'ugly', a 'complete disgrace', 'antisocial and anti competitive'.

Budde: You know, I have told Sol Trujillo [Telstra CEO] and others within Telstra that I am prepared to sit down with them and discuss anything about the industry. If they don't agree with what I'm saying, then let's discuss it rather than shout. And I personally don't like the way that Telstra is behaving. Now people can say, 'Who cares what Paul Budde thinks'. Well, I care. I care that Telstra is misbehaving. And I don't like the bullying of somebody else in the industry – whether it's Labor or Liberal – to the level Telstra is doing with Graeme Samuel [ACCC chairman] and with Coonan.

TJA: So you wrote to apologise to Coonan on behalf of the industry, excluding Telstra, of course?

Budde: Yes. It's a shame that this is our industry.

TJA: My reaction was that the letter suggested you were a bit of a sycophant, you know, sucking up to her.

Budde: OK. And I've had people say to me, 'You want to earn brownie points from the Minister et cetera'.

TJA: In the letter you write that you too have been the 'victim of personal attacks' from Telstra and that you 'must put on a brave face'. Is that mainly a matter of snide comments about you personally over the years?

Budde: Yes, comments referring to my Dutch background. For example, 'Paul Budde always talks like ja, ja, ja', or one PR guy saying something along the lines of, 'Who can trust in a copier salesman from The Netherlands?' because I worked for Rank Xerox at one stage. And the ABC have been told that I'm not independent, so they have to phone me and ask questions to see whether this is correct.

TJA: Well, at least the ABC reporters check it out and provide some balance to Telstra, which is not happening with this interview format! Did your relationship with Telstra change with the arrival of the new American management team?

Budde: Yes. It's changed for the worse obviously.

TJA: Have you actually met Trujillo?

Budde: No, I have met Phil Burgess (Managing Director, Public Policy & Communications).

TJA: And was that a constructive meeting?

Budde: No, absolutely not. We were on the same plane to Canberra so when we landed, I tapped him on the shoulder and introduced myself. The shouting match started at the airport, and we then shared a cab to the hotel. The tirade just went on and on. It was very much a one-way street, not a dialogue.

TJA: But you're not alone in crossing swords with Burgess. Another person who enjoys controversy, *Quadrant* editor, P.P. McGuinness, told me recently he had a stormy scene with Burgess at an event that, I think, was organised by Telstra's consultant, Henry Ergas.

Budde: Yes, Burgess gets paid for that and that's the way he is. I don't have a problem with it, but I have had this personal experience with him.

TJA: Meanwhile, business models for financing infrastructure are changing with investment banks and private equity firms such as Babcock & Brown or Macquarie or KKR moving into the telecoms/ content markets. Can you foresee a day when one of these firms might move on Telstra because they see the sum of its parts as more attractive than the whole?

Budde: There is a likelihood that something like that will happen because it makes sense to have structural separation between the infrastructure and the content. If you look at Sensis, Big Pond and Foxtel, these are three good companies with top management people but they are competing with each other. Sensis has gone down the drain, Foxtel is going nowhere, and Big Pond is caught in the middle because they can't compete with Sensis and they can't compete with Foxtel. From a financial point of view, you could structurally separate them so the infrastructure becomes separate.

TJA: In this scenario, would the Future Fund still remain the major shareholder in the infrastructure arm?

Budde: Well, a very important role for government is infrastructure.

TJA: I doubt the Future Fund board and management would see it that way!

Budde: I think the money from the Future Fund could be used for infrastructure. I don't think there is a huge controversy in Australia about government investment in infrastructure which is good for the development of the nation. It doesn't really matter whether it's hospitals or schools or telecommunications.

TJA: Finally, you certainly appear to be enjoying the challenges that the changing technological, financial and political environment continues to deliver...

Budde: Absolutely, I love it. I thrive on it.

TJA: And you also appear to be making the most of the natural environment that Australia has to offer given we have done this interview in the iconic Blues Point Tower where we have panoramic views of Sydney Harbour and its foreshore.

Budde: Yes; I've had this office since last month, and I love it!

ENDNOTES

¹ Budde, Paul. 'Open letter to the Minister for Communications', in *Telecoms & Broadband Business Newsletter*, 18 September 2007. Buckety, NSW: Buddecom.

Cite this article as: Fell, Liz. 2007. 'Interview with Paul Budde'. *Telecommunications Journal of Australia* 57 (2/3): pp. 37.1 to 37.13. DOI: 10.2104/tja07037.