

Technical Note

ICT Regulatory Tracker 2007-2024

May 2026



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Foreword



Effective ICT regulation is an essential foundation for digital development. It shapes whether markets attract investment, whether services become more affordable and whether networks expand to reach more people. As digital transformation accelerates, it also matters for how countries organize wider digital governance – through clearer mandates, stronger coordination and more consistent implementation across the digital ecosystem.

The ITU ICT Regulatory Tracker has become the reference benchmark for assessing ICT regulatory maturity, used by Member States, international organizations and academia. Its value lies in a robust, neutral and well-established methodology applied consistently across 194 countries, drawing on official inputs to the ITU World Telecommunication/ICT Regulatory Survey and structured desk research. The 2007–2024 dataset is especially important: it allows countries to move beyond snapshots and understand direction of travel – how reforms accumulate, how regulatory systems progress across the generations of regulation, and where progress tends to accelerate or plateau.

I am pleased to share this Technical Note with the global development community. It translates the evidence base from the latest edition of the ICT Regulatory Tracker into clear, actionable insights. It provides a global picture of regulatory evolution, compares regional trajectories across the six ITU regions and highlights trends within vulnerable country groups – least developed countries (LDCs), landlocked developing countries (LLDCs) and small island developing States (SIDS). It is written for two audiences: senior decision-makers who need a concise view of trends and implications, and specialists who want sufficient methodological detail to replicate and extend the analysis.

The key takeaway is straightforward: many countries have strengthened their regulatory frameworks substantially over the past two decades, but progress remains uneven and gaps persist. Understanding these patterns is not only useful for ICT sector reform; it helps countries consolidate the regulatory foundations that are increasingly required for broader digital governance and digital transformation readiness. In that spirit, the publication complements wider ITU benchmarking work, including the G5 Benchmark and the Digital Policy Readiness Framework.

I invite countries and partners to use the benchmarking and comparative findings in this publication to inform national and regional roadmaps – prioritizing reforms, identifying gaps, and learning from peers. A shared evidence base can support more targeted capacity building, stronger cooperation, and more effective regulation in support of inclusive digital transformation.

A handwritten signature in black ink, appearing to read 'Cosmas Luckyson Zavazava'.

Dr Cosmas Luckyson Zavazava
Director of the Telecommunication Development Bureau
International Telecommunication Union

Key messages - Trends in telecommunication/ICT regulation

- **ICT regulation has shifted structurally from command-and-control models to integrated, pro-competitive frameworks.** The share of countries in G3/G4 rose from 21 per cent in 2007 to 65 per cent in 2024.
- **G4 has become the dominant endpoint of reform for many countries**, but about one-in-three countries remains in G1-G2 in 2024, indicating persistent gaps in enabling conditions for investment, competition, and consumer outcomes.
- **Reform has been driven primarily by the spread of modern market rules and competition safeguards.** Across countries and regions, the largest gains are found consistently in Pillar III (Regulatory Regime) and Pillar IV (Competition Framework).
- **Institutional design and mandate expansion matter, but they evolve more slowly.** Improvements in **regulatory regimes and regulatory mandates** are steady, yet capacity, independence and mandate clarity remain binding constraints in many contexts.
- **Regulatory change happens in bursts, not steadily:** periods of rapid upgrading are followed by longer phases of consolidation as countries embed and implement changes.
- **Regional convergence is real but incomplete.** Regions that started furthest behind in 2007 – particularly Africa, the Arab States, and Asia and the Pacific – recorded the largest relative gains, narrowing gaps while still trailing the global frontier on average.
- **Europe remains the global benchmark for integrated regulation**, with broad consolidation near the top tier and near-ceiling performance in the core regulatory toolkit.
- **The Americas region shows broad convergence toward good practice**, with a widening set of high performers and strong improvements anchored in competition safeguards, structured wholesale markets and more predictable spectrum policies.
- **Asia and the Pacific is the most internally diverse region, but also one of the fastest improving**, combining near-frontier leaders with significant catch-up by many middle-income countries; small island economies progress more slowly due to scale and capacity constraints.
- **The Arab States region show a two-speed profile:** several frontier frameworks, particularly in the Gulf Cooperation Council, alongside persistent low maturity in fragile contexts where foundational reforms remain incomplete.
- **Vulnerable-country groups outpaced the world average in proportional terms.** Between 2007 and 2024, **least developed countries (LDCs) (+29.9 points), landlocked developing countries (LLDCs) (+27.9), and small island developing States (SIDS) (+28.4)** all improved substantially, demonstrating that structural constraints do not preclude regulatory transformation.
- **A new frontier is emerging within vulnerable groups:** top LDCs, LLDCs and SIDS now reach upper-G3 or lower-G4 levels, showing that advanced regulatory maturity is achievable when institutions, mandates and competition tools advance together.

1 Introduction

Effective ICT and telecommunication regulation forms a critical part of the enabling environment for digital transformation and is a structural determinant of digital development trajectories. It frames how markets open to competition, how scarce resources such as spectrum are managed, how consumer rights are protected, and how incentives for long-term investment are structured. Predictable, pro-competitive frameworks aligned with international good practice are commonly associated with more affordable services and faster network expansion; conversely, weak or fragmented regulation is associated with persistently high prices and slow broadband uptake, particularly in low-income economies.

As economies digitalize, the significance of telecommunication/ICT regulation extends well beyond the traditional sector towards supporting broader digital governance, cutting across competition policy, cybersecurity, data protection, digital identity, online content and sectoral applications such as e-health, e-education and digital finance. To make this evolution measurable, the International Telecommunication Union (ITU) has developed a suite of benchmarking tools, including the ICT Regulatory Tracker, the Benchmark of Fifth-Generation Collaborative Regulation (G5 Benchmark) and the Digital Policy Readiness Framework that jointly provide an evidence base on the maturity of national policy, legal and governance frameworks.¹

1.1 Purpose of this note

This Technical Note analyses how national ICT policy and regulatory frameworks evolved from 2007 to 2024 across 194 countries, using the ITU ICT Regulatory Tracker as the primary dataset. The analysis provides senior policy-makers with an accessible synopsis of global and regional trends and regulatory subject matter experts with methodological detail to replicate results and extend the analysis on countries or regions of interest. Prepared by the Regulatory and Market Environment team of the ITU Telecommunication Development Bureau (BDT), the analysis supports evidence-based dialogue, knowledge sharing and regulatory capacity building.

The Technical Note:

- Describes global and regional trajectories in regulatory maturity (2007-2024) using the ICT Regulatory Tracker and its pillars.²
- Provides insights on trends in ITU regions (Africa, Americas, Arab States, Asia-Pacific, Commonwealth of Independent States (CIS), Europe) and groups of vulnerable countries such as least developed countries (LDCs), landlocked developing countries (LLDCs), and small island developing States (SIDS).
- Identifies convergence/divergence patterns and transition paths from Generation 1 (G1) through to Generation 4 (G4) of ICT regulation.

¹ ITU [ICT Regulatory Tracker](#), [G5 Benchmark](#), [Digital Policy Readiness Framework](#); and the series of [GSR Best Practice Guidelines](#).

² ITU [Generations of ICT Regulation model](#)

What is this Technical Note about?

- **This Technical Note uses the ICT Regulatory Tracker to quantify how regulatory maturity has evolved globally over time.** It draws on comparable data for 194 countries over 2007-2024 to identify trajectories, patterns, and transition paths across the generations of regulation.
- **The analysis is designed for two audiences: decision-makers and specialists.** It provides a concise picture of global/regional trends for senior leaders and sufficient methodological detail for experts to replicate and extend the analysis.
- **The ICT Regulatory Tracker is one element in a wider ITU benchmarking suite.** Used alongside the G5 Benchmark and the Digital Policy Readiness Framework, it helps link ICT regulatory maturity to broader digital governance readiness.

1.2 Methodology of the analysis

Primary data source. The analysis in this Technical Note is based on the ICT Regulatory Tracker dataset for the period 2007-2024.³ The ICT Regulatory Tracker is an evidence-based tool that pinpoints changes in the ICT regulatory environment over time and facilitates benchmarking and trend identification across countries and regions. The ICT Regulatory Tracker codifies institutional and market rules based on official data submitted by ITU administrations through the biennial ITU World Telecommunication/ICT Regulatory Survey and desk research. The dataset is published on the ITU policy benchmarking platform, the G5 Accelerator.⁴

Box 1: Generations of regulation model and ITU policy benchmarks

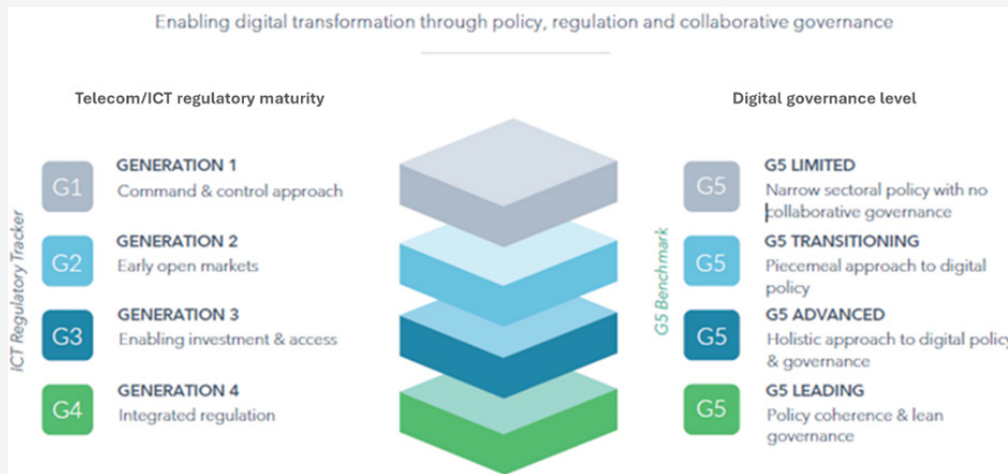
Evolution of regulatory governance

The ITU model of the generations of regulation traces the shift from command-and-control oversight (Generation 1 or G1) to integrated generation (G4). On a parallel track to the four generations of telecommunication/ICT sector reform, Generation 5 (G5) charts the digital transformation journey - from its inception to building a thriving digital economy and society. The journey witnesses a growing readiness of national legal and regulatory frameworks - from limited, to transitioning, to advanced, to leading (see diagram below). On the way, national stakeholders increasingly align behind high-level policy leadership, with consistent policy implementation and fast-tracking progress to development goals, such as the Sustainable Development Goals (SDGs). Each generation and readiness level marks a step toward a more enabling environment, with clearer mandates, more proportionate and agile tools, stronger coordination across sectors and closer collaboration among public sector entities and ecosystem stakeholders.

³ ITU [ICT Regulatory Tracker](#).

⁴ ITU [ICT Regulatory Tracker](#).

Generations of regulation model



Source: ITU

As countries advance along the generations continuum, the policy focus expands and governance and enforcement capacity strengthens. Graduating to a more advanced generation reduces policy uncertainty and improves investor confidence. The objective is sustained improvements in regulatory quality that translate into stronger market performance and connectivity outcomes. In practice, the stable, transparent and contestable frameworks characteristic of G4 (ICT regulatory maturity) and of the G5 Advanced and Leading tiers (digital governance readiness) lower financing costs and support long-horizon investment in fibre and advanced mobile networks.

ICT Regulatory Tracker

The ICT Regulatory Tracker is an evidence-based tool to help decision-makers and regulators make sense of the rapid evolution of ICT regulation. It has identified major regulatory trends driving the ICT sector since 2007 and tracks countries' progress from G1 'command and control' regulation through to G4 'integrated telecommunication regulation'. Based on high-quality data from 194 countries, it uses 50 indicators organized across four pillars: regulatory authority, regulatory mandate, regulatory regime, competition framework.

This enables various analytical features to pinpoint the changes taking place in the ICT regulatory environment. Using both quantitative and qualitative data, it enables benchmarking and the identification of trends in ICT legal and regulatory frameworks. It also helps identify the gaps in existing regulatory frameworks, making the case for further regulatory reform towards achieving a vibrant and inclusive ICT sector.

For more information on the ICT Regulatory Tracker, please see Annex 1 'Note on Methodology - ICT Regulatory Tracker'.

See also: app.gen5.digital/tracker/concepts

Complementary ITU benchmarking frameworks

Building on the ICT Regulatory Tracker and on the GSR Best Practice Guidelines¹, the **ITU Benchmark of Fifth-Generation Collaborative Regulation (G5 Benchmark)** has set out new goals for regulatory excellence and as the ‘gold standard’ for collaboration among regulators and for digital policy design that accelerates digital transformation; it serves as a compass for regulators on their journey towards a thriving digital economy.

Most recently, the Global Digital Regulatory Outlook² has introduced a **Digital Policy Readiness Framework** (originally known as the Unified Framework), derived from the ICT Regulatory Tracker and the G5 Benchmark, to assess the state of readiness of national policy, legal and governance frameworks for digital transformation across a set of nine thematic benchmarks.

See also: <https://app.gen5.digital/benchmark/about> and app.gen5.digital/unified-framework/about

¹ ITU, [GSR Best Practice Guidelines](#) (all years).

² ITU, [Global Digital Regulatory Outlook 2023](#).

Trend metrics. The analysis uses annual simple (unweighted) means of the ICT Regulatory Tracker at global and regional levels, for the total score and pillar scores for 2007–2024, providing a comparable time series of regulatory maturity over time without population or GDP weighting.

The **distribution of countries by regulatory generation** (G1–G4) in 2007 and 2024 is described to show movement from earlier to more advanced governance models.

Transition paths from 2007 to 2024 for all countries are constructed, and upgrades by cohort are analysed to track progress through the generations of regulation ladder, from G1 through G4, by 2024. A cohort is defined as a group of countries that began in the G1, G2, G3 or G4 tier, respectively, in 2007.

Periods of acceleration and plateau are identified through comparisons of Tracker scores, highlighting windows of faster reform and consolidation.

Regional trajectories are profiled, and pillar-level averages for LDCs, LLDCs and SIDS are produced to show where progress concentrates and where gaps persist.

2 Global evolution of ICT regulation, 2007-2024

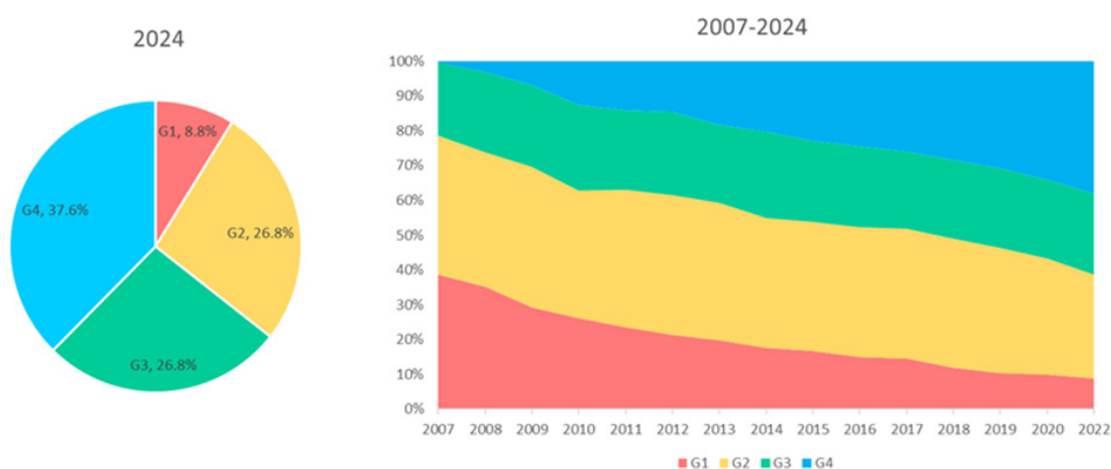
This section provides an overview of the global evolution of ICT regulation over the period 2007-2024 based on the ITU generations of regulation model and the ICT Regulatory Tracker 2024 dataset.

2.1 Evolution of generations of ICT regulation over time

Overall, the long-term global trend shows broad consolidation around pro-competition and pro-investment regulation (G4 tier), creating the institutional foundation for whole-of-government, collaborative digital regulation (G5) and wider digital-economy enablers.

The 2024 edition of the ICT Regulatory Tracker documents a structural transition over the past two decades (as shown in Figure 1 below). In 2024, almost two-thirds of national telecommunication/ICT markets worldwide were operating within mature regulatory frameworks: 38 per cent of countries were in the G4 tier (integrated regulation) and 27 per cent of countries in the G3 tier (enabling investment and access). A further 26 per cent of countries remained in the G2 tier (early open markets), while just 9 per cent of countries were still in the G1 tier (command-and-control regulation). In essence, the majority of countries have progressed to G3 and G4, but roughly one in three countries (36 per cent) is yet to reach G3 and may experience limited investment, competition and consumer outcomes in ICT markets.

Figure 1: Evolution of generations of ICT regulation worldwide, 2007-2024



Source: ITU, [gen5.digital](https://www.itu.int/gen5/digital)

Disaggregating global trends across distinct time periods, the following patterns emerge:

- **2007 baseline:** countries were concentrated in the G1 and G2 tiers (78 per cent combined), with 21 per cent of countries in the G3 tier and only one country in the G4 tier (0.5 per cent).
- **2010-2014:** during the period, many countries moved out of the G1 tier (shrinking from 39 per cent of countries down to 17 per cent). A first increase in countries in the G3 and G4 tiers was observed, reflecting strengthened licensing frameworks, competition safeguards and consumer protection.
- **2015-2019:** The period witnessed an acceleration of countries into the G4 tier (growing from 23 to 31 per cent) while the number of countries in the G2 tier steadily declined (from 37 to 32 per cent).

- **2020-2024:** The G4 tier became the dominant tier between 2020-2024 (rising to 38 per cent in 2024) and the number of countries in the G1 tier fell into single digits (9 per cent). Overall, the share of countries in G3 and G4 more than tripled: from 21 per cent in 2007 to 65 per cent in 2024, signalling widespread adoption of the full spectrum of telecommunication and competition regulation.

This trajectory is consistent with earlier ITU findings that legal and regulatory frameworks have matured at different speeds⁵, with converged institutions and collaborative practices gaining ground worldwide⁶; it also provides the regulatory base on which countries can progress toward Generation 5 collaborative digital regulation as measured by the G5 Benchmark⁷, which ITU links to stronger digital economy outcomes⁸.

What stands out: Global trends 2007-2024

- **Global regulatory maturity has shifted upward over 2007-2024**, with most countries now operating under enabling (G3) or integrated (G4) frameworks.
 - **G3-G4 has become the global norm:** the share of countries in the top two tiers rose from 21 per cent (2007) to 65 per cent (2024).
 - **The steepest structural shift has been the decline of 'command-and-control' regulation:** G1 fell from a large minority in 2007 to single digits in 2024.
 - **Reform progressed in phases:** early exits from G1 (2010-2014), faster movement into G4 (2015-2019), and continued consolidation with G4 as the dominant tier (2020-2024).
- **A substantial minority remains below the enabling threshold:** roughly one in three countries is still in G1-G2 in 2024, indicating persistent gaps in the basic conditions for investment, competition and consumer outcomes.
- **The dominant direction of travel is toward integrated, pro-competition, pro-investment regulation**, creating the regulatory base for more collaborative, cross-sector digital governance.

2.2 Global trends

Distribution by generation

Over the past two decades, countries have been moving steadily towards higher generations of ICT regulation. The regional distribution over the period 2007-2024 is shown in Table 1.

⁵ ITU, [Global Digital Regulatory Outlook 2023](#), Section 6.3 and Figure 4 (global/regional maturity of telecommunications vs. digital governance)

⁶ ITU, [Global Digital Regulatory Outlook 2023](#), Section 6.4 and Figures 7, 9 and 10 (institutional evolution and regulator/ministerial collaboration)

⁷ ITU, [G5 Benchmark](#).

⁸ See ITU, [Benchmark of fifth-generation collaborative digital regulation 2023: Global and regional trends](#), Figures 4-5, [digitalregulation.org/wp-content/uploads/D-PREF-BB-2023-01-PDF-E.pdf](#); [Global Digital Regulatory Outlook 2023](#), Section 6.6, Figures 14-16; and Katz, R. & Jung, J. (2022). [Collaborative digital regulation: a much-needed approach to achieving growth of the digital economy](#). ITU Journal on Future and Evolving Technologies, Vol. 3(2).

Table 1: ICT Regulatory Tracker - Number of countries by generation, 2007 and 2024

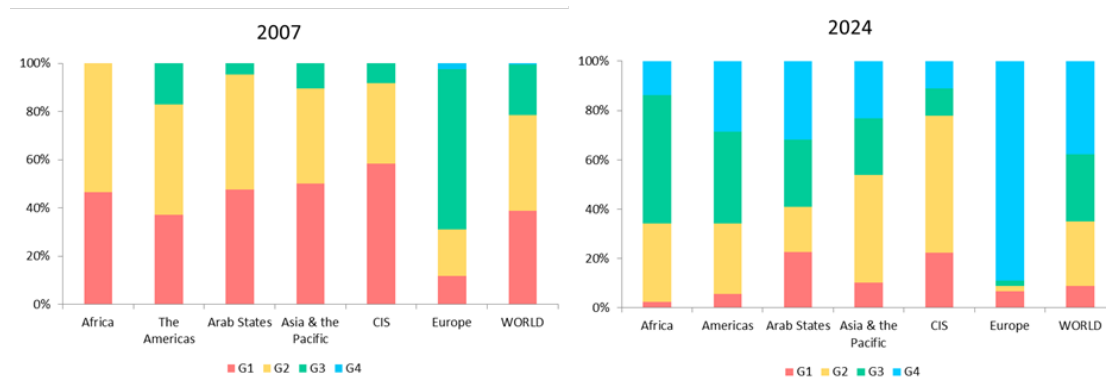
Region	G4		G3		G2		G1		Total number of countries
	2007	2024	2007	2024	2007	2024	2007	2024	
Africa	0	6	0	23	23	14	20	1	44
Americas	0	10	6	13	16	10	13	2	35
North America	0	2	2	0	0	0	0	0	2
Latin America and the Caribbean	0	8	4	13	16	10	13	2	33
Arab States	0	7	1	6	10	4	10	5	22
Asia-Pacific	0	9	4	9	15	17	19	4	39
CIS	0	1	1	1	4	5	7	2	9
Europe	1	40	28	1	8	1	5	3	45
World	1	73	40	53	76	51	74	17	194

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

The global distribution has shifted markedly towards higher levels of regulatory maturity. In 2007 only one country, Belgium, was in the G4 and 40 were in the G3 tier, respectively; by 2024 there were 73 countries in the G4 and 53 countries in the G3 tier. Over the same period, the number of countries in the G1 tier fell from 74 to 17, and in the G2 tier from 76 to 51. Overall, almost two-thirds of countries (65 per cent) are now in the G3 and G4 tier compared to 21 per cent in 2007, reflecting sustained improvements in regulatory frameworks across regions.

Figure 2: Distribution of generations of ICT regulation, by region, 2007 and 2024



Source: ITU ICT Regulatory Tracker (2007-2024)

Europe recorded the strongest consolidation at the top: G4 tier countries rose from one to 40, with approximately 89 per cent of the region in the G4 tier in 2024. The number of countries in the G3 tier fell from 28 to one, as countries moved up the ladder. A European country, Italy, reaches a score of 100 for the first time in 2024, meeting the highest ICT Regulatory Tracker benchmark for ICT regulation.

In the Americas: North America moved fully into the G4 tier (two out of two countries in 2024) from the G3 tier in 2007, while **Latin America and the Caribbean** progressed from four to 13 countries in the G3 tier and from zero to eight countries in the G4 tier; the number of countries in the G1 tier decreased from 13 to two.

Africa shows broad-based upgrading: the number of countries in the G1 tier decreased from 20 to one. The number of countries that progressed to the G3 tier expanded from zero to 23 and six countries reached the G4 tier. Nearly two-thirds (66%) of African countries are now in the G3 and G4 tiers.

The Arab States region advanced from one to six countries in the G3 tier and from zero to seven countries in the G4 tier, although five countries remain in the G1 tier in 2024.

Asia and the Pacific made significant progress with the number of countries in the G4 tier rising from zero to nine and the number of countries in the G3 tier rising from four to nine; the region still features a significant number of countries in the G2-tier (17).

The CIS region shows incremental gains: in the G4 tier, the number of countries that progressed was one (from zero), and the number of countries in the G3 tier remained one. Most countries concentrated in the G2 and G1 tiers, with five countries in the G2-tier and two countries in the G1-tier in 2024, respectively.

What stands out: Distribution by generation 2007-2024

- **Every ITU region shifted toward higher regulatory generations, but at different speeds and with different end-states.**
- **Europe** consolidated most strongly at the top, with a large majority of countries in G4 by 2024 and the first perfect score recorded in 2024.
- **Africa and the Americas** show broad upgrading and shrinking G1 footprints, with many countries now in G3 and a growing number in G4.
- **Asia-Pacific and the Arab States** advanced meaningfully but retain sizeable G2 (and, in the Arab States, G1) cohorts, signalling unfinished transitions.
- **CIS** progress is incremental, with most countries still concentrated in G1-G2.

Global leaderboards

Table 2 shows, side-by-side, the top-20 countries by total ICT Regulatory Tracker score for 2007 (baseline) and 2024 (baseline), together with each country's comparative score. Using 2007 and 2024 as separate baselines allows to highlight both the early leaders in regulatory reform and today's frontrunners, and to show how each country's score in the other year has changed relative to its baseline position. This makes it possible to see which countries have consolidated their lead, which have newly entered the top group, and which have slowed their progress over time.

Table 2: ICT Regulatory Tracker – Top 20 countries by score, 2007 and 2024 baseline

Country	Region	2007 base-line	2024 compara-tive	Country	Region	2024 base-line	2007 compara-tive
Belgium	Europe	89.5	97.0	Italy	Europe	100.0	45.0
France	Europe	83.5	95.5	Lithuania	Europe	99.5	78.5
Australia	Asia-Pacific	83.5	94.5	Finland	Europe	99.0	74.5
Hungary	Europe	83.5	93.0	Ireland	Europe	99.0	77.0
Portugal	Europe	83.0	97.0	Saudi Arabia	Arab States	97.0	55.2
Austria	Europe	81.5	92.5	Belgium	Europe	97.0	89.5
Malta	Europe	81.5	95.0	Denmark	Europe	97.0	62.7
Romania	Europe	81.0	95.0	Pakistan	Asia-Pacific	97.0	76.0
Latvia	Europe	80.5	90.0	Dominican Rep.	Americas	97.0	74.5
Poland	Europe	80.5	90.5	Portugal	Europe	97.0	83.0
Norway	Europe	80.0	96.5	Norway	Europe	96.5	80.0
Germany	Europe	80.0	94.5	Brazil	Americas	96.0	75.8
Cyprus	Europe	79.5	89.7	France	Europe	95.5	83.5
Slovakia	Europe	79.5	88.5	United Kingdom	Europe	95.5	78.5
Greece	Europe	79.5	91.0	Switzerland	Europe	95.5	78.0
United States	Americas	79.5	86.5	Malta	Europe	95.0	81.5
Lithuania	Europe	78.5	99.5	Romania	Europe	95.0	81.0
United Kingdom	Europe	78.5	95.5	Trinidad and Tobago	Americas	95.0	55.0
Slovenia	Europe	78.5	94.0	Australia	Asia-Pacific	94.5	83.5

Table 2: ICT Regulatory Tracker – Top 20 countries by score, 2007 and 2024 baseline (continued)

Country	Region	2007 base-line	2024 compara-tive	Country	Region	2024 base-line	2007 compara-tive
Switzer-land	Europe	78.0	95.5	Germany	Europe	94.5	80.0

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

The two leaderboards tell a clear story of widening leadership and sustained progress.

In 2007, Europe was leading the field with eighteen of the top-20 places, joined only by one country from Asia and the Pacific and one from the Americas. By 2024 the picture is more diverse: fourteen Europe countries remain in the top group, but they are now joined by three countries from the Americas, one Arab State and two countries from Asia and the Pacific. This shift points to a broad diffusion of modern regulatory practice beyond the early European front-runners.

Despite this diversification, there is notable persistence at the top. Eleven countries appear on both leaderboards: Australia, Belgium, France, Germany, Lithuania, Malta, Norway, Portugal, Romania, Switzerland, and the United Kingdom. This shows continuity among leaders as new entrants catch up.

The magnitude of improvement is substantial. Among the 2007 top-20 countries, the average score rose from 81 in 2007 to 94 in 2024, an increase of 13 points. Within the top 20 cohort, Lithuania recorded the largest gain (+21 points), followed by Switzerland (+17.5) and the United Kingdom (+17). Looking at today’s top-20, the average 2024 score is 96.6 compared with 74.3 in 2007 – an increase of 22 points, with a median improvement of 21 points, showing rapid catch-up among several countries. Standout improvers include Italy (+55, from 45 to 100), Saudi Arabia (+42), Trinidad and Tobago (+40), and Denmark (+34). A majority (thirteen of the twenty countries) had 2007 scores below 80, highlighting how widely reforms have taken hold since 2007.

The policy implication is straightforward. Countries advance most when institutional capacity is paired with modern regulatory instruments and clear mandates. The broader regional mix among 2024 leaders suggests that regulatory modernization is no longer confined to early adopters; with a sequenced reform package, substantial progress is feasible within a few policy cycles.

What stands out: Leaderboards 2007 and 2024

- **Leadership has widened geographically:** top performers are no longer concentrated almost entirely in Europe, with new entrants from the Americas, the Arab States, and Asia and the Pacific.
- **There is persistence among early leaders, alongside catch-up by newcomers:** a core group remains at the top while several countries have closed large gaps since 2007.
- **Top-tier outcomes are achievable within a few policy cycles:** This includes for countries that started from mid-level scores, when reforms are sustained and sequenced.

Top raisers 2007-2024

Table 3 shows the absolute change in total score for each of the top 15 risers in the ICT Regulatory Tracker from 2007 to 2024.

Table 3: ICT Regulatory Tracker – Top 15 risers, total score 2007 and 2024

Rank	Country	Region	Overall 2007	Overall 2024	Change
1	Somalia	Arab States	0.0	77.5	+77.5
2	Comoros	Arab States	5.5	74.2	+68.7
3	Solomon Islands	Asia-Pacific	6.5	69.5	+63.0
4	Eswatini	Africa	17.5	79.0	+61.5
5	Vanuatu	Asia-Pacific	16.0	77.0	+61.0
6	Myanmar	Asia-Pacific	6.8	67.5	+60.7
7	Kuwait	Arab States	16.3	76.0	+59.7
8	Uzbekistan	CIS	14.8	72.5	+57.7
9	Iraq	Arab States	9.0	64.5	+55.5
10	Italy	Europe	45.0	100.0	+55.0
11	Dominica	Americas	12.5	67.5	+55.0
12	Cambodia	Asia-Pacific	19.0	72.0	+53.0
13	Brunei Darussalam	Asia-Pacific	28.0	80.5	+52.5
14	Benin	Africa	17.5	70.0	+52.5
15	Iceland	Europe	39.7	92.0	+52.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

The top fifteen risers show large, broad-based improvements from low starting points.

On average, these countries increased their total score by 59 points (median 58). Twelve of the fifteen began below 20 out of 100 in 2007 (and fourteen below 40 out of 100) and now average 76 out of 100, indicating substantial institutional and policy modernization over the period.

The fast-movers group is geographically diverse. Four countries from the Arab States region, five from Asia and the Pacific, two from Africa, two from Europe, and one each from the CIS,

and the Americas – showing that regardless of starting point countries can accelerate regulatory progress when reforms are well designed and effectively implemented.

Several cases illustrate the scale of change. Somalia (+77), Comoros (+69) and the Solomon Islands (+63) moved from very low initial levels to mid-to-high scores by 2024. Italy (+55) is the only country among these fifteen that also appears in the 2024 top-twenty ranking by total score, showing that dramatic improvement can coincide with high absolute performance.

These improvements typically accompany the creation or strengthening of independent regulatory authorities, the expansion of mandates (infrastructure sharing, broadcasting and Internet content and consumer protection) and the adoption of forward-looking instruments such as spectrum and licensing reforms. Countries aiming for rapid progress should prioritize a sequenced package that pairs stronger institutions with a modern regulatory toolkit.

What stands out: Top 15 raisers 2007-2024

- **The largest gains come from low starting points:** fast movers moved from very low scores to mid-to-high performance by 2024.
- **Rapid improvement is not region-specific:** major jumps occurred across multiple regions, indicating that starting position does not determine the ceiling.
- **Big leaps are typically associated with institutional strengthening plus modern market rules and competition safeguards,** rather than isolated reforms.

Leaderboards in key regulatory domains

Table 4 presents the top-20 countries’ total ICT Regulatory Tracker score in 2024 (with 2007 comparatives). The group’s 2024 totals are tightly clustered close to the goalpost (average 97, up from 75 in 2007, with an average gain of about 22 points).

Table 4: ICT Regulatory Tracker – Top 20 countries by pillar score, 2007 and 2024

Country	Region	Pillar I (max score 20)		Pillar II (max score 22)		Pillar III (max score 30)		Pillar IV (max score 28)		Total (max score 100)	
		2007	2024	2007	2024	2007	2024	2007	2024	2007	2024
Italy	Europe	11.0	20.0	7.0	22.0	10.0	30.0	17.0	28.0	45.0	100.0
Lithuania	Europe	16.0	20.0	16.5	21.5	20.0	30.0	26.0	28.0	78.5	99.5
Finland	Europe	17.0	19.0	17.5	22.0	16.0	30.0	24.0	28.0	74.5	99.0
Ireland	Europe	19.0	20.0	18.0	21.0	16.0	30.0	24.0	28.0	77.0	99.0
Belgium	Europe	18.0	20.0	17.5	20.0	28.0	30.0	26.0	27.0	89.5	97.0
Denmark	Europe	13.0	18.0	17.0	21.0	10.0	30.0	22.7	28.0	62.7	97.0
Dominican Rep.	Americas	17.0	19.0	17.5	20.0	16.0	30.0	24.0	28.0	74.5	97.0
Pakistan	Asia-Pacific	19.0	20.0	18.0	22.0	18.0	28.0	21.0	27.0	76.0	97.0
Portugal	Europe	19.0	19.0	18.0	20.0	19.0	30.0	27.0	28.0	83.0	97.0
Saudi Arabia	Arab States	17.0	18.0	18.5	22.0	13.0	30.0	6.7	27.0	55.2	97.0

Table 4: ICT Regulatory Tracker – Top 20 countries by pillar score, 2007 and 2024 (continued)

Country	Region	Pillar I (max score 20)		Pillar II (max score 22)		Pillar III (max score 30)		Pillar IV (max score 28)		Total (max score 100)	
Norway	Europe	18.0	20.0	15.0	19.5	20.0	30.0	27.0	27.0	80.0	96.5
Brazil	Americas	16.0	20.0	16.5	19.0	20.0	29.0	23.3	28.0	75.8	96.0
France	Europe	17.0	18.0	17.5	20.5	24.0	30.0	25.0	27.0	83.5	95.5
Switzerland	Europe	18.0	20.0	15.0	18.5	22.0	30.0	23.0	27.0	78.0	95.5
United Kingdom	Europe	19.0	20.0	16.5	19.5	20.0	28.0	23.0	28.0	78.5	95.5
Malta	Europe	16.0	19.0	17.5	20.0	20.0	28.0	28.0	28.0	81.5	95.0
Romania	Europe	17.0	19.0	19.0	21.0	18.0	28.0	27.0	27.0	81.0	95.0
Trinidad and Tobago	Americas	12.0	20.0	12.0	21.0	10.0	28.0	21.0	26.0	55.0	95.0
Australia	Asia-Pacific	18.0	19.0	21.5	19.5	22.0	30.0	22.0	26.0	83.5	94.5
Germany	Europe	15.0	17.0	20.0	20.5	22.0	30.0	23.0	27.0	80.0	94.5

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

What stands out: Leaderboards in key regulatory domains

As shown in the table, 14 of the 20 countries are from Europe, joined by three from the Americas, and one each from the Arab States, South Asia, and Asia and the Pacific – evidence that high regulatory performance is now geographically broader than in the 2007 baseline.

The pillar profile of today’s leaders is distinctive. Most countries sit at or are near the ceiling of Pillar III (regulatory regime / instruments): in 2024, 14 countries score the maximum 30, one scores 29, and five score 28. Pillar I (institutional arrangements) is uniformly strong, with 2024 values between 17 and 20. Pillar II (regulatory mandates) shows steady convergence toward the upper bound (19 – 22 across the group), while Pillar IV (competition framework) displays the widest remaining variation (26-28). On average across these countries, Pillar III contributes the largest improvement since 2007 (about eleven points), followed by Pillar IV (about four points), Pillar II (about four points), and Pillar I (about three points).

There is clear persistence among leaders alongside strong progress by newcomers.

Twelve of the twenty countries had 2007 totals below 80 points yet now achieve scores in the mid-to high-nineties. Examples include Italy (from 45 to 100), Saudi Arabia (from about 55 to 97), Trinidad and Tobago (from 55 to 95), and Denmark (from about 63 to 97). Others, such as Belgium, France, Norway, and the United Kingdom, were already strong performers in 2007 and have moved closer to the ceiling by 2024. Germany enters at the threshold (tied on the 2024 total with the Netherlands) with a balanced pillar profile and a full 30 on Pillar III.

Two implications follow. First, progress among advanced countries is driven less by institutional redesign alone and more by the accumulation of the full set of regulatory tools such as licensing and spectrum reforms, infrastructure sharing, competition and consumer-protection instruments. Second, closing the last few points to the advanced tier depends on continued

work in Pillar II and Pillar IV, where variation remains. Clarifying mandates and deepening complementary competition-focused policies help translate institutional strength into sustained, measurable gains.

What stands out: Leaderboards in key regulatory domains

- **High performers converge most strongly on regulatory tools (Pillar III):** near-ceiling scores suggest the 'core toolkit' is the defining feature of top regulatory maturity.
- **Institutional setup is consistently strong among leaders (Pillar I),** while mandates (Pillar II) and competition frameworks (Pillar IV) are where variation remains.
- **Closing the last distance to the top tier depends less on creating institutions and more on deepening mandates and competition practice** to translate rules into consistent market outcomes.

2.3 Velocity of change: generational transition paths

This subsection examines the speed at which countries move between the four generations of regulation and the number of upgrade steps countries take over the period 2007-2024 (or their transition paths). Each country's regulatory generation in 2007 is compared with its regulatory generation in 2024, thereby capturing transitions from G1, G2 or G3 to higher tiers.

For the purposes of the analysis, countries are grouped into cohorts based on their regulatory generation in 2007. The G1, G2, G3 and G4 cohorts therefore comprise all countries that begin the period in first-, second-, third- and fourth-generation regulation, respectively. The country cohort tables are included in Annex 2.

Upward mobility of countries across regulatory generations

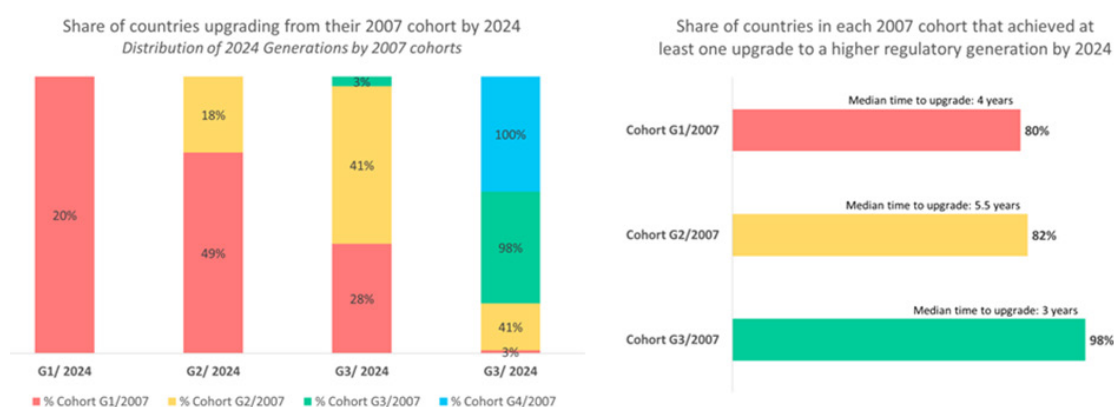
Overall, movement across regulatory generations has been broad-based rather than concentrated. The evolution of telecommunication/ICT regulation shows predominantly forward movement, with few reversals, over 2007-2024.

Figure 3 summarises this upward mobility in two complementary ways. The Panel in **Figure 3 (left chart)** shows, for each 2007 cohort, *how* countries are distributed across the four generations by 2024.

- each **colour** corresponds to the generation cohort countries have started from in 2007 (G1, G2, G3 or G4), and
- the **bars** show the percentage of cohorts attaining each generation by 2024.

The easiest way to read the figure is to pick one colour (one cohort) and follow its segments from left to right to see how much of that cohort remains at its starting generation and how much has moved up the ladder.

Figure 3: Movement of countries across generations of regulation, 2007-2024



Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Percentages are rounded; totals may not always add up to exactly to 100 per cent.

Figure 3 (right chart) focuses on **when** countries first move up. For each 2007 cohort (G1, G2 and G3), the bar shows the share of countries that achieve at least one upgrade between 2007 and 2024, and the label above each bar reports the median number of years it takes to reach that first upgrade.

Taken together, the two panels reveal distinct mobility patterns for each starting position:

- G1 cohort (starting in the G1 tier).** By 2024, 20 per cent of these countries remain in G1, 49 per cent have moved up one level to G2, 28 per cent have reached G3, and 3 per cent have reached G4. In other words, four out of five countries starting from the lowest regulatory generation have upgraded at least once, and nearly one-third have climbed two or more generations. Examples include **Azerbaijan** and **Bangladesh** moving from the G1 to the G2 tier; **Benin** and **Bolivia** progressing to the G3 tier; and **Costa Rica** and **Iceland** reaching the G4 tier. Countries such as **Andorra**, **Antigua and Barbuda** and **Cuba** remain in the G1 tier in 2024. Panel 3(b) shows that around 80 per cent of the G1 cohort experience at least one upgrade, with a median time of **four years** to the first step up.
- G2 cohort (starting in the G2 tier).** In 2024, 18 per cent of this cohort are still in the G2 tier, while 41 per cent have moved to the G3 tier and another 41 per cent have reached the G4 tier. This indicates particularly strong upward mobility from the middle of the distribution: more than four out of five 2007 G2-tier countries now have reached the two highest generations. Among them, **Angola** and **Botswana** move from the G2 to the G3 tier, while **Albania**, **Argentina** and **Armenia** advance to the G4 tier. Countries such as **Afghanistan**, **Algeria** and **Bhutan** remain in the G2 tier. As Panel 3(b) highlights, about 82 per cent of the G2 cohort achieve at least one upgrade, with a median time of **5.5 years** to the first upgrade.
- G3 cohort (starting in the G3 tier).** This cohort converges rapidly at the top. Only one country, **Saint Vincent and the Grenadines**, remains in the G3 tier by 2024, while 98 per cent of countries in this cohort have advanced to the G4 tier. The group includes a wide range of countries such as **Australia**, **Brazil**, **Canada**, **Finland** and many European Union member States, all of which now sit in the highest generation. Their upgrade to G4 was quicker than for the lower tier cohorts, with a median time of **three years** to the move to G4 (Panel 3(b)).
- G4 cohort (starting in the G4 tier).** Only one country – **Belgium** – was in G4 already in 2007 and it remains in G4 in 2024, highlighting the stability of the original frontrunner. At the same time, the full time series reveals that few countries that reached G4 during the period did not stay there. **Mexico** is a notable example: it rises from the G1 tier in the early 2000s to the G4 tier between 2015 and 2022 but regresses to G3 in 2024 because of the dismantling of the separate ICT regulator and therefore the lower resulting Pillar 1 score.

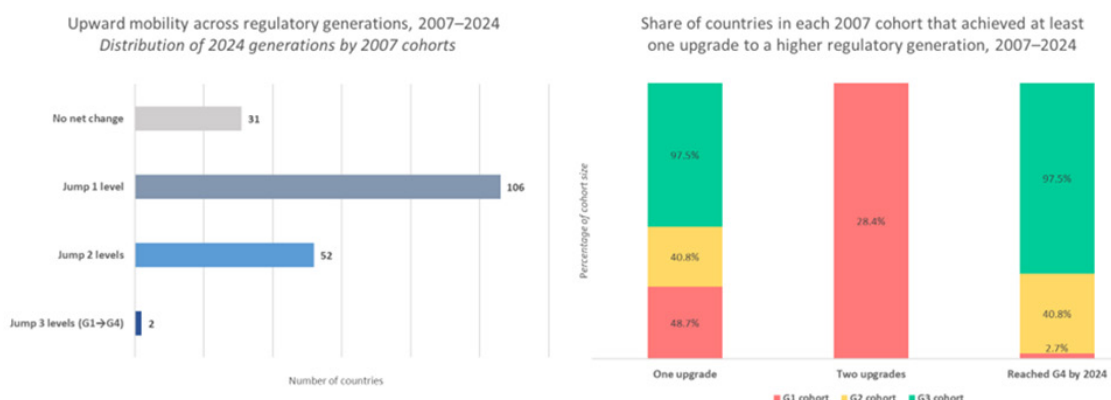
What stands out: Upward mobility across regulatory generations

- **Upgrading is the norm:** most countries moved up at least one generation between 2007 and 2024, with very few reversals.
- **Starting position shapes speed and results:** countries already in G3 in 2007 typically reached G4 quickly, while countries starting in G1-G2 tend to move more gradually.
- **Transitions are concentrated in the middle of the distribution:** movement from G2 into G3 and G4 accounts for a large share of overall progress.
- **Broad-based upward mobility:** around four in five countries starting in G1 or G2 upgraded at least once by 2024.
- **Strong convergence at the top:** almost all countries that started in G3 in 2007 reached G4 by 2024.
- **G4 is generally 'sticky',** with limited cases of regression and clear institutional explanations when it occurs.

How far countries moved: depth of upgrade

Where the previous analysis focuses on **who moved and when**, **Figure 4** looks at **how far** countries moved on the generational ladder. Panel **4(a)** groups countries by their net change in generation between 2007 and 2024 and shows how many fall into each category.

Figure 4: Depth of upgrade in generation of regulation, 2007-2024



Source: ITU ICT Regulatory Tracker (2007-2024)

- **No net change.** Thirty-one countries or 15 per cent of countries worldwide show no net change in generation over the period. This group includes countries that remain at the lower end of the spectrum, such as **Andorra**, **Antigua and Barbuda** and **Cuba**, which stay in the G1 tier, as well as countries that are already relatively advanced, such as **Saint Vincent and the Grenadines** (remaining in the G3 tier) and **Belgium**, which starts and ends the period in the G4 tier.
- **Jump 1 tier.** A total of 106 countries advance by exactly one tier (for example, from G1 to G2 or from G2 to G3). Among these, **Ethiopia** and **Kazakhstan** move from the G1 to the G2 tier, while **Mongolia** and **Tunisia** progress from the G2 to the G3 tier. These cases illustrate steady but incremental institutional change, often reflecting the gradual strengthening of sector-specific regulators and basic competition safeguards.
- **Jump 2 levels.** Fifty-two countries move up by two tiers (G1 to G3, G1 to G4, or G2 to G4). For instance, **Kuwait** and Zimbabwe progress from the G1 to the G3 tier, while **Bahamas** and **Egypt** move from the G2 directly to the G4 tier over the period. Such two-step

leaps typically reflect broader reforms that extend regulatory mandates, introduce more sophisticated market oversight and deepen coordination.

- **Jump 3 levels.** Two countries make a three-tier leap from G1 in 2007 to G4 in 2024. **Costa Rica** and **Iceland** both follow this trajectory, transforming from first-generation environments into fully fledged, fourth-generation regulatory frameworks within less than two decades.
- No country ends 2024 in a lower generation than in 2007.

Panel **4(b)** then shows *how* these movements are distributed across the starting cohorts. It presents, for each type of upgrade (exactly one tier, exactly two tiers, and arrival in G4 regardless of the number of steps), the percentage contribution of the G1, G2 and G3 cohorts. This highlights which starting positions account for most of the action:

- **Among countries that jump one tier**, almost half originate in the G1 cohort and about two-fifths in the G2 cohort, reflecting cases such as **Azerbaijan, Bangladesh, Angola** and **Botswana**.
- **For two-tier jumps**, the G1 and G2 cohorts again lead, with examples such as **Bolivia, Jordan** and **Malawi**, highlighting sizeable catch-up from lower starting points.
- **Among countries that end in the G4 tier**, nearly all come from the G2 and G3 cohorts, including countries like **Brazil, India** and Malaysia, with a smaller contribution from early movers in the G1 cohort such as **Costa Rica** and **Iceland**.
- **Upward mobility is widespread:** 82 per cent or 160 countries have moved at least one generation upwards since 2007, and 28 per cent or 54 countries have progressed by two or more generations.
- Viewed together, Figure 4 reinforces the conclusion that **upgrades are the norm rather than the exception**.
- **Most countries experience at least one upward shift in regulatory generation**, and a substantial number make two-step or even three-step moves over the 17-year period.
- **Countries starting in higher generations tend to upgrade faster**, while those starting from lower generations often take more time to step up to higher generations of regulation, together driving the broad-based diffusion of more mature regulatory practices worldwide.

What stands out: How far countries moved: depth of upgrade

- **Most countries advanced, but primarily in single steps:** one-tier upgrades are the most common pathway.
- **A significant minority made two-tier or larger jumps**, demonstrating that accelerated transitions are possible under comprehensive reform packages.
- **Countries starting lower tend to move more slowly but account for most multi-step catch-up**, while countries starting higher tend to upgrade faster but have less room to move.

2.4 Periods of acceleration and plateaus, contextualized by major global events

Regulatory reform activity has not been constant over time. Between 2007 and 2024, the ICT Regulatory Tracker records distinct **waves of upgrades** separated by periods of consolidation.

Because the data is biennial during the period 2020-2024, movements are measured relative to the previous observed year (for example, 2022 is compared with 2020, 2024 with 2022).

Two broad acceleration episodes stand out in the data:

- an early wave in the years following the **global financial crisis (2008-2010)**, and
- a later wave in the **immediate post-COVID period (2022)**, when many countries updated their formal regulatory frameworks in response to the crisis.

These dynamics are first described at the aggregate level (Figure 5), then decomposed by pillar (Figure 6), and finally examined for a specific cohort with substantial headroom for change - countries still in G2 in 2019 (Table 5).

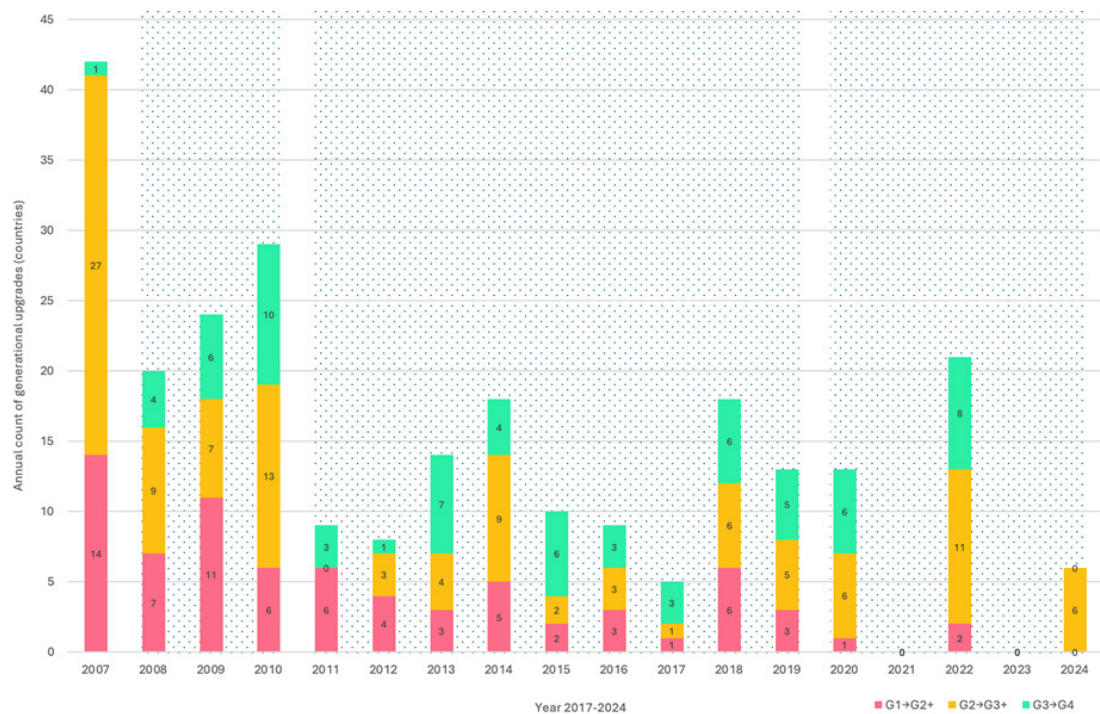
Upgrade waves over time

Figure 5 introduces the timing and magnitude of regulatory movement. Each bar shows the **annual number of countries that move up at least one generation**, broken down by transition type:

- upgrades from **G1 to G2 or higher (G1 → G2+)**,
- from **G2 to G3 or higher (G2 → G3+)**, and
- from **G3 to G4 (G3 → G4)**.

Because the observations are every two years for the period 2020-2024, there are no bars for 2021 and 2023; the bars labelled 2022 and 2024 reflect upgrades accumulated since 2020 and 2022, respectively.

Figure 5: Upgrade waves and ICT regulatory reform momentum, 2007-2024 - Annual upgrade counts (stacked by transition)



Source: ITU ICT Regulatory Tracker (2007-2024)

The pattern unfolds in three phases:

- **2008-2010 - post-crisis acceleration.** The first years after 2007 show high regulatory activity, also translating into multiple upgrades out of the G1, G2 and the G3 tier. This phase is characterised by countries strengthening basic regulatory authority functions and mandates (Pillars I-II) and adopting more structured market rules under Pillar III, such as clearer licensing frameworks and more predictable spectrum and interconnection arrangements. Several countries that are now in the G4 tier, including Colombia, **Estonia**, Kenya and **Pakistan**, begin to consolidate their reforms in this period.
- **2011-2019 - extended consolidation with steady upgrades.** Annual upgrades are moderate in numbers compared with the immediate post-crisis spike but remain positive. The composition gradually shifts: the G1 to G2+ tier transitions become less dominant, while the G2 to G3+ upgrades and the G3 to G4 upgrades become more frequent. This corresponds to more systematic application of competition-oriented instruments within Pillar III and IV indicators, such as strengthened conditions for market entry, wholesale access and other pro-competitive safeguards. Countries such as Rwanda, **Thailand**, **Saudi Arabia**, and **South Africa** illustrate this gradual, multi-step progression.
- **2020-2024 - post-COVID acceleration.** After a relatively quiet 2019, the bar for 2022 shows increased regulatory activity driving mainly G2 to G3+ upgrades and G3 to G4 upgrades. Many regulators formalize changes first introduced during the COVID-19 period: for example, clarifying regulatory responsibilities, tightening quality-of-service and transparency rules, or adjusting authorization and spectrum management frameworks captured under Pillars II-IV. The 2024 bar suggests that this momentum continued at a slower pace, particularly in parts of **sub-Saharan Africa**, **Latin America and the Caribbean**, where several countries consolidated their move from the G2 tier towards the G3 and G4 tiers.

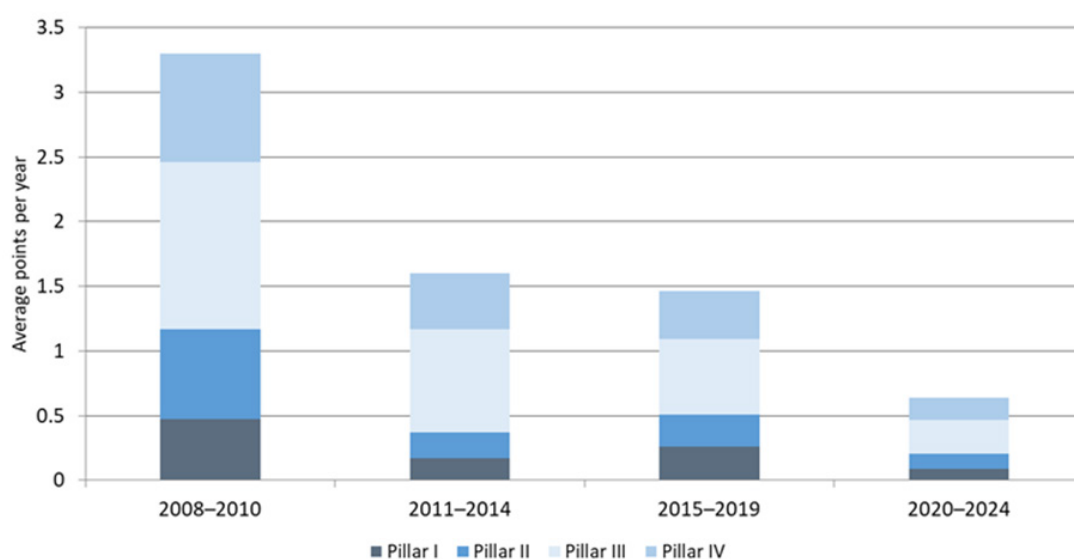
What stands out: Upgrades over time

- **Regulatory reform occurs in waves rather than at a constant pace**, with acceleration episodes separated by consolidation periods.
- **Two acceleration episodes stand out: an early post-financial-crisis wave and a post-COVID wave**, with the latter concentrated in countries with remaining headroom (notably G2).
- **Later waves reflect a shift from basic institution-building to deeper market and competition reforms.**
 - **2008-2010:** rapid early movement out of G1 as many countries established basic regulatory functions and foundational market rules.
 - **2011-2019:** steady consolidation with gradual upgrading and a growing emphasis on competition-oriented measures.
 - **2020-2024:** renewed momentum post-COVID, driven mainly by G2 → G3+ and G3 → G4 upgrades, followed by slower consolidation.

Which pillars drive each wave?

To understand what lies behind the upgrade waves, **Figure 6** breaks down global improvements in the ICT Regulatory Tracker by **pillar** over four periods: 2008-2010, 2011-2014, 2015-2019 and 2020-2024. Each stacked bar in Figure 6 shows the **average annual gain in points per year** for Pillars I-IV; each stack sums to the total annual improvement in the composite score for that window.

Figure 6: Average annual gains on the ICT Regulatory Tracker, by pillar and period



Source: ITU ICT Regulatory Tracker (2007-2024)

The figure can be read vertically (how much progress per year) and by colour (which pillar accounts for what share of the growth):

- Pillar III - Regulatory regime.** This thematic area is the largest contributor in every period, pointing to the sustained progress in enhancing foundational ICT regulatory frameworks. Gains here reflect reforms in the rules governing market operation, such as changes in licensing, interconnection, numbering, universal service mechanisms, and spectrum assignment conditions. The strong contribution of Pillar III in 2008-2010 and 2011-2014 signals that modernizing the core ruleset for telecommunication/ICT markets stood out as priority for many countries during these years.
- Pillar IV - Competition framework.** Structural market reforms have accelerated over time, especially from **2015-2019** and into **2020-2024**. The gains in this area reflect the introduction or strengthening of competition safeguards captured in the ICT Regulatory Tracker, including clearer criteria for significant market power, more consistent ex-ante and ex-post remedies, and greater openness to new service providers.
- Pillar II - Regulatory mandate.** Starting from a relative higher baseline in 2007, the expansion of regulatory mandates shows modest but growing contributions across periods, with a noticeable uptick in **2020-2024**. This is consistent with an expansion or clarification of regulators' formal remits within the broader digital sector - for example, oversight of additional ICT services and networks or more explicit responsibilities for consumer and quality-of-service oversight as codified in sector legislation and secondary regulation.
- Pillar I - Regulatory authority.** This area captures institutional features such as the existence of a dedicated regulator, its degree of formal independence, financing model and consultation practices. These elements tend to change less frequently, which explains their more gradual upward trend over the full period. Also, as most of today's ICT regulators - 130 - were already established by 2007, most countries had relatively higher original scores. During the first upgrade wave from 2008 to 2010, 20 new regulators were created, driving the highest relative activity over the period. Just 11 ICT regulators have been established since 2010 and making an incremental contribution to ongoing regulatory reforms, bringing the number of separate ICT regulators to 166 in 2024.

What stands out: Regulatory areas driving upgrade waves

- **Regulatory tools and market rules (Pillar III) drive progress in every period**, making them the most consistent engine of upward movement.
- **Competition frameworks (Pillar IV) become increasingly important over time**, especially from 2015 onward.
- **Institutional features and mandates (Pillars I-II) improve more gradually**, reflecting higher starting baselines and less frequent structural change.

A closer look at the 2019 G2 cohort

The upgrade waves in Figure 5 and the pillar contributions in Figure 6 above suggest that the post-COVID acceleration is strongest where there was still room to move up the generational ladder. To examine this more closely, Table 5 below shows countries that were in the G2 tier in 2019 and tracks how far they progressed by 2022 and 2024. This 'G2-in-2019' cohort comprises 70 countries (see Annex 3).

Table 5: Cohort outcomes for countries starting in the G2 tier in 2019: shares of countries moving generations and mean pillar deltas to 2024

Metric	Value
Cohort size (number of countries starting in the G2 tier in 2019)	70
Share of countries moving from G2 to at least G3 by 2022	22.9 %
Share of countries moving from G2 to at least G3 by 2024	30.0 %
Mean Δ Pillar I (2019 \rightarrow 2024)	+0.50
Mean Δ Pillar II (2019 \rightarrow 2024)	+0.70
Mean Δ Pillar III (2019 \rightarrow 2024)	+1.70
Mean Δ Pillar IV (2019 \rightarrow 2024)	+1.60
Mean Δ Overall (2019 \rightarrow 2024)	+4.49

Source: ITU ICT Regulatory Tracker (2007-2024)

The table presents three groups of indicators drawn directly from the ICT Regulatory Tracker.

Share of countries moving up a generation. A significant portion of the cohort has progressed from the G2 tier to a higher generation.⁹ By **2,022**, about **23 per cent** of countries that were in the G2 tier in 2019 had already moved up to the G3 tier. By **2024**, this proportion rises to **30 per cent**, meaning that almost one in three countries in this cohort has reached the G3 tier within five years.

⁹ In practice, all upward moves are from the **G2 tier to the G3 tier** (no country in this cohort reaches the G4 tier by 2024).

Average pillar changes (2019 through to 2024). Across the cohort, average gains are positive in all four pillars but strongest in:

- **Pillar III - Regulatory regime:** +1.70 points
- **Pillar IV - Competition framework:** +1.60 points
- **Pillar II - Regulatory mandate:** +0.70 points, and
- **Pillar I - Regulatory authority:** +0.50 points

Overall composite change. On average, the total Tracker score for the cohort increases by an average of **4.5 points** between 2019 and 2024, confirming that regulatory frameworks were getting increased attention over the period.

These results point to a **post-COVID-19 reform push among second-generation regulators.** Countries in the G2 tier in 2019 most often:

- tighten and expand the rules that govern market entry and operation (Pillar III),
- reinforce competition safeguards (Pillar IV), and
- in many cases, adjust their formal mandates and institutional features as reflected in Pillars I and II.

Examples include **Angola, Benin, Bolivia, Cambodia, Mozambique, Uruguay, and Viet Nam**, which all move from the G2 to the G3 tier while registering sizeable pillar gains.

What stands out: What stands out: A closer look at the 2019 G2 cohort

- Overall, the G2-in-2019 cohort reinforces the period analysis: **countries taking early market reforms off the ground in the midst of COVID-19 have capitalized the most on post-pandemic reforms.** upgrading the institutional, mandate, regime and competition elements measured by the ICT Regulatory Tracker.
- **Post-COVID upgrading is strongest where countries were still in G2:** by 2024, about one in three G2-in-2019 countries had moved to at least G3.
- **The biggest gains in this cohort are in regulatory tools and competition safeguards (Pillars III-IV),** with smaller but positive changes in mandates and institutional features.
- **The cohort confirms the broader pattern:** the fastest recent progress comes from tightening market rules and competition practice, not from institutional redesign alone.

3 Regional trajectories and profiles

Regional dynamics provide a complementary view to the global evolution of ICT regulation described in Section 2. By examining trends across the six ITU regions – Africa, Americas, Arab States, Asia and the Pacific, CIS, and Europe – the analysis highlights how regulatory maturity has diffused across diverse institutional, economic and market landscapes.

This section presents regional averages for 2007 and 2024 (Table 6), compares pillar-level strengths and gaps across regions (Table 7), and illustrates how these translate into country-level performance within each region. Taken together, the results indicate an across-the-board improvement, while revealing distinct regional patterns in the pillar-level drivers of progress.

3.1 Regional progression in overall regulatory maturity

Table 6 shows the regional averages for the overall ICT Regulatory Tracker score for 2007 and 2024. All regions show strong improvement over the 17-year period, but the scale and depth of progress vary across countries and regions.

Table 6: ICT Regulatory Tracker (overall score): Regional averages, 2007 vs 2024 and progress

Region	2007 (average score)	2024 (average score)	% change
Europe	68.4	88.1	28.8
Americas	47.7	74.3	56
Africa	41.5	71.5	72.2
Asia-Pacific	36.5	66.3	82
Arab States	34.3	63.8	85.7
CIS	33.1	52.4	58.4

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

Notes: Averages are simple (unweighted) country means by region for the indicated year, using all economies with data in that year.

Europe remains the highest-scoring region and continues to set the benchmark for integrated regulatory frameworks, rising from an overall score of 68.4 to 88.1. **The Americas** score progressed from 47.7 to 74.3, reflecting broad modernization in regulatory regimes, including for licensing and competition safeguards.

Africa, Asia and the Pacific, and **the Arab States** are regions that started at lower baselines but show the largest relative gains: +72 per cent, +82 per cent and +86 per cent, respectively. These gains reflect structural reforms to regulatory mandates, more explicit competition frameworks, and wider adoption of spectrum management and market-entry tools. The **CIS** region score improves more gradually, from 33.1 to 52.4, with progress most evident in countries that expanded competition and consumer-protection measures.

What stands out: Regional trajectories and profiles

- **All six ITU regions improved markedly between 2007 and 2024**, confirming that regulatory modernization has diffused globally.
- **Regional patterns differ in pace and depth**, reflecting varied institutional starting points, market structures and reform sequencing.
- **Across regions, progress is increasingly driven by 'how markets are regulated'** (rules and competition safeguards), not only by institutional set-up.
- Europe remains the highest-performing region and continues to set the benchmark for integrated regulatory frameworks in 2024.
- Regions that started furthest behind in 2007 improved the most in relative terms - notably the Arab States, Asia and the Pacific, and Africa - indicating meaningful convergence from lower baselines.
- The Americas show strong, broad-based modernization, with significant gains consistent with stronger licensing frameworks and competition safeguards.
- CIS improved more gradually and remains the lowest regional average, with progress concentrated in a subset of reforming countries rather than evenly distributed.

3.2 Pillar profiles: how regions strengthened their regulatory frameworks

Table 7 provides the pillar-level decomposition of regional averages. A consistent pattern emerges across all six regions:

- **Pillar III (Regulatory Regime)** and **Pillar IV (Competition Framework)** account for the largest gains;
- **Pillar I (Regulatory Authority)** and **Pillar II (Regulatory Mandates)** show slower, structural improvements.

Table 7: ICT Regulatory Tracker: Regional averages by pillar (2007 vs 2024)

Region	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
Africa	10.9	16.0	12.6	18.1	6.1	18.1	11.9	19.3
Arab States	8.9	13.57	10.7	15.79	7.9	17.9	6.9	16.5
CIS	7.6	9.26	9.76	12.4	4.94	13.6	10.86	17.26
Asia-Pacific	8.4	12.8	10.8	16.3	6.1	18.2	11.2	18.9
Europe	15.3	17.3	14.8	18.4	16.44	26.8	21.8	25.6

Table 7: ICT Regulatory Tracker: Regional averages by pillar (2007 vs 2024) (continued)

Region	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
Americas	12.2	15.6	12.2	16.4	8.4	19.9	14.9	22.4
World	11.2	15.0	12.3	17.0	8.9	20.2	13.9	20.8

Source: ITU ICT Regulatory Tracker (2007-2024)

Africa shows large increases in Pillars III and IV, mainly reflecting reforms in interconnection, infrastructure sharing and spectrum management frameworks. **Asia and the Pacific** has achieved strong gains in all pillars, especially in Pillar III where many countries introduced clearer conditions for market entry and wholesale access. **The Arab States** have advanced steadily, with Gulf countries achieving high scores in Pillars III and IV and North African countries showing consistent strengthening of regulatory mandates. **The Americas** also records significant progress in Pillar III and Pillar IV, consistent with the region’s focus on competition safeguards and market-entry conditions. **CIS** countries show improvements in Pillars II and IV but continue to lag behind in implementing basic reforms such as unified licensing frameworks. **Europe** remains the leading region across all four pillars with near-ceiling performance in Pillar III.

What stands out: Pillar profiles: how regions strengthened their regulatory frameworks

- **Across all regions, the largest gains are in Pillar III (Regulatory regime) and Pillar IV (Competition framework)**, reflecting the diffusion of modern market rules and competition-oriented oversight.
- **Pillars I (Regulatory authority) and II (Regulatory mandates) improved steadily but more slowly**, consistent with the longer timelines required for institutional and legal consolidation.
- **Europe’s profile is near-ceiling in the core regulatory toolkit (Pillar III)**, while remaining variation is concentrated in mandates and competition practice.
- **Africa, the Americas, Asia-Pacific, and the Arab States show their strongest momentum in Pillars III-IV**, indicating that recent progress is increasingly about the depth and quality of market regulation, not only the existence of institutions.
- **CIS continues to lag on core market reforms**, suggesting that incomplete adoption of foundational instruments (e.g., unified licensing and wholesale access frameworks) remains a key constraint.

3.3 Regional profiles

The following subsections describe each region’s regulatory trajectory.

Africa

Africa’s ICT regulatory frameworks show overall improvement trend (Table 8). Almost all countries improved markedly between 2007 and 2024, with several achieving substantial progress in competition rules and spectrum management. Countries such as **Kenya, Nigeria, Rwanda,**

South Africa and Uganda reached advanced levels of regulatory maturity and graduate to G4 by strengthening licensing frameworks, expanding regulatory mandates and enhancing enforcement mechanisms. Overall, however, progress is uneven across the continent, with 14 countries remaining in the G2 tier also by 2024, where institutional independence and competition safeguards remain less developed.

Table 8: ICT Regulatory Tracker scores - Africa region, 2007 and 2024

Country	2007	2024
Angola	55.7	75.7
Benin	17.5	70
Botswana	60	82
Burkina Faso	57	84
Burundi	17.3	60.7
Cabo Verde	49	74
Cameroon	41	75.7
Central African Republic	25.5	53.5
Chad	36.3	58.7
Congo (Republic of the)	18	68.7
Côte d'Ivoire	51.8	74
Democratic Republic of the Congo	35	70
Equatorial Guinea	13.5	50
Eritrea	14	14
Eswatini	17.5	79
Ethiopia	13.5	52
Gabon	37	64
Gambia	54.3	72.7
Ghana	65	81
Guinea	24.3	76.3
Guinea-Bissau	33.3	50.3
Kenya	63.5	93
Lesotho	55.5	70.5
Liberia	36.7	82.3
Madagascar	55	69.5
Malawi	57.5	87.5
Mali	45.5	67
Mauritius	66.5	80.5
Mozambique	50.2	70.5

Table 8: ICT Regulatory Tracker scores - Africa region, 2007 and 2024 (continued)

Country	2007	2024
Namibia	23.5	68.7
Niger	29	68
Nigeria	69.5	92
Rwanda	68.7	85.7
Sao Tome and Principe	44	72.7
Senegal	59	82.7
Seychelles	37.7	79.5
Sierra Leone	20.2	61.2
South Africa	41.3	88
South Sudan	-	53.2
Sudan	47.5	75.5
Tanzania	56.3	81.7
Togo	30	71.7
Uganda	56	85
Zambia	43.2	78.3
Zimbabwe	39.7	70.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

Table 9 illustrates that gains occur across all pillars, with particularly strong improvements in **Pillars III and IV**, driven by reforms in interconnection, infrastructure sharing, quality of service (QoS) regulation, numbering and spectrum regulations. Although **Pillar I** and **Pillar II** have also improved, they remain the main areas where institutional capacity and mandate clarity require further reinforcement.

Table 9: ICT Regulatory Tracker Scores by Pillar - Africa Region, 2007 and 2024

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
Angola	14	14	19	20	12	22	10.7	19.7
Benin	6	18	7.5	18	0	20	4	14
Botswana	14	20	17	22	10	20	19	20
Burkina Faso	13	20	15	19	12	18	17	27
Burundi	5	12	7	16	0	12	5.33	20.7

Table 9: ICT Regulatory Tracker Scores by Pillar - Africa Region, 2007 and 2024 (continued)

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)			Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)
Cabo Verde	14	16	19	20	11	17	5	21
Cameroon	13	19	15	20	4	22	9	14.7
Central African Rep.	8	14	5.5	15.5	0	7	12	17
Chad	11	14	10	19	6	14	9.4	11.7
Congo (Republic of the)	0	17	4	16	0	16	14	19.7
Côte d'Ivoire	15	19	15.5	19	4	18	17.4	18
Democratic Republic of the Congo	13	12	15	17	4	16	3	25
Equatorial Guinea	0	13	8.5	16	0	12	5	9
Eritrea	2	2	6	6	2	2	4	4
Eswatini	0	19	3.5	20	2	20	12	20
Ethiopia	9	13	2.5	15	2	8	0	16
Gabon	14	14	14	17	6	19	3	14
Gambia	16	17	17	19	10	18	11.3	18.7
Ghana	16	16	15	19	10	18	24	28
Guinea	0	15	6	18	0	21	18.3	22.3
Guinea-Bissau	8	15	10	12	2	6	13.3	17.3
Kenya	14	19	18.5	22	10	25	21	27
Lesotho	16	17	14.5	15.5	9	18	16	20
Liberia	15	22	9	19	4	22	8.7	19.4
Madagascar	14	16	16	16.5	12	20	13	17
Malawi	14	17	14.5	20.5	10	23	19	27
Mali	14	15	12.5	18	11	17	8	17
Mauritius	15	17	20.5	21.5	8	14	23	28
Mozambique	13	15	10.5	14.5	13	25	13.7	16
Namibia	9	20	9.5	18	2	22	3	8.7
Niger	2	14	10	16	4	20	13	18
Nigeria	18	19	19.5	22	12	26	20	25
Rwanda	17	20	18	21	15	20	18.7	24.7
Sao Tome and Principe	9	15	16	18	6	20	13	19.7

Table 9: ICT Regulatory Tracker Scores by Pillar – Africa Region, 2007 and 2024 (continued)

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)			Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)
Senegal	17	16	18	18	14	24	10	24.7
Seychelles	2	14	9	17.5	8	23	18.7	25
Sierra Leone	2	16	9.5	17.5	2	16	6.7	11.7
South Africa	12	18	17	22	2	26	10.37	22
South Sudan		13			16.5	4		19.7
Tanzania	15	18	14	20	8	20	19.3	23.7
Togo	12	14	10	18	2	21	6	18.7
Uganda	15	16	13	20	10	24	18	25
Zambia	15	16	13.5	20	4	22	10.7	20.3
Zimbabwe	16	18	15	21	0	18	8.7	13.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Pillar 1 ‘Regulatory Authority’ max score = 20; Pillar 2 ‘Regulatory Mandate’ max score = 22; Pillar 3 ‘Regulatory Regime’ max score = 30; Pillar 4 ‘Competition Framework’ max score = 28

What stands out: Regulatory trends in Africa

Africa’s trajectory demonstrates substantial catch-up from a low baseline: the majority of countries moved toward the G3-G4 tiers, with six countries achieving G4 status and many others closing the gap through sequenced reforms that consolidate the regulatory authority, modernize regulatory regimes and strengthen regulatory oversight.

Arab States

The Arab States show steady regulatory advancement (Table 10). By 2024, several Gulf Cooperation Council (GCC) member countries – including Saudi Arabia, Bahrain, Oman, Qatar and the UAE – operate some of the most advanced ICT regulatory frameworks globally. Arab States countries such as **Egypt, Morocco, and Tunisia** also recorded strong improvements, particularly in expanding regulatory mandates and improving competition frameworks. Five countries, however, remain in the least advanced generation of regulation, G1, struggling to launch foundational market reforms.

Table 10: ICT Regulatory Tracker scores - Arab States region, 2007 and 2024

Country	2007	2024
Algeria	43	66
Bahrain	69.5	87.5
Comoros	5.5	74.2
Djibouti	4.5	4.5
Egypt	58.7	87
Iraq	9	64.5
Jordan	68.3	86
Kuwait	16.3	76
Lebanon	4.5	20.3
Libya	2.5	12.7
Mauritania	48.5	66
Morocco	76	85.5
Oman	48	90
Palestine (State of)*	-	38.5
Qatar	31	73.2
Saudi Arabia	55.2	97
Somalia	0	77.5
Sudan	47.5	75.5
Syrian Arab Republic	23.5	43
Tunisia	47	75.8
United Arab Emirates	49.5	87
Yemen	13	15

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

*Palestine is not an ITU Member State; the status of Palestine in ITU is the subject of Resolution 99 (Rev. Dubai, 2018) of the ITU Plenipotentiary Conference

Pillar results in Table 11 show significant gains in **Pillar III (Regulatory Regime)** and **Pillar IV (Competition Framework)** across the region, reflecting more structured licensing, wholesale access, and spectrum policies. Lower-income or conflict-affected countries have improved but remain at early stages of regulatory maturity.

Table 11: ICT Regulatory Tracker Scores by Pillar – Arab States Region, 2007 and 2024

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
Algeria	18	18	13	16.5	6	22	6	9.5
Bahrain	17	17	17.5	17.5	14	26	21	27
Comoros	0	14	5.5	14.5	0	22	0	23.7
Djibouti	0	0	2.5	2.5	2	2	0	0
Egypt	16	19	17	19	10	23	15.7	26
Iraq	2	16	7	21.5	0	15	0	12
Jordan	18	19	15	20	21	25	14.4	22
Kuwait	0	20	10	21	1	18	5.3	17
Lebanon	2	2	2.5	10	0	7	0	1.3
Libya	0	0	2.5	6	0	2	0	4.7
Mauritania	16	16	12.5	15	13	17	7	18
Morocco	17	18	15	19.5	22	25	22	23
Oman	13	17	17	20	11	26	7	27
Palestine (State of)*	-	4		11.5		12		11
Qatar	9	15	13	18.5	8	24	1	15.7
Saudi Arabia	17	18	18.5	22	13	30	6.7	27
Somalia	0	16	0	19.5	0	14	0	28
Sudan	12	17	16.5	16.5	8	21	11	21
Syrian Arab Republic	2	16	4.5	15	4	6	13	6
Tunisia	18	19	11	15.5	12	23	6	18.3
United Arab Emirates	10	17	20.5	22	14	26	5	22
Yemen	0	0	3	3	6	8	4	4

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Pillar 1 'Regulatory Authority' max score = 20; Pillar 2 'Regulatory Mandate' max score = 22; Pillar 3 'Regulatory Regime' max score = 30; Pillar 4 'Competition Framework' max score = 28

*Palestine is not an ITU Member State; the status of Palestine in ITU is the subject of Resolution 99 (Rev. Dubai, 2018) of the ITU Plenipotentiary Conference

What stands out: Regulatory trends in Arab States

Growth is driven by the rapid modernization in GCC countries and strong improvements in North Africa, while gaps persist in fragile contexts. The region’s performance is characterised by high scores at the frontier but uneven progress across the full distribution.

Asia and the Pacific

Asia and the Pacific exhibits significant, widespread improvement between 2007 and 2024 (Table 12). Mature markets such as **Australia, Singapore, New Zealand, Japan, and Republic of Korea** improved further, while many middle-income countries – including **India, Thailand, Malaysia, Mongolia, and Viet Nam** – made sizeable gains from mid-level baselines. Several Pacific Island States also advanced, though at a slower pace due to scale and capacity constraints.

Table 12: ICT Regulatory Tracker scores - Asia and Pacific region, 2007 and 2024

Country	2007	2024
Afghanistan	45.3	66.3
Australia	83.5	94.5
Bangladesh	35.8	65.5
Bhutan	50.5	66.7
Brunei Darussalam	28.0	80.5
Cambodia	19.0	72.0
China	25.8	63.0
Fiji	20.5	61.0
Hong Kong, China	72.5	85.5
India	47.2	90.0
Indonesia	30.0	57.0
Iran (Islamic Republic of)	48.5	85.0
Japan	48.0	74.5
Kiribati	45.5	56.5
Republic of Korea	47.8	76.5
Lao P.D.R.	16.7	46.7
Malaysia	56.0	86.0
Maldives	45.3	60.5
Marshall Islands	13.0	23.5
Micronesia	11.0	57.0
Mongolia	43.3	75.2
Myanmar	6.8	67.5
Nauru		33.2
Nepal (Republic of)	41.0	58.3

Table 12: ICT Regulatory Tracker scores - Asia and Pacific region, 2007 and 2024 (continued)

Country	2007	2024
New Zealand	61.0	88.5
Pakistan	76.0	97.0
Palau	11.5	19.5
Papua New Guinea	22.0	63.5
Philippines	32.0	79.2
Sri Lanka	56.0	47.3
Samoa	46.7	71.8
Singapore	71.3	93.5
Solomon Islands	6.5	69.5
Thailand	46.7	87.7
Timor-Leste	8.0	50.5
Tonga	20.5	53.7
Tuvalu	8.0	12.3
Vanuatu	16.0	77.0
Viet Nam	22.2	71.8

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

Table 13 shows that the region has strengthened all four pillars, with especially marked progress in **Pillar III**, where many economies introduced robust market-entry rules, strengthened wholesale access obligations and adopted more transparent interconnection frameworks.

Table 13: ICT Regulatory Tracker Score by Pillar - Asia and the Pacific Region, 2007 and 2024

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
Afghanistan	14.0	12.0	15.0	20.0	3.0	13.0	13.3	21.3
Australia	18.0	19.0	21.5	19.5	22.0	30.0	22.0	26.0
Bangladesh	11.0	15.0	15.5	19.5	2.0	16.0	7.3	15.0
Bhutan	12.0	17.0	18.5	22.0	10.0	12.0	10.0	15.7
Brunei Darussalam	10.0	18.0	13.0	20.5	1.0	27.0	4.0	15.0
Cambodia	0.0	16.0	7.5	18.0	2.0	16.0	9.5	22.0
China	2.0	8.0	10.5	11.0	6.0	22.0	7.3	22.0

Table 13: ICT Regulatory Tracker Score by Pillar - Asia and the Pacific Region, 2007 and 2024 (continued)

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
Fiji	2.0	12.0	4.5	14.0	2.0	17.0	12.0	18.0
Hong Kong, China	18.0	18.0	16.5	17.5	14.0	22.0	24.0	28.0
India	17.0	20.0	11.5	16.0	4.0	26.0	14.7	28.0
Indonesia	8.0	6.0	9.0	11.0	2.0	14.0	11.0	26.0
Iran (Islamic Republic of)	14.0	19.0	17.0	19.0	9.0	28.0	8.5	19.0
Japan	2.0	8.0	5.0	11.5	18.0	28.0	23.0	27.0
Kiribati	11.0	11.0	18.5	18.5	4.0	12.0	12.0	15.0
Republic of Korea	15.0	10.0	10.5	15.5	8.0	30.0	14.3	21.0
Lao P.D.R.	2.0	2.0	5.0	12.0	4.0	16.0	5.7	16.7
Malaysia	15.0	19.0	13.0	20.0	10.0	25.0	18.0	22.0
Maldives	10.0	13.0	19.0	19.5	10.0	13.0	6.3	15.0
Marshall Islands	0.0	4.0	2.0	6.5	2.0	4.0	9.0	9.0
Micronesia	0.0	15.0	1.0	22.0	0.0	10.0	10.0	10.0
Mongolia	13.0	18.0	13.0	20.5	8.0	19.0	9.3	17.7
Myanmar	0.0	7.0	4.5	17.5	2.0	15.0	0.3	28.0
Nauru		5.0		11.5		4.0		12.7
Nepal (Republic of)	13.0	15.0	16.0	18.0	2.0	14.0	10.0	11.3
New Zealand	15.0	18.0	6.0	16.5	16.0	26.0	24.0	28.0
Pakistan	19.0	20.0	18.0	22.0	18.0	28.0	21.0	27.0
Palau	0.0	4.0	7.5	7.5	2.0	6.0	2.0	2.0
Papua New Guinea	6.0	17.0	8.0	19.5	0.0	13.0	8.0	14.0
Philippines	6.0	17.0	10.0	18.5	4.0	24.0	12.0	19.7
Sri Lanka	16.0	7.0	19.0	12.0	6.0	10.0	15.0	18.3
Samoa	14.0	15.0	17.0	19.5	12.0	22.0	3.7	15.3
Singapore	17.0	17.0	18.0	21.5	14.0	28.0	22.3	27.0
Solomon Islands	0.0	13.0	3.5	17.5	0.0	18.0	3.0	21.0
Thailand	18.0	20.0	13.5	20.0	7.0	25.0	8.2	22.7
Timor-Leste	0.0	12.0	4.0	13.5	0.0	15.0	4.0	10.0
Tonga	0.0	4.0	4.5	10.0	0.0	19.0	16.0	20.7
Tuvalu	0.0	0.0	3.0	3.0	0.0	4.0	5.0	5.3
Vanuatu	0.0	15.0	4.0	22.0	0.0	14.0	12.0	26.0

Table 13: ICT Regulatory Tracker Score by Pillar - Asia and the Pacific Region, 2007 and 2024 (continued)

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
Viet Nam	2.0	15.0	7.5	12.5	6.0	25.0	6.7	19.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Pillar 1 'Regulatory Authority' max score = 20; Pillar 2 'Regulatory Mandate' max score = 22; Pillar 3 'Regulatory Regime' max score = 30; Pillar 4 'Competition Framework' max score = 28

What stands out: Regulatory trends in Asia and the Pacific

Asia and the Pacific is the most internally diverse region, yet also one of the fastest-improving. Several countries advanced from the G1 and G2 to the G3 and G4 tiers, while the region's leaders score near the upper end of the global distribution.

CIS

CIS countries show moderate but uneven regulatory improvement (Table 14). Countries such as **Armenia and Uzbekistan** advanced significantly by expanding regulatory mandates and improving competition rules, while others remain at early stages of regulatory maturity. Progress in **Pillar I** and **Pillar II** is visible but less pronounced than in other regions, reflecting the gradual evolution of institutional frameworks.

Table 14: ICT Regulatory Tracker Scores - CIS, 2007 and 2024

Country	2007	2024
Armenia	54.8	87.5
Azerbaijan	29.8	69.5
Belarus	11.8	42.5
Kazakhstan	13.5	48
Kyrgyzstan	51	68
Russian Federation	21	58.5
Tajikistan	16	19
Turkmenistan	6	6
Uzbekistan	14.8	72.5

Source: ITU ICT Regulatory Tracker (2007-2024)

*Ukraine, Moldova and Georgia were classified as belonging to the CIS region until 2017. In 2018 they were classified as Europe.

Colour coding: ● G1 ● G2 ● G3 ● G4

Table 15 shows that improvements are concentrated in **Pillar III** and **Pillar IV**, while competition safeguards, market entry conditions and wholesale access arrangements remain limited in most countries in the region.

Table 15: ICT Regulatory Tracker Score by Pillar - CIS Region, 2007 and 2024

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
Armenia	19	19	11.5	19.5	6	22	18.3	27
Azerbaijan	0	11	7.5	15.5	6	18	16.3	25
Belarus	0	4	6.5	11.5	2	9	3.3	18
Kazakhstan	2	6	5.5	11	0	16	6	15
Kyrgyzstan	16	17	12	15	4	15	19	21
Russian Federation	2	10	9	9.5	4	18	6	21
Tajikistan	2	4	6	6	2	2	6	7
Turkmenistan	0	0	6	6	0	0	0	0
Uzbekistan	0	12	6.5	17.5	2	22	6.3	21

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Pillar 1 'Regulatory Authority' max score = 20; Pillar 2 'Regulatory Mandate' max score = 22; Pillar 3 'Regulatory Regime' max score = 30; Pillar 4 'Competition Framework' max score = 28

*Ukraine, Moldova and Georgia were classified as belonging to the CIS region until 2017. In 2018 they were classified as Europe.

What stands out: Regulatory trends in CIS

CIS is the slowest-converging region overall, but the countries that modernized their regulatory regimes achieved large gains, demonstrating the potential for rapid upgrading when mandates and competition frameworks are strengthened.

Europe

Europe continues to lead global regulatory performance (Table 16). Nearly all countries operate at G4 levels and exhibit stable, mature regulatory institutions. The region's performance in Pillar III is near perfect, with many countries scoring the full 30 points, and Pillar II and IV scores converge toward the upper bound.

Table 16: ICT Regulatory Tracker scores - Europe, 2007 and 2024

Country	2007	2024
Albania	51.7	91
Andorra	10.5	29
Austria	81.5	92.5

Table 16: ICT Regulatory Tracker scores - Europe, 2007 and 2024 (continued)

Country	2007	2024
Belgium	89.5	97
Bosnia and Herzegovina	65	91
Bulgaria	71.7	94
Croatia	76.5	94
Cyprus	79.5	89.7
Czech Republic	73	89
Denmark	62.7	97
Estonia	70.7	90.5
Finland	74.5	99
France	83.5	95.5
Georgia*	71.5	93.5
Germany	80	94.5
Greece	79.5	91
Hungary	83.5	93
Iceland	39.7	92
Ireland	77	99
Israel	30.2	68.5
Italy	45	100
Latvia	80.5	90
Liechtenstein	72.5	85
Lithuania	78.5	99.5
Luxembourg	68	89.5
Malta	81.5	95
Moldova*	61.8	87.3
Monaco	17	31
Montenegro	71	93
Netherlands	73.5	94.5
North Macedonia	54.2	86.5
Norway	80	96.5
Poland	80.5	90.5
Portugal	83	97
Romania	81	95
San Marino	25	36.5
Serbia	67.2	88.8
Slovakia	79.5	88.5

Table 16: ICT Regulatory Tracker scores - Europe, 2007 and 2024 (continued)

Country	2007	2024
Slovenia	78.5	94
Spain	76	91
Sweden	69	90
Switzerland	78	95.5
Türkiye	73.2	92.5
Ukraine*	44.8	79.3
United Kingdom	78.5	95.5

Source: ITU ICT Regulatory Tracker (2007-2024)

*Ukraine, Moldova, and Georgia were classified as belonging to the CIS region until 2017. In 2018 they were classified as Europe.

They are therefore listed in both tables.

Colour coding: ● G1 ● G2 ● G3 ● G4

Table 17 shows that Europe’s pillar profile is consistent across countries, reflecting the long-standing influence of harmonized frameworks and converged regulatory practices across the European Union and the wider region.

Table 17: ICT Regulatory Tracker Scores by Pillar - Europe, 2007 and 2024

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
Albania	16	19	13	20	8	26	14.7	26
Andorra	2	6	2.5	9	6	10	0	4
Austria	17	18	16.5	19.5	22	28	26	27
Belgium	18	20	17.5	20	28	30	26	27
Bosnia and Herzegovina	18	19	18	20	10	26	19	26
Bulgaria	18	19	16	17	17	30	20.7	28
Croatia	19	19	16.5	19	18	28	23	28
Cyprus	18	19	15.5	17	24	28	22	25.7
Czech Republic	17	18	18	18	17	28	21	25
Denmark	13	18	17	21	10	30	22.7	28
Estonia	13	14	15	21.5	20	28	22.7	27
Finland	17	19	17.5	22	16	30	24	28
France	17	18	17.5	20.5	24	30	25	27
Georgia*	17	19	17	16.5	14	30	24	28

Table 17: ICT Regulatory Tracker Scores by Pillar - Europe, 2007 and 2024 (continued)

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
Germany	15	17	20	20.5	22	30	23	27
Greece	19	19	16.5	17	18	28	26	27
Hungary	18	18	18.5	21	20	26	27	28
Iceland	8	18	9	20	4	26	18.7	28
Ireland	19	20	18	21	16	30	24	28
Israel	2	7	9.5	13.5	6	22	12.7	26
Italy	11	20	7	22	10	30	17	28
Latvia	19	19	15.5	17	20	28	26	26
Liechtenstein	14	14	11.5	17	22	28	25	26
Lithuania	16	20	16.5	21.5	20	30	26	28
Luxembourg	15	19	13	18.5	18	26	22	26
Malta	16	19	17.5	20	20	28	28	28
Moldova*	18	19	16	18	9	25	19.3	25.3
Monaco	0	0	6	9	0	10	11	12
Montenegro	18	18	15	19	14	28	24	28
Netherlands	15	19	12.5	17.5	22	30	24	28
North Macedonia	17	19	14.5	19.5	14	30	8.7	18
Norway	18	20	15	19.5	20	30	27	27
Poland	18	16	17.5	17.5	18	30	27	27
Portugal	19	19	18	20	19	30	27	28
Romania	17	19	19	21	18	28	27	27
San Marino	4	10	4	9.5	2	2	15	15
Serbia	18	18	18.5	18.5	10	28	20.7	24.3
Slovakia	16	15	16.5	18.5	26	28	21	27
Slovenia	18	18	15.5	21	18	28	27	27
Spain	19	17	13	16	20	30	24	28
Sweden	15	20	17	19	14	24	23	27
Switzerland	18	20	15	18.5	22	30	23	27
Türkiye	18	19	16.5	17.5	16	30	22.7	26
Ukraine*	15	16	15	17	10	23	5.3	23.3

Table 17: ICT Regulatory Tracker Scores by Pillar - Europe, 2007 and 2024 (continued)

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
United Kingdom	19	20	16.5	19.5	20	28	23	28

Source: ITU ICT Regulatory Tracker (2007-2024)

*Ukraine, Moldova and Georgia were classified as belonging to the CIS region until 2017. In 2018 they were classified as Europe.

They are therefore listed in both tables.

Note: Pillar 1 'Regulatory Authority' max score = 20; Pillar 2 'Regulatory Mandate' max score = 22; Pillar 3 'Regulatory Regime' max score = 30; Pillar 4 'Competition Framework' max score = 28

What stands out: Regulatory trends in Europe

Europe is the only region where nearly all countries score in the highest 90-100 range by 2024. The region reflects long-term institutional consolidation, regional harmonization of regulatory practices and the adoption of competition-oriented market frameworks.

Americas

The Americas region shows substantial convergence toward global good practice (Table 18). Many countries - including **Argentina, Brazil, Canada, Colombia, Costa Rica, , Dominican Republic, Peru, and United States,** - achieved G4 levels, while smaller economies improved steadily from mid-range baselines.

Table 18: ICT Regulatory Tracker scores - The Americas, 2007 and 2024

Country	2007	2024
Antigua and Barbuda	18.8	34.8
Argentina	63.5	86.5
Bahamas	46.2	87.5
Barbados	60.82	71.2
Belize	19.5	56
Bolivia	30.5	75.5
Brazil	75.82	96
Canada	71	87.5
Chile	48	83
Colombia	67	88
Costa Rica	39.82	91
Cuba	8.5	27
Dominica	12.5	67.5
Dominican Republic	74.5	97

Table 18: ICT Regulatory Tracker scores - The Americas, 2007 and 2024 (continued)

Country	2007	2024
Ecuador	63.5	78
El Salvador	62.5	69.5
Grenada	39.5	68.5
Guatemala	32	66
Guyana	33	68.5
Haiti	26.7	59.8
Honduras	26.7	75.87
Jamaica	65.5	78.5
Mexico	41.7	72
Nicaragua	50.3	74.8
Panama	44.8	80.5
Paraguay	51.2	64.5
Peru	70	86
Saint Kitts and Nevis	61	68
Saint Lucia	53.3	77.5
Saint Vincent and the Grenadines	76	79
Suriname	13.5	60
Trinidad and Tobago	55	95
United States	79.5	86.5
Uruguay	32	70.8
Venezuela	54.5	71.8

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

Pillar results in Table 19 show the strongest regional performance in **Pillars III** and **IV**, driven by competition reforms, structured wholesale markets, and more predictable spectrum policies.

Table 19: ICT Regulatory Tracker Score by Pillar - The Americas, 2007 and 2024

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
Antigua and Barbuda	0	4	6.5	11.5	2	6	10.3	13.3
Argentina	17	19	16.5	19.5	12	26	18	22
Bahamas	15	17	14.5	18.5	6	26	10.7	26
Barbados	17	16	12.5	12.5	14	20	17.3	22.7

Table 19: ICT Regulatory Tracker Score by Pillar - The Americas, 2007 and 2024 (continued)

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
Belize	4	17	8.5	18	4	12	3	9
Bolivia	6	17	9	21	2	20	13.5	17.5
Brazil	16	20	16.5	19	20	29	23.3	28
Canada	17	19	14	16.5	24	30	16	22
Chile	12	13	15	18	2	24	19	28
Colombia	15	20	11	17	18	24	23	27
Costa Rica	17	20	11.5	18	10	29	1.3	24
Cuba	0	4	7.5	10	0	8	1	5
Dominica	2	11	9.5	15.5	0	18	1	23
Dominican Republic	17	19	17.5	20	16	30	24	28
Ecuador	14	15	13.5	17	12	20	24	26
El Salvador	17	16	12.5	12.5	12	16	21	25
Grenada	12	14	14.5	17.5	10	16	3	21
Guatemala	5	16	6	12	2	11	19	27
Guyana	4	17	15	17.5	2	12	12	22
Haiti	12	12	10	17.5	2	10	2.7	20.3
Honduras	5	14	10	17.5	2	24	9.7	20.3
Jamaica	18	18	13.5	13.5	12	19	22	28
Mexico	15	4	7	11	4	30	15.7	27
Nicaragua	16	14	14	21.5	4	16	16.3	23.3
Panama	14	19	8.5	15.5	6	20	16.3	26
Paraguay	15	18	15.5	15.5	6	12	14.7	19
Peru	17	18	11	12	14	28	28	28
Saint Kitts and Nevis	12	13	15	15	13	19	21	21
Saint Lucia	15	17	14	17.5	4	18	20.3	25
Saint Vincent and the Grenadines	16	16	17	17	18	20	25	26
Suriname	6	14	6.5	15	0	18	1	13
Trinidad and Tobago	12	20	12	21	10	28	21	26
United States	19	19	16.5	15.5	20	28	24	24
Uruguay	10	16	8	17.5	6	18	8	19.3

Table 19: ICT Regulatory Tracker Score by Pillar – The Americas, 2007 and 2024 (continued)

Country	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
Venezuela	17	19	16.5	20.5	4	10	17	22.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Pillar 1 ‘Regulatory Authority’ max score = 20; Pillar 2 ‘Regulatory Mandate’ max score = 22; Pillar 3 ‘Regulatory Regime’ max score = 30; Pillar 4 ‘Competition Framework’ max score = 28

What stands out: Regulatory trends in the Americas

The Americas is a **fast-converging region with a widening group of high performers**. Improvements are evident across the region, though smaller markets still face institutional and implementation challenges.

Overview of regional profiles

The regional profiles below synthesize how regulatory maturity has evolved across the six ITU regions since 2007. They highlight where progress has been fastest, which pillars have driven change, and where gaps remain most persistent. Read together, the profiles show both convergence toward more mature regulatory practice and continued variation in institutional strength, mandate clarity, and the depth of competition frameworks.

What stands out: Regional trends 2007-2024

Africa

- **Strong catch-up from a low baseline:** most countries improved substantially, with a growing group now in G3–G4.
- **Progress is driven mainly by stronger market rules and competition safeguards** (notably interconnection, infrastructure sharing and spectrum management).
- **A smaller set of countries has reached advanced maturity (G4)**, showing what is achievable with sequenced reforms and stronger enforcement.
- **Uneven progress persists: a sizeable G2 cohort remains**, with continuing gaps in institutional independence and competition practice.

Americas

- **Broad convergence toward global good practice**, with multiple countries now operating at G4 levels and a widening group of strong performers.
- **Regional gains are concentrated in regulatory regimes and competition frameworks** (structured market entry, wholesale arrangements, and spectrum predictability).
- **Smaller markets show steady improvement but face institutional and implementation constraints**, limiting the pace of transition to the top tiers.
- **The region combines established leaders with significant catch-up**, reflecting diffusion of modern regulatory instruments across diverse market structures.

Arab States

- **A 'two-speed' profile:** frontier performance in several GCC markets alongside persistent low maturity in a subset of fragile contexts.
- **Strong improvements in market rules and competition safeguards underpin regional gains,** especially in licensing, wholesale access and spectrum policies.
- **North African countries show consistent strengthening of mandates and competition frameworks,** complementing Gulf-led modernization.
- **Remaining G1 countries** underscore that foundational market reforms are still incomplete in parts of the region.

Asia and the Pacific

- **High internal diversity but rapid overall improvement,** with multiple countries moving from G1-G2 into G3-G4.
- **Progress is strongest in Pillar III reforms** – clearer market-entry rules, wholesale access obligations and interconnection frameworks.
- **Leading markets remain near the top of the global distribution,** while several middle-income countries have closed large gaps since 2007.
- **Small island economies have advanced more slowly,** reflecting scale and capacity constraints rather than lack of reform direction.

CIS

- **The slowest-converging region overall,** with progress uneven and several countries still at early stages of regulatory maturity.
- **Where reform occurred, gains were sizable** – especially in regulatory regimes and competition rules, demonstrating strong latent potential.
- **Institutional and mandate evolution has been more gradual than in other regions,** limiting the depth and consistency of market reforms.
- **Persistent gaps remain in market-entry conditions,** wholesale access and competition practice across much of the region.

Europe

- **The global benchmark region,** with most countries operating at or near G4 and many scoring in the 90-100 range by 2024.
- **Near-ceiling performance in the regulatory regime** pillar reflects deep adoption of the full regulatory toolkit and stable, predictable market rules.
- **Regulatory domain profiles (as captured by the four Tracker pillars) are broadly consistent across countries,** reflecting long-term institutional consolidation and regional harmonization of regulatory practice.
- **The remaining variation is narrow** and concentrated in competition and mandate refinements, rather than foundational institutional design.

4 Groups of vulnerable countries

This section presents the evolution of ICT regulatory maturity among **LDCs**, **LLDCs** and **SIDS**, drawing on the ICT Regulatory Tracker to compare 2007 and 2024 scores at both the aggregate and country levels.

The results show that vulnerable economies facing long-standing structural constraints have nonetheless achieved substantial regulatory progress between 2007 and 2024. The three country groups began the period with some of the lowest baseline scores worldwide, reflecting limited institutional capacity, fragmented mandates and regulatory frameworks that were still largely oriented toward first- or second-generation approaches.

Yet, as shown in **the tables below**, all three groups recorded improvements that outpaced the **world** average in proportional terms. This upward movement mirrors the global patterns described in Section 2, where the main drivers of progress are reforms to the regulatory regime and competition framework.

The analysis below features:

- averages analysis for each group of countries (overall and by pillar),
- country-level tables for 2007 and 2024, and
- a short interpretation of what the tables reveal about each group’s trajectory.

Overall trends across vulnerable-country groups

The ICT Regulatory Tracker results show that all three vulnerable groups have made **substantial regulatory progress** since 2007, despite facing persistent structural constraints. As summarised in **Table 20**, LDCs, LLDCs and SIDS each recorded improvements that exceed the **world** average in proportional terms, narrowing but not closing the distance to the global front runners, between 2007 and 2024:

- **LDCs**: The average score of LDCs rose by +29.9 points (from 33.8 to 63.7)
- **LLDCs**: The average score of LLDCs rose by +27.9 points (from 38.8 to 66.7)
- **SIDS**: The average score of SIDS rose by +28.4 points (from 34.6 to 63.0)

Table 20: ICT Regulatory Tracker: Averages for vulnerable groups (2007 and 2024)

Group	2007	2024	Δ (pp)	% change
LDCs	33.76	63.68	29.92	88.6
LLDCs	38.8	66.65	27.85	71.8
SIDS	34.62	62.97	28.35	81.9
World	46.22	73.03	26.81	58

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Countries belonging to more than one typology are counted in each relevant group.

Regulatory progress is also evident when looking at the averages by pillar, as shown in Table 21.

- **Pillar III** (Regulatory Regime) and **Pillar IV** (Competition Framework) show the largest absolute gains (Table 21).

- **Pillar I** (Regulatory Authority) and **Pillar II** (Regulatory Mandates) also rise, however institutional enhancement is still under way.

Table 21: ICT Regulatory Tracker: Averages for vulnerable groups by pillar (2007 and 2024)

Group	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)	
	2007	2024	2007	2024	2007	2024	2007	2024
LDCs	8.84	13.5	10.68	16.34	5.2	15.76	9.04	18.09
LLDCs	10.26	14.5	11.24	17.25	5.58	16.28	11.72	18.62
SIDS	7.5	12.89	10.79	15.86	5.39	15.7	10.94	18.51
World	11.2	15.0	12.3	17.0	8.9	20.2	13.9	20.8

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Countries belonging to more than one typology are counted in each relevant group.

Note: Pillar 1 'Regulatory Authority' max score = 20; Pillar 2 'Regulatory Mandate' max score = 22; Pillar 3 'Regulatory Regime' max score = 30; Pillar 4 'Competition Framework' max score = 28

Vulnerable countries have achieved faster progress than the global average, driven primarily by reforms in regulatory regimes and competition frameworks. Their advances demonstrate that structural challenges do not preclude regulatory transformation, especially where reforms are sequenced, mandates clarified and market rules modernised.

Four clear patterns emerge from the comparative data:

- **Broadly distributed gains over time.** Nearly every country in each group strengthened its regulatory framework between 2007 and 2024. Many moved from the G1-G2 tier starting positions into the G3-G4 range, reflecting significant institutional and regulatory framework upgrading.
- **Regulatory regime and competition framework reforms drive most of the gains.** Across all three groups, the largest improvements appear in **Pillar III (Regulatory Regime)** and **Pillar IV (Competition Framework)**, the components of the ICT Regulatory Tracker that capture modern market rules, wholesale access, interconnection conditions and spectrum-management mechanisms. This mirrors the global dynamics described in Section 2.
- **Institutional strengthening continues at a slower pace.** **Pillar I (Regulatory Authority)** and **Pillar II (Regulatory Mandates)** show consistent, positive trends but evolve more gradually. These pillars embed structural institutional changes, e.g. establishing or empowering regulators, expanding mandates, formalising consultation processes, which typically require time and political stability to consolidate.
- **A clearer frontier is emerging.** Although LDCs, LLDCs and SIDS remain below the world average, the strongest performers in each group now score in the **upper G3 or lower G4 tiers**, demonstrating that advanced regulatory maturity is not limited to high-income regions. Their trajectories confirm that, when authority, mandate and competition tools evolve together, even structurally constrained countries can reach advanced levels within a few policy cycles.

What stands out: Overall trends across vulnerable-country groups

- **All three vulnerable-country groups improved faster than the world average in proportional terms** between 2007 and 2024, narrowing – but not closing – the gap with global front runners.
- **Progress is primarily driven by reforms to market rules and competition safeguards (Pillars III and IV)**, mirroring the global pattern.
- **Institutional strengthening and mandate expansion (Pillars I and II) are improving but remain works in progress**, reflecting the longer timelines required for structural change.
- **A clear ‘frontier’ is emerging within each group**: top performers now reach upper-G3 or lower-G4 levels, demonstrating that advanced regulatory maturity is achievable even under structural constraints.

Least developed countries (LDCs)

The LDC group began the period with some of the lowest levels of regulatory maturity worldwide (Table 22). By 2024, however, many LDCs have made substantial, broad-based improvements, with several advancing into the upper G3 or lower G4 ranges. Countries such as Malawi, Rwanda, and Uganda have all moved into the G4 tier by 2024. Moreover, a broader group is now firmly in the upper G3 tier, including Liberia, Senegal, Tanzania, and Zambia, reflecting strengthened mandates, clearer market-entry rules, expanded competition safeguards and more structured QoS and spectrum frameworks.

Table 22: ICT Regulatory Tracker Score - LDCs, 2007 and 2024

Country	Group	2007	2024
Afghanistan	LDC+LLDC	45.3	66.3
Angola	LDC	55.7	75.7
Bangladesh	LDC	35.8	65.5
Benin	LDC	17.5	70.0
Bhutan	LDC+LLDC	50.5	66.7
Burkina Faso	LDC+LLDC	57.0	84.0
Burundi	LDC+LLDC	17.3	60.7
Cambodia	LDC	19.0	72.0
Central African Republic	LDC+LLDC	25.5	53.5
Chad	LDC+LLDC	36.3	58.7
Comoros	LDC+SIDS	5.5	74.2
Democratic Republic of the Congo	LDC	35.0	70.0
Djibouti	LDC	4.5	4.5
Eritrea	LDC	14.0	14.0
Ethiopia	LDC+LLDC	13.5	52.0
Gambia	LDC	54.3	72.7

Table 22: ICT Regulatory Tracker Score - LDCs, 2007 and 2024 (continued)

Guinea	LDC	24.3	76.3
Guinea-Bissau	LDC+SIDS	33.3	50.3
Haiti	LDC+SIDS	26.7	59.8
Kiribati	LDC+SIDS	45.5	56.5
Lao P.D.R.	LDC+LLDC	16.7	46.7
Lesotho	LDC+LLDC	55.5	70.5
Liberia	LDC	36.7	82.3
Madagascar	LDC	55.0	69.5
Malawi	LDC+LLDC	57.5	87.5
Mali	LDC+LLDC	45.5	67.0
Mauritania	LDC	48.5	66.0
Mozambique	LDC	50.2	70.5
Myanmar	LDC	6.8	67.5
Nepal (Republic of)	LDC+LLDC	41.0	58.3
Niger	LDC+LLDC	29.0	68.0
Rwanda	LDC+LLDC	68.7	85.7
Sao Tome and Principe	LDC+SIDS	44.0	72.7
Senegal	LDC	59.0	82.7
Sierra Leone	LDC	20.2	61.2
Solomon Islands	LDC+SIDS	6.5	69.5
Somalia	LDC	0.0	77.5
South Sudan	LDC+LLDC		53.2
Sudan	LDC	47.5	75.5
Tanzania	LDC	56.3	81.7
Timor-Leste	LDC+SIDS	8.0	50.5
Togo	LDC	30.0	71.7
Tuvalu	LDC+SIDS	8.0	12.3
Uganda	LDC+LLDC	56.0	85.0
Yemen	LDC	13.0	15.0
Zambia	LDC+LLDC	43.2	78.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

Table 22 also highlights notable multi-generation jumps from the G1 tier into the G3 tier. The largest improvements among LDCs include:

- Somalia: from a score of zero to a score of 77.5;
- Comoros: from a score of 5.5 to a score of 74.2;

- Solomon Islands: from a score of 6.5 to a score of 69.5.

These cases illustrate how even very low starting points can give rise to substantial gains when mandates are expanded and core regulatory tools are introduced in a consistent, sequenced manner. At the same time, the group distribution remains heterogeneous. Some LDCs register only modest improvement due to fragile institutional settings, conflict environments or limited regulatory capacity.

In this regard, Table 23 below reveals that pillars evolve differently across the group:

- **Pillar I** (regulatory authority) shows clear but uneven upgrades as more LDCs establish separate regulators, adopt due-process mechanisms and clarify appeals arrangements. Here, Burkina Faso, Liberia, and Rwanda score highest, reflecting clearer governance arrangements and well-established regulatory authority.
- **Pillar II** (regulatory mandates) improves as responsibilities expand to cover new ICT services and consumer-protection functions. Countries that score highest among LDCs include Butan, Malawi, and Rwanda.
- **Pillar III** (regulatory regime) and Pillar IV (competition framework) show the largest gains, reflecting reforms to market-entry conditions, interconnection, wholesale access, QoS and spectrum assignments. In terms of score, Pillar 3 is led by Mozambique, Senegal, and Uganda, whereas for Pillar 4 the highest scoring countries include Malawi, Myanmar, and Somalia.

Table 23: ICT Regulatory Tracker Score by Pillar – LDCs, 2007 and 2024

Country	Group	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)		Overall	
		2007	2024	2007	2024	2007	2024	2007	2024	2007	2024
Afghanistan	LDC+LLDC	14	12	15	20	3	13	13.3	21.3	45.3	66.3
Angola	LDC	14	14	19	20	12	22	10.7	19.7	55.7	75.7
Bangladesh	LDC	11	15	15.5	19.5	2	16	7.3	15	35.8	65.5
Benin	LDC	6	18	7.5	18	0	20	4	14	17.5	70
Bhutan	LDC+LLDC	12	17	18.5	22	10	12	10	15.7	50.5	66.7
Burkina Faso	LDC+LLDC	13	20	15	19	12	18	17	27	57	84
Burundi	LDC+LLDC	5	12	7	16	0	12	5.3	20.7	17.3	60.7
Cambodia	LDC	0	16	7.5	18	2	16	9.5	22	19	72
Central African Rep.	LDC+LLDC	8	14	5.5	15.5	0	7	12	17	25.5	53.5
Chad	LDC+LLDC	11	14	10	19	6	14	9.3	11.7	36.3	58.7
Comoros	LDC+SIDS	0	14	5.5	14.5	0	22	0	23.7	5.5	74.2
Dem. Rep. of the Congo	LDC	13	12	15	17	4	16	3	25	35	70
Djibouti	LDC	0	0	2.5	2.5	2	2	0	0	4.5	4.5
Eritrea	LDC	2	2	6	6	2	2	4	4	14	14
Ethiopia	LDC+LLDC	9	13	2.5	15	2	8	0	16	13.5	52
Gambia	LDC	16	17	17	19	10	18	11.3	18.7	54.3	72.7

Table 23: ICT Regulatory Tracker Score by Pillar – LDCs, 2007 and 2024 (continued)

Guinea	LDC	0	15	6	18	0	21	18.3	22.3	24.3	76.3
Guinea-Bissau	LDC+SIDS	8	15	10	12	2	6	13.3	17.3	33.3	50.3
Haiti	LDC+SIDS	12	12	10	17.5	2	10	2.7	20.3	26.7	59.8
Kiribati	LDC+SIDS	11	11	18.5	18.5	4	12	12	15	45.5	56.5
Lao P.D.R.	LDC+LLDC	2	2	5	12	4	16	5.7	16.7	16.7	46.7
Lesotho	LDC+LLDC	16	17	14.5	15.5	9	18	16	20	55.5	70.5
Liberia	LDC	15	22	9	19	4	22	8.7	19.3	36.7	82.3
Madagascar	LDC	14	16	16	16.5	12	20	13	17	55	69.5
Malawi	LDC+LLDC	14	17	14.5	20.5	10	23	19	27	57.5	87.5
Mali	LDC+LLDC	14	15	12.5	18	11	17	8	17	45.5	67
Mauritania	LDC	16	16	12.5	15	13	17	7	18	48.5	66
Mozambique	LDC	13	15	10.5	14.5	13	25	13.7	16	50.2	70.5
Myanmar	LDC	0	7	4.5	17.5	2	15	0.3	28	6.8	67.5
Nepal (Republic of)	LDC+LLDC	13	15	16	18	2	14	10	11.3	41	58.3
Niger	LDC+LLDC	2	14	10	16	4	20	13	18	29	68
Rwanda	LDC+LLDC	17	20	18	21	15	20	18.7	24.7	68.7	85.7
Sao Tome and Principe	LDC+SIDS	9	15	16	18	6	20	13	19.7	44	72.7
Senegal	LDC	17	16	18	18	14	24	10	24.7	59	82.7
Sierra Leone	LDC	2	16	9.5	17.5	2	16	6.7	11.7	20.2	61.2
Solomon Islands	LDC+SIDS	0	13	3.5	17.5	0	18	3	21	6.5	69.5
Somalia	LDC	0	16	0	19.5	0	14	0	28	0	77.5
South Sudan	LDC+LLDC		13		16.5		4		19.7		53.2
Sudan	LDC	12	17	16.5	16.5	8	21	11	21	47.5	75.5
Tanzania	LDC	15	18	14	20	8	20	19.3	23.7	56.3	81.7
Timor-Leste	LDC+SIDS	0	12	4	13.5	0	15	4	10	8	50.5
Togo	LDC	12	14	10	18	2	21	6	18.7	30	71.7
Tuvalu	LDC+SIDS	0	0	3	3	0	4	5	5.3	8	12.3
Uganda	LDC+LLDC	15	16	13	20	10	24	18	25	56	85
Yemen	LDC	0	0	3	3	6	8	4	4	13	15
Zambia	LDC+LLDC	15	16	13.5	20	4	22	10.7	20.3	43.2	78.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Pillar 1 'Regulatory Authority' max score = 20; Pillar 2 'Regulatory Mandate' max score = 22; Pillar 3 'Regulatory Regime' max score = 30; Pillar 4 'Competition Framework' max score = 28

Colour coding: ● G1 ● G2 ● G3 ● G4

What stands out: Trends in least developed countries (LDCs)

- **LDCs moved from very low baselines to materially stronger frameworks**, with several countries now in upper-G3 or G4 by 2024.
- **Large multi-generation jumps are possible from very low starting points** when reforms are sequenced and the core regulatory toolkit is introduced consistently.
- **Gains are driven by upgrades to market-entry rules, interconnection, wholesale access, QoS and spectrum frameworks** - resulting in improvements in Pillars III and IV.
- **Performance remains uneven**: fragile contexts and capacity limitations continue to slow institutional consolidation and implementation in a subset of countries.

Landlocked developing countries (LLDCs)

LLDCs face unique challenges, most notably the absence of direct access to submarine cables, which often translates into higher transit costs for connectivity, more concentrated markets and additional coordination needs with neighbouring jurisdictions. Yet **Table 24** shows that LLDCs have made considerable progress since 2007, with many countries narrowing the gap to the world average.

Table 24: ICT Regulatory Tracker Scores - LLDCs, 2007 and 2024

Country	Group	2007	2024
Afghanistan	LDC+LLDC	45.3	66.3
Armenia	LLDC	54.8	87.5
Azerbaijan	LLDC	29.8	69.5
Bhutan	LDC+LLDC	50.5	66.7
Bolivia (Plurinational State of)	LLDC	30.5	75.5
Botswana	LLDC	60.0	82.0
Burkina Faso	LDC+LLDC	57.0	84.0
Burundi	LDC+LLDC	17.3	60.7
Central African Rep.	LDC+LLDC	25.5	53.5
Chad	LDC+LLDC	36.3	58.7
Eswatini	LLDC	17.5	79.0
Ethiopia	LDC+LLDC	13.5	52.0
Kazakhstan	LLDC	13.5	48.0
Kyrgyzstan	LLDC	51.0	68.0
Lao P.D.R.	LDC+LLDC	16.7	46.7
Lesotho	LDC+LLDC	55.5	70.5
Malawi	LDC+LLDC	57.5	87.5
Mali	LDC+LLDC	45.5	67.0

Table 24: ICT Regulatory Tracker Scores – LLDCs, 2007 and 2024 (continued)

Moldova	LLDC	61.8	87.3
Mongolia	LLDC	43.3	75.2
Nepal (Republic of)	LDC+LLDC	41.0	58.3
Niger	LDC+LLDC	29.0	68.0
North Macedonia	LLDC	54.2	86.5
Paraguay	LLDC	51.2	64.5
Rwanda	LDC+LLDC	68.7	85.7
South Sudan	LDC+LLDC		53.2
Tajikistan	LLDC	16.0	19.0
Turkmenistan	LLDC	6.0	6.0
Uganda	LDC+LLDC	56.0	85.0
Uzbekistan	LLDC	14.8	72.5
Zambia	LDC+LLDC	43.2	78.3
Zimbabwe	LLDC	39.7	70.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

Six LLDCs have achieved substantial regulatory progress and in 2024 operate in the G4 tier at advanced levels of regulatory maturity, with structured mandates, clearer competition safeguards and near-complete sets of modern market-regulation tools. These are:

- Armenia (87.5)
- Malawi (87.5)
- Moldova (87.3)
- North Macedonia (86.5)
- Rwanda (85.7)
- Uganda (85.0).

Moreover, both Uzbekistan and Eswatini upgraded over two regulatory generations from very low baselines: Uzbekistan – one of the two double-landlocked countries worldwide – moved from the G1 tier and a score of 14.8 in 2007 to G3 and a score of 72.5 in 2024. Eswatini moved from G1 and a score of 17.5 to G3 and a score of 79 in 2024.

These cases show that even without coastal access, significant reforms in market structure, licensing and spectrum frameworks can quickly raise regulatory maturity. Table 25, which presents the ICT Regulatory Tracker scores by pillar for LLDCs for 2007 and 2024, reinforces this picture:

- **Pillar I** strengthens in most LLDCs as institutions become more formalized and governance procedures improve. Countries that score highest in this pillar include Botswana, Burkina Faso, and Rwanda.

- **Pillar II** records some of the highest values across vulnerable groups, pointing to the consolidation of regulatory mandates. Countries that score highest in this pillar include Bhutan, Botswana, and Zimbabwe.
- **Pillar III** and **Pillar IV** show substantial improvements, especially in countries that adopted wholesale access policies, unified licensing arrangements, competition safeguards and more transparent spectrum-management practices. Among the leading scorers in Pillar III are North Macedonia with a maximum score of 30, Moldova (25) and Uganda (24). Countries that scored highest in Pillar IV include Armenia, Burkina Faso, and Malawi, each with a score of 27.

Table 25: ICT Regulatory Tracker Score by Pillar - LLDCs, 2007 and 2024

Country	Group	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)		Overall	
		2007	2024	2007	2024	2007	2024	2007	2024	2007	2024
Afghanistan	LDC + LLDC	14	12	15	20	3	13	13.3	21.3	45.3	66.3
Armenia	LLDC	19	19	11.5	19.5	6	22	18.3	27.0	54.8	87.5
Azerbaijan	LLDC	0	11	7.5	15.5	6	18	16.3	25.0	29.8	69.5
Bhutan	LDC + LLDC	12	17	18.5	22	10	12	10.0	15.7	50.5	66.7
Bolivia (Plurinational State of)	LLDC	6	17	9	21	2	20	13.5	17.5	30.5	75.5
Botswana	LLDC	14	20	17	22	10	20	19.0	20.0	60.0	82.0
Burkina Faso	LDC + LLDC	13	20	15	19	12	18	17.0	27.0	57.0	84.0
Burundi	LDC + LLDC	5	12	7	16	0	12	5.3	20.7	17.3	60.7
Central African Rep.	LDC + LLDC	8	14	5.5	15.5	0	7	12.0	17.0	25.5	53.5
Chad	LDC + LLDC	11	14	10	19	6	14	9.3	11.7	36.3	58.7
Eswatini	LLDC	0	19	3.5	20	2	20	12.0	20.0	17.5	79.0
Ethiopia	LDC + LLDC	9	13	2.5	15	2	8	0.0	16.0	13.5	52.0
Kazakhstan	LLDC	2	6	5.5	11	0	16	6.0	15.0	13.5	48.0
Kyrgyzstan	LLDC	16	17	12	15	4	15	19.0	21.0	51.0	68.0
Lao P.D.R.	LDC + LLDC	2	2	5	12	4	16	5.7	16.7	16.7	46.7
Lesotho	LDC + LLDC	16	17	14.5	15.5	9	18	16.0	20.0	55.5	70.5
Malawi	LDC + LLDC	14	17	14.5	20.5	10	23	19.0	27.0	57.5	87.5

Table 25: ICT Regulatory Tracker Score by Pillar – LLDCs, 2007 and 2024 (continued)

Mali	LDC + LLDC	14	15	12.5	18	11	17	8.0	17.0	45.5	67.0
Moldova	LLDC	18	19	15.5	18	9	25	19.3	25.3	61.8	87.3
Mongolia	LLDC	13	18	13	20.5	8	19	9.3	17.7	43.3	75.2
Nepal (Republic of)	LDC + LLDC	13	15	16	18	2	14	10.0	11.3	41.0	58.3
Niger	LDC + LLDC	2	14	10	16	4	20	13.0	18.0	29.0	68.0
North Macedonia	LLDC	17	19	14.5	19.5	14	30	8.7	18.0	54.2	86.5
Paraguay	LLDC	15	18	15.5	15.5	6	12	14.7	19.0	51.2	64.5
Rwanda	LDC + LLDC	17	20	18	21	15	20	18.7	24.7	68.7	85.7
South Sudan	LDC + LLDC		13		16.5		4		19.7		53.2
Tajikistan	LLDC	2	4	6	6	2	2	6.0	7.0	16.0	19.0
Turkmenistan	LLDC	0	0	6	6	0	0	0.0	0.0	6.0	6.0
Uganda	LDC + LLDC	15	16	13	20	10	24	18.0	25.0	56.0	85.0
Uzbekistan	LLDC	0	12	6.5	17.5	2	22	6.3	21.0	14.8	72.5
Zambia	LDC + LLDC	15	16	13.5	20	4	22	10.7	20.3	43.2	78.3
Zimbabwe	LLDC	16	18	15	21	0	18	8.7	13.3	39.7	70.3

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Pillar 1 'Regulatory Authority' max score = 20; Pillar 2 'Regulatory Mandate' max score = 22; Pillar 3 'Regulatory Regime' max score = 30; Pillar 4 'Competition Framework' max score = 28

Colour coding: ● G1 ● G2 ● G3 ● G4

What stands out: Trends in landlocked developing countries (LLDCs)

- Despite structural connectivity disadvantages, **LLDCs show broad and sustained improvement**, with six countries reaching advanced (G4) maturity by 2024.
- **High performance is achievable without coastal access when countries strengthen mandates and implement competition-oriented market rules**, including licensing, wholesale access and spectrum management, while those with slower institutional evolution remain at mid-range levels.
- **Pillars III and IV account for much of the progress, while Pillars I and II improve where institutional arrangements and governance procedures are formalized.**
- **Outcomes vary sharply:** the fastest progress is seen where internal reforms are paired with effective cross-border coordination¹; laggards reflect slower institutional evolution and weaker market reform depth.

¹ Based on an extended analysis; cross-border coordination is not included as indicator in the ICT Regulatory Tracker.

Small island developing states (SIDS)

The SIDS group is characterized by small populations, high exposure to external shocks and limited economies of scale. Despite these constraints, **Table 26** shows that the group's regulatory trajectories are strongly positive, with many SIDS reaching the G3 and G4 tiers by 2024. Top performers include **the Bahamas (87.5), the Dominican Republic (97), Singapore (93.5), and Trinidad and Tobago (95).**

Table 26: ICT Regulatory Tracker Score – SIDS, 2007 and 2024

Country	Group	2007	2024
Antigua and Barbuda	SIDS	18.8	34.8
Bahamas	SIDS	46.2	87.5
Barbados	SIDS	60.8	71.2
Belize	SIDS	19.5	56.0
Cabo Verde	SIDS	49.0	74.0
Comoros	LDC+SIDS	5.5	74.2
Cuba	SIDS	8.5	27.0
Dominica	SIDS	12.5	67.5
Dominican Rep.	SIDS	74.5	97.0
Fiji	SIDS	20.5	61.0
Grenada	SIDS	39.5	68.5
Guinea-Bissau	LDC+SIDS	33.3	50.3
Guyana	SIDS	33.0	68.5
Haiti	LDC+SIDS	26.7	59.8
Jamaica	SIDS	65.5	78.5

Table 26: ICT Regulatory Tracker Score – SIDS, 2007 and 2024 (continued)

Kiribati	LDC+SIDS	45.5	56.5
Maldives	SIDS	45.3	60.5
Marshall Islands	SIDS	13.0	23.5
Mauritius	SIDS	66.5	80.5
Micronesia	SIDS	11.0	57.0
Nauru	SIDS		33.2
Palau	SIDS	11.5	19.5
Papua New Guinea	SIDS	22.0	63.5
Saint Kitts and Nevis	SIDS	61.0	68.0
Saint Lucia	SIDS	53.3	77.5
Saint Vincent and the Grenadines	SIDS	76.0	79.0
Samoa	SIDS	46.7	71.8
Sao Tome and Principe	LDC+SIDS	44.0	72.7
Seychelles	SIDS	37.7	79.5
Singapore	SIDS	71.3	93.5
Solomon Islands	LDC+SIDS	6.5	69.5
Suriname	SIDS	13.5	60.0
Timor-Leste	LDC+SIDS	8.0	50.5
Tonga	SIDS	20.5	53.7
Trinidad and Tobago	SIDS	55.0	95.0
Tuvalu	LDC+SIDS	8.0	12.3
Vanuatu	SIDS	16.0	77.0

Source: ITU ICT Regulatory Tracker (2007-2024)

Colour coding: ● G1 ● G2 ● G3 ● G4

Several SIDS also show large multi-generational jumps since 2007, including Vanuatu (moving from the G1 tier with 16 points in 2007 to the G3 tier with 77 points in 2024), Papua New Guinea (moving from the G1 tier with 22 points in 2007 to the upper G2 tier with 63.5 points in 2024) and the Solomon Islands (moving from the G1 tier with 6.5 points in 2007 to the upper G2 tier with 69.5 points in 2024). These cases demonstrate the potential for rapid improvements even in very small or geographically dispersed States.

The pillar analysis (Table 27) highlights several structural features of SIDS' regulatory evolution:

- **Pillar I** (regulatory authority) improves steadily as regulatory governance arrangements mature. Countries with leading scores include Trinidad and Tobago with a maximum score of 20 and Jamaica with a score of 18.
- **Pillar II** (regulatory mandates) rises sharply in several countries due to expanded legal responsibilities across ICT services and stronger consumer-protection roles. Countries

with leading scores include Micronesia with the maximum score of 22 and Singapore with a score of 21.5.

- **Pillar III** (regulatory regime) shows significant progression driven by market-entry reforms, interconnection rules, and spectrum-management improvements. Among the countries that score highest are the Dominican Republic with a maximum score of 30, and Singapore, and Trinidad and Tobago with a score of 28.
- **Pillar IV** (competition framework) sees strong gains in countries that introduced or strengthened rules on significant market power, and foreign ownership. Countries that score highest in Pillar 4 include the Dominican Republic, Jamaica, and Mauritius at 28 points.

Table 27: ICT Regulatory Tracker Score by Pillar - SIDS, 2007 and 2024

Country	Group	Pillar I: Regulatory Authority (max score 20)		Pillar II: Regulatory Mandate (max score 22)		Pillar III: Regulatory Regime (max score 30)		Pillar IV: Competition framework (max score 28)		Overall	
		2007	2024	2007	2024	2007	2024	2007	2024	2007	2024
Antigua and Barbuda	SIDS	0	4	6.5	11.5	2	6	10.3	13.3	18.8	34.8
Bahamas	SIDS	15	17	14.5	18.5	6	26	10.7	26.0	46.2	87.5
Barbados	SIDS	17	16	12.5	12.5	14	20	17.3	22.7	60.8	71.2
Belize	SIDS	4	17	8.5	18	4	12	3.0	9.0	19.5	56.0
Cabo Verde	SIDS	14	16	19	20	11	17	5.0	21.0	49.0	74.0
Comoros	LDC+SIDS	0	14	5.5	14.5	0	22	0.0	23.7	5.5	74.2
Cuba	SIDS	0	4	7.5	10	0	8	1.0	5.0	8.5	27.0
Dominica	SIDS	2	11	9.5	15.5	0	18	1.0	23.0	12.5	67.5
Dominican Rep.	SIDS	17	19	17.5	20	16	30	24.0	28.0	74.5	97.0
Fiji	SIDS	2	12	4.5	14	2	17	12.0	18.0	20.5	61.0
Grenada	SIDS	12	14	14.5	17.5	10	16	3.0	21.0	39.5	68.5
Guinea-Bissau	LDC+SIDS	8	15	10	12	2	6	13.3	17.3	33.3	50.3
Guyana	SIDS	4	17	15	17.5	2	12	12.0	22.0	33.0	68.5
Haiti	LDC+SIDS	12	12	10	17.5	2	10	2.7	20.3	26.7	59.8
Jamaica	SIDS	18	18	13.5	13.5	12	19	22.0	28.0	65.5	78.5
Kiribati	LDC+SIDS	11	11	18.5	18.5	4	12	12.0	15.0	45.5	56.5
Maldives	SIDS	10	13	19	19.5	10	13	6.3	15.0	45.3	60.5
Marshall Islands	SIDS	0	4	2	6.5	2	4	9.0	9.0	13.0	23.5
Mauritius	SIDS	15	17	20.5	21.5	8	14	23.0	28.0	66.5	80.5
Micronesia	SIDS	0	15	1	22	0	10	10.0	10.0	11.0	57.0
Nauru	SIDS		5		11.5		4		12.7		33.2

Table 27: ICT Regulatory Tracker Score by Pillar – SIDS, 2007 and 2024 (continued)

Palau	SIDS	0	4	7.5	7.5	2	6	2.0	2.0	11.5	19.5
Papua New Guinea	SIDS	6	17	8	19.5	0	13	8.0	14.0	22.0	63.5
Saint Kitts and Nevis	SIDS	12	13	15	15	13	19	21.0	21.0	61.0	68.0
Saint Lucia	SIDS	15	17	14	17.5	4	18	20.3	25.0	53.3	77.5
Saint Vincent and the Grenadines	SIDS	16	16	17	17	18	20	25.0	26.0	76.0	79.0
Samoa	SIDS	14	15	17	19.5	12	22	3.7	15.3	46.7	71.8
Sao Tome and Principe	LDC+SIDS	9	15	16	18	6	20	13.0	19.7	44.0	72.7
Seychelles	SIDS	2	14	9	17.5	8	23	18.7	25.0	37.7	79.5
Singapore	SIDS	17	17	18	21.5	14	28	22.3	27.0	71.3	93.5
Solomon Islands	LDC+SIDS	0	13	3.5	17.5	0	18	3.0	21.0	6.5	69.5
Suriname	SIDS	6	14	6.5	15	0	18	1.0	13.0	13.5	60.0
Timor-Leste	LDC+SIDS	0	12	4	13.5	0	15	4.0	10.0	8.0	50.5
Tonga	SIDS	0	4	4.5	10	0	19	16.0	20.7	20.5	53.7
Trinidad and Tobago	SIDS	12	20	12	21	10	28	21.0	26.0	55.0	95.0
Tuvalu	LDC+SIDS	0	0	3	3	0	4	5.0	5.3	8.0	12.3
Vanuatu	SIDS	0	15	4	22	0	14	12.0	26.0	16.0	77.0

Source: ITU ICT Regulatory Tracker (2007-2024)

Note: Pillar 1 ‘Regulatory Authority’ max score = 20; Pillar 2 ‘Regulatory Mandate’ max score = 22; Pillar 3 ‘Regulatory Regime’ max score = 30; Pillar 4 ‘Competition Framework’ max score = 28

Colour coding: ● G1 ● G2 ● G3 ● G4

What stands out: Trends in small island developing States (SIDS)

- **SIDS made strong gains relative to their scale**, with many reaching G3 and a subset achieving G4-level performance by 2024.
- **Large jumps from low baselines demonstrate that small and dispersed markets can modernize quickly** when reforms focus on the core market toolkit and enforcement.
- **Progress spans all regulatory domains**, with particularly strong results where mandates and consumer-protection roles are clarified and competition safeguards are strengthened.
- **Variation remains wide**: top performers show near-complete frameworks, while some small States still face persistent capacity and institutional constraints that limit consolidation.

5 Conclusion

The ICT Regulatory Tracker dataset for 2007–2024 shows a clear structural shift from command-and-control regulation towards integrated, pro-competitive frameworks. By 2024, almost two thirds of countries operate in the G3/G4 tiers, compared with just one fifth in 2007. The main drivers of this transformation lie in the regulatory regime and competition framework pillars, where countries have progressively moved from basic market opening to more sophisticated, rules-based oversight of access, interconnection and market power.

At the same time, the ladder of progress has not been climbed at the same pace everywhere. Europe and North America have largely consolidated in the top tier globally, while regions that started furthest behind in 2007 – notably Africa, the Arab States, and Asia and the Pacific – record the largest relative gains and an increasingly diverse group of top performers. Vulnerable country groups (LDCs, LLDCs and SIDS) have also moved upwards, but their average scores and generational profiles confirm that gaps in institutional capacity, mandates and competition safeguards remain material. The distribution of ‘fast risers’ – spanning all regions and income groups – underlines that substantial upgrading is feasible within a few policy cycles when institutional reform and modern regulatory instruments move together.

The time profile of reforms points to a ‘wave’ dynamic: an early post financial crisis effort to exit the G1 tier followed by an extended period of consolidation, and a renewed post-COVID acceleration, especially among G2 tier countries with greater scope for improvement. In these episodes, regulatory regimes and competition frameworks again account for most of the measured progress, while institutional arrangements and formal mandates evolve more gradually but steadily. This pattern suggests that many countries have now assembled the core ruleset for functioning telecommunication and broadband markets, and that the next margins of improvement will increasingly lie in cross-sector collaboration, digital-economy enablers and implementation quality rather than in basic sector reform alone.

Looking ahead, the ICT Regulatory Tracker will remain a central tool for making these dynamics visible and comparable as countries navigate the transition from mature telecommunication regulation towards broader digital governance. As generations converge at the top of the scale, the emphasis is likely to shift from ‘how far’ countries have moved on the G1–G4 ladder to ‘how ready’ their policy, legal and institutional frameworks are to support data-driven services, platform competition, affordability and meaningful connectivity – measured by the G5 Benchmark. The 2007–2024 period has laid the regulatory groundwork on which the next phase of digital transformation will build.

What stands out: Conclusions: Key messages

- **Global ICT regulation has structurally shifted toward integrated, pro-competitive frameworks**, with G3/G4 now the norm compared with 2007.
- **Progress has been driven mainly by the spread of modern market rules and competition safeguards**, moving regulatory practice from basic liberalization to more rules-based oversight of access, interconnection and market power.
- **Convergence is real but incomplete**: advanced regions have consolidated at the top, while fast catch-up in lower-baseline regions and vulnerable-country groups coexists with persistent gaps in institutional capacity, mandates and competition practice.
- **Reform happens in waves**, periods of rapid upgrading are followed by longer phases of consolidation as countries embed and implement changes.

→ **The next frontier is less about basic sector reform and more about implementation quality and cross-sector digital governance readiness, where collaborative regulation and broader digital-economy enablers become decisive.**

For further insight into digital governance and digital transformation readiness, see the ITU [G5 Benchmark](#) and the [Digital Policy Readiness Framework](#).

Annex 1: Note on Methodology of the ICT Regulatory Tracker

What is the ICT Regulatory Tracker? The ICT Regulatory Tracker is an evidence-based tool to help decision-makers and regulators make sense of the rapid evolution of ICT regulation. The ICT Regulatory Tracker enables various analytical features to pinpoint the changes taking place in the ICT regulatory environment. Using both quantitative and qualitative data, the ICT Regulatory Tracker makes possible benchmarking and the identification of trends in ICT legal and regulatory frameworks. It likewise helps identify the gaps in existing regulatory frameworks, making the case for further regulatory reform towards achieving a vibrant and inclusive ICT sector.

Scope. The ICT Regulatory Tracker is composed of a total of 50 indicators (11 composite, see full list in Table 7) grouped into four pillars (see also Table 13):

- 1) the regulatory authority (focusing on the functioning of the separate regulator),
- 2) regulatory mandates (who regulates what),
- 3) the regulatory regime (what regulation exists in major areas) and
- 4) the competition framework in the ICT sector (level of competition in the main market segments).

Period. The ICT Regulatory Tracker is available for the period 2007-2024. It covers:

- 2007-2010: data for 190 countries and economies
- 2011-2013: 191 countries and economies
- 2014-2017: 192 countries and economies
- 2018-24: 194 countries and economies

Table 28: Countries and economies included in the ICT Regulatory Tracker, 2007 to 2024

Afghanistan	Chad	Greece	Liechtenstein	Palau	Sudan
Albania	Chile	Grenada	Lithuania	Palestine†**	Suriname
Algeria	China	Guatemala	Luxembourg	Panama	Sweden
Andorra	Colombia	Guinea	Madagascar	Papua New Guinea	Switzerland
Angola	Comoros	Guinea-Bissau	Malawi	Paraguay	Syrian Arab Republic
Antigua and Barbuda	Congo (Rep. of the)	Guyana	Malaysia	Peru	Tajikistan
Argentina	Costa Rica	Haiti	Maldives	Philippines	Tanzania
Armenia	Croatia	Honduras	Mali	Poland	Thailand
Australia	Cuba	Hong Kong, China*	Malta	Portugal	Timor-Leste
Austria	Cyprus	Hungary	Marshall Islands	Qatar	Togo

Table 28: Countries and economies included in the ICT Regulatory Tracker, 2007 to 2024 (continued)

Azerbaijan	Czech Republic	Iceland	Mauritania	Romania	Tonga
Bahamas	Côte d'Ivoire	India	Mauritius	Russian Federation	Trinidad and Tobago
Bahrain	Dem. Rep. of the Congo	Indonesia	Mexico	Rwanda	Tunisia
Bangladesh	Denmark	Iran (Islamic Republic of)	Micronesia	Saint Kitts and Nevis	Turkmenistan
Barbados	Djibouti	Iraq	Moldova	Saint Lucia	Tuvalu
Belarus	Dominica	Ireland	Monaco	Saint Vincent and the Grenadines	Türkiye
Belgium	Dominican Rep.	Israel	Mongolia	Samoa	Uganda
Belize	Ecuador	Italy	Montenegro	San Marino	Ukraine
Benin	Egypt	Jamaica	Morocco	Sao Tome and Principe	United Arab Emirates
Bhutan	El Salvador	Japan	Mozambique	Saudi Arabia	United Kingdom
Bolivia (Plurinational State of)	Equatorial Guinea	Jordan	Myanmar	Senegal	United States
Bosnia and Herzegovina	Eritrea	Kazakhstan	Namibia	Serbia	Uruguay
Botswana	Estonia	Kenya	Nauru†	Seychelles	Uzbekistan
Brazil	Eswatini	Kiribati	Nepal (Republic of)	Sierra Leone	Vanuatu
Brunei Darussalam	Ethiopia	Republic of Korea	Netherlands	Singapore	Venezuela
Bulgaria	Fiji	Kuwait	New Zealand	Slovakia	Viet Nam
Burkina Faso	Finland	Kyrgyzstan	Nicaragua	Slovenia	Yemen
Burundi	France	Lao P.D.R.	Niger	Solomon Islands	Zambia
Cabo Verde	Gabon	Latvia	Nigeria	Somalia	Zimbabwe
Cambodia	Gambia	Lebanon	North Macedonia	South Africa	
Cameroon	Georgia	Lesotho	Norway	South Sudan†	

Table 28: Countries and economies included in the ICT Regulatory Tracker, 2007 to 2024 (continued)

Canada	Germany	Liberia	Oman	Spain	
Central African Rep.	Ghana	Libya	Pakistan	Sri Lanka	

Notes:

† Not included in the 2007 baseline for the ICT Regulatory Tracker; first year available in the dataset:

- Nauru: first year available 2014
- Palestine: first year available 2018
- South Sudan: first year available 2011

* Hong Kong, Special Administrative Region of China is included here as an economy.

** Palestine is not an ITU Member State; the status of Palestine in ITU is the subject of Resolution 99 (Rev. Dubai, 2018) of the ITU Plenipotentiary Conference

Data mechanics: coding & scores After coding the originally qualitative information, all indicators are given a score between 0 and 2. The benchmark for the scoring is what is considered the best possible scenario based on the internationally recognized [regulatory best practices that were adopted by the global community of regulators at the annual ITU Global Symposiums for Regulators](#).

Table 29: ICT Regulatory Tracker structure and scoring rules

Pillar	Name	Number of indicators	Max score	Countries ranked if min indicators
I	Regulatory authority	10	20	10
II	Regulatory mandates	11	22	11
III	Regulatory regime	15	30	15
IV	Competition framework	14	28	14
	ICT Regulatory Tracker	50	100	50

Source of data. The ICT Regulatory Tracker is based on self-reported information gathered yearly via the [ITU World Telecommunication Regulatory Survey](#) as well as desktop research based on official sources and direct outreach to national telecommunication/ICT regulatory authorities.

Indicators. The full set of indicators is shown in Table 30.

Table 30: ICT Regulatory Tracker indicators, per pillar

Pillar	Area	No.	Indicator
I	Regulatory Authority	1	Separate telecom/ICT regulator
		2	Autonomy in decision-making
		3	Accountability
		4	Percentage of diversified funding
		5	Public consultations mandatory before decisions
		6	Enforcement power
		7	Sanctions or penalties imposed by regulator
		8	Dispute resolution mechanism
		9	Appeals to decisions
		10	Existence of Competition Authority
			Max score: 20
II	Regulatory Mandate		Who is in charge of regulating the following?
		11	Quality of Service obligations measures and service quality monitoring
		12	Licensing
		13	Interconnection rates and price regulation
		14	Radio frequency allocation and assignment
		15	Spectrum monitoring and enforcement
		16	Universal service/access
		17	Broadcasting: radio and TV transmission
		18	Broadcasting content
		19	Internet content
		20	IT
		21	Consumer issues
	Max score: 22		
III	Regulatory Regime	22	Types of licenses
		23	License exempt
		24	Operators required to publish Reference Interconnection Offer
		25	Interconnection prices made public
		26	Quality of Service monitoring required
		27	Infrastructure sharing for mobile operators permitted

(continued)

Pillar	Area	No.	Indicator
		28	Infrastructure sharing mandated
		29	Co-location/site sharing mandated
		30	Unbundled access to the local loop required
		31	Secondary spectrum trading allowed
		32	Band migration allowed
		33	Number portability required from fixed-line operators
		34	Number portability required from mobile operators
		35	Individual users allowed to use VoIP
		36	National plan that involves broadband
			Max score: 30
IV	Competition Framework		<i>Competition exists in the following market segments:</i>
		37	Local and long distance domestic and international fixed line services
		38	IMT: 3G, 4G, etc. services
		39	Cable modem, DSL, fixed wireless broadband
		40	Leased lines
		41	International Gateways
		42	Status of the main fixed line operator: public, partially or fully private
		43	Legal concept of dominance or SMP
		44	Criteria used in determining dominance or SMP
			Foreign participation/ownership in:
		45	Facilities-based operators
		46	Spectrum-based operators
		47	Local service operators / long-distance service operators
		48	International service operators
49	Internet Service Providers: ISPs		
	50	Value-added service providers	
			Max score: 28

Detailed methodology. The matrix with the detailed methodology of the ICT Regulatory Tracker can be downloaded online at itu.int/go/tracker. It provides detailed information on the choice, composition and scoring of each indicator.

Annex 2: Overview of 2007 Country Cohorts G1-G4

No.	2007 G1 cohort (n = 74)	2007 G2 cohort (n = 76)	2007 G3 cohort (n = 40)	2007 G4 cohort (n = 1)
1	Andorra	Afghanistan	Australia	Belgium
2	Antigua and Barbuda	Albania	Austria	
3	Azerbaijan	Algeria	Brazil	
4	Bangladesh	Angola	Bulgaria	
5	Belarus	Argentina	Canada	
6	Belize	Armenia	Croatia	
7	Benin	Bahamas	Cyprus	
8	Bolivia (Plurinational State of)	Bahrain	Czech Republic	
9	Brunei Darussalam	Barbados	Dominican Rep.	
10	Burundi	Bhutan	Estonia	
11	Cambodia	Bosnia and Herzegovina	Finland	
12	Central African Rep.	Botswana	France	
13	Chad	Burkina Faso	Georgia	
14	China	Cabo Verde	Germany	
15	Comoros	Cameroon	Greece	
16	Congo (Rep. of the)	Chile	Hong Kong, China	
17	Costa Rica	Colombia	Hungary	
18	Cuba	Côte d'Ivoire	Ireland	
19	Dem. Rep. of the Congo	Denmark	Latvia	
20	Djibouti	Ecuador	Liechtenstein	
21	Dominica	Egypt	Lithuania	
22	Equatorial Guinea	El Salvador	Malta	
23	Eritrea	Gambia	Montenegro	
24	Eswatini	Ghana	Morocco	
25	Ethiopia	India	Netherlands	
26	Fiji	Iran (Islamic Republic of)	Norway	

(continued)

No.	2007 G1 cohort (n = 74)	2007 G2 cohort (n = 76)	2007 G3 cohort (n = 40)	2007 G4 cohort (n = 1)
27	Gabon	Italy	Pakistan	
28	Grenada	Jamaica	Peru	
29	Guatemala	Japan	Poland	
30	Guinea	Jordan	Portugal	
31	Guinea-Bissau	Kenya	Romania	
32	Guyana	Kiribati	Saint Vincent and the Grenadines	
33	Haiti	Republic of Korea	Singapore	
34	Honduras	Kyrgyzstan	Slovakia	
35	Iceland	Lesotho	Slovenia	
36	Indonesia	Luxembourg	Spain	
37	Iraq	Madagascar	Switzerland	
38	Israel	Malawi	Türkiye	
39	Kazakhstan	Malaysia	United Kingdom	
40	Kuwait	Maldives	United States	
41	Lao P.D.R.	Mali		
42	Lebanon	Mauritania		
43	Liberia	Mauritius		
44	Libya	Mexico		
45	Marshall Islands	Moldova		
46	Micronesia	Mongolia		
47	Monaco	Mozambique		
48	Myanmar	Nepal (Republic of)		
49	Namibia	New Zealand		
50	Niger	Nicaragua		
51	Palau	Nigeria		
52	Papua New Guinea	North Macedonia		
53	Philippines	Oman		
54	Qatar	Panama		

(continued)

No.	2007 G1 cohort (n = 74)	2007 G2 cohort (n = 76)	2007 G3 cohort (n = 40)	2007 G4 cohort (n = 1)
55	Russian Federation	Paraguay		
56	San Marino	Rwanda		
57	Seychelles	Saint Kitts and Nevis		
58	Sierra Leone	Saint Lucia		
59	Solomon Islands	Samoa		
60	Somalia	Sao Tome and Principe		
61	Suriname	Saudi Arabia		
62	Syrian Arab Republic	Senegal		
63	Tajikistan	Serbia		
64	Timor-Leste	South Africa		
65	Togo	Sri Lanka		
66	Tonga	Sudan		
67	Turkmenistan	Sweden		
68	Tuvalu	Tanzania		
69	Uruguay	Thailand		
70	Uzbekistan	Trinidad and Tobago		
71	Vanuatu	Tunisia		
72	Viet Nam	Uganda		
73	Yemen	Ukraine		
74	Zimbabwe	United Arab Emirates		
75		Venezuela		
76		Zambia		

Annex 3: Overview of 2019 Country Cohort G1-G4

No.	Country (G2 in 2019)	No.	Country (G2 in 2019)
1	Afghanistan	36	Kyrgyzstan
2	Algeria	37	Lao P.D.R.
3	Angola	38	Lesotho
4	Azerbaijan	39	Madagascar
5	Bangladesh	40	Maldives
6	Barbados	41	Mali
7	Belarus	42	Mauritania
8	Belize	43	Micronesia
9	Benin	44	Mozambique
10	Bhutan	45	Myanmar
11	Bolivia (Plurinational State of)	46	Namibia
12	Brunei Darussalam	47	Nepal (Republic of)
13	Burundi	48	Nicaragua
14	Cambodia	49	Niger
15	Central African Rep.	50	Papua New Guinea
16	Chad	51	Paraguay
17	China	52	Qatar
18	Congo (Rep. of the)	53	Russian Federation
19	Côte d'Ivoire	54	Saint Kitts and Nevis
20	Dem. Rep. of the Congo	55	Samoa
21	Dominica	56	Sao Tome and Principe
22	El Salvador	57	Seychelles
23	Equatorial Guinea	58	Sierra Leone
24	Fiji	59	Solomon Islands
25	Gabon	60	Somalia
26	Grenada	61	South Sudan
27	Guatemala	62	Sri Lanka
28	Guinea-Bissau	63	Sudan
29	Guyana	64	Suriname
30	Haiti	65	Syrian Arab Republic

(continued)

No.	Country (G2 in 2019)	No.	Country (G2 in 2019)
31	Indonesia	66	Togo
32	Iraq	67	Tonga
33	Israel	68	Uruguay
34	Kazakhstan	69	Venezuela
35	Kiribati	70	Viet Nam

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