BROADBAND COMMISSION
FOR DIGITAL DEVELOPMENT

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for Digital Development**

Palais des Nations, UN,

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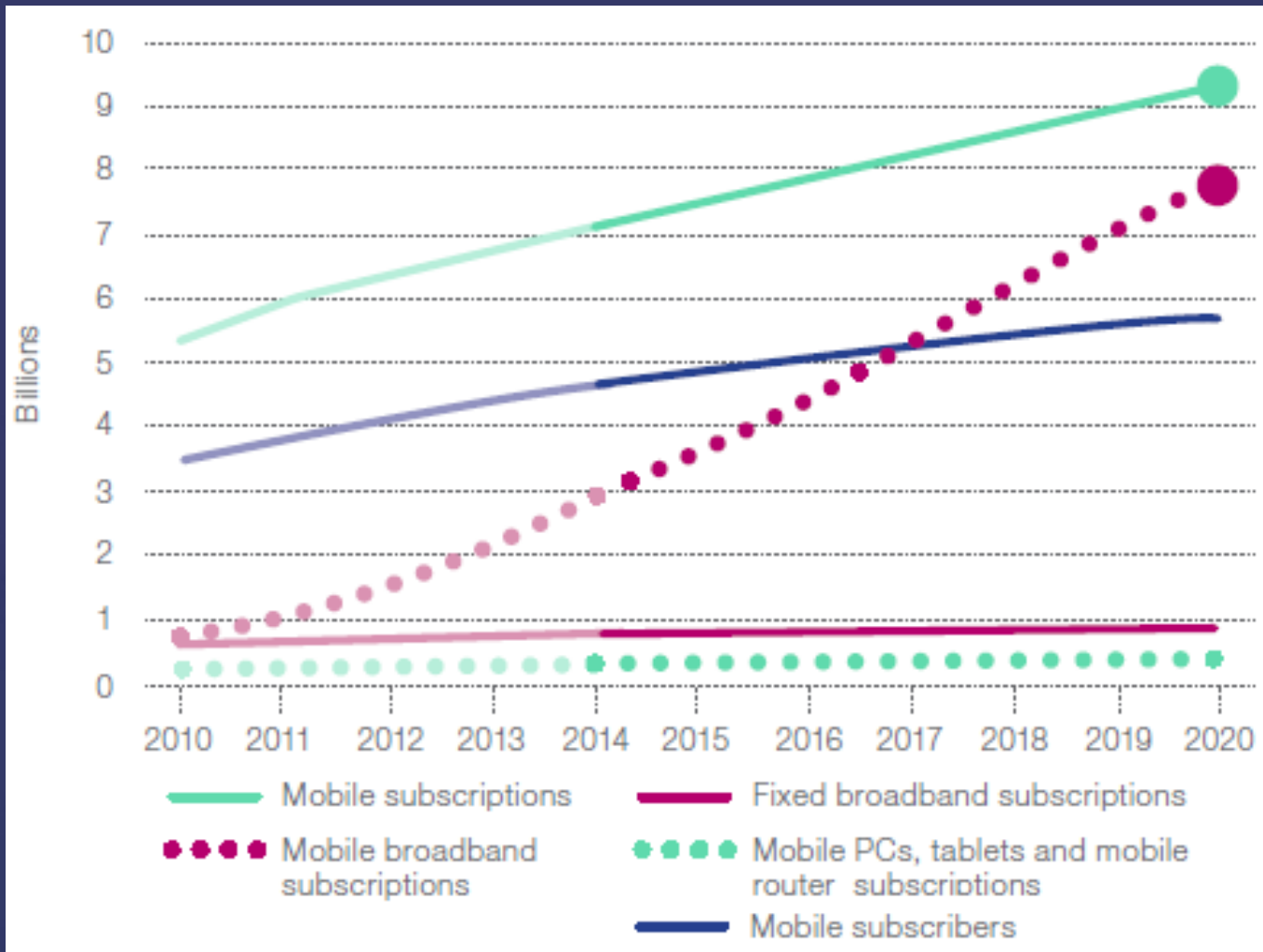
State of Broadband 2015 – mixed messages

- 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 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 and up from 2.7 billion a year earlier, but some 4 billion people remain offline.

- Challenges for connecting the next billion people include universal access and the language barrier.

# Mobile broadband fastest-growing technology in history
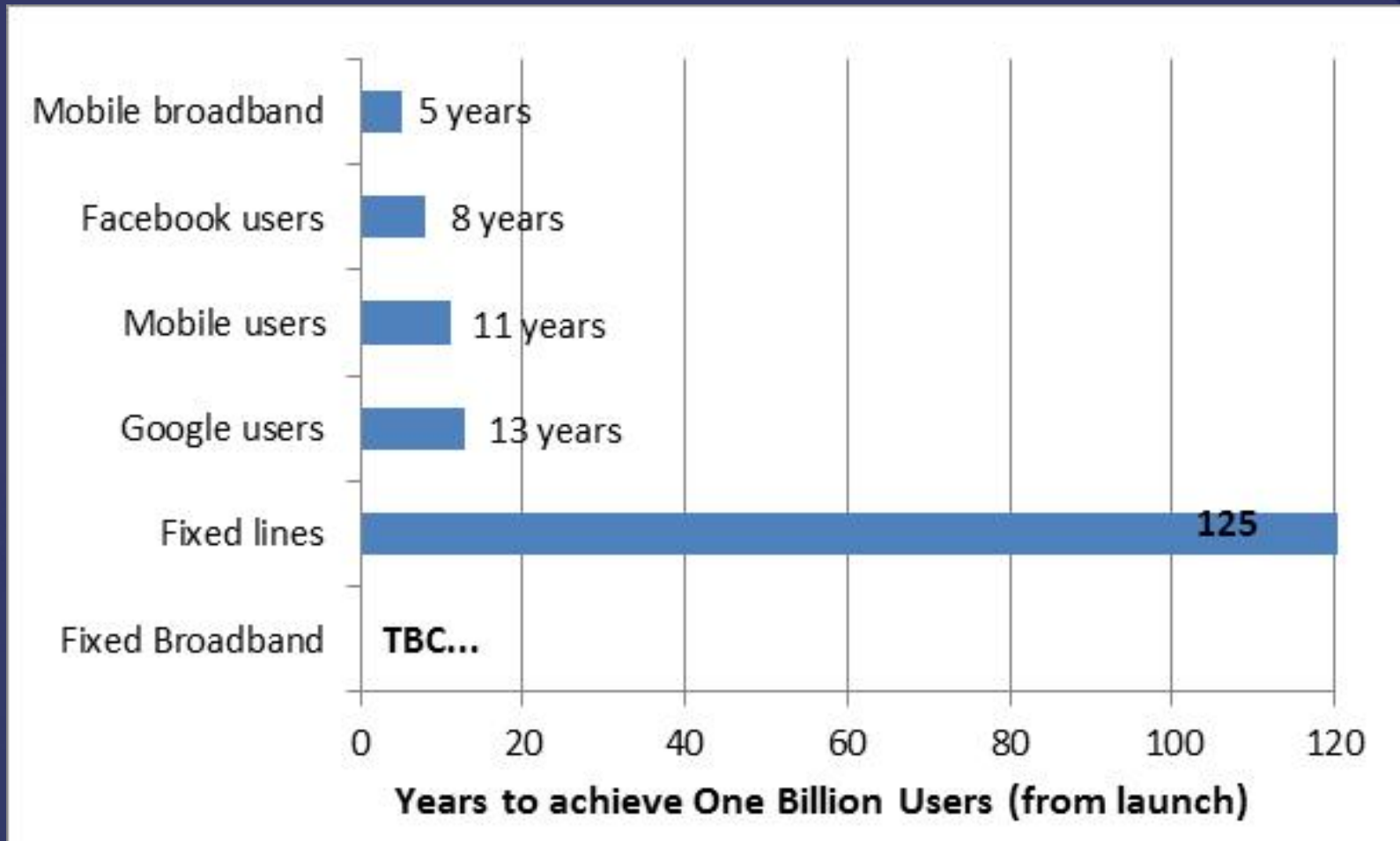
Source: ITU.

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

- Mobile subscriptions
- Fixed broadband subscriptions
- Mobile broadband subscriptions
- Mobile PCs, tablets and mobile router subscriptions
- Mobile subscribers

Source: Ericsson.

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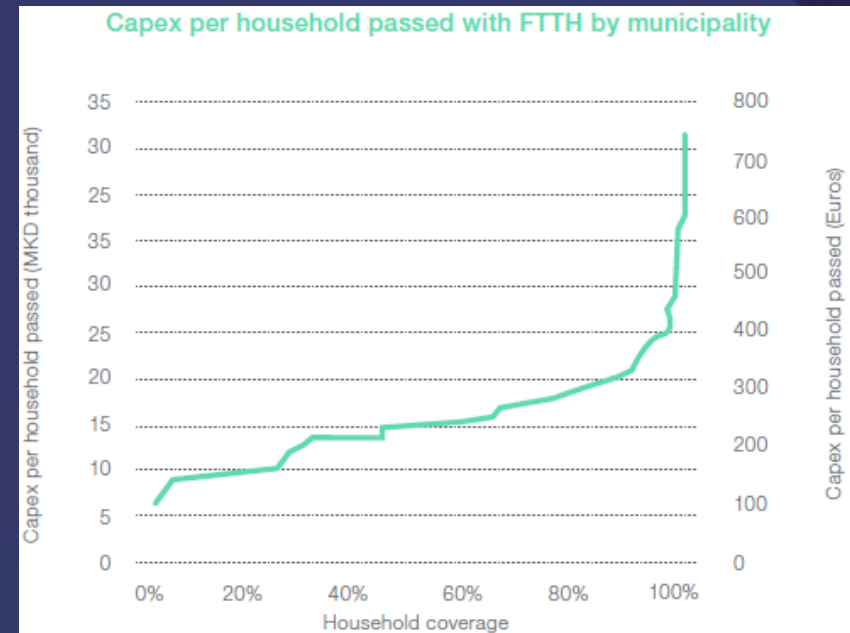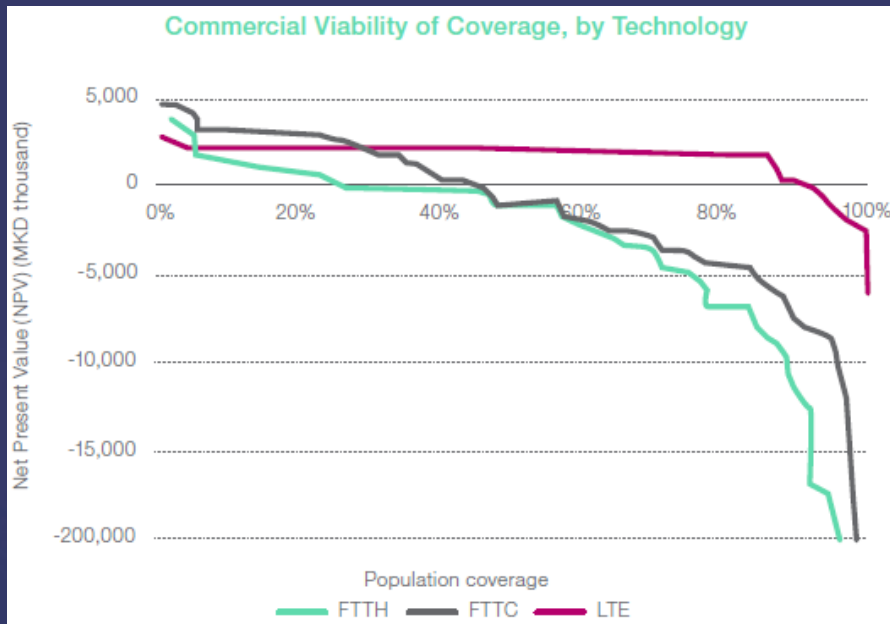# 4G networks & subscriptions taking off – 2014 a transition point
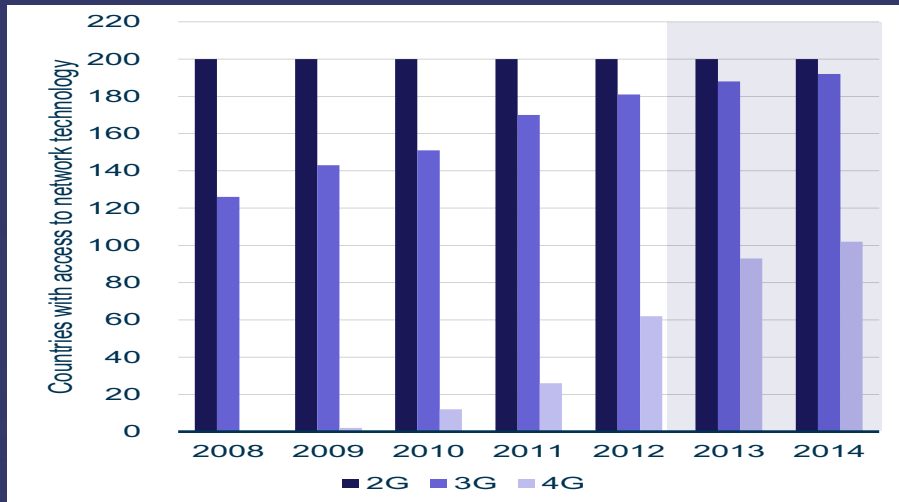
Source: Telegeography (left); GSMAi (right).

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New divide emerging in connected devices per capita for different regions
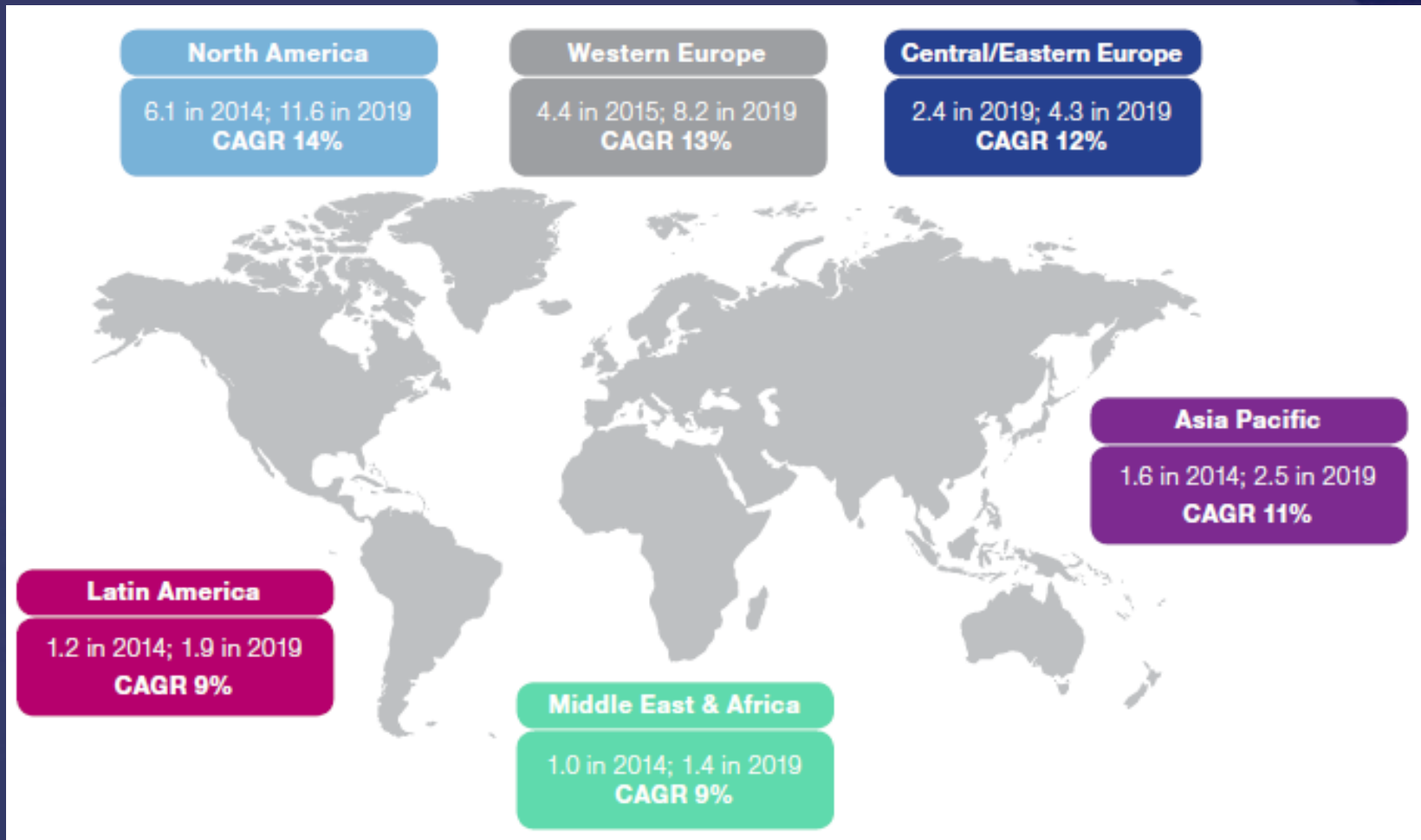
Source: Cisco VNI.

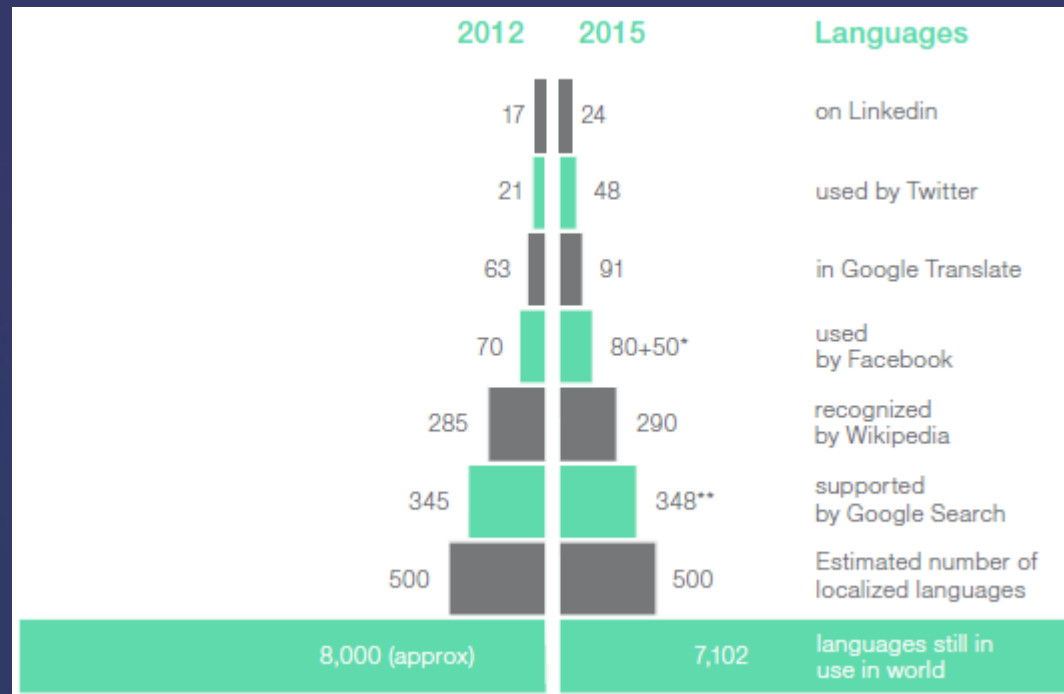# Supply side challenge – extending network access beyond urban areas

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?

| 2012	2015	Languages
17	24	on Linkedin
21	48	used by Twitter
63	91	in Google Translate
70	80+50*	used by Facebook
285	290	recognized by Wikipedia
345	348**	supported by Google Search
500	500	Estimated number of localized languages
8,000 (approx)	7,102	languages still in use in world

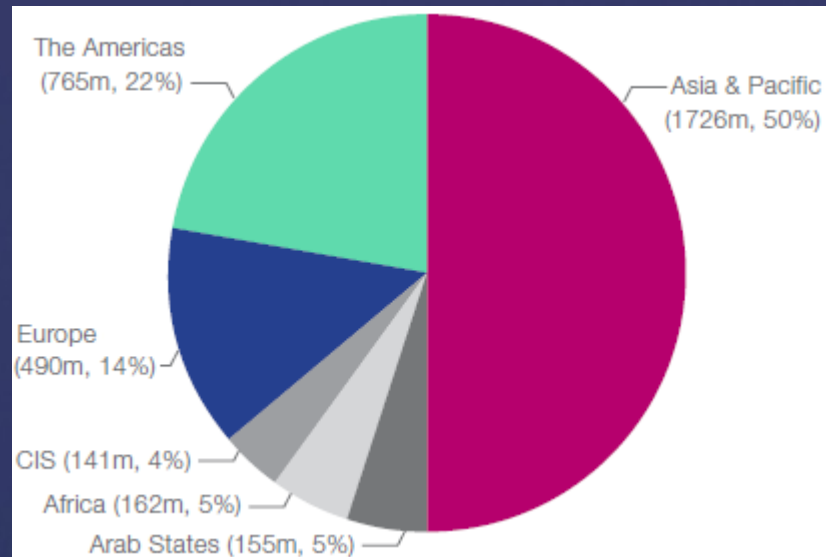*Source: ITU, based on various sources.*

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Strong growth in Mobile Broadband

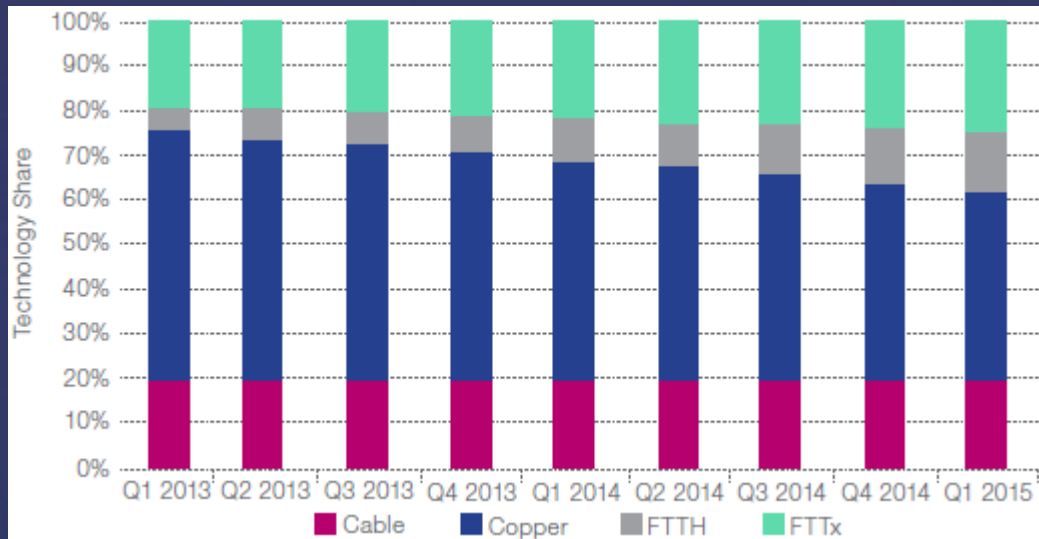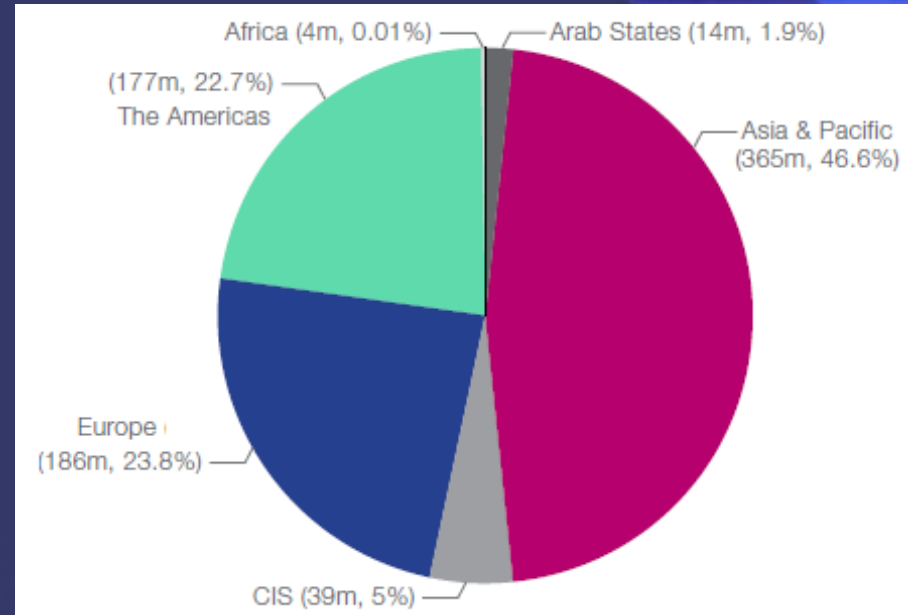→ *Strong growth in subscriptions and penetration*
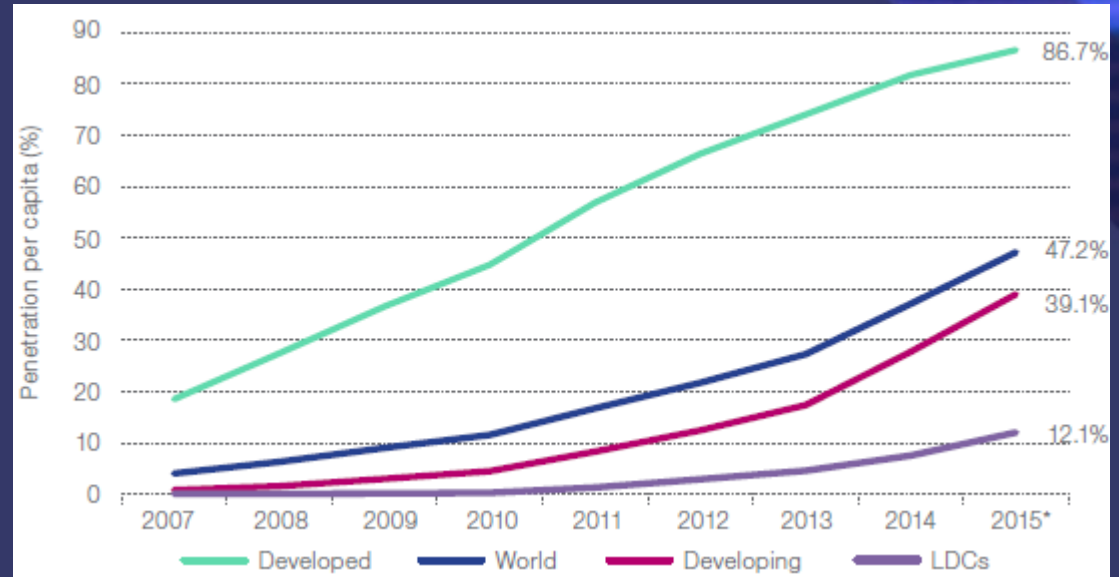
→ *Asia-Pacific success story: The rapid expansion of Asia-Pacific squeezing other regions' market shares – despite increases in subscribers, Europe 16% ->14% ; Americas 24% ->22%.*

Source: ITU.

Moderate growth in Fixed Broadband

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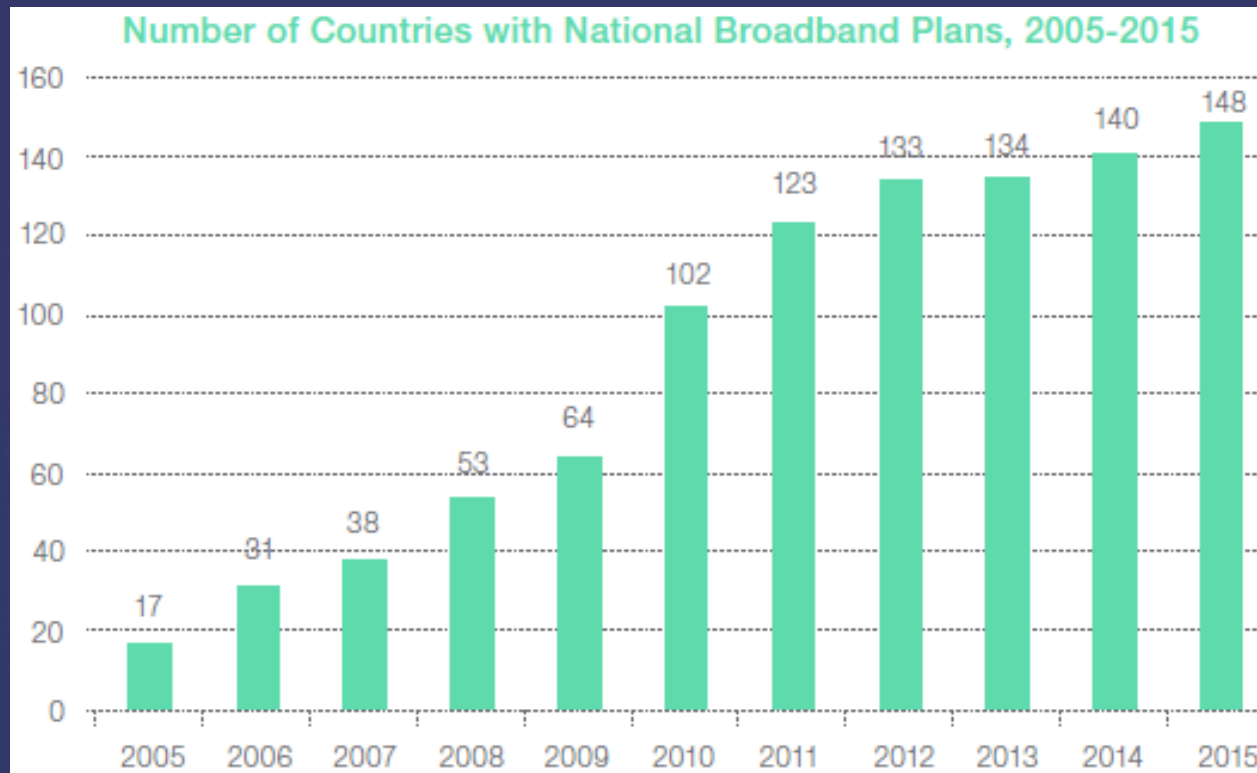

→ *Strong growth in subscriptions and penetration*

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

Target 1: National Broadband Plans

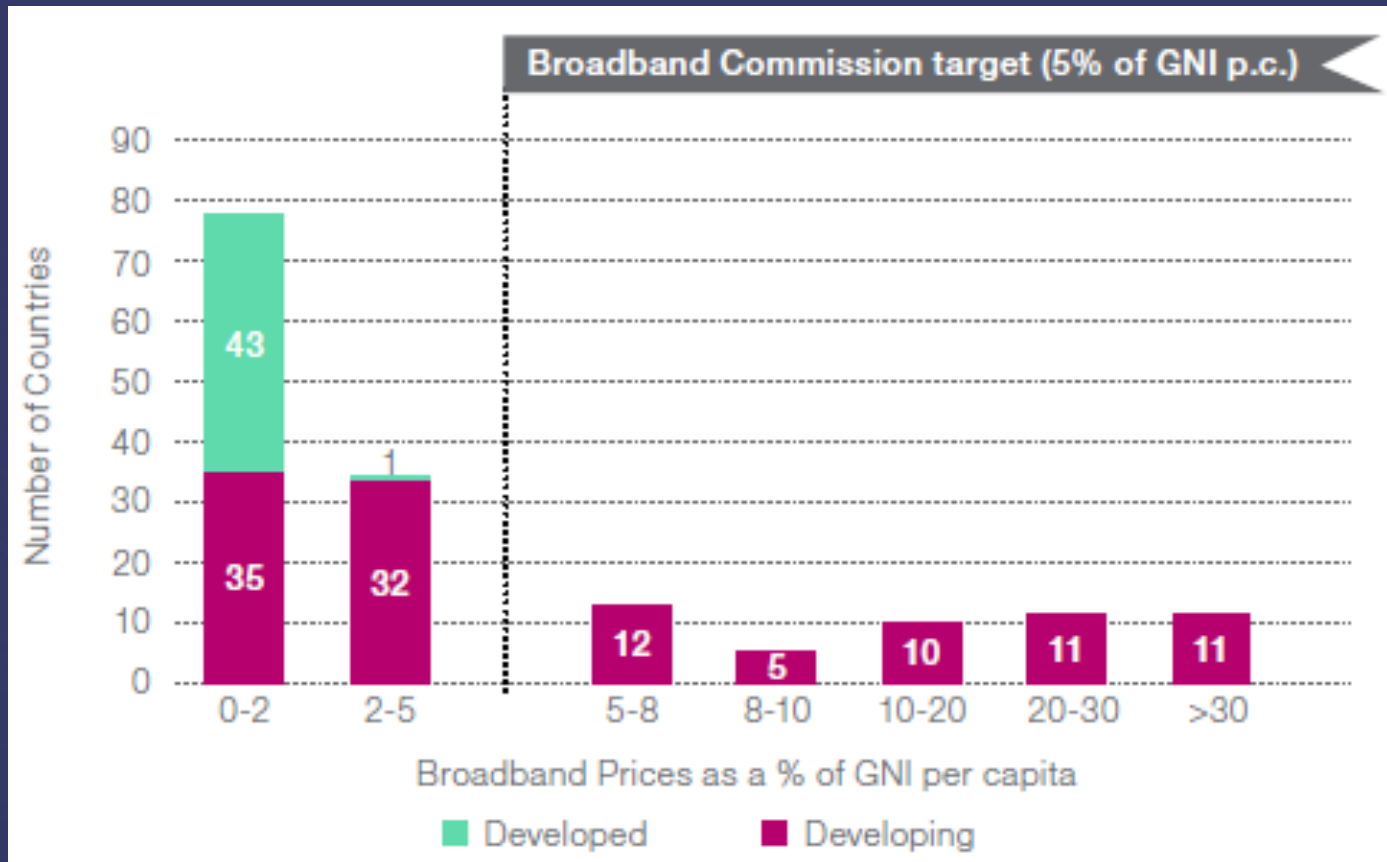*Vitally important that countries should develop a Broadband Plan*

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

Number of Countries with National Broadband Plans, 2005-2015

Year	Number
2005	17
2006	31
2007	38
2008	53
2009	64
2010	102
2011	123
2012	133
2013	134
2014	140
2015	148

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.
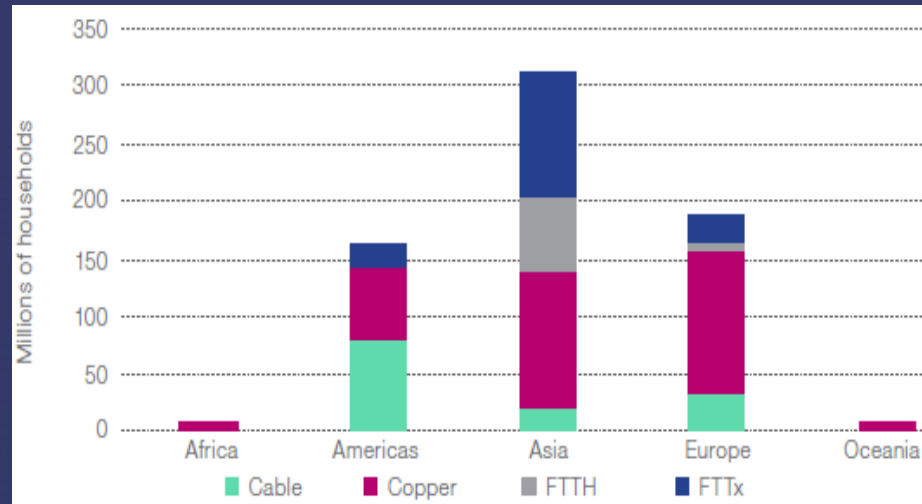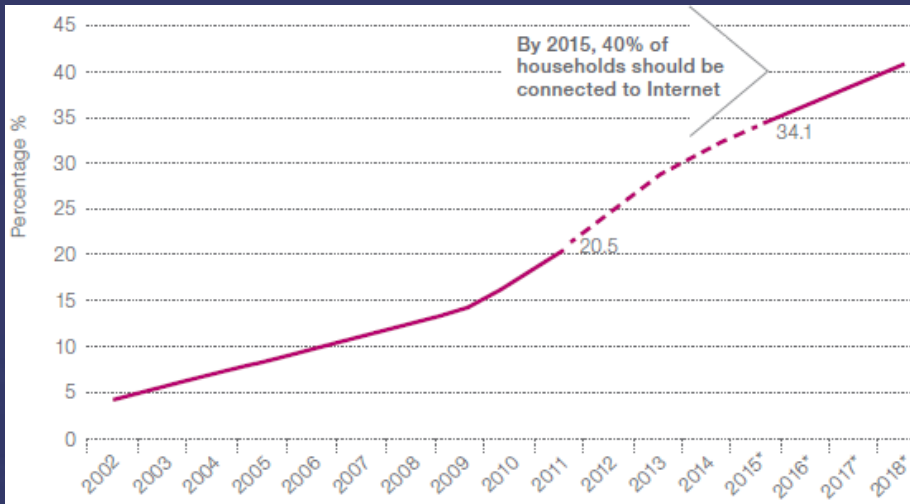
Source: ITU.

Broadband Commission target (5% of GNI p.c.)

Number of Countries / Broadband Prices as a % of GNI per capita

0-2: 43 (Developed), 35 (Developing)
2-5: 1 (Developed), 32 (Developing)
5-8: 12
8-10: 5
10-20: 10
20-30: 11
>30: 11

■ Developed ■ Developing

Target 3: Getting households online

By 2015, 40% of households in developing countries should have Internet access.
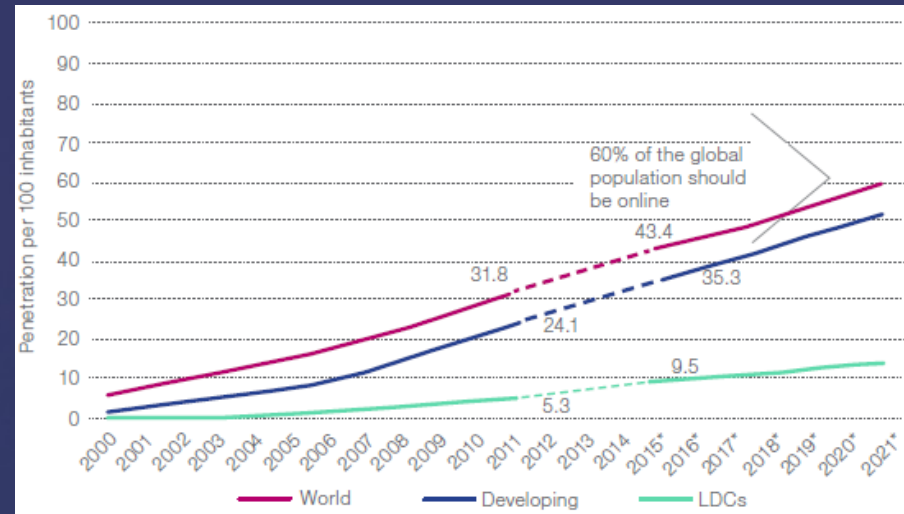*Actual: 46.4% world; 34.1% developing and 7% in LDCs*

Source: ITU (left); Point Topic (right).
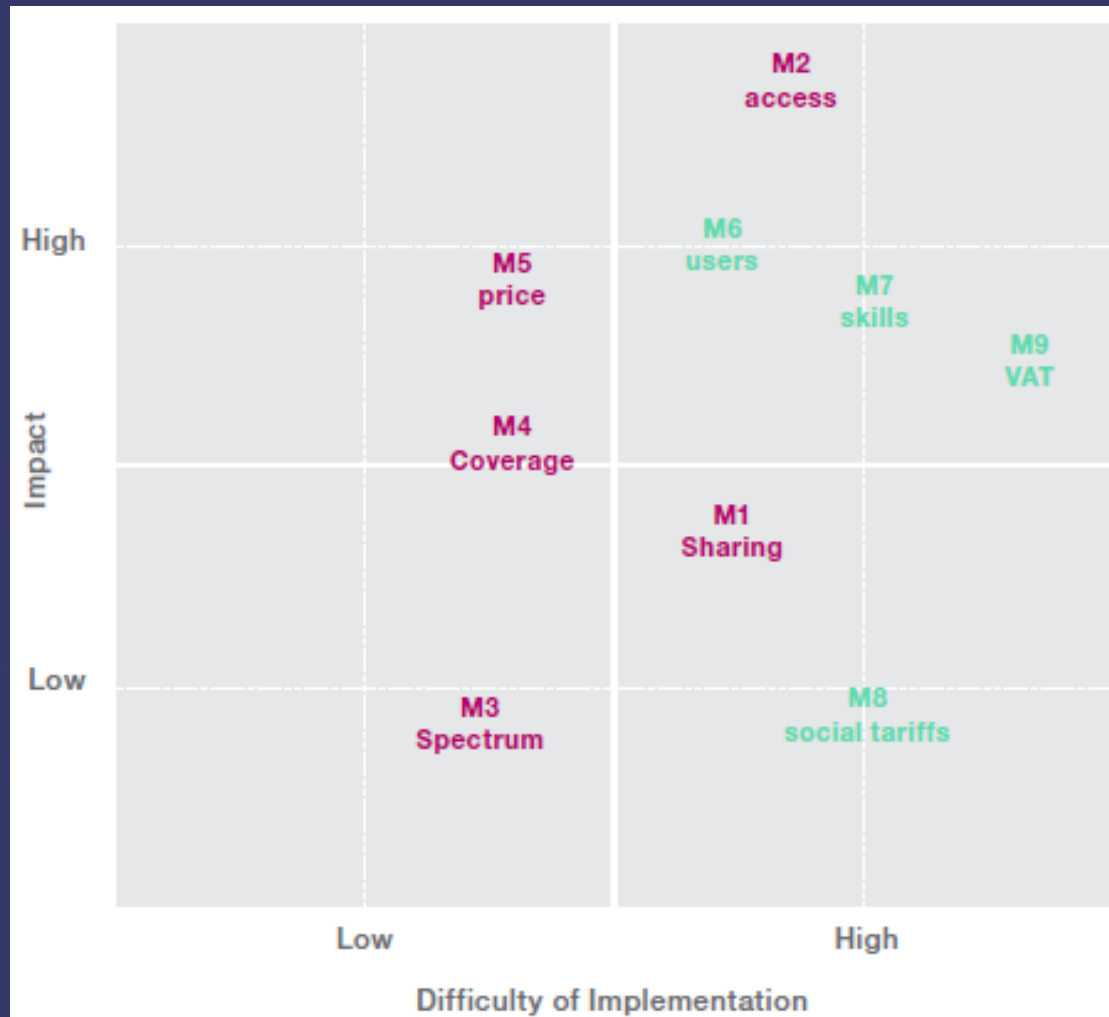
Target 4: Getting people online

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.

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Policy Measures for Broadband

Source: Broadband Commission, based on Analysys Mason. 15

Thank you for your attention

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