State of Broadband Report 2013

Key Messages

01 While **Internet penetration globally will reach 38.8% by the end of 2013**, more than **two thirds of people in developing countries will still remain unconnected**, as will over **90% of people in the world's 49 least developed countries.**

02 Mobile broadband continues to show the **highest growth rate of any ICT, at over 30% per year.** By the end of 2013, mobile broadband subscriptions will exceed fixed broadband subscriptions by a ratio of 3:1 (up from 2:1, just two years ago).

03 **Mobile broadband is growing faster than any technology in human history.** Five countries now have mobile broadband penetration in excess of 100 connections per capita (Singapore, Japan, Finland, Korea and Sweden). By the beginning of 2013, **32 economies had mobile-broadband subscription penetration in excess of one subscription for every two inhabitants,** compared with just 13 countries at the beginning of 2012.

04 There are **more than 70 economies where more than half the population now has access to the Internet.**

05 The **top ten countries** in the world for Internet use are all located in Europe, except for New Zealand (8th) and Qatar (10th).

06 The **top seven countries for Internet penetration,** headed by Iceland and Norway, all now have Internet penetration of over 90%.

07 The top four countries in the world for fixed broadband penetration are all located in Europe, **headed by Switzerland, the only country in the world where fixed broadband penetration exceeds 40%.**

08 The **Republic of Korea** ranks in the top five economies for mobile and fixed broadband penetration worldwide, and has the **highest household broadband penetration in the world.**

09 Broadband is continuing to become **more affordable around the world,** although it remains out of reach in many countries. In terms of the Broadband Commission's target, the number of countries in which broadband is affordable in 2012 remained static and unchanged since 2011 – although many are now approaching the target.

10 There is a clear need for **policy leadership in broadband** to facilitate the deployment of broadband around the world. Some 134 countries had a broadband plan in place by mid-2013.

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11 The Internet and mobile were widely credited with the 'death of distance' – the rise of mobile broadband may be widely credited with the 'death of location'.

12 Worldwide, countries are slipping slightly off-track to achieve the Commission's advocacy target for household penetration.

13 Further efforts in **improving access** are needed to achieve the targets for individual Internet user penetration. Smartphones and mobile broadband may provide the much-needed additional channel to achieve this.

14 **Censorship** of the Internet, as evidenced by national filtering of online content, appears to be becoming more widely practiced, even within States with liberal democratic traditions.

15 There are **different mechanisms for achieving universal broadband,** including universal service regulations, universal service funds (USFs), national targets, programmes and incentives for operators and stakeholders in the broadband value chain, as the commercial costs of broadband provision rise significantly for connecting final subscribers for a range of reasons (e.g. remote areas, identifying last subscribers etc).

16 There is **no single recipe that is likely to work for all countries** – instead, countries need to relate the options they choose for universalizing broadband to their market needs.

17 There is a strong correlation between local infrastructure and local content - **multilingual content plays a vital role in driving demand for broadband services.**

18 This year's State of Broadband report also outlines a variety of ways in which broadband is improving the lives of people around the world, in m-health, education and m-learning, m-payments, training, innovation and the acquisition of new skills. Firms are today moving into the provision of services which may have been formerly perceived as the responsibility of the State – reshaping our understanding of the roles of the public / private sectors.