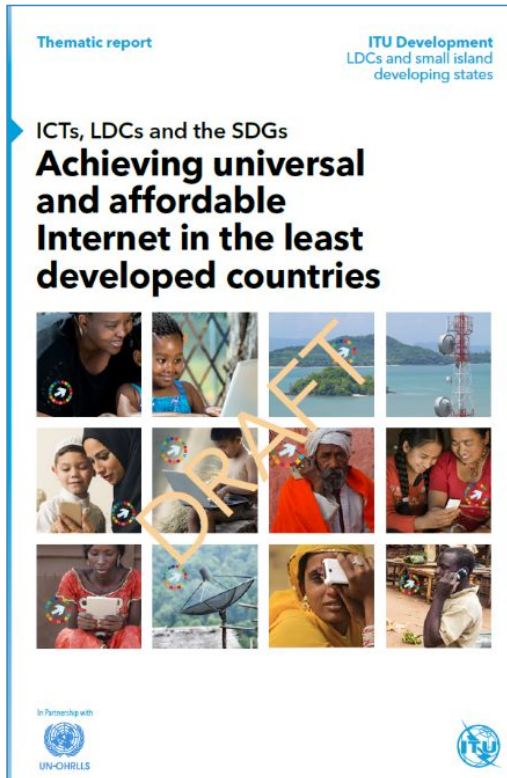




Pre-WTDC-17 Ministerial Roundtable on
ICT④SDGs in LDCs, LLDCs & SIDS
8 October, 2017



ICTs, LDCs and the SDGs Achieving universal and affordable Internet in the least developed countries

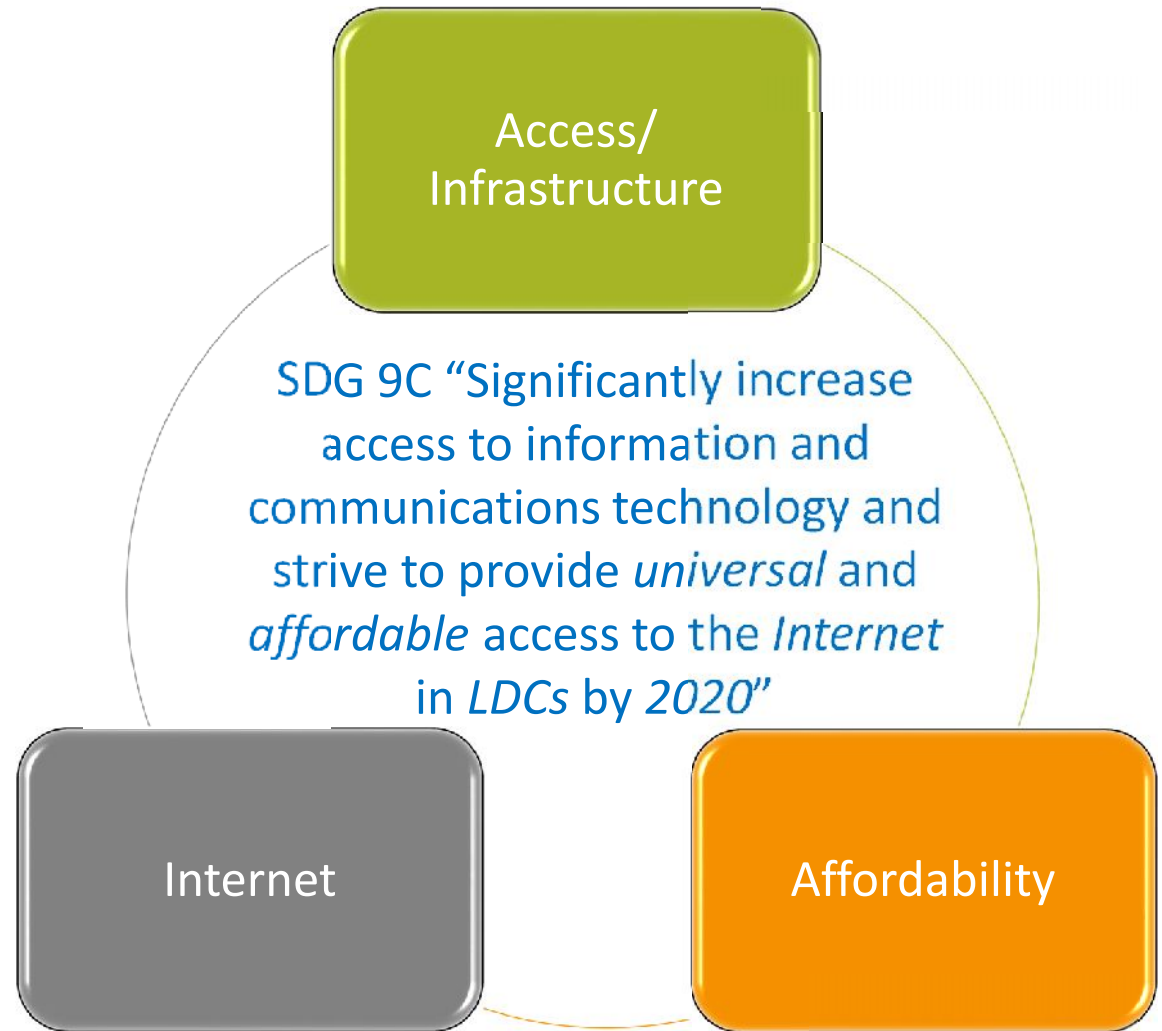
Vanessa GRAY
Head of LDCs, SIDS &
Emergency Telecommunications Division
BDT/ITU





LDCs & LLDCs SIDS

- LDCs: 47 countries highly vulnerable to economic and environmental shocks
- Includes 17 LLDCs and 9 SIDS
- LDCs, LLDCs and SIDS face related development challenges but are very different in terms of geography, population and level of economic development.



Source: ITU



Highlights

- ICTs, in particular basic services and applications over 2G networks, have had a significant impact on development but promise from broadband is even greater
- LDCs are on track to achieve SDG 9C in terms of access & affordability
- Internet use expected to remain low and skills remain a key barrier
- It is possible to leapfrog: sharing experiences from LDCs
- 3 dimensional framework - access, affordability & skills – to identify strengths and weaknesses and guide policies



Access/Infrastructure

Miles of networks:

1st: International

2nd: National backbone

3rd: User access

Plus "Invisible mile"



Explosive growth in access to submarine cables & national backbone infrastructure

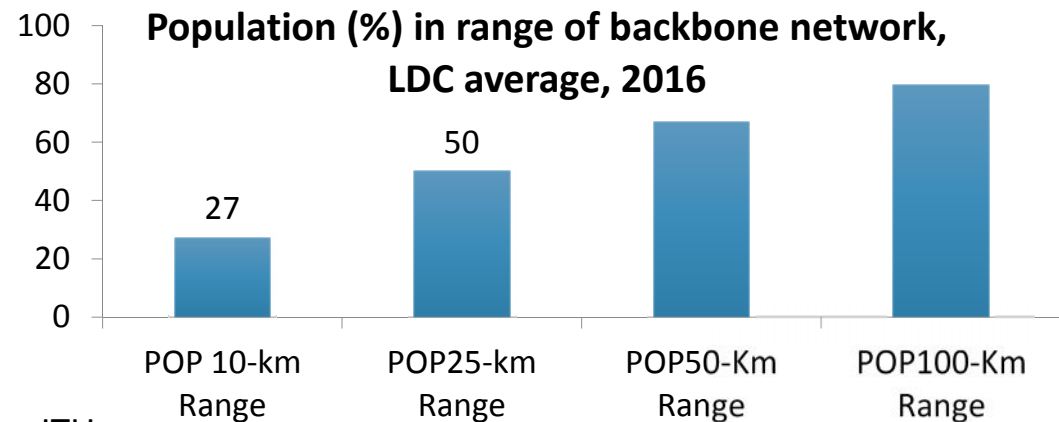
International

- Except for 6 (out of 30) ALL sea-facing LDCs have landing stations
- Almost all LLDCs have fiber optic cable cross-border terrestrial links but prices generally higher due to transit
- Unconnected SIDS are planning access to submarine cables
- Leverage regional economic communities for policy on cost-based & open access to submarine cables

National

Better backbone infrastructure through:

- Access to spectrum/digital dividend
- Regulation on rights of way and open access to networks
- Infrastructure sharing
- Universal Service Funds

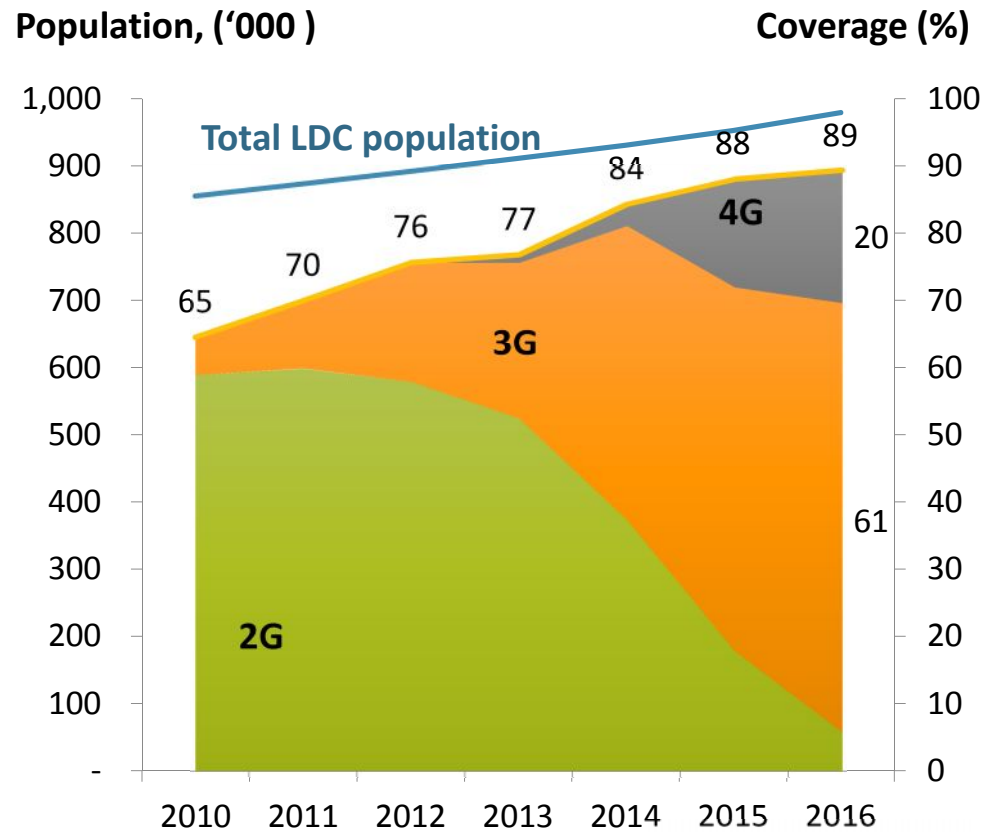


Source: ITU



Mobile population coverage in LDCs

- Narrowband (2G) Internet coverage high with remaining gaps almost all in rural areas
- 61% of population covered by 3G mobile broadband network
- 26 LDCs have launched 4G

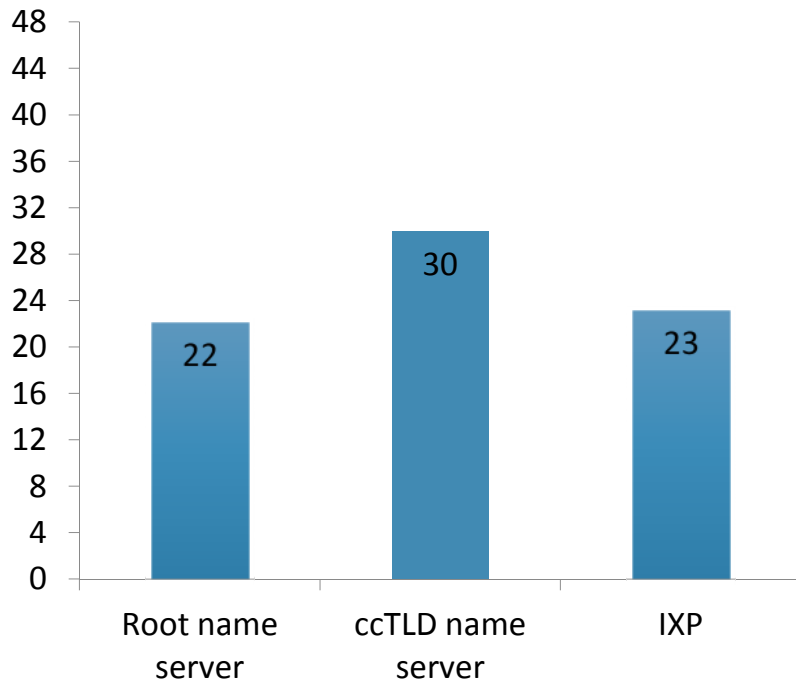


Source: ITU

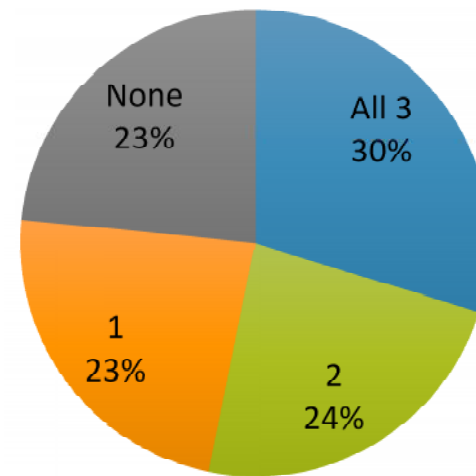


Building core Internet infrastructure

Number of LDCs with:



% of LDCs that have 3 fundamental Internet infrastructure components, 2017



Source: ITU

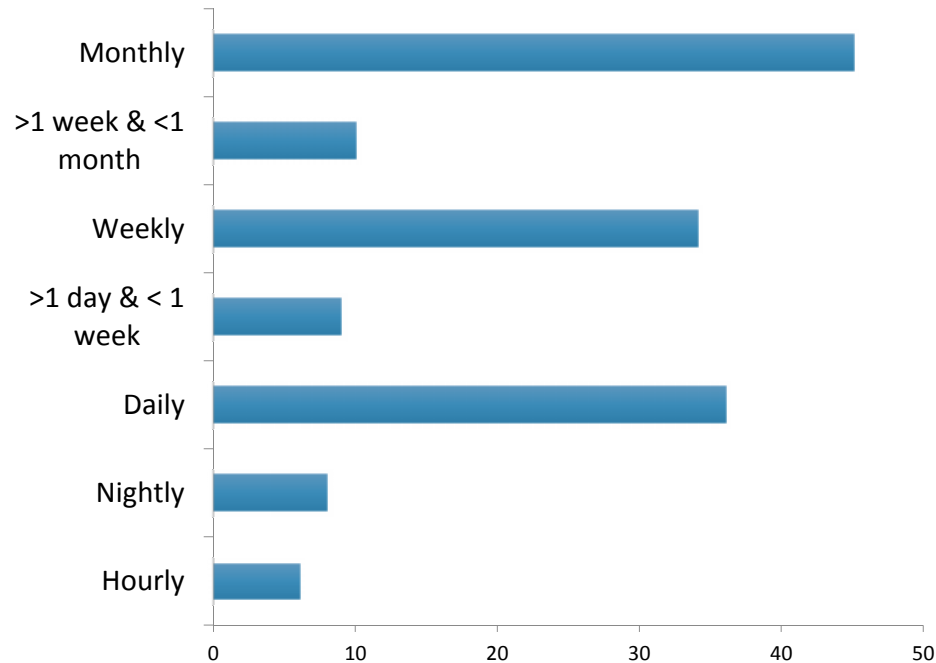


Affordability



Understanding affordability

Number of LDCs with different mobile broadband Internet bundles



- Despite price drops, international comparison (ITU price basket) shows that broadband remains unaffordable to many
- ...but by 2020 will be affordable in many LDCs
- Handset biggest barrier to entry
- Flexible tariffs help with affordability and operators have adapted to low-income users
- Governments can help bring down prices by driving competition and limiting taxes
- Backbone constraints for LLDCs and some SIDS

Source: ITU



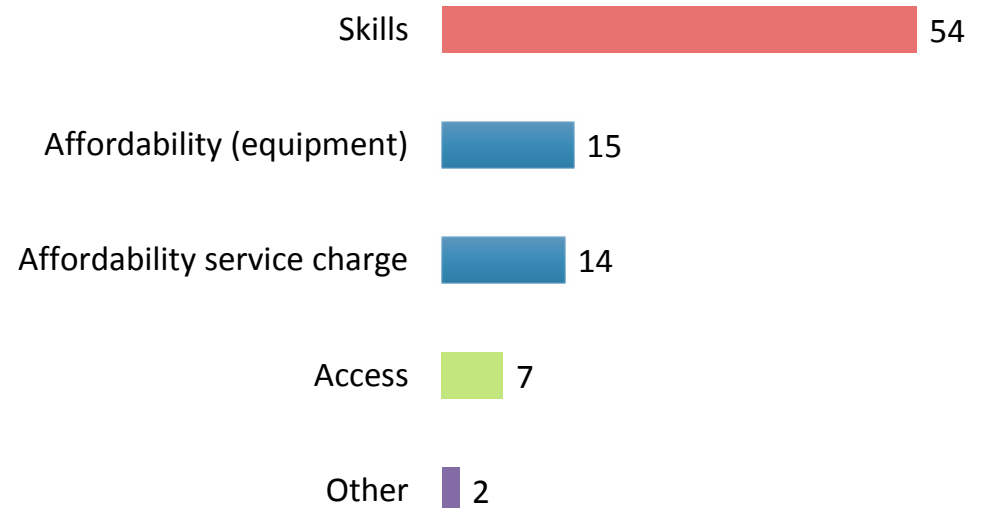
Skills



Skills emerging as leading barrier

- Lack of digital literacy emerging as a leading barrier to Internet use in many LDCs
- Digital skills closely linked to educational attainment
- Secondary school enrolment in LDCs (43%) lies well below world average (76%)
- Strategic ICT sector plans need to highlight the role of, and make link to educational policies
- Gender digital divide must be addressed to ensure universality aspect of SDG 9C

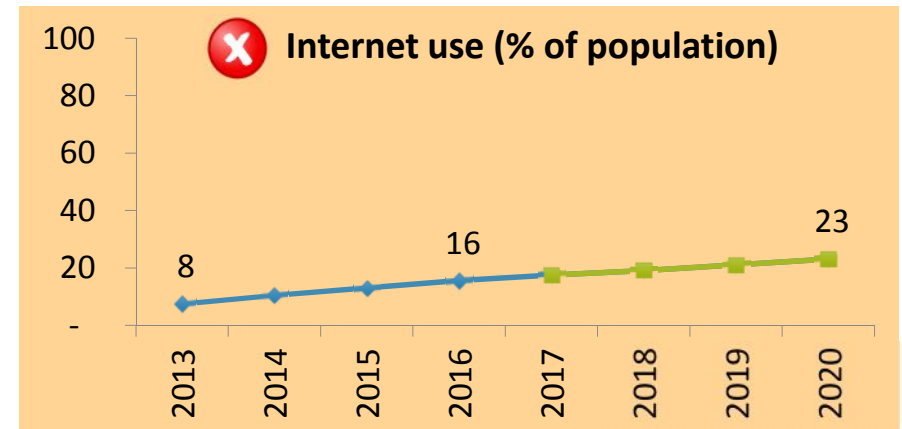
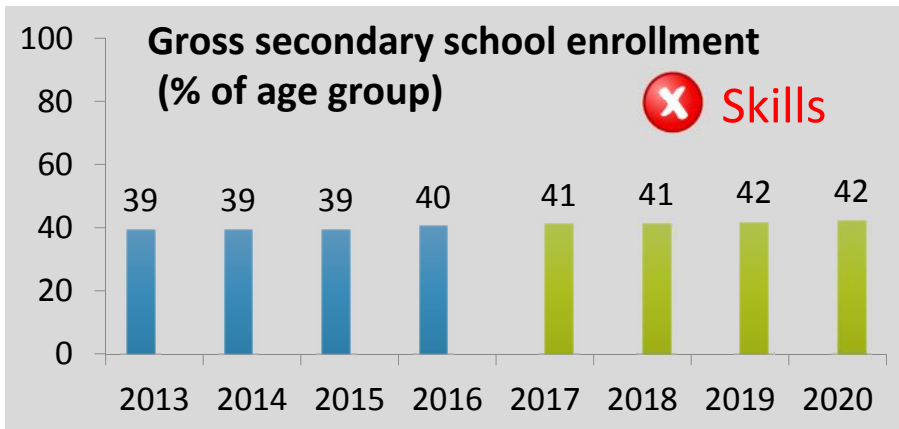
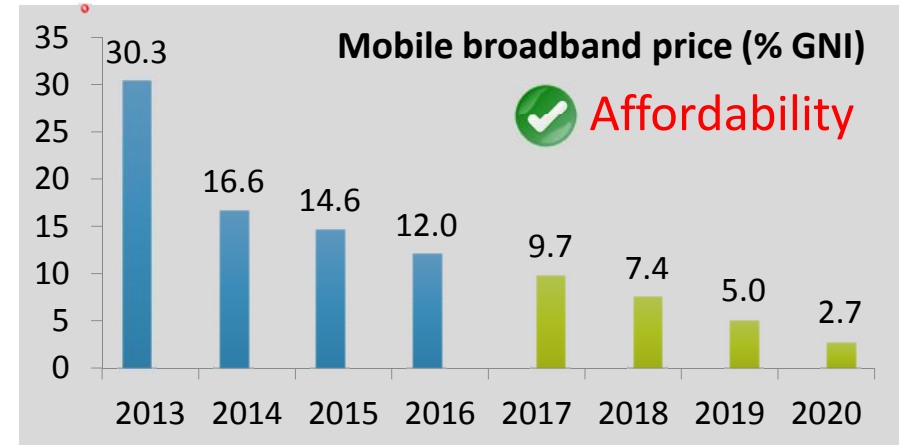
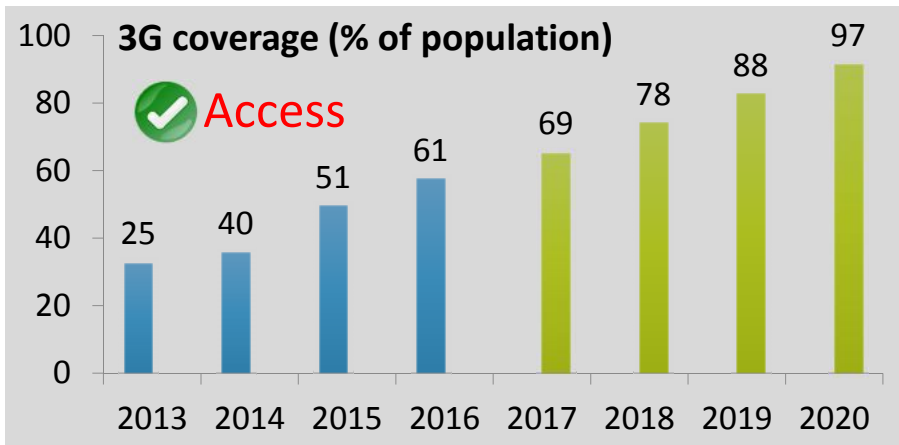
Zambia, Barriers to Internet use, 2015



Source: ITU



Target 9C in 2020

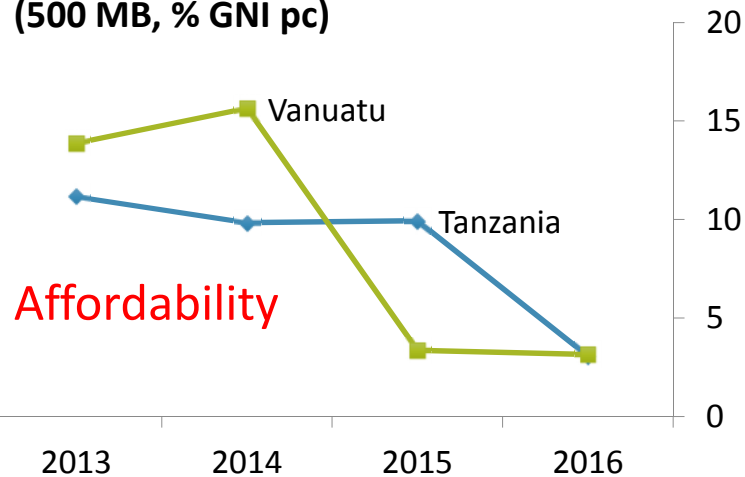


Source: ITU

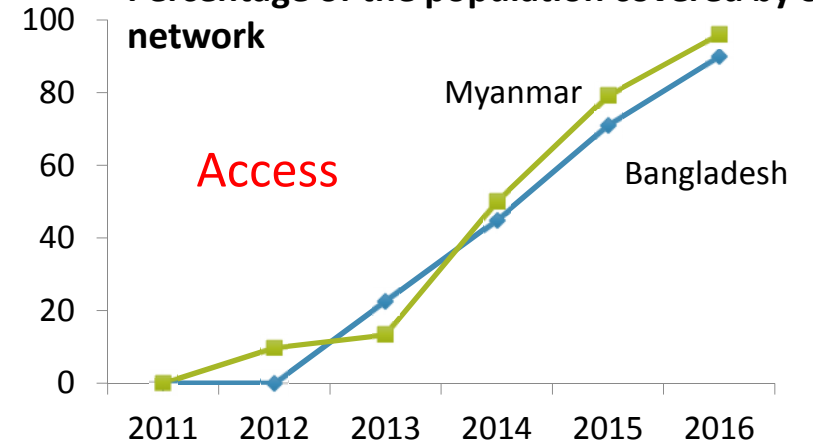


It is possible to leapfrog

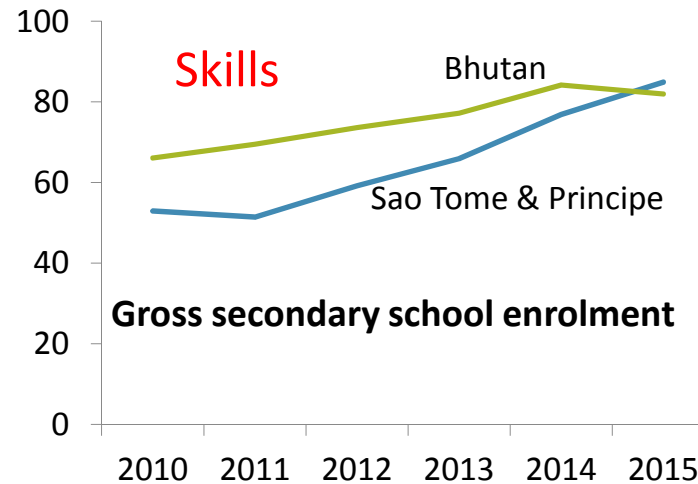
Mobile broadband price per month (500 MB, % GNI pc)



Percentage of the population covered by 3G network



Gross secondary school enrolment

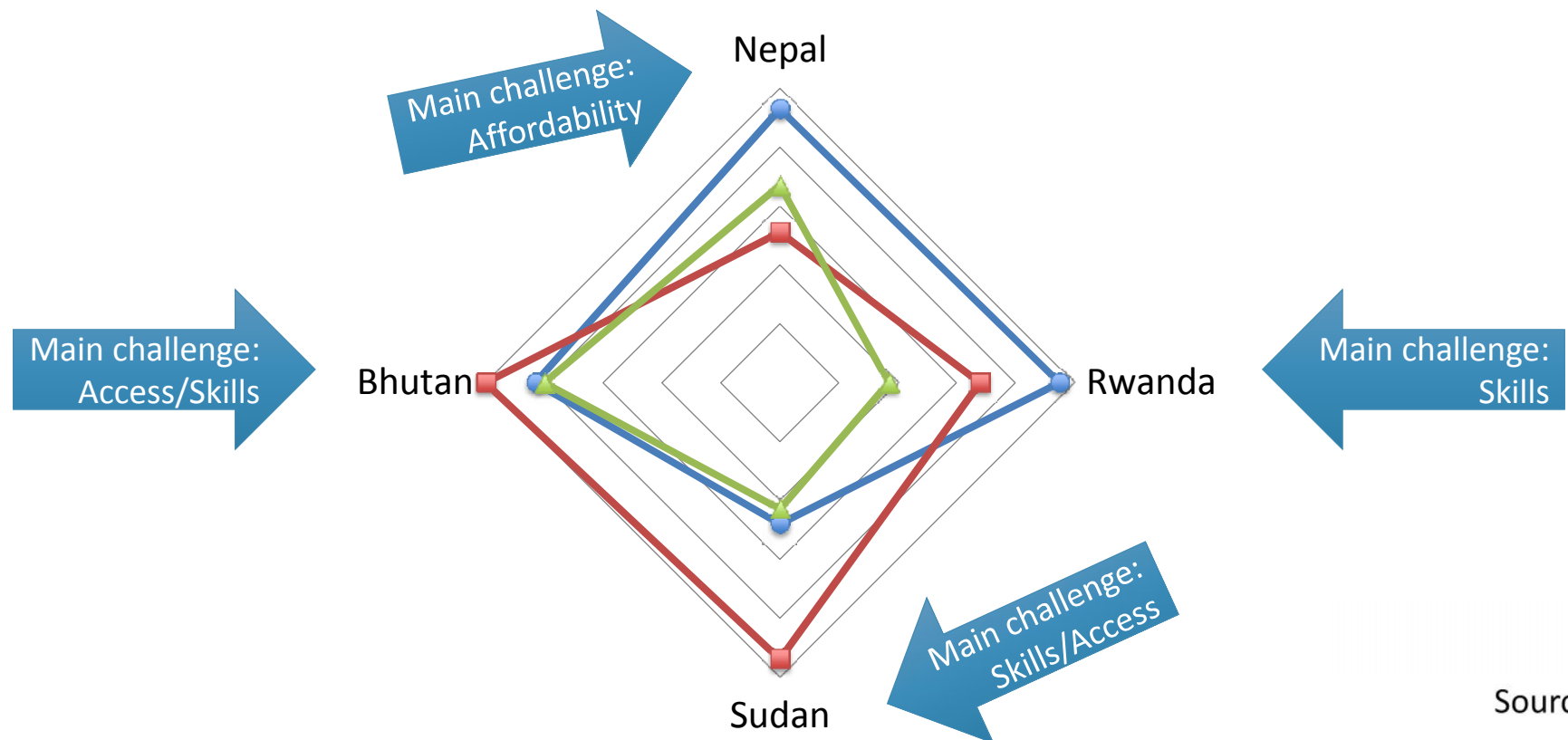


Source: ITU



3 dimensional framework to guide policy makers: access, affordability & skills

● Access ■ Affordability ▲ Skills



Source: ITU



Recommendations

- ✓ Drive competition and intensity of competition
- ✓ Coverage obligations, open access regulation & universal service funds
- ✓ Build core infrastructure
- ✓ Rationalize taxation
- ✓ Focus on digital literacy and skills
- ✓ Achieve gender parity
- ✓ Foster institutional strengthening
- ✓ Produce better data



Send your comments to
bdtlse@itu.int by Oct. 31, 2017

Thematic report

ITU Development
LDCs and small island
developing states

ICTs, LDCs and the SDGs
**Achieving universal
and affordable
Internet in the least
developed countries**

In Partnership with
UN-OHRLLS