

A global coalition  
working to make  
broadband  
affordable for all



Regional Snapshot:

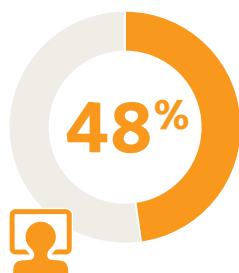
# Asia

## Affordability Report 2019



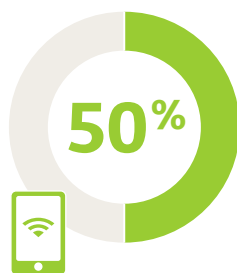
The Affordability Report is an annual report published by the **Alliance for Affordable Internet**. It examines the policy and regulatory frameworks that have allowed some countries to make broadband internet access more affordable, accessible, and universal and seeks to understand what others can do to catch up quickly. The 2019 Affordability Report explores the policy progress made across 61 low- and middle-income countries and 17 countries in Asia.

## In Asia...



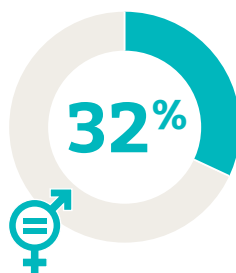
**ONLINE POPULATION**

(ITU, 2019)



**MOBILE INTERNET SUBSCRIBERS**

(A4AI/GSMA, 2019)



**INTERNET USE GENDER GAP**

(A4AI/ITU, 2019)

## Asia 2019 ADI Rankings

The **Affordability Drivers Index (ADI)** scores and ranks all 61 countries based on an in-depth analysis of communications infrastructure and access and affordability indicators.

ADI RANK (ASIA)	GLOBAL ADI RANK	COUNTRY	ACCESS SCORE	INFRASTRUCTURE SCORE	ADI SCORE (OUT OF 100)
1	1	Malaysia	98.2	65.6	85.3
2	6	Turkey	79.2	60.3	72.7
3	8	▲ 1 Thailand	79.4	55.6	70.3
4	9	▼ 1 India	72.7	61.5	69.9
5	14	▲ 1 Pakistan	68.1	55.6	64.4
6	16	Indonesia	74.4	47.0	63.2
7	18	▲ 3 Jordan	61.5	57.8	62.1
8	24	▲ 1 Vietnam	59.6	54.2	59.3
9	25	▼ 1 Sri Lanka	64.9	46.5	58.0
10	26	▲ 5 Philippines	64.7	46.5	57.9
11	35	▲ 5 China	50.3	50.0	52.3
12	38	Cambodia	55.2	43.8	51.6
13	39	Nepal	50.3	47.4	50.9
14	41	Bangladesh	47.4	45.3	48.3
15	43	▼ 13 Myanmar	43.6	46.0	46.7
16	48	▲ 3 Kazakhstan	54.5	30.5	44.3
17	61	Yemen	0.0	0.0	0.0

● = No Change | ▲ 1 = Up from previous year | ▼ 1 = Down from previous year



**Malaysia** is one of the highest performers on the Affordability Drivers Index because of its strong public access program through the Pusat centers, which offer reliable, high-bandwidth internet access for large numbers of people and focus on access for those less likely to connect, especially women.

## What is affordable internet?

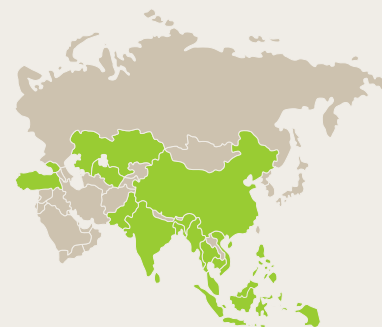
# “1 for 2”

1GB of mobile prepaid data of 2% or less of average monthly income

## How affordable is access in Asia?

# 16 out of 25

countries we track have affordable internet:



- Bangladesh
- Cambodia
- China
- Georgia
- India
- Indonesia
- Kazakhstan
- Malaysia
- Myanmar
- Pakistan
- Philippines
- Sri Lanka
- Thailand
- Turkey
- Uzbekistan
- Viet Nam



1GB of data costs an average person just over

# 2.7%

of their monthly income.

Data remains even more expensive for the poorest in society, for whom 1GB can cost 10-20%

The **2019 Affordability Report** calls on policy makers and regulators to promote competitive and diverse broadband markets as key ingredients to drive down the cost of internet access. Competitive and diverse markets, especially those with robust public access options, emerge as a path forward for increased inclusion and the expansion of digital economies.



Globally, consumers pay an estimated additional  
**\$3.42 per GB**  
 in more consolidated markets

## How do we create stronger market competition?

### 1 Fair Market Rules

Policymakers should set fair rules for entry into the market, with clear licensing requirements for traditional providers and community networks. Effective operating rules are also necessary for service providers to plan long-term network investments.

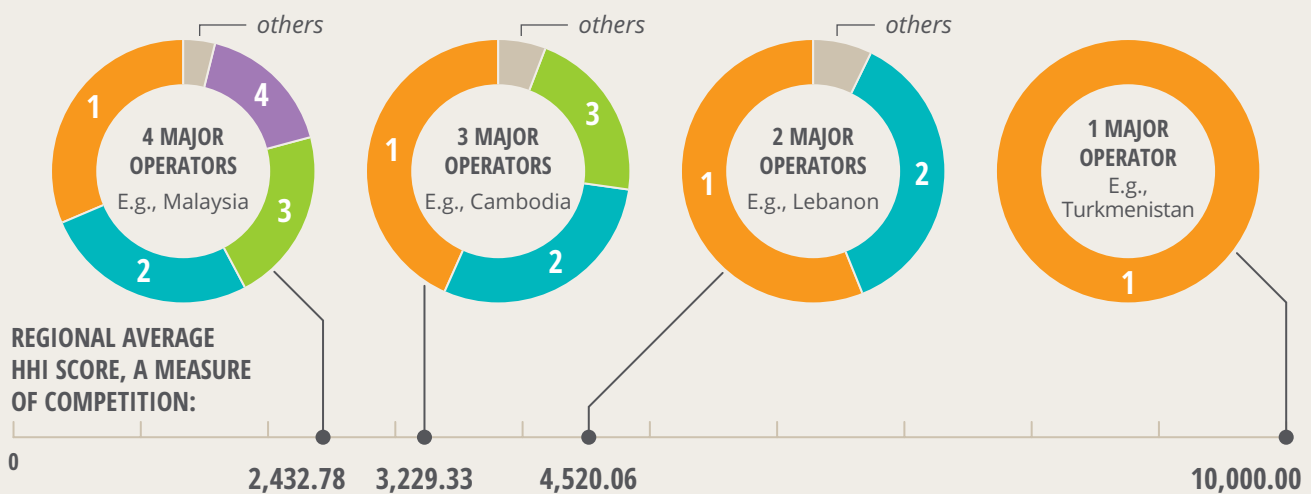
### 2 Evidence-Based Policies

Policymakers and regulators should base their decisions on publicly available evidence and consult all stakeholders in inclusive processes, including businesses and civil society groups.

### 3 Dynamic Competition Policy

Policymakers and regulators should apply dynamic pressures to markets as they change to support positive and sustainable market competition.

## The Shape of Mobile Broadband Markets in Asia



Source: A4AI/GSMAi, 2018

## How can we build healthy, diverse broadband markets?

### 1 Competitive Markets for Mobile Broadband

Robust and competitive markets give consumers a wider choice of services and pressures operators to lower prices and improve services. They also provide the regulatory certainty necessary to encourage investment.

### 2 Affordable Backhaul & Infrastructure

Regulators and policymakers play a key role in facilitating passive and active infrastructure sharing among operators, supporting open access networks, and allocating spectrum in a fair and transparent manner for the greatest public benefit.

### 3 Diverse Connectivity Strategies & Public Access

Public access strategies and community networks complement private investment by providing more opportunities to connect and expanding internet coverage to a wider diversity of people.



# A global coalition working to make broadband affordable for all



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