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| Report by the Secretary-General | |
| SITUATIONAL ANALYSIS FOR THE ITU STRATEGIC AND FINANCIAL PLANS 2028-2031 | |
| **Purpose**  This document presents a draft text for the Situational Analysis that informs the development of the draft new strategic and financial plans 2028-2031.  **Action required**  The Council Working Group for strategic and financial plans 2028-2031 is invited to **consider** and **endorse** the draft Situational Analysis for the draft new Strategic and Financial Plans 2028‑2031.  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **References**  [*CWG-SFP website*](https://www.itu.int/en/council/CWG-SFP-2028-2031/Pages/default.aspx)*;* [*Resolution 1428 (C24)*](https://www.itu.int/md/S24-CL-C-0139/en) | |

ITU Strategic and Financial Plans 2028-2031: situational analysis

# 1 ITU as a part of the United Nations System

The International Telecommunication Union (ITU) is the United Nations specialized agency for digital technologies. ITU’s foundational strengths lie in its long-standing mandate and technical expertise. Through its treaty-based frameworks, particularly the Radio Regulations, ITU enables the global coordination of radio-frequency spectrum and satellite orbits —essential resources for mobile communications, broadcasting, and the growing space economy. Its standards development activities support interoperability, innovation, and technology diffusion in critical areas such as broadband, AI, quantum communications, cybersecurity, and smart cities. The Union's ability to foster global consensus on sensitive technical issues, while respecting national sovereignty, has been essential in enabling the development of globally interconnected systems.

The value proposition of ITU also includes its ability to provide technical assistance and build national capacities. ITU’s platforms for policy and regulatory dialogue, such as the Global Symposium for Regulators, help Member States harmonize regulatory approaches and foster investment-friendly environments. Its capacity building and advisory services —delivered through regional and global programs— enhance countries’ ability to adopt emerging technologies and implement effective digital strategies. These strengths position ITU as a key enabler of the Sustainable Development Goals (SDGs), particularly those related to digital inclusion, infrastructure, education, innovation, and climate action.

Since its founding in 1865, ITU continues to hold a central position in the global digital ecosystem. As digital technologies transform societies, economies, and institutions, ITU’s role as a convener, standard-setter, coordinator, and provider of technical support remains highly relevant. Its diverse membership —comprising 194 Member States, over 1 000 industry members, academia, civil society organizations, the technical community, and regional and international organizations— reflects the organization’s unique ability to bring together all stakeholders to promote inclusive, secure, and sustainable digital development.

# 2 Developments since the ITU 2022 Plenipotentiary Conference

## 2.1 Developments within the UN System

Since the 2022 Plenipotentiary Conference, the digital agenda has become increasingly visible across the United Nations system and has manifested itself as a central piece of multilateral cooperation and the broader implementation of the SDGs. The culmination of this momentum is reflected in the adoption of the Pact for the Future and its Global Digital Compact (GDC) in 2024. These developments underscore a shared recognition of the need to advance universal and meaningful connectivity, promote digital inclusion, and strengthen the governance of emerging technologies such as AI, data, and cybersecurity.

These developments have also solidified the centrality of digital transformation across the UN system. UN entities have scaled up their digital strategies, operations, and coordination mechanisms to reflect the increasing relevance of digital technologies in delivering their mandates.

Some examples of how digital issues are in focus at the UN include: follow up activities on the GDC and other digital aspects in the Pact for the Future, including establishment of an Office for Digital and Emerging Technologies within the UN Secretariat and plans to establish an AI Scientific Panel and Global Dialogue on AI Governance; expanded content on digital issues at the annual STI Forum, the naming of A Digital Revolution as the first of six actions in the Beijing+30 Action Agenda, marking the 30th anniversary of the Beijing Declaration and Platform for Action for women's empowerment. Most recent examples include the Fourth International Conference on Financing for Development whose *Compromiso de Sevilla* highlights the importance of digital infrastructure and services, calling for increased investment and collaboration in this field; and the Third UN Conference on Landlocked Developing Countries (LLDCs) which promotes digital advancements as a key driver to unlock the full potential of LLDCs. Similarly, the Second World Summit on Social Development will pay significant attention to social inclusion in the digital space. Digital themed UN conferences and meetings, resolutions and reports have also become more common.

While the strengthening of the global digital agenda through the GDC and increased cooperation across UN entities provides an impetus for ITU to reinforce its key role in the global governance and development ecosystem, these developments also require ensuring that ITU remains a neutral platform, inclusive of the aspirations and considerations of all Member States.

In this evolving environment, the ITU is uniquely positioned to strengthen its role as a trusted technical agency on telecommunications/ICTs. Remaining a technically focused, neutral, and consensus-based organization, as digital and cyber issues become more prominent, will help maintain the trust of all Member States. This involves reinforcing its unique mandate on telecommunications/ICTs while being responsive to broader UN initiatives, such as the GDC and WSIS+20.

ITU's participation in the WSIS process, its role in standard-setting, and capacity-building activities directly support the objectives outlined in the GDC. With the WSIS framework recognized as a key implementation mechanism for the GDC, ITU is expected to play a central role in supporting its Member States in achieving their ambitions. Contributions to these objectives take the form of practical support mechanisms, for example, ITU regulatory toolkits, digital skills development, and technical assistance to governments and regulators.

Another example, the AI for Good Skills Coalition (launched in 2025), contributes to ITU’s strategic objective of advancing inclusive digital capacity development, reinforcing its role in supporting implementation of the GDC and WSIS+20 Review outcomes.

At the operational level, the reformed UN Development System (UNDS) continues to promote integrated and collaborative country-level support. As a member of the UN Sustainable Development Group, ITU’s engagement with the UN Sustainable Development Cooperation Frameworks (UNSDCFs) and its collaboration with UN Resident Coordinators (RCs) is vital to ensure that digital connectivity and ICT infrastructure remain core enablers of national strategies. ITU’s regional offices have increased their interaction with RCs and UN Country Teams, contributing to Common Country Assessments (CCAs), offering ICT-related data and insights, and promoting national digital inclusion efforts.

ITU has also stepped up its collaboration with the UNDS through the Joint SDG Fund, an innovative instrument to incentivize transformative policy shifts and stimulate strategic investment to accelerate implementation of the SDGs. Co-leading the technical secretariat of the Joint SDG Fund’s digital transformation work, and as a member of the Fund's Operational Steering Committee. In times of financial uncertainty and strong demand for solutions, initiatives that combine innovative finance with the technical expertise of the UN system can deliver better outcomes.

Regional office contributions to CCAs and UNSDCFs further this objective by embedding digital development priorities into country-level planning and interagency coordination mechanisms, as well as joint toolkits, shared diagnostics, and coordinated capacity-building activities to improve coherence and visibility of digital development within UN frameworks.

Moreover, enhanced collaborative efforts across UN entities, particularly in areas of AI innovations, digital public infrastructure, digital resilience, environmental sustainability, quantum, and smart cities, are helping to position ITU as a contributor, convener and standard setter. While overlapping mandates and emerging digital governance frameworks may generate parallel workstreams, they also provide opportunities for ITU to build synergies, amplify its impact, and secure resources by engaging with system-wide initiatives.

As head of a specialized agency, ITU's Secretary-General is a member of the UN System Chief Executives Board (CEB), the highest-level coordination forum of the United Nations system chaired by the UN Secretary-General. ITU is also a member of the UN Sustainable Development Group, the system-wide forum for joint policy formation and decision-making on sustainable development, chaired by the UN Deputy Secretary-General.

Most recently, in 2025, the UN80 Initiative was launched, structured around three key workstreams: enhancing operational efficiency, assessing how mandates – or key tasks – from Member States are implemented, and exploring structural reforms across the UN system. To advance these three workstreams, seven UN80 clusters were established and ITU, together with the International Labour Organization (ILO), was tasked to coordinate the Specialized Agencies cluster.

Additionally, the emergence of multiple digital initiatives outside the UN system, including regionally driven frameworks and private-sector-led models, may pose competitive pressures. ITU’s ability to convene diverse stakeholders and uphold universally agreed standards will be critical in ensuring its continued relevance. Strategic diplomacy, inclusive stakeholder engagement, and agility in adapting to emerging digital policy debates will define the Union’s success in the years ahead.

ITU’s platforms for dialogue, including the World Telecommunication/ICT Policy Forum (WTPF), the Global Symposium for Regulators (GSR), and WSIS related processes, support Member States by facilitating policy exchange and consensus-building on priority issues. These are complemented by technical resources such as the Digital Regulation Handbook, WSIS Stocktaking Database, and results frameworks aligned with the SDGs.

Recognizing the expanding scope of digital cooperation, ITU’s Strategic and Financial Plans (SFP) have begun to integrate these global priorities more explicitly. In line with ITU's leadership role in WSIS and the high relevance of ITU mandates to GDC implementation, ITU is necessarily deeply involved in the WSIS+20 review and has a key leadership role in GDC follow up including as co-chair of the Pact of the Future Working Group on Digital Technologies while also continuing to offer technical support and policy leadership to the UN system on digital issues.

This will ensure that ITU’s voice is clearly heard, and its technical expertise leveraged in shaping the future of global digital governance.

## 2.2 Changes in the Telecommunications and ICTs Landscape

The telecommunications and ICT landscape has experienced unprecedented transformation since 2022. The momentum generated during the COVID-19 pandemic for digitalization has accelerated, fueled by breakthrough advancements in 6G, Artificial Intelligence (AI), quantum computing, and satellite-based communications. These technologies are reshaping infrastructure and accelerating global competition around connectivity, standards, and governance frameworks, while raising the strategic importance of international coordination.

At the same time, protracted crises have severely impacted access to ICT connectivity and telecommunication infrastructure in a number of countries and regions, further exacerbating the digital divide and undermining development efforts in affected regions. Telecommunications is a key enabler for humanitarian response and remains essential in crisis situations. As such, prioritizing continuity of telecommunications and emergency telecommunications is fundamental to enable effective humanitarian action, protect frontline workers, and ensure affected communities can access critical information and stay connected.

Disruptions from climate-related events, cyber threats, and infrastructure failures have placed digital resilience at the centre of global telecommunications policy. ITU has prioritized digital resilience as a key theme for the World Telecommunication/ICT Policy Forum to be held in 2026 (WTPF-26), recognizing the need for robust, adaptable, and secure digital infrastructures to withstand and recover from such disruptions. Resilience of such key foundational infrastructures as submarine cables and communications satellites as well as digital platforms has become a key component for resilience of economies and societies which depend increasingly on digital infrastructure and services.

The widespread deployment of large language models (LLMs) since 2022 has marked a major inflection point in the evolution of AI. LLMs are now enabling advanced innovation across education, public services, health, and content generation, which introduce new opportunities for digital transformation, but also raise urgent questions about data governance, multimedia authenticity, algorithmic accountability, and an unequal distribution or concentration of innovation capacity. ITU is responding to these developments through its AI for Good platform, global standards development, policy conversations across various ITU convening platforms, and its co-leadership of the UN Inter-Agency Working Group on AI, which promotes inclusive, rights-based, and sustainable approaches to AI.

Quantum computing is also growing rapidly. Quantum technologies hold the potential to revolutionize data processing, cryptography, and scientific simulations, Quantum’s potential to enhance areas such as climate forecasting, secure communications and AI capabilities is significant, but so are the risks. Quantum computing may disrupt existing cybersecurity systems, while limited global investment risks deepening digital divides. ITU is currently convening standardization, policy guidance and cross-sectoral partnerships, including the Quantum for Good initiative under AI for Good and ongoing development of quantum-safe encryption standards such as Quantum Key Distribution (QKD).

Environmental sustainability is another key dimension of the changing ICT landscape. Digital technologies offer numerous opportunities to mitigate and adapt to climate change and monitor planetary health. At the same time, the rapid growth of consumer devices, data centers and connectivity networks has increased the sector’s energy consumption, greenhouse gas emissions, and e-waste production. Data centers accounted for around 1.5% of the world’s electricity consumption in 2024, or 415 terawatt-hours (TWh), and is set to more than double to around 945 TWh by 2030[[1]](#footnote-1). E-waste is projected to rise to 82 million tons in 2030[[2]](#footnote-2). To address this, ITU and its partners are advocating for and supporting their membership with e-waste management through the development of policy and regulation, the monitoring of ICT sector greenhouse gas emissions and energy consumption and the development of climate-smart standards, to reduce the negative environmental impacts and leverage the opportunities of ICTs.

Space technologies are taking on new importance, particularly in remote and underserved areas. Advances in Low Earth Orbit (LEO) constellations and geostationary satellites are expanding connectivity while supporting climate monitoring, disaster and emergency response and agriculture. As the space economy grows, with projections reaching USD 1.8 trillion by 2035[[3]](#footnote-3), concerns are also mounting over orbital congestion, debris and equitable access to spectrum and orbital resources. ITU plays a central role through global spectrum management, satellite coordination and frameworks for space sustainability. ITU is committed to inclusive and sustainable space connectivity, supporting enabling regulatory environments, promoting equitable access and strengthening coordination.

Against this backdrop, ITU faces a dynamic and competitive environment. It must continue to adapt to the emergence of new stakeholders, including new market players and regional alliances, which are increasingly influencing the digital policy space. ITU's strength lies in its convening power, technical expertise, and inclusive multilateral framework. To remain relevant, ITU should intensify efforts in areas like digital inclusion, cybersecurity, resilient connectivity, AI innovation, Space sustainability and climate action.

The Union must help Member States bridge persistent digital divides through investment-friendly policy environments, capacity-building, digital literacy programs, and support for infrastructure development. ITU should champion inclusive digital transformation that leaves no one behind, facilitate and advocate for availability of connectivity to support resilience of societies and economies, including in crisis or humanitarian situations, and guide the global dialogue on emerging technologies, by developing practical guidance and standards for safe, ethical, inclusive and effective use of ICTs in the years to come.

# 3 Progress in the Implementation of ITU Strategic Plan 2024–2027 Targets

The ITU Strategic Plan for 2024–2027 centers around two overarching strategic goals: Universal Connectivity and Sustainable Digital Transformation. The implementation of targets under these goals reflects global momentum in expanding digital access, affordability, and sustainability, while also underlining persistent gaps between regions and population groups. This section presents a focused review of progress achieved by 2024 in implementing the key targets associated with these two strategic goals.

Under the Universal Connectivity goal, progress has been recorded in extending access to broadband networks. As of 2024, 68% of the global population, or 5.5 billion people, are using the Internet—up from 65% in 2023. Nevertheless, one-third of the population remains offline, with internet penetration reaching only 27% in low-income countries compared to 93% in high-income regions. Target 1.1, on universal broadband coverage, remains a work in progress despite mobile network coverage reaching 97.9% globally.

Affordability continues to be a major barrier to universal access (Target 1.2). The median price of a mobile broadband basket (2GB) has declined globally to 1.1% of Gross National Income (GNI) per capita, yet users in low-income economies still pay 19 times more than those in high-income countries. For fixed broadband, the cost remains prohibitively high in many parts of the world, up to one-third of monthly income in the poorest economies, undermining progress toward affordable internet for all.

Target 1.3, ensuring broadband access for every household, has seen considerable gains. Global household connectivity now exceeds 95%, achieving the threshold set for 2024. Yet actual usage and the quality of connection vary widely. Meanwhile, Target 1.4, which focuses on device ownership, reveals that 80% of individuals aged 10 and older own a mobile phone globally, but this figure drops to 56% in low-income countries. These disparities directly affect access and usage outcomes across other targets.

The integration of ICTs and the Internet into education and expansion of digital skills remain key pillars of digital inclusion, with Target 1.5 addressing school connectivity. While data is still being collected, initiatives such as Giga are driving efforts to connect schools, particularly in underserved regions. Similarly, cyber readiness (Target 1.6) has improved, with 132 countries having operational Computer Incident Response Teams (CIRTs) and 127 with adopted national cybersecurity strategies —reflecting growing global alignment with cybersecurity best practices.

Target 1.7, universal individual access to the Internet, emphasizes disparities by geography. In 2024, urban internet usage stood at 83% compared to just 48% in rural areas. In low-income countries, only 16% of rural dwellers are online. Bridging this divide requires investment not only in infrastructure but also in digital literacy, localized content, and affordable services.

Turning to Sustainable Digital Transformation, Target 2.1 seeks to bridge digital gaps related to gender, age, and geography. In 2024, 70% of men and 65% of women used the Internet globally, but the gender parity score remains below optimal levels in Least Developed Countries (0.70) and regions such as Africa and the Arab States. In contrast, parity has been reached in Europe, CIS, and the Americas.

Youth continue to lead in digital adoption. Globally, 79% of those aged 15 to 24 are online, compared to 66% of the general population. In low-income countries, this demographic is 1.9 times more likely to be online than older groups, underlining the importance of youth-focused digital policies. Nonetheless, significant disparities persist in rural access, where infrastructure gaps intersect with affordability and skills barriers to deepen exclusion.

Target 2.2, promoting digital skills for all, faces challenges due to limited data availability. Only 90 countries report skill metrics, and just 40 offer disaggregated, comparable information. Among available data, over 80% of internet users demonstrate basic communication skills, but data on problem-solving and technical competencies remains sparse, impeding global assessments and policy responses.

Environmental sustainability (Target 2.5) is becoming increasingly urgent. According to the Global E-waste Monitor 2024, from 2010 to 2022, the amount of e-waste generated globally has increased by 82%, from 34 billion kg to 62 billion kg. 22.3 per cent of this e-waste mass was documented as formally collected and recycled in an environmentally sound manner. Despite increased recycling volumes from 8 billion kg in 2010 to 13.8 billion kg in 2022, the growth of e-waste generation is outpacing the formal collection and recycling by almost factor of 5. The [Greening Digital Dashboard](https://greeningdigital.itu.int/), launched by ITU, monitors emissions and energy consumption by 200 leading digital companies. GHG emissions are still on the rise. In 2023, 166 of 200 companies reported Scope 1 and 2 operational emissions, totaling 297 million tCO2 e — a 1.4 per cent increase from the previous year. Their combined footprint now represents approximately 0.8 per cent of all global energy-related emissions. Data centers, in particular, those powering AI, are major contributors.

To fully implement the 2024–2027 targets, greater alignment is needed between policy, investment, and measurement. A more comprehensive and timely global data ecosystem will enable evidence-based policymaking. ITU's leadership in standardization, capacity building, and convening stakeholders across the digital ecosystem remains pivotal in helping Member States meet these ambitious goals.

# 4 Towards 2030

The digital landscape continues to evolve at a rapid pace, creating both opportunities and pressures for institutional adaptation. Technological advances in AI, blockchain, quantum computing, and satellite-based communications are transforming connectivity, data use, and digital governance. New actors, including multinational tech firms and regional initiatives, are shaping digital rules and standards, introducing more complex dynamics into the global ecosystem. These developments increase demand for agile, inclusive, and technically competent global coordination, reaffirming ITU’s relevance while also highlighting the need for ongoing institutional renewal.

The ITU has embarked on a comprehensive transformation process, with efforts underway to modernize its internal systems, enhance transparency, and improve the efficiency of service delivery. The creation of an Oversight Unit with internal audit, investigation, and evaluation functions strengthens governance and internal accountability. Investments in IT platforms and performance management are helping to improve the responsiveness of the organization to the members' needs. Additionally, efforts to reinforce ethics, risk management, and results-based management are enhancing confidence in ITU's institutional integrity.

Despite these efforts, several internal and external challenges persist. ITU’s internal processes can be slow to respond to fast-moving developments in technology and policy. Constraints in coordination across the Bureaux and the General Secretariat (as well as between the Headquarters and the field offices) can create inefficiencies and duplication. Additionally, the organization’s regional and in-country presence remains limited compared to other UN agencies, which can restrict its ability to support implementation at the national level. Growing workload pressures also present risks to institutional resilience and staff well-being.

Financial constraints are a key consideration for ITU’s future. Revenues have remained relatively stable for over two decades despite rising costs and increased demand for services. Although cost savings and efficiency measures have been introduced, significant investment is needed to modernize ITU’s infrastructure and operational capacity.

At the global level, the accelerating pace of digitalization presents both opportunities and risks. The potential for ICTs to drive economic growth, innovation, climate resilience, and inclusive development is widely recognized. However, these benefits are not evenly distributed. The digital divide remains a significant barrier, especially in low-income countries and rural areas. Emerging technologies bring challenges and opportunities that require coordinated responses, technical standards, and institutional capacity—all areas where ITU can add significant value.

To deliver on these global priorities, ITU must strengthen internal coordination, accelerate its response to emerging technologies, and deepen country-level engagement through its regional presence and interagency collaboration. Focused planning, streamlined decision-making, and clear alignment of roles across the organization will be critical to reinforcing ITU’s capacity to support Member States and contribute meaningfully to the implementation of the Strategic Plan.

ITU can work to consolidate its role as a central multilateral (and multistakeholder) platform for digital cooperation. A renewed focus on delivering results, engaging new stakeholders, and aligning work programs across the Union can enhance the effectiveness and coherence of its work. Strengthening strategic partnerships with regional bodies, standardization organizations, and development partners will be essential to extend ITU’s reach and leverage its impact.

In shaping its future value proposition, ITU must articulate how it delivers solutions in five critical areas: (1) global management of spectrum/satellite orbits, development of standards, and infrastructure; (2) data collection and analysis, capacity development and knowledge sharing; (3) regulatory and policy guidance to foster inclusive digital markets; (4) emergency and disaster response, cybersecurity, and resilience-building; and (5) institutional transparency, efficiency, and accountability. These elements, combined with a renewed strategic focus, can ensure that ITU continues to provide value to its diverse membership and plays a central role in shaping a trusted, inclusive, and sustainable digital future.

ITU’s enduring strength lies in its ability to unite a global and diverse membership to address shared digital challenges through consensus, technical excellence, and inclusive dialogue. While institutional improvements may still be needed, the organization remains uniquely positioned to serve as a global hub for the governance, development, and deployment of digital technologies. By leveraging its assets and addressing its gaps, ITU can help drive forward a digital transformation that benefits all people and communities, reinforcing its value as a key pillar of the evolving digital ecosystem.

# 5 SWOT analysis

A SWOT analysis is a strategic planning tool used by organizations to identify and evaluate their internal and external environments. The acronym SWOT stands for:

– Strengths – Current internal capabilities and resources that give the organization a competitive advantage and should be leveraged.

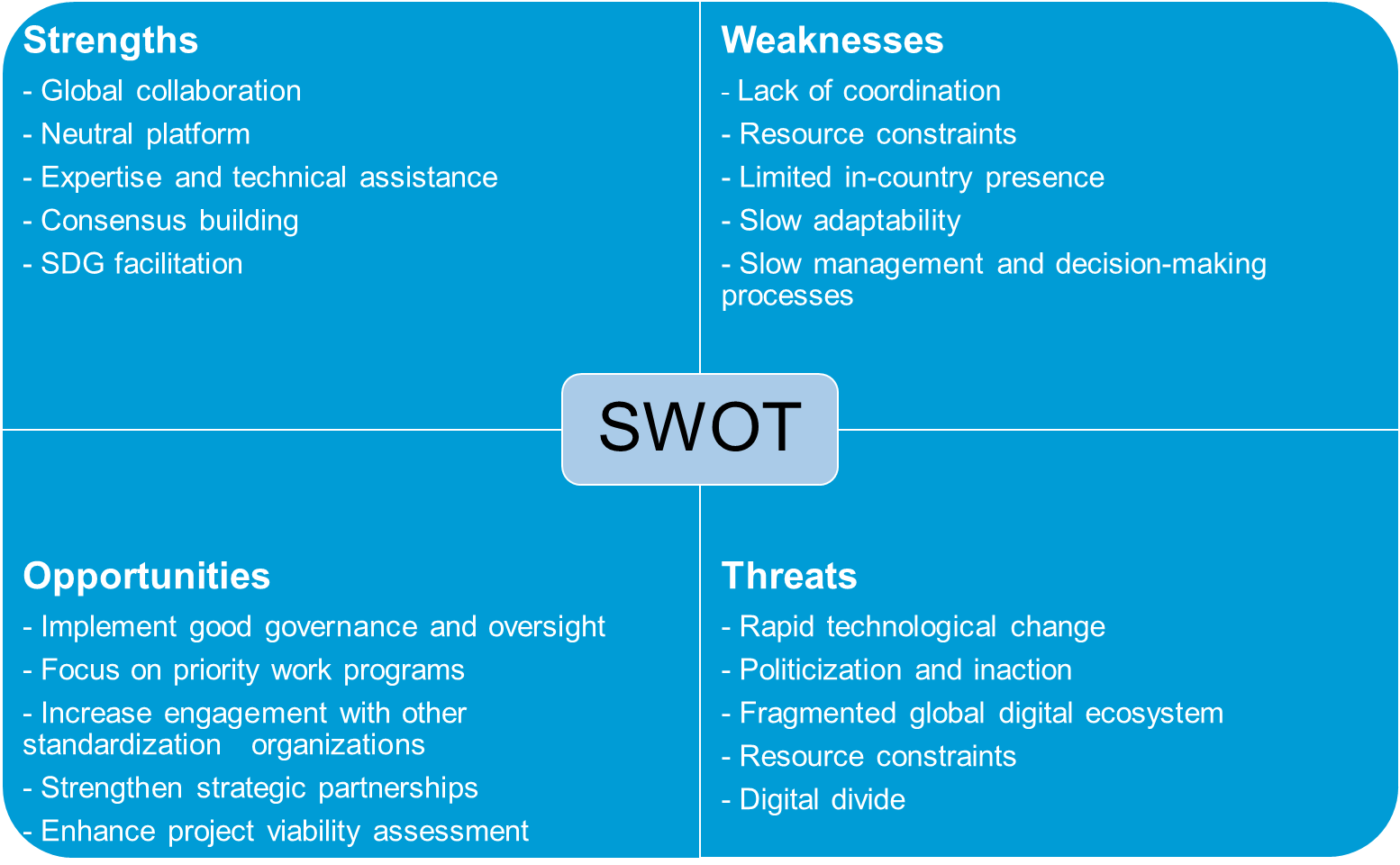
– Weaknesses – Current internal limitations or areas where the organization underperforms and needs improvement.

– Opportunities – External trends in the environment, developments, or situations that the organization can capitalize on to grow or improve performance in future.

– Threats – External challenges or risks that could negatively impact the organization and must be anticipated or mitigated.

By systematically analyzing these four dimensions, organizations can better align their strategies with their capabilities and the external environment.

The chart below presents the results of the Council Working Group for Strategic and Financial Plans' 1st Online Consultation, conducted in 2024.



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1. [Energy and AI – Analysis - IEA](https://www.iea.org/reports/energy-and-ai). [↑](#footnote-ref-1)
2. Global E-waste Monitor Report (<https://ewastemonitor.info/wp-content/uploads/2024/12/GEM_2024_EN_11_NOV-web.pdf>), ITU/UNITAR, 2024. [↑](#footnote-ref-2)
3. WEF/McKinsey report: <https://www.mckinsey.com/industries/aerospace-and-defense/our-insights/space-the-1-point-8-trillion-dollar-opportunity-for-global-economic-growth?utm_source=chatgpt.com>. [↑](#footnote-ref-3)