ADVOCACY TARGET 1: Making broadband policy Universal – by 2015, all countries should have a NBP or strategy or include broadband in their UAS Definition

The vital importance of national policy leadership is now increasingly understood by ICT stakeholders around the world. Policy leadership provides a clear vision to identify opportunities, constraints and actions around the supply and demand of broadband.

Although in many countries, broadband deployment has been realized through the efforts of the private sector, Governments play an essential role in ensuring a stable regulatory and legal framework to foster and incentivize investments, create a level playing-field amongst the different actors present in the market, establish adequate spectrum policy and reasonable spectrum allocation, and ensure long-term and sustainable competition. Governments can also implement programmes such as e-government, digital literacy initiatives and connected public institutions and locations.

Progress on policy leadership is relatively recent, with an explosion in the number of countries introducing broadband plans in 2009-2010. Prior to 2006, most plans focused on information society issues, with broadband coming to the fore from 2008 onwards.

More recently, Digital Agendas have grown in popularity, incorporating a cross-sectoral perspective. By mid-2013, some 134 or 69% of all countries had a national plan, strategy, or policy in place to promote broadband, and a further 12 countries or 6% were planning to introduce such measures in the near future. However, some 47 countries (or nearly a quarter of all countries) still do not have any plan, strategy or policy in place.

Even when evaluating Global Growth in Broadband countries have plans, achieving progress in implementation may prove challenging or slow. Recent ITU/Broadband Commission/Cisco research (2013) suggests an opportunity cost associated with the absence of a broadband plan. Factoring out the impact of average income per capita, market concentration and urbanization, this research suggested that countries with...
Plans are associated with fixed broadband penetration some 2.5% higher on average than countries without Plans – a significant margin of advantage. In mobile, the impact of a Plan may be even greater – countries with plans are associated with mobile broadband penetration some 7.4% higher on average than countries without plans, suggesting that national policy leadership can help establish a positive vision for the development of broadband within a national market. Featured Insight 15 offers insight into Qatar’s experience with its National ICT Plan 2015, while Featured Insight 16 describes Malaysia’s High-Speed Broadband (HSBB) project. Annex 1 (State of Broadband 2013 report) provides the list of National Broadband Plans.