What is A4AI?

We are the
world's broadest technology sector alliance
working to
drive down the price of broadband
by
transforming policy and regulatory frameworks.

How do we work in member countries?

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In each member country, we form a
national multi-stakeholder coalition

↗   ↑   ↖

civil society   public sector   private sector

to
IDENTIFY KEY BARRIERS TO AFFORDABLE ACCESS
&
DEVISE TAILORED SOLUTIONS TO DRIVE PRICES DOWN

In Bangladesh so far….

- First Forum took place July 2017

- Based on discussions, participants agreed on a number of urgent areas to tackle with the following two areas as a starting point:
  - Developing of strategies for scaling-up public access points
  - Developing a roadmap to broadband development in the country

- The A4AI and a2i teams conducted several discussions with partners on how to address the above urgent needs

- Based on those, the team developed a concept note for the development of a strategy and action plan to support Bangladesh in securing efficient and affordable broadband access and use.

Internet Affordability in Asia

Failing to take needed action to provide affordable internet

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Globally, policies have barely changed since 2014

<< Average increase in policy scores across all areas: 10% >>

Just **19 countries meet "1 for 2"** affordability target

-- 1GB of mobile broadband priced at
2% or less of average monthly income --

Internet use across Asia in 2017

49%
ONLINE POPULATION
(A4AI/ITU, 2016)

41%
MOBILE
BROADBAND
PENETRATION
(GSMA, 2016)

17%
INTERNET USE
GENDER GAP
(ITU FACTS AND FIGURES, 2016)

How affordable is internet in Asia?

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1GB

1GB of data costs an average citizen nearly

3%

of their monthly income

Just **8** out of **17** countries surveyed have "affordable" internet:

Sri Lanka
Kazakhstan
China
Turkey

Malaysia
Jordan
Indonesia
Pakistan

Asia's performance on the ADI

ADI RANK (ASIA)	GLOBAL ADI RANK	COUNTRY	ACCESS POLICY SCORE	INFRASTRUCTURE POLICY SCORE	ADI SCORE Scored out of a possible total of 100
1	4	Malaysia	85.25	49.86	68.65
2	9	Turkey	71.73	48.58	61.13
3	16	Vietnam	69.75	35.65	53.55
4	17	Thailand	67.79	37.32	53.40
5	23	Indonesia	61.34	38.89	50.92
6	24	Sri Lanka	55.17	45.03	50.91
7	25	China	63.56	36.13	50.65
8	27	Jordan	62.57	34.39	49.22
9	28	Pakistan	56.54	40.03	49.07
10	33	Philippines	57.09	36.46	47.53
11	35	India	55.36	37.46	47.16
12	41	Nepal	51.80	30.35	41.74
13	42	Myanmar	40.61	40.83	41.37
14	43	Kazakhstan	58.86	21.97	41.07
15	46	Bangladesh	45.69	31.88	39.41
16	48	Cambodia	42.17	32.72	38.05
17	58	Yemen	0.00	0.00	0.00

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Progress toward affordable internet

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Public Access

Just half of the countries studied have public access policies in place that are also backed by financial support for implementation.

Resource Sharing

ONLY 45%

45% of countries have plans to facilitate resource sharing among telecommunications companies (e.g., sharing of infrastructure, including towers and fibre networks); even where countries have plans, implementation is rare.

Efficient Use of Spectrum

Only one in three countries have detailed, time-bound plans for making more spectrum available to meet increasing demands.

USAFs

Universal Service and Access Funds, an important tool to finance strategic investments in the sector, either don't exist or are dormant in over a third of countries.

Broadband Plans

OUTDATED IN 41% OF COUNTRIES

National broadband plans to guide the policy reforms needed to achieve universal access have never been developed or are badly outdated in 41% of countries.

Policy toward affordable internet

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Overall, Asian countries score **5 or less out of 10** in all policy areas, indicating the crucial need for improvement.

1. Policy & regulation for competition

2. Broadband policy

3. Public access policies & use of USAFs

4. Infrastructure sharing

5. Spectrum policy

■ Asia Average
■ Global Average

Internet Affordability in Bangladesh

Internet use in Bangladesh in 2017

41%
INTERNET
PENETRATION
(A4AI, 2016)

14%
MOBILE
BROADBAND
PENETRATION
(GSMA, 2016)

2.6%
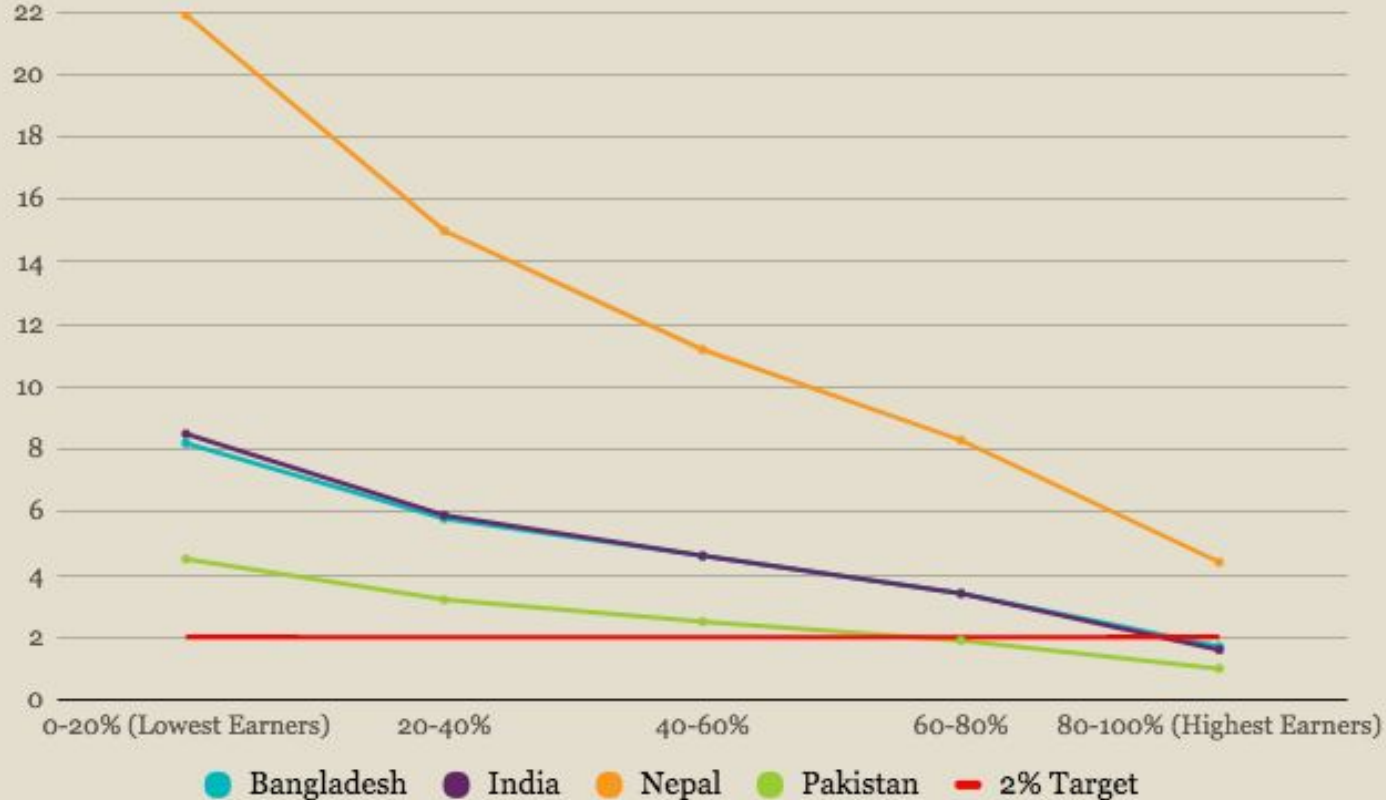COST OF 1GB OF
MOBILE PREPAID
INTERNET
(AS % OF GNI PC)
(A4AI, 2016)

How affordable is 1GB for different income groups?

Internet Affordability Across Income Quintiles
Price of 1GB as % of GNI pc

Legend: Bangladesh, India, Nepal, Pakistan, 2% Target

X-axis: 0-20% (Lowest Earners), 20-40%, 40-60%, 60-80%, 80-100% (Highest Earners)

Making Effective and Affordable Internet a Reality in Bangladesh

A Strategy and Action Plan

- The Vision of Digital Bangladesh: to provide 50% of its citizens with high-speed broadband connectivity by 2021
- Bangladesh needs to develop a cohesive action plan aligned with Digital Bangladesh goals, where all stakeholders are bound to work collaboratively towards the common goal.
  - A clear vision and guiding strategy to support the development and coordination of affordable broadband plans across Bangladesh
  - Enhance investment in new technologies and access to unserved areas
  - Declaring broadband as an essential infrastructure of the nation with wifi in public spaces, including libraries, union buildings, and other public infrastructure

A Strategy and Action Plan

- Maximising the public utility of licensed spectrum and piloting the potential use of unlicensed spectrum to further increase affordable access in the nation
- Rationalising the license regime towards market-oriented, competition based and technology and network neutral operations, stimulated by conducive regulatory incentives and conditions
- Proper utilization of social obligation funds and other mechanisms that incentivize access in unconnected locales and among underserved populace
- People-centred, service-oriented policies that encourage broadband adoption in every nook and corner of the nation, especially by marginalized populations who stand to benefit the most

A Strategy and Action Plan

- Increase access government eServices
- Over 300,000 access points in Bangladesh for providing low-cost access and digital skills to the remaining 75 million people with access to services, opportunities, and knowledge resources
- Focus on digital equality with over 40% of women users who maximize the power of connectivity
- Seamless connectivity and inclusion among small and medium entrepreneur, with a focus on women led businesses
- Clear targets for affordable access and use of broadband grounded in the "1 for 2" for all target, i.e., 1GB of mobile broadband priced at 2% or less of average monthly income and other recommended targets by the Broadband Commission

A Strategy and Action Plan: Some Deliverables

- Project work plan with agreed deliverables and timelines (April 2018)
- Field research: Primary and secondary research to get a base line picture of the reality of access and use in the country (May-July 2018)
- Mapping of infrastructure and identified gaps (April 2018)
- Review of infrastructure, spectrum and deployment related policies with recommendations for amendments (May-July 2018)
- Review of Universal Access and Service strategy and the effectiveness of the Fund (July 2018)

A Strategy and Action Plan: Some Deliverables

- Gender gap analysis and recommendations for policies to address the digital gender divide (based on survey results; August 2018)
- Recommendations for public access solutions expansion and scale-up (September 2018)
- Several public consultations to get inputs to key questions and validate possible solutions/recommendations
- A complete Strategy and Action Plan (with clear time bound targets) for Effective and Affordable Broadband in Bangladesh at the end of the year or early 2019

Thank you!

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