

# BROADBAND COMMISSION

FOR DIGITAL DEVELOPMENT

## State of Broadband 2015

Regional Conference on Regulatory Activity in the  
Electronic Communications Sector

Budva, Montenegro

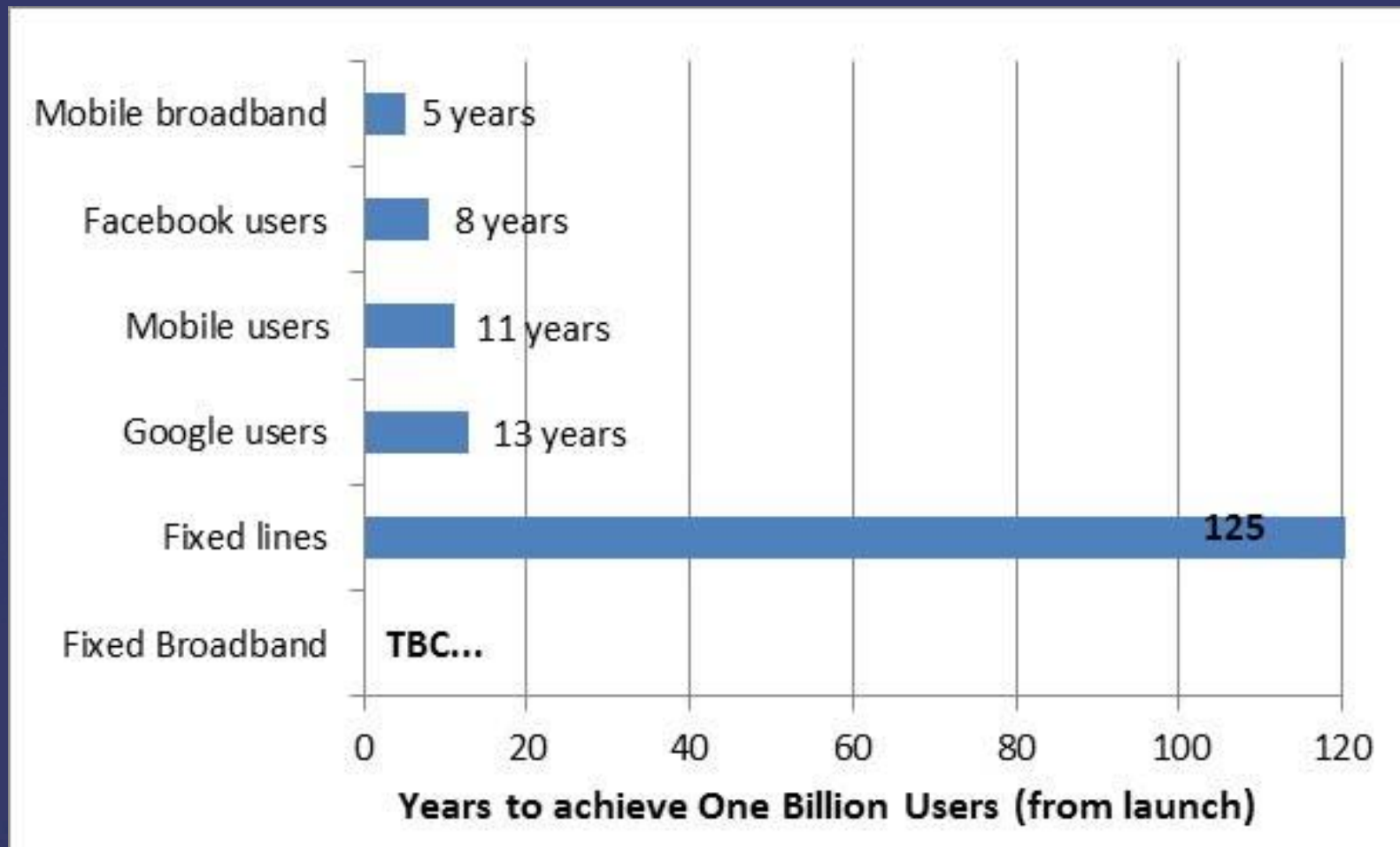
28 September 2015



## State of Broadband 2015 – mixed messages

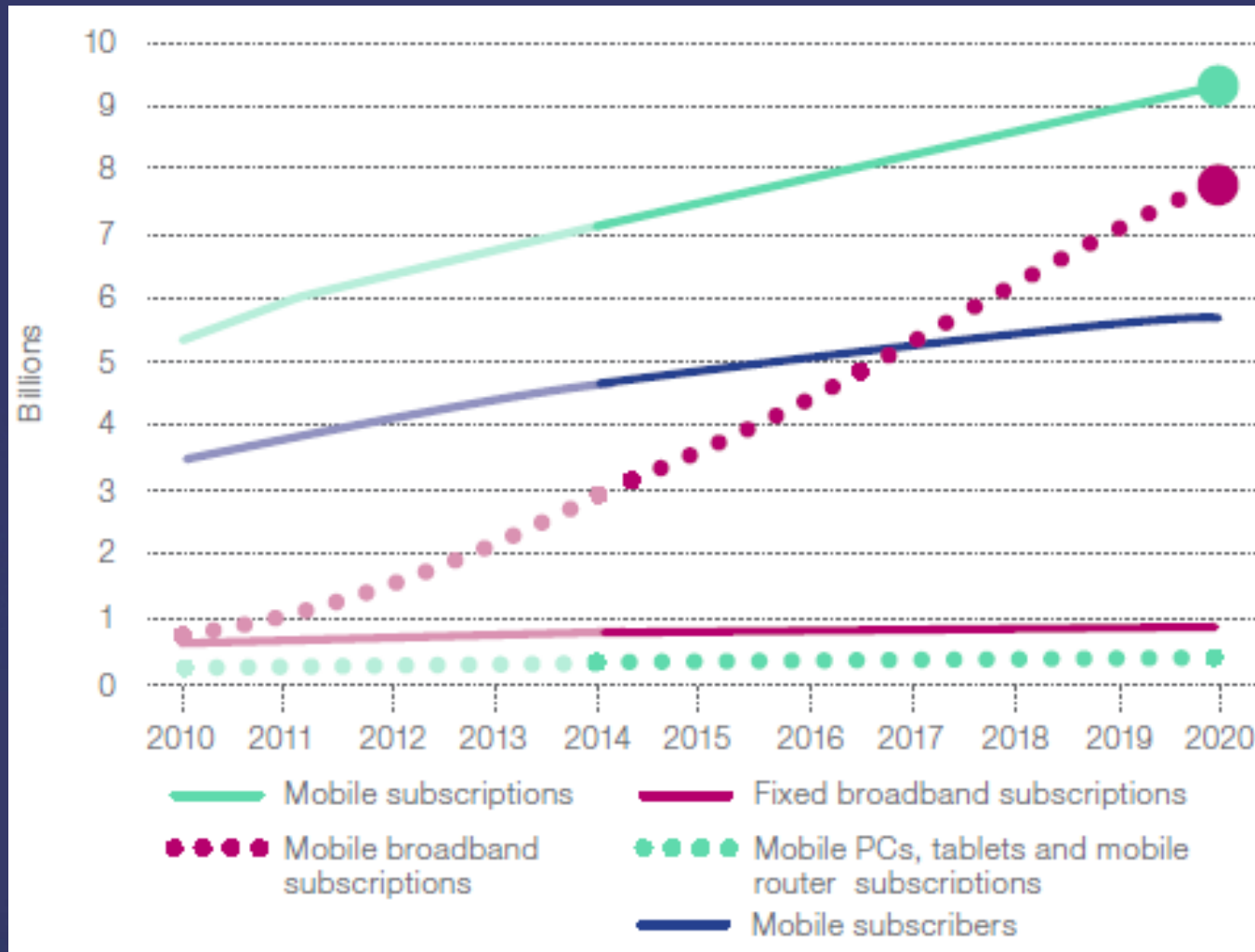
- Every year, the Broadband Commission for Digital Development takes the pulse of global broadband industry.
- This year's report finds mixed messages – while pockets of strong growth continue in mobile broadband and Facebook users, overall growth in Internet usage is slowing, as networks roll out beyond densely populated urban areas.
- By end 2015, some 3.2 billion people will be online, over 43.4% of the total world population , but some 4 billion or 57% of people remain offline.
- Challenges for connecting the next – and last – billion people include universal access and the language barrier.

# Mobile broadband fastest-growing technology in history



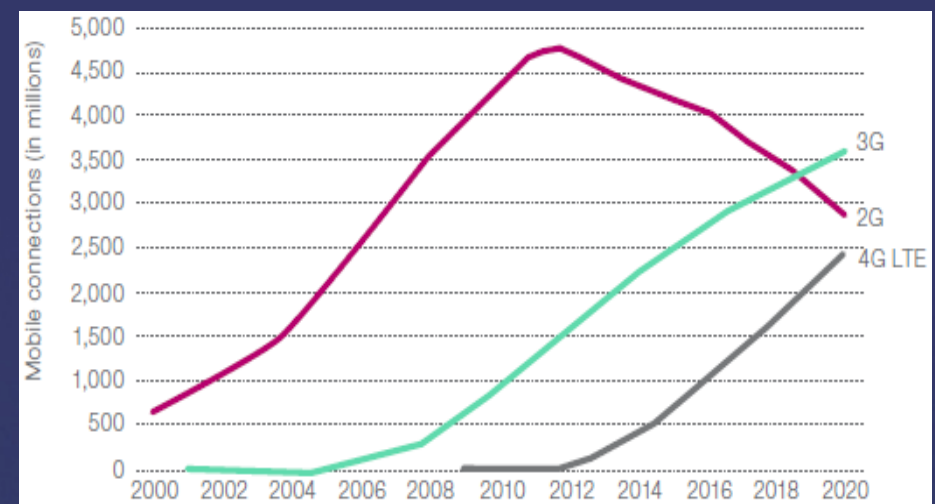
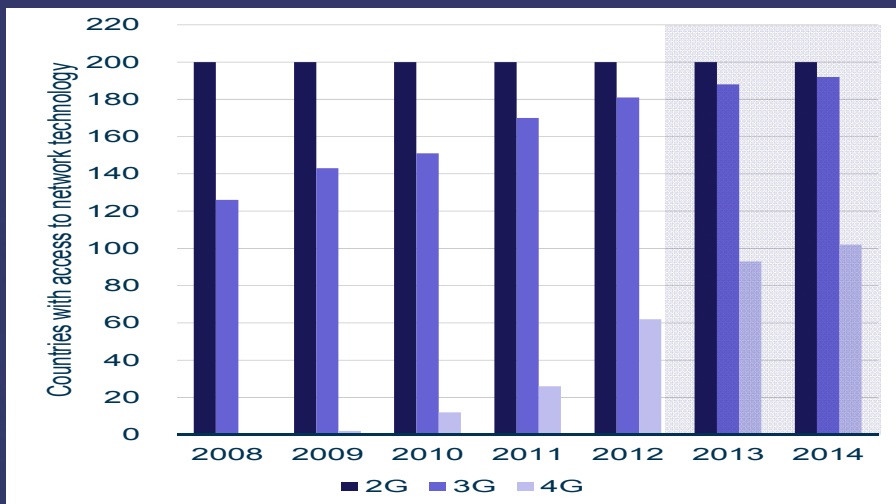
Source: ITU.

# Has the digital divide been bridged? Subscriptions v. Subscribers



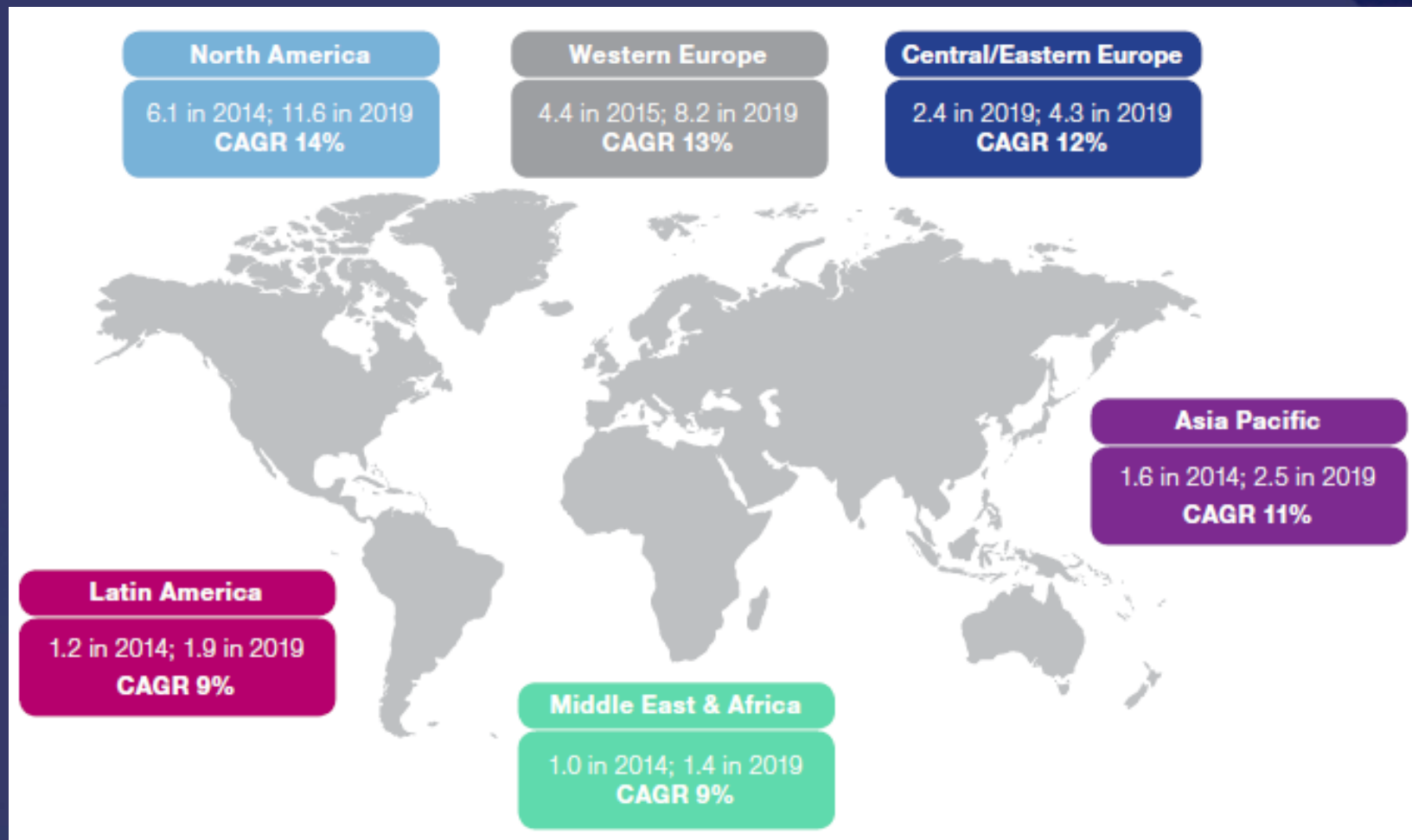
Source: Ericsson.

# 4G networks & subscriptions taking off – 2014 a transition point



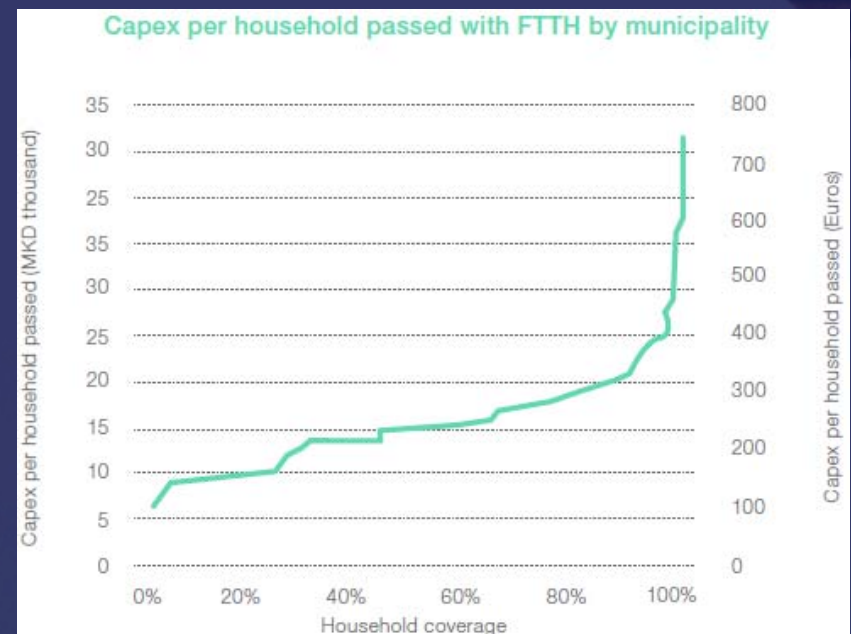
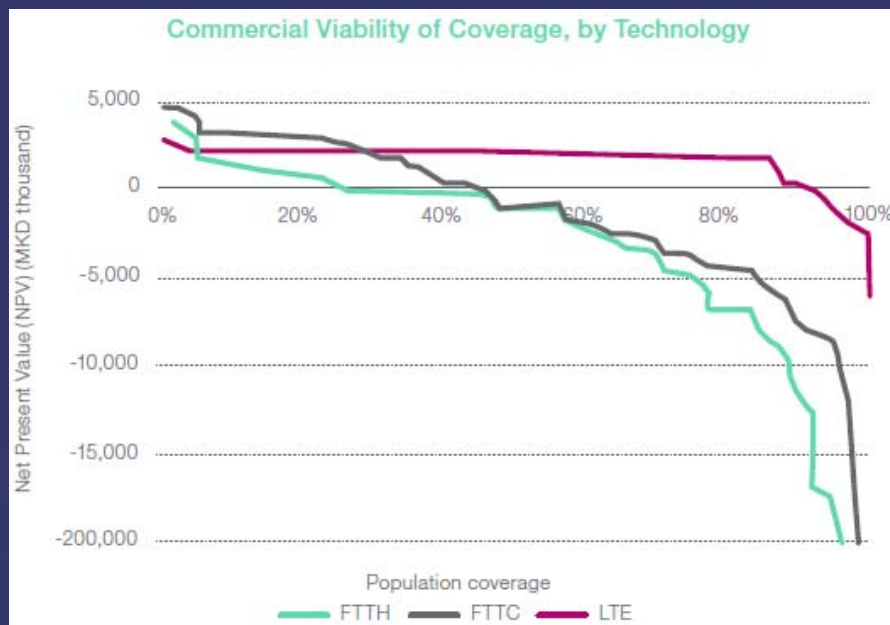
*Source: Telegeography (left); GSMAi (right).*

# New divide emerging in connected devices per capita for different regions



Source: Cisco VNI.

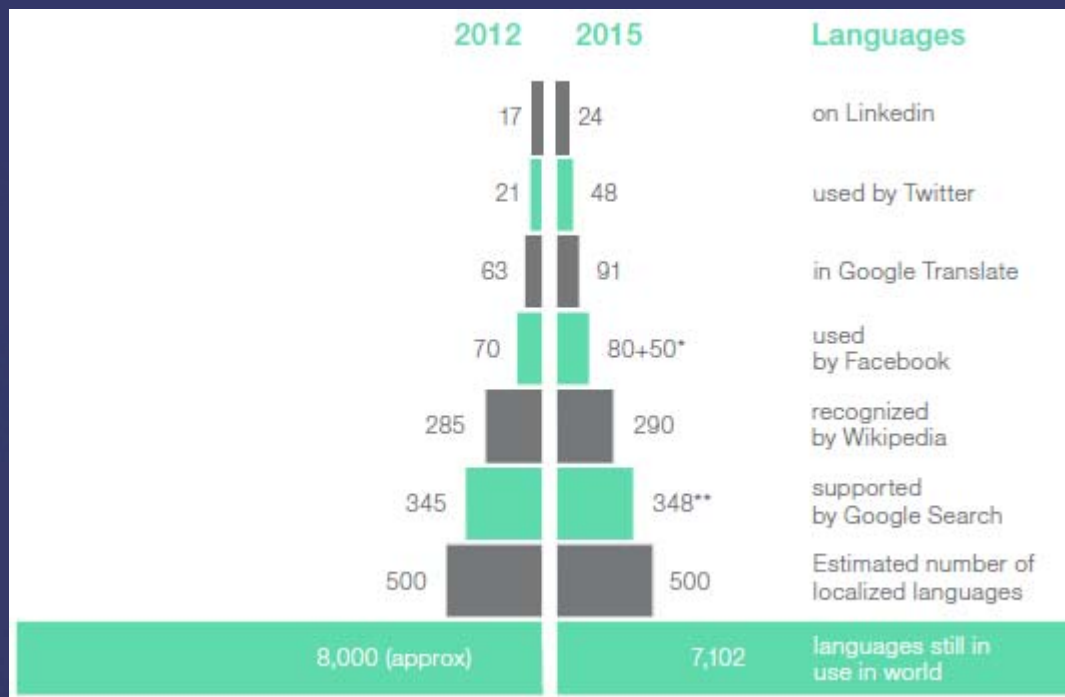
# Supply side challenge – extending network access beyond urban areas



Source: Analysys Mason.

## Demand side challenge – Lack of languages online is a barrier

*Online language profile fails to reflect speaker base;  
Growth in languages online is not matching overall growth;  
Online services are multinational, but are they multilingual?*

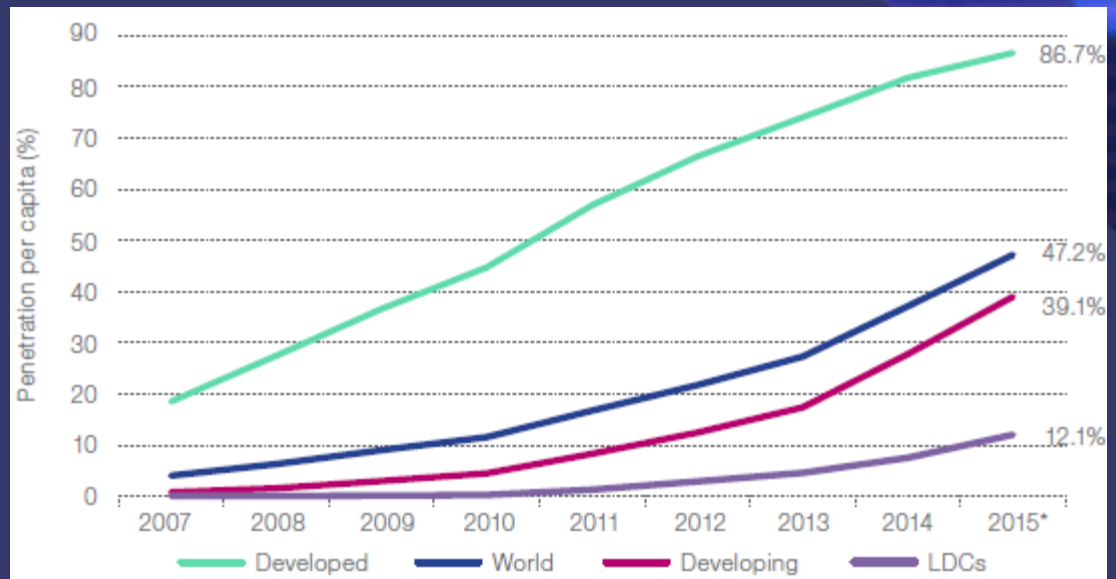


*Source: ITU, based on various sources.*



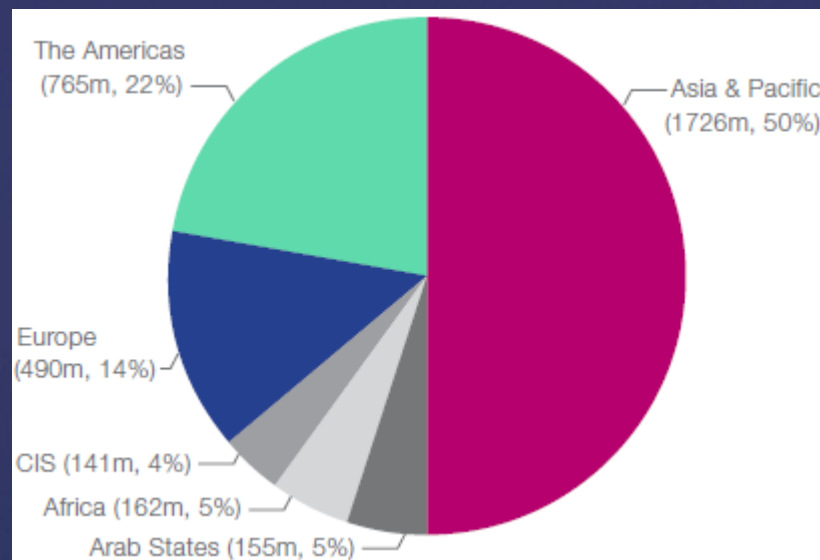
# Strong growth in Mobile Broadband

→ *Strong growth in subscriptions and penetration*



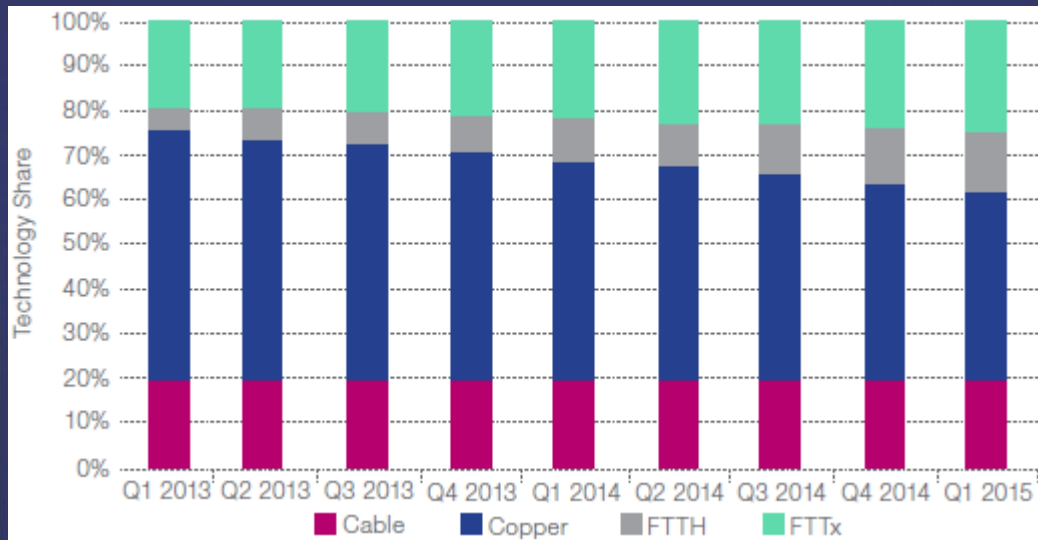
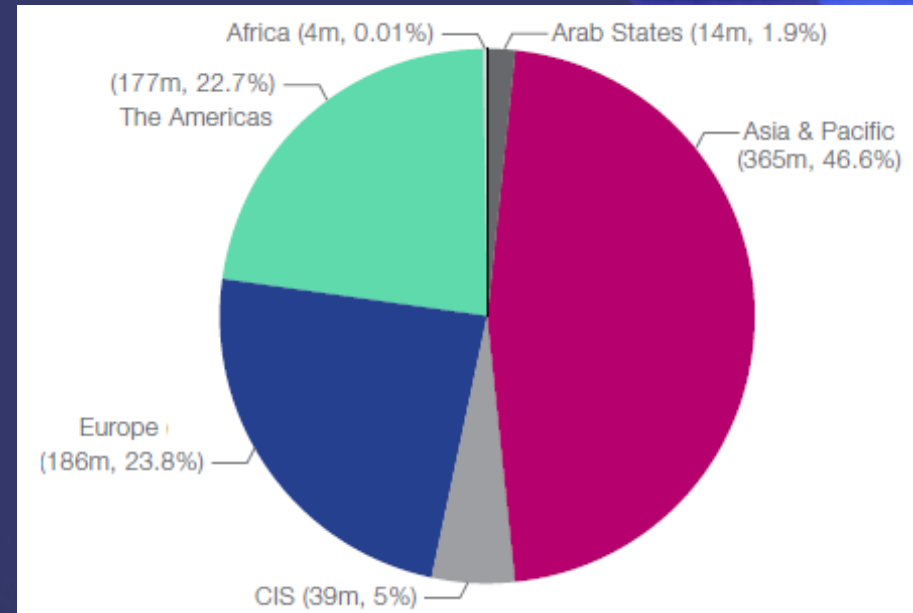
→ *Asia-Pacific success story: The rapid expansion of Asia-Pacific squeezing other regions' market shares – despite increases in subscribers, Europe 16% ->14% ; Americas 24% ->22%.*

Source: ITU.



# Moderate growth in Fixed Broadband

→ 794 million by end 2015.  
*Asia-Pacific increased its share of subscribers from 45% to 46%.*



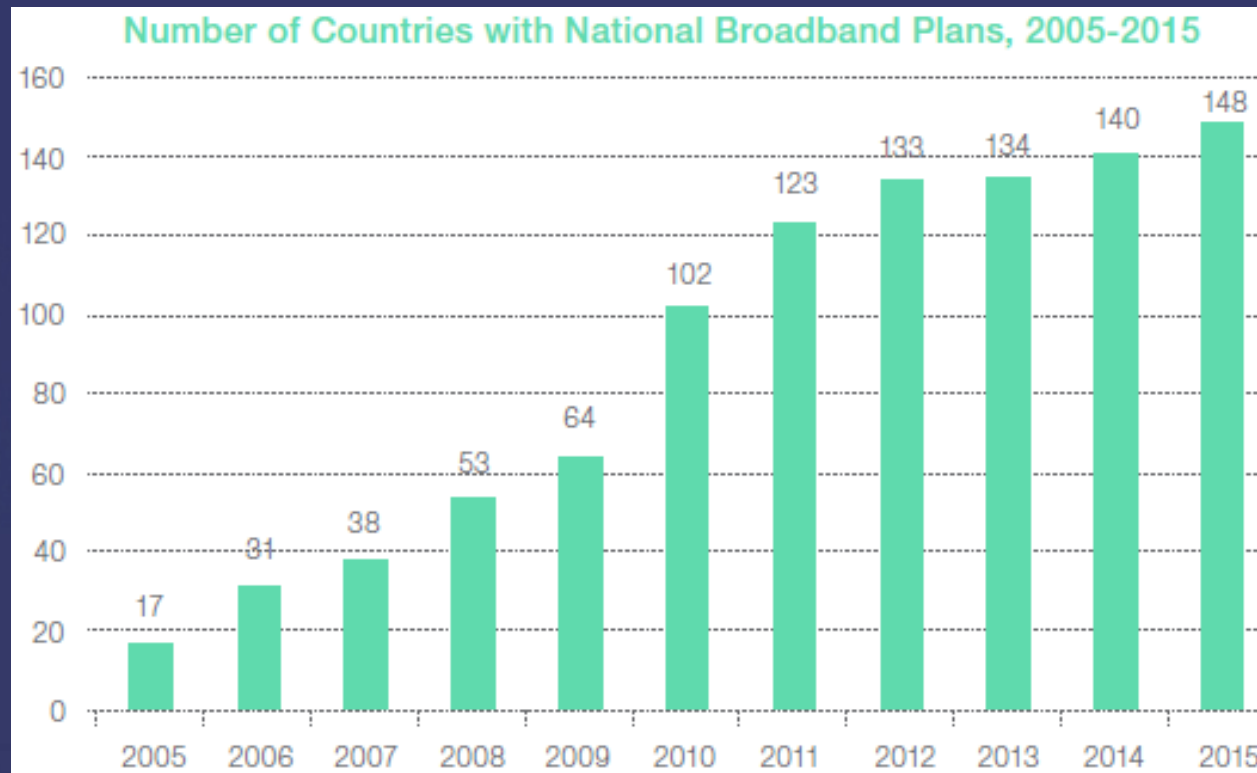
→ *Strong growth in subscriptions and penetration*

*Source: ITU (above);  
 Point Topic (bottom).*

# Target 1: National Broadband Plans

*Vitally important that countries should develop a Broadband Plan*

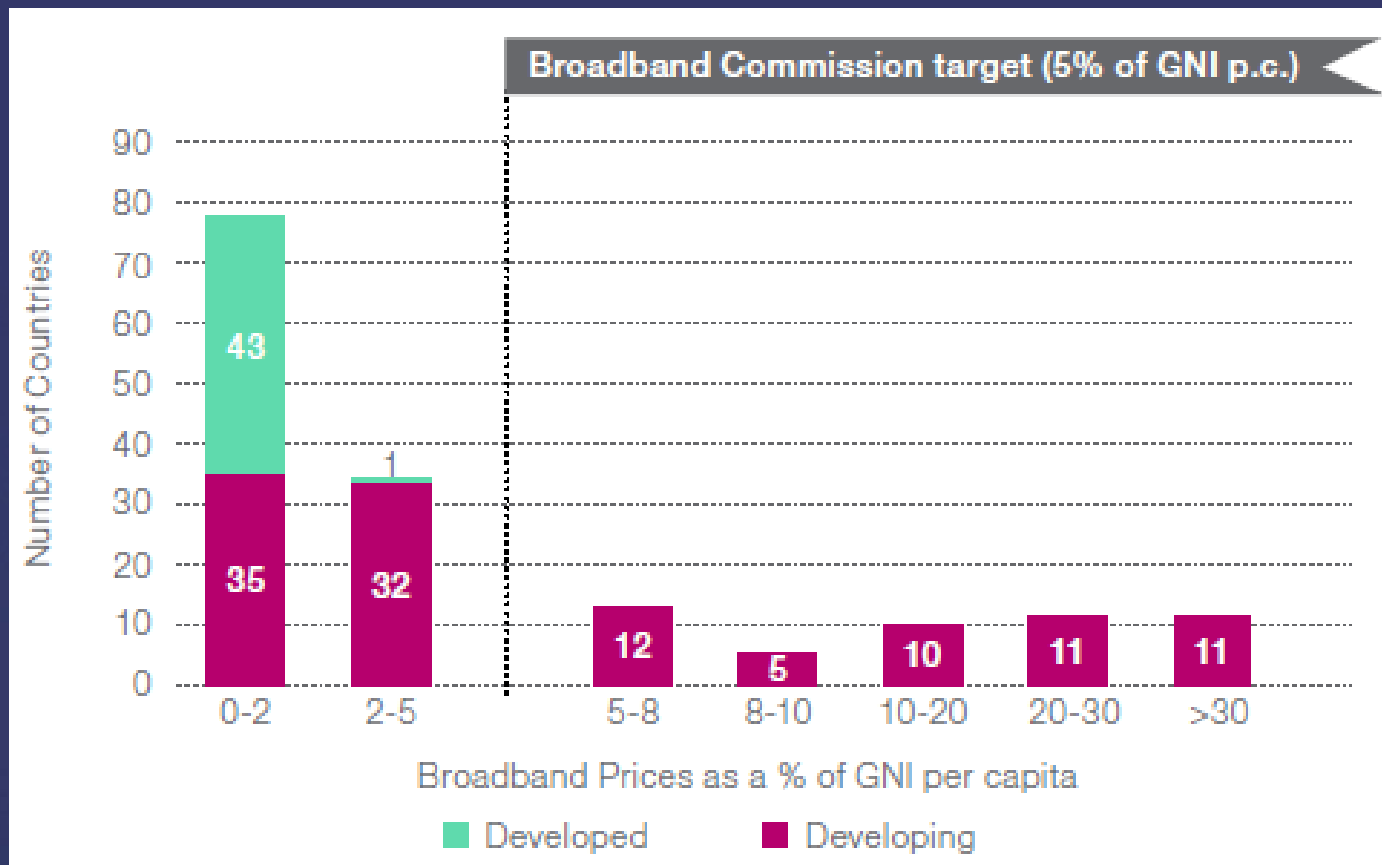
*148 countries now have a Plan in place, with 6 NBPs underway, but succession strategy for Plans expiring in 2015 unclear.*



*Source: Broadband Commission for Digital Development.*

## Target 2: Affordability

*By 2014, 111 countries have met the Broadband Commission target of 5% per capita, up from 108 countries in 2013.*

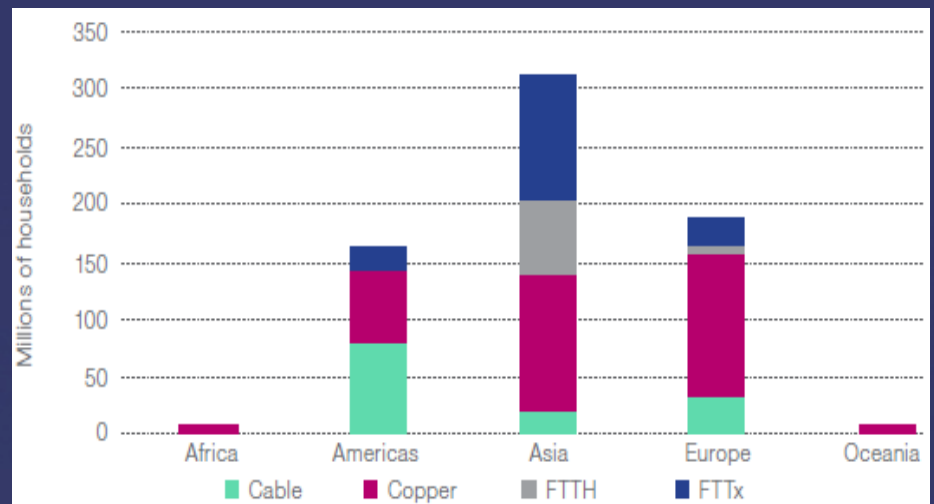
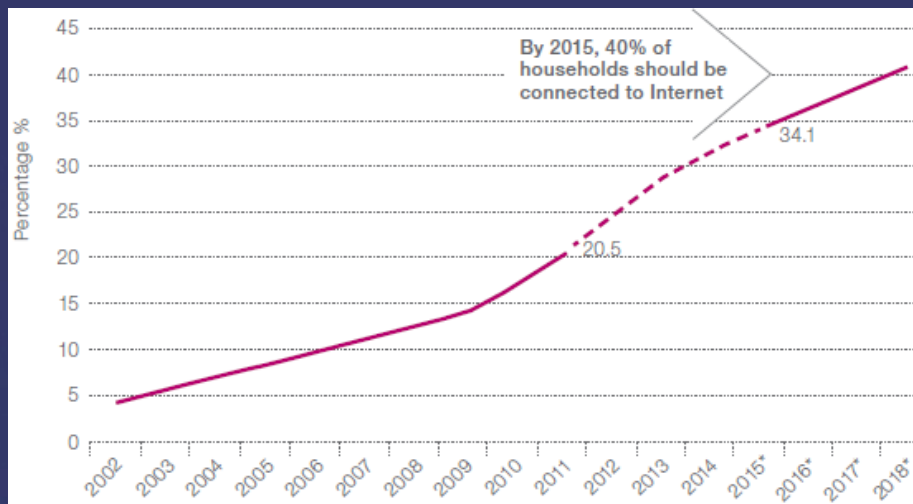


Source:  
ITU.

## Target 3: Getting households online

*By 2015, 40% of households in developing countries should have Internet access.*

*Actual: 46.4% world; 34.1% developing and 7% in LDCs*

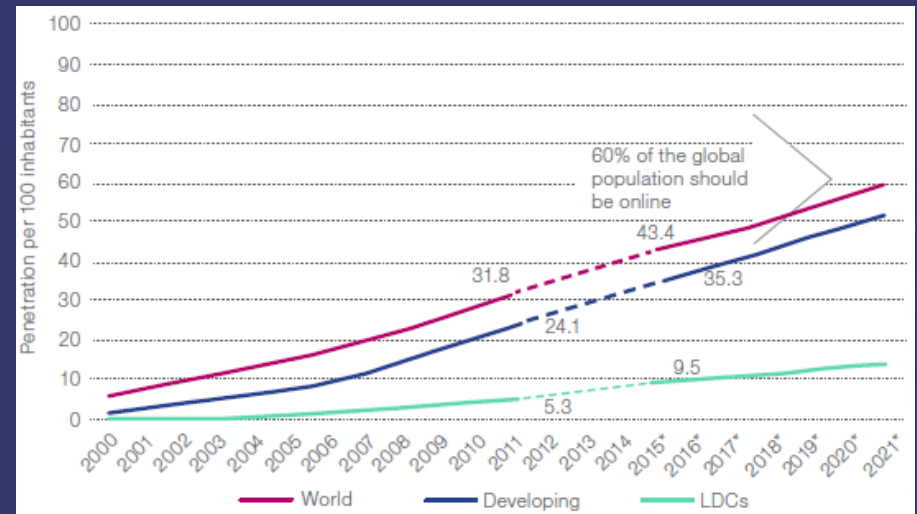


*Source: ITU (left); Point Topic (right).*

## Target 4: Getting people online

*By 2015, Internet user penetration should reach 60% worldwide, 50% in developing countries and 15% in LDCs:*

*Actual: 43.4% world; 35.3% developing and 9.5% in LDCs*



Source: ITU.

# Policy Measures for Broadband



*Source: Broadband Commission, based on Analysys Mason.* 15

Thank you for your attention



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