Why do maps matter?
Global regulatory contexts for infrastructure sharing and mapping

Teddy Woodhouse, Research Analyst & Advocate
<teddy.woodhouse@webfoundation.org>
What is A4AI?

Infrastructure Sharing & Mapping

Regulatory Connections

Conclusion
WE ARE THE
WORLD’S BROADEST TECHNOLOGY
SECTOR ALLIANCE

WORKING TO
DRIVE DOWN THE PRICE OF
BROADBAND

BY
TRANSFORMING POLICY AND
REGULATORY FRAMEWORKS
All have endorsed one set of **best practices**

- grounded on the principles of internet freedom and the fundamental rights of expression, assembly, and association online -

for making **affordable broadband internet** a reality.
### VARIABLES in the AFFORDABILITY DRIVERS INDEX

<table>
<thead>
<tr>
<th>Targets within NBP</th>
<th>USAF focus on marginalised users</th>
<th>Evidence in policy-making</th>
<th>Policies for free or low-cost public access</th>
<th>USAF infrastructure investments</th>
<th>Regulatory transparency</th>
<th>Gender-responsive NBPs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market concentration</td>
<td>Adoption of NBP</td>
<td>Mobile broadband connections (%)</td>
<td>ITU-EYE cluster</td>
<td>Internet use penetration</td>
<td>Mobile internet penetration</td>
<td>Smartphone adoption</td>
</tr>
<tr>
<td>Licensing frameworks</td>
<td>Investment guidelines</td>
<td>Spectrum management vs. demand</td>
<td>Spectrum transparency</td>
<td>Rule enforcement</td>
<td>Rights of way and tower zoning</td>
<td>Infrastructure sharing</td>
</tr>
<tr>
<td>Bandwidth per user</td>
<td>Investment per subscriber</td>
<td>Secure internet servers</td>
<td>Electrification rate</td>
<td>Number of IXPs</td>
<td>Mobile number portability</td>
<td>3G network coverage</td>
</tr>
</tbody>
</table>
INFRASTRUCTURE SHARING

INDUSTRY COST SAVINGS (≤50%)

INFRASTRUCTURE MAPPING

↑ TRANSPARENCY
↑ COORDINATION
↑ EFFICIENCY
(↑ RURAL & MARGINAL CONNECTIVITY)
Mobile Broadband Market Competition (Q4 2018), by Region

Source: GSMA Intelligence, ITU

Average Herfindahl-Hirschman Index

- **Mapping Required**
- **Mapping Not Required**

- **Africa**
- **Asia**
- **Americas**
- **Europe**
- **Oceania**
% Change in Internet Users (2012-2017), by IS/IM regulatory approach

Source: International Telecommunications Union

- Mapping Required
- Regional Average
- Mapping Not Required
GREATER AFFORDABILITY & ACCESS TO BROADBAND

MARKET COMPETITION

CONSULTATIVE & EVIDENCE-BASED REGULATION

MARKET CONDITIONS

PARTICIPATORY PROCESSES

INFRASTRUCTURE SHARING & MAPPING
Teddy Woodhouse, Research Analyst & Advocate
<teddy.woodhouse@webfoundation.org>