

BROADBAND COMMISSION
FOR SUSTAINABLE DEVELOPMENT

The State of Broadband 2019

*Broadband as a Foundation
for Sustainable Development*

**BROADBAND
COMMISSION** 2025
TARGETS

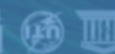


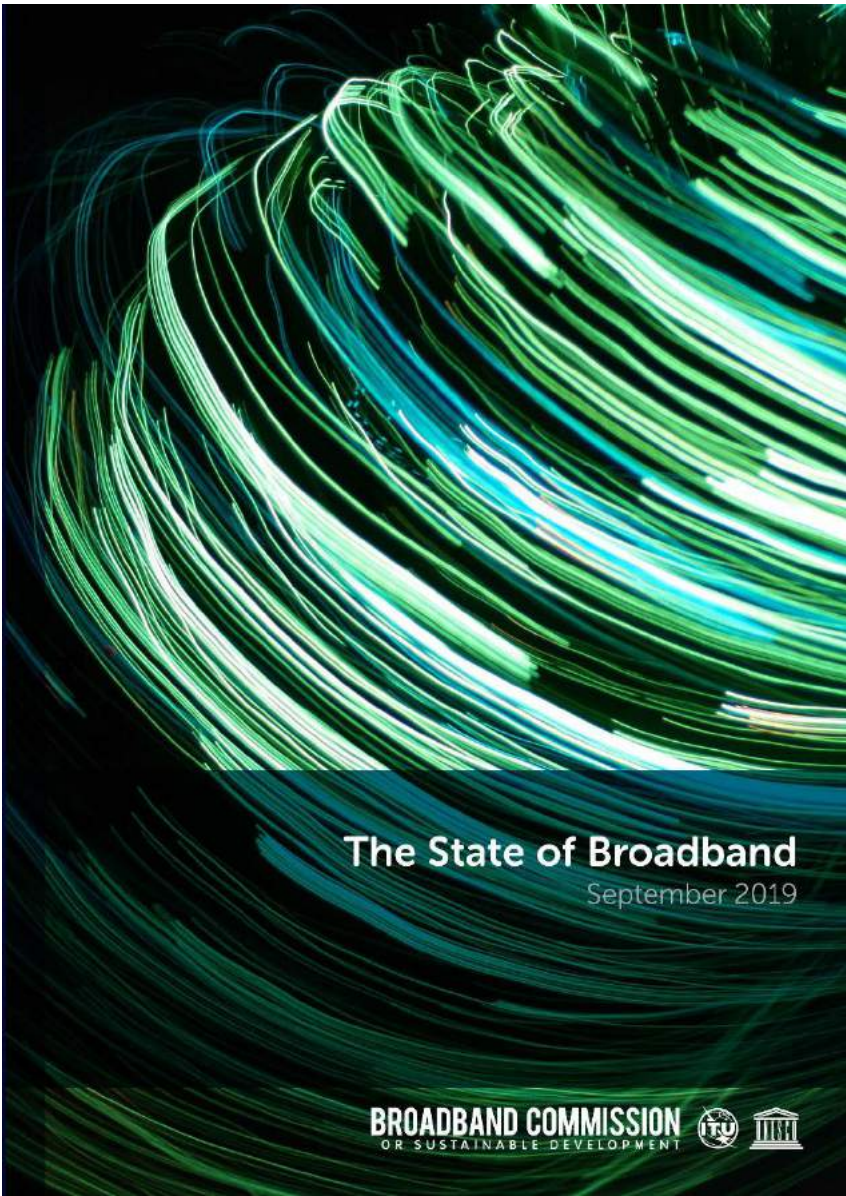
The State of Broadband:
Broadband as a Foundation
for Sustainable Development
September 2019

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Global participation in the digital economy in 2018...

and significant milestones reached



World
Population

7.6
billion

Mobile Broadband
Subscriptions

5.3
billion

Unique Mobile
Subscribers

5.1
billion

Internet users

3.9
billion

Unique mobile
internet subscribers

3.5
billion

Active Social Media
Users

3.5
billion

Fixed Broadband
Subscriptions

1.1
billion

69%

67%

51%

47%

45%

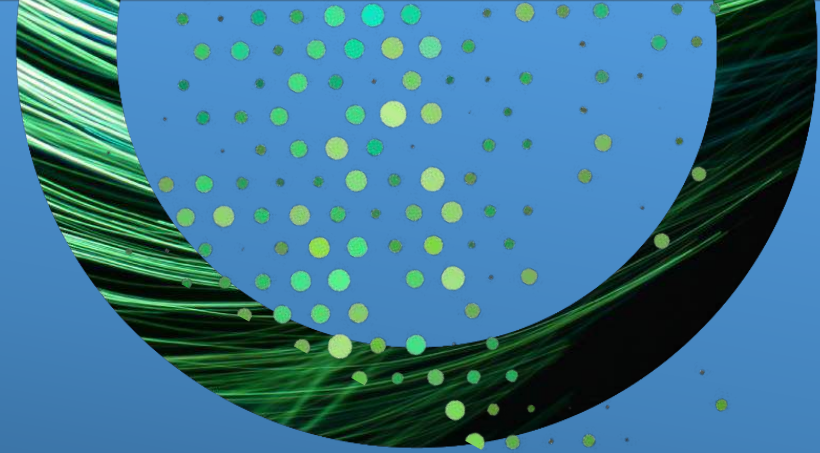
14%

Meaningful Universal Connectivity



“Broadband adoption that is not just **available, accessible, relevant and affordable**, but also connectivity that is **safe, trusted, empowering users** and leading to **positive impact**”

Meaningful Universal Connectivity



Thoughtful Approaches

- Understanding the nature of different types of adoption – sipping and dipping, metered usage;
- Recognizing, and addressing, cultural and social norms as barriers;
- Focusing on marginalized communities and the users first;
- Recognizing that technologies can be used benevolently or maliciously;
- Focusing on demand drivers, not just supply/ network infrastructure;
- Promoting the development of basic digital skills;
- Encouraging and assessing sustaining (incremental) innovation, as well as disruptive innovations;
- Considers social impacts in addition to commercial returns when designing and evaluating new initiatives;
- Brave and strategic leadership, recognizing connectivity as a means to a greater shared outcome

Meaningful Universal Connectivity

- Trusted;
- Builds user agency / empower users to not only be consumers but also producers;
- Inclusive;
- Sustainable;
- Relevant;
- Enables adoption of useful digital platforms and services (by commercial entities and the public sector; G2C, B2C, B2B);
- Responds to local needs;
- Leads to positive impacts (poverty alleviation, income growth, opportunities) and outcomes across sectors (education, health, agriculture, among others);
- Supports efforts to achieve the SDGs

Recommendations made as part of the State of Broadband Report from 2012 to 2018

66 different recommendations
- Ten broad categories

1

Generalized recommendations around ICT policy and regulatory regimes

2

Improving Data / Statistics / Monitoring

3

Increasing Skills / Human Capital / Capacity-building

4

Universal Service approaches: USFs, USOs

5

Taxation

6

A Focus on Local:
Content,
Language,
Hosting,
Entrepreneurship

7

Financing and
Investment

8

Open Access and
Infrastructure
Sharing

9

Spectrum Policy

10

National
Broadband Plans

Global advocacy for broadband and digital economy issues

UN Secretary-General High-Level Panel on Digital Cooperation : “The Age of Digital Interdependence”

1. Create an inclusive digital economy;
2. Strengthen human and institutional capacity;
3. Protect human rights and human agency;
4. Ensure digital trust, security and stability;
5. Foster global digital cooperation

European Union-African Union Digital Economy Task Force “Accelerating the Achievement of the Sustainable Development Goals”

1. Accelerate universal access to affordable broadband;
2. Guarantee essential skills for all to enable citizens to thrive in the digital age;
3. Improve the business environment and facilitating access to finance and business support services to boost digitally enabled entrepreneurship;
4. Accelerate the adoption of eServices and the further development of the digital economy for achieving the Sustainable Development Goals.

The **Commission’s seven targets** and recommendations over the last decade map directly into the Panel and the EU/AU DE task force’s recommendations.





Meeting the Broadband Commission's Seven 2025 Targets

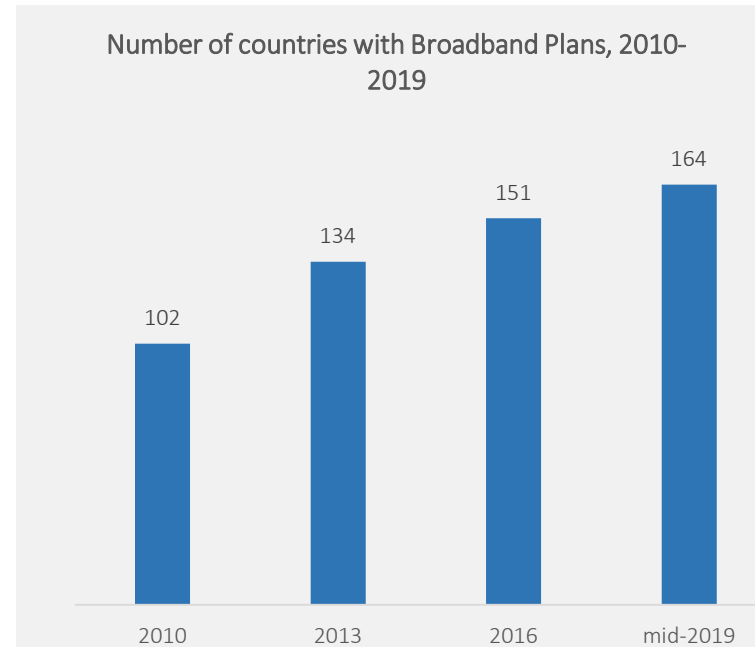




1 Making broadband policy universal

By 2025, all countries should have a funded National Broadband Plan or strategy or include broadband in their Universal Access and Service (UAS) Definition.

164 countries worldwide have a broadband plan of some sort, with several countries currently in the process of adopting one. This is an increase from 159 countries in the 2018 State of Broadband Report.

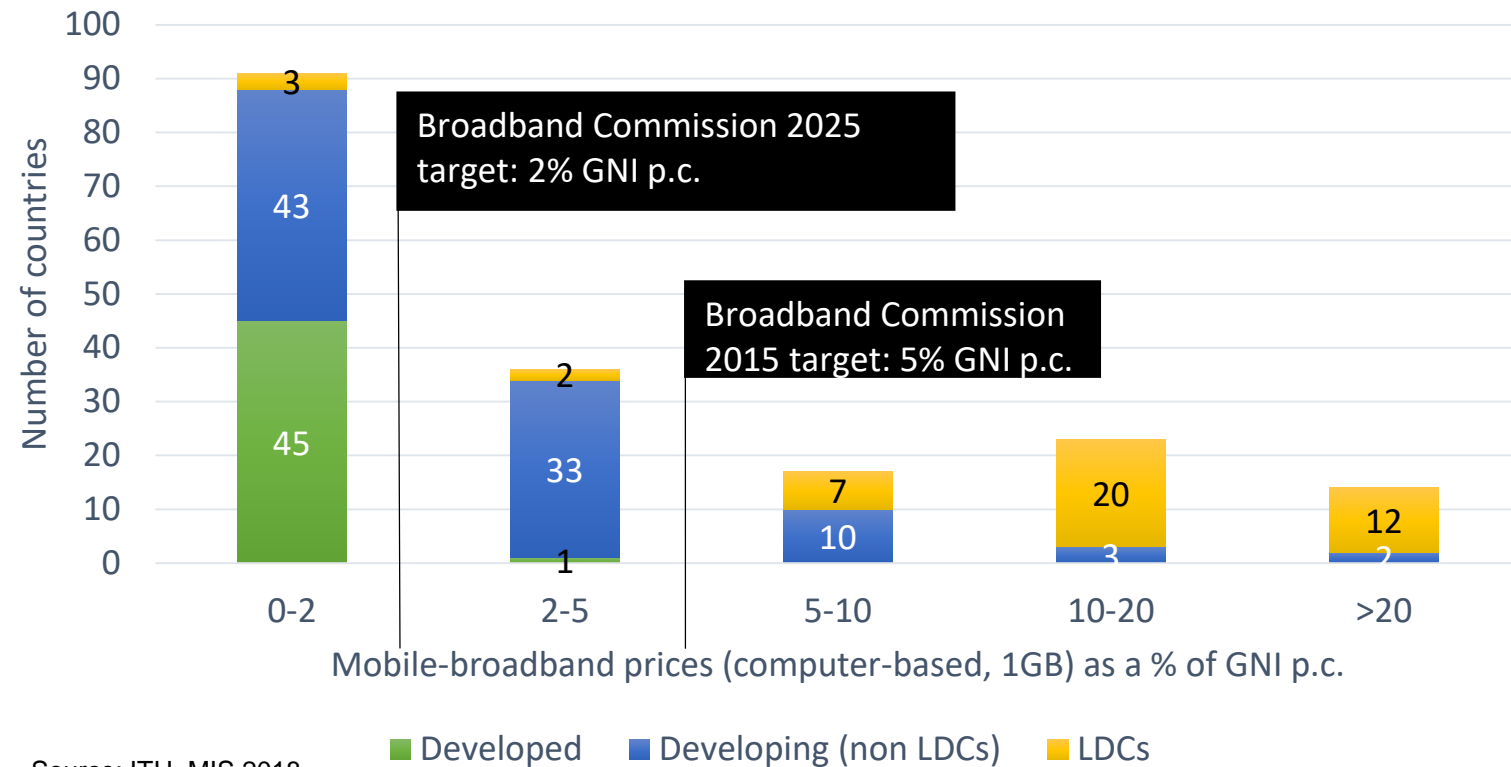


Source: ITU

2 Making broadband affordable

By 2025, entry-level broadband services should be made affordable in developing countries at less than 2% of monthly Gross National Income (GNI) per capita

In 2017, 90 countries worldwide had mobile broadband prices (computer-based, 1GB) below 2% of monthly GNI per capita, whereas 69 countries have entry-level fixed broadband prices below 2% of monthly GNIpc.

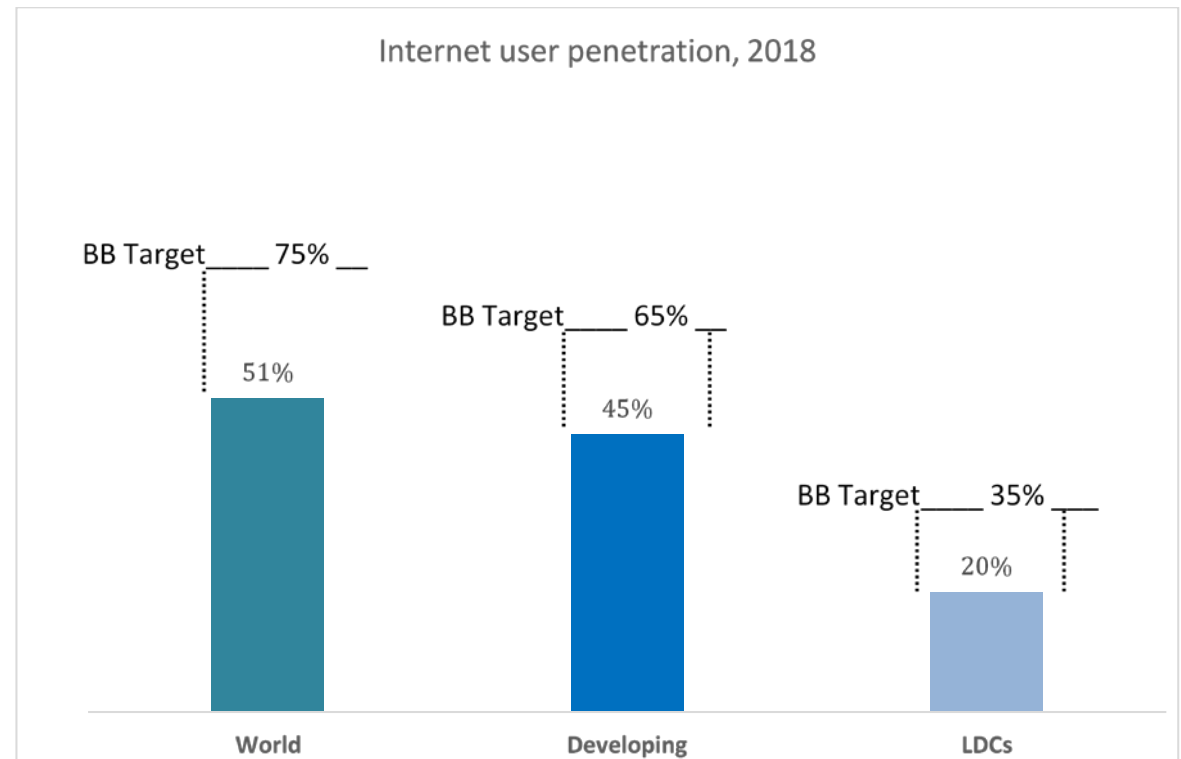


Source: ITU, MIS 2018

3 Getting people online

By 2025, Broadband-Internet user penetration should reach:
a) 75% worldwide b) 65% in developing countries c) 35% in Least Developed Countries

Global internet user penetration is currently at 51%, and below the target. Internet user penetration is 45% in developing countries, below the 65% target, and in LDCs, internet adoption is at 20%, below the 35% target.



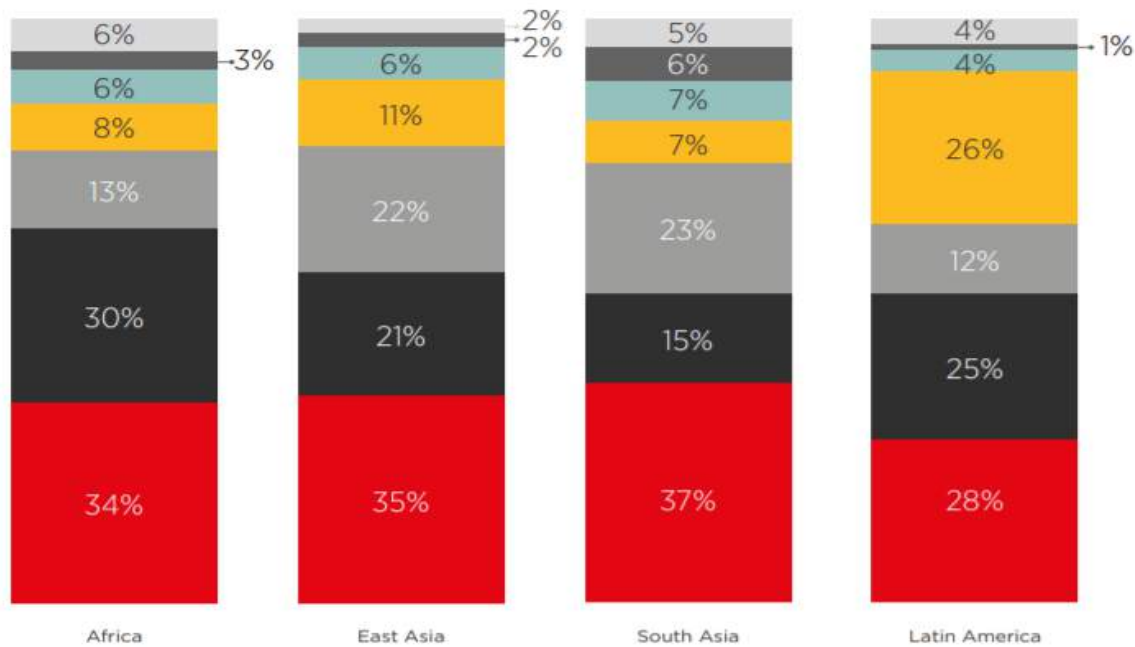
Source: ITU



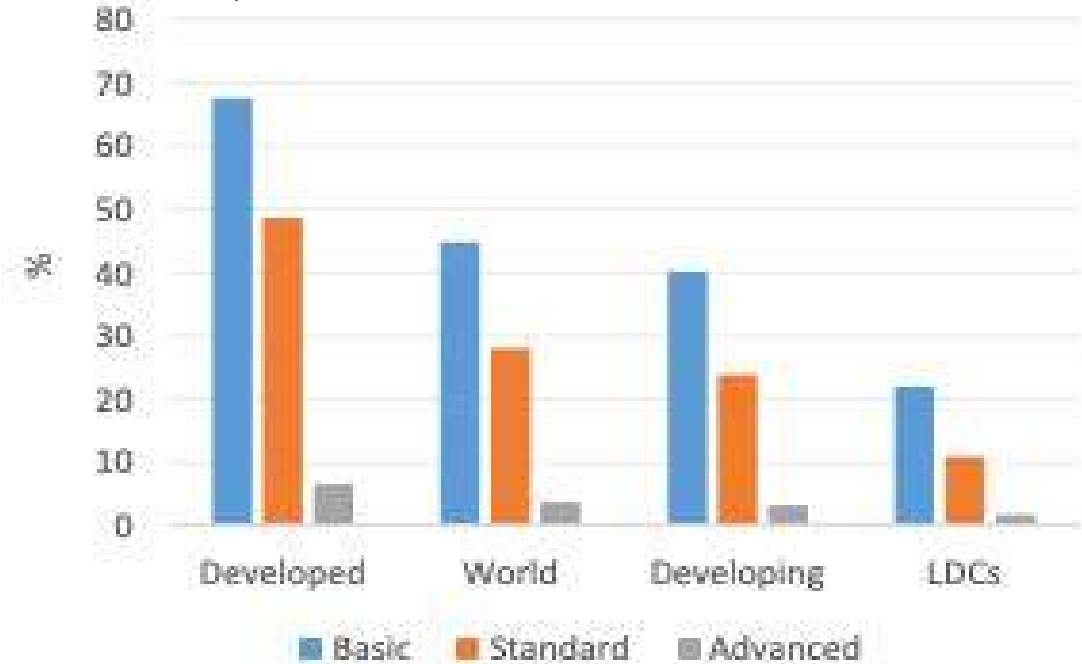
4 Acquiring minimum digital skills and literacy

By 2025, 60% of youth and adults should have achieved at least a minimum level of proficiency in sustainable digital skills

The top barriers to mobile internet use in surveyed low- and middle-income countries, by region



Percentage of individuals with ICT skills, by development status, 2017

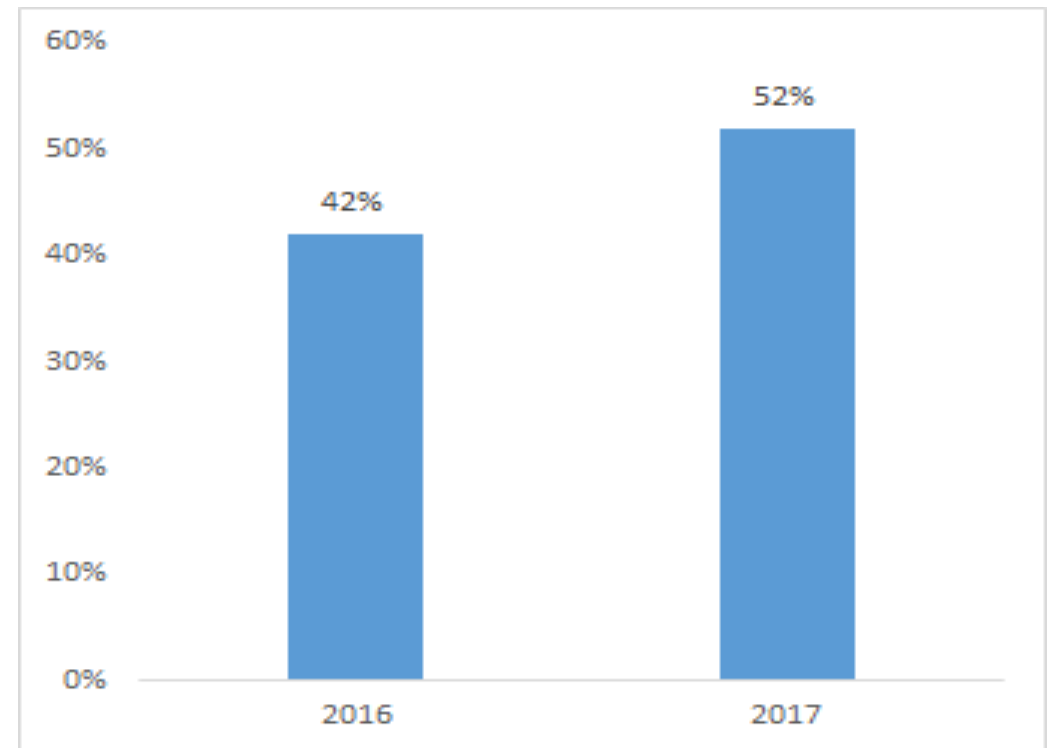




5 Using digital financial services

By 2025, 40% of the world's population should be using digital financial services

Globally, 52 per cent of the population had made or received digital payments in the past year (% age 15+)



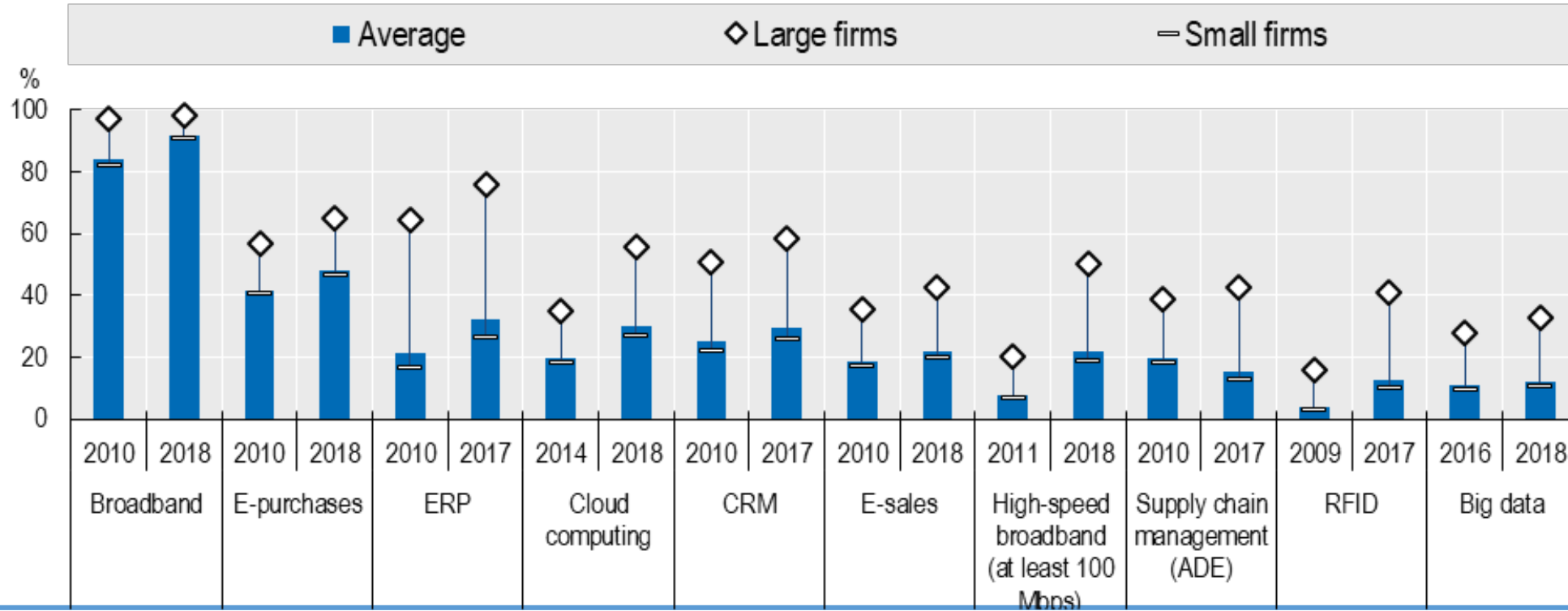
Source: World Bank Global Findex Database



6 Getting businesses online

Getting businesses online: By 2025, improve connectedness of Micro-, Small- and Medium-sized Enterprises (MSMEs) by 50%, by sector

Diffusion of selected ICT tools and activities in large and small businesses, OECD, 2010 and 2018

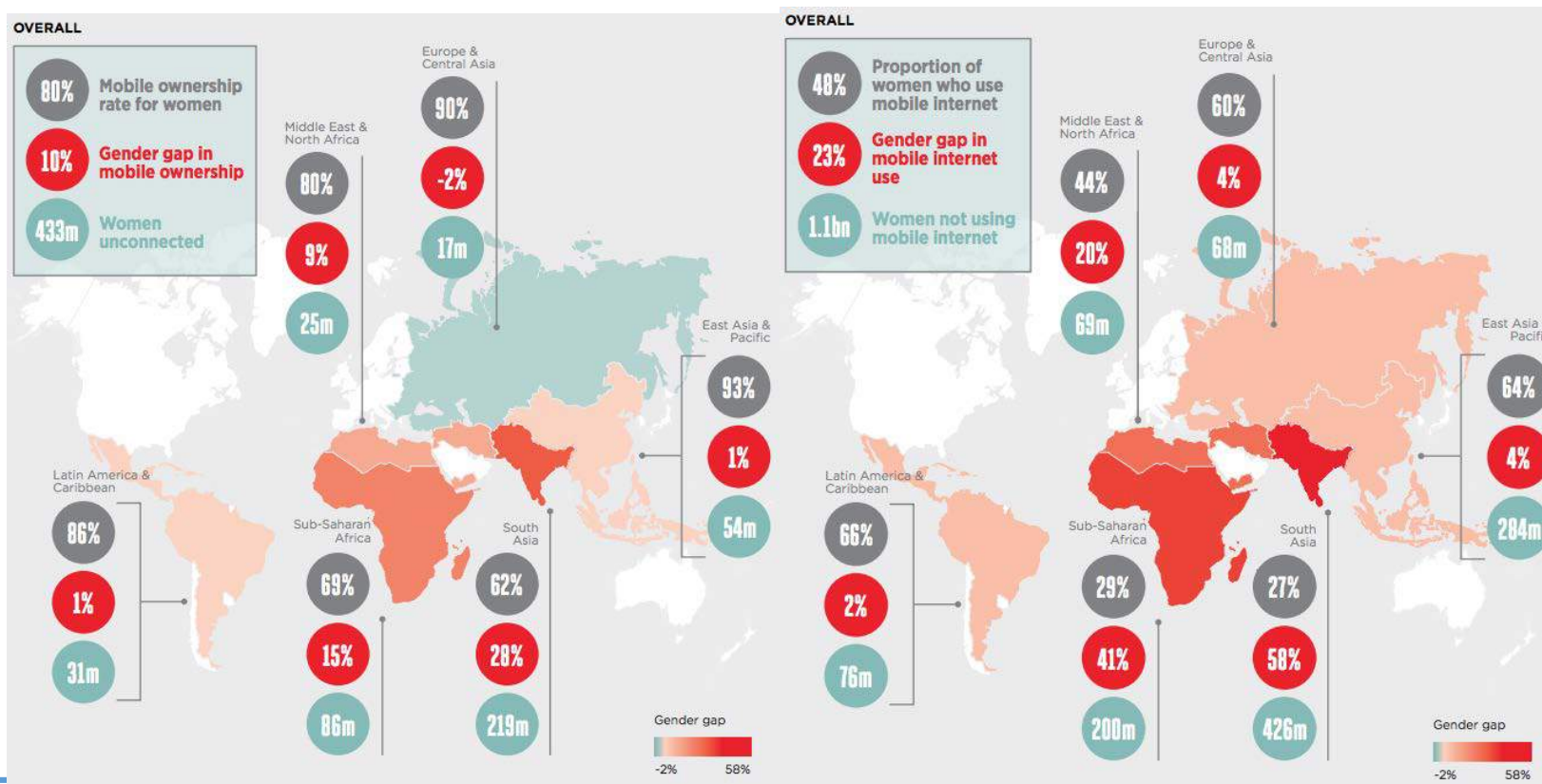


Source: OECD, ICT Access and Usage by Businesses Database



7 Achieving gender equality in access to broadband

By 2025, gender equality should be achieved across all targets.



Note: (Base = total adult population)

Source: GSMA Connected Women, "The Mobile Gender Gap Report 2019"

State of Broadband 2019

Actions and Recommendations



- 1 Embed a focus on digital inclusion in broadband plans and digital economy efforts, paying attention to the challenges of marginalized communities and vulnerable populations, particularly women and girls.
- 2 Amplify efforts to improve digital skills – including basic digital skills – to help citizens, Small- and Medium-Sized Enterprises (SMEs) and public sector agencies to make the most of digital opportunities as well as skills to distinguish online disinformation and other threats to the right to information and empower Internet users to avoid becoming either victims or distributors of disinformation.



3 Add public access policies into universal access and service (UAS) initiatives and national broadband plans, such as ensuring UAS policies explicitly include sites and locations (such as libraries, community centres, and areas of public gathering) where low-cost internet access may be facilitated.

4 Support effective and innovative spectrum policies to improve broadband availability for underserved and marginalized groups, by ensuring that sufficient amounts of appropriate spectrum is available at the right time and under the right conditions.



- 5 Expand initiatives to map network coverage and infrastructure needs, developing priority lists for investments, including where subsidies are required.
- 6 Explore measures to protect children online in national broadband plans.
- 7 Support international and national efforts to provide broadband connectivity to refugees and displaced individuals.
- 8 Include a focus on limiting environmental impacts and addressing climate change through ICT in national broadband plans.



9 Encourage and evaluate both sustaining, as well as disruptive, innovations in broadband across technologies, business models and regulations, as connecting the next 49% will require actions that go beyond 'business as usual'.

10 Promote the affordability of broadband by adopting appropriate policy and regulation.



Commissioner Insights



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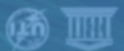


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