

• A global coalition  
• working to  
• make broadband  
• affordable for all



# Asia

## Regional Snapshot

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2017 Affordability Report

[www.a4ai.org](http://www.a4ai.org)

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 what others can do to catch up quickly. The 2017 Affordability Report explores the policy progress made across 58 low- and middle-income countries.

## In Asia...



**49%**

**ONLINE  
POPULATION**

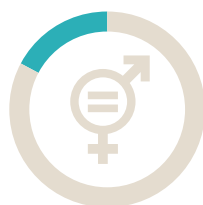
(A4AI/ITU, 2016)



**41%**

**MOBILE BROADBAND  
PENETRATION**

(GSMA, 2016)



**17%**

**INTERNET USE  
GENDER GAP**

(ITU Facts and Figures, 2016)

## Asia 2017 ADI Rankings

The **Affordability Drivers Index (ADI)** scores and ranks all 58 countries based on an in-depth analysis of communications infrastructure and access and affordability indicators.

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

## What is affordable internet?

**“1 for 2”**

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

## How affordable is access in Asia?

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



Sri Lanka  
Kazakhstan  
China  
Turkey

Malaysia  
Jordan  
Indonesia  
Pakistan



**1GB of data  
costs an average  
citizen nearly**

**3%**  
**of their monthly  
income**

## How do Asia's policies measure up against the rest of the world?

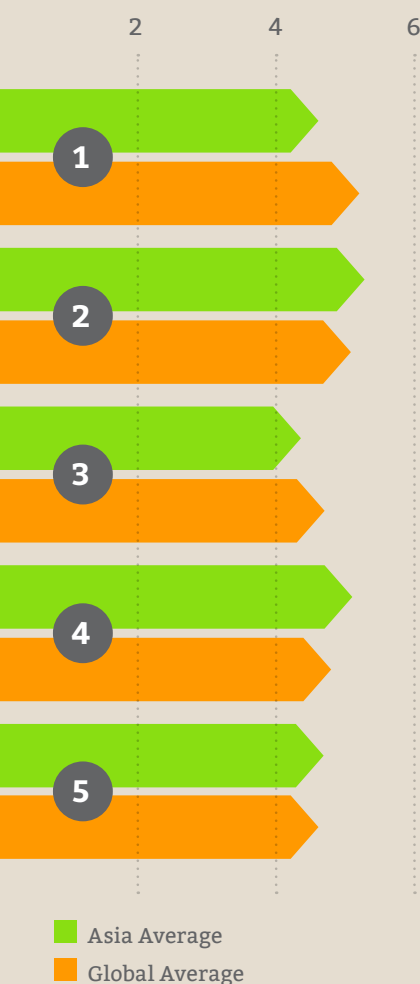
Countries are scored out of 10, to gauge their performance in implementation of policy measures to improve affordability.

**Overall, Asian countries score**

**5 or less out of 10**

**in all policy areas, indicating the crucial need for improvement.**

Asia Policy Scores v. Global Policy Scores



# Progressing Towards Affordability

1

## Policy & Regulation for Competition

Regulatory independence, transparent and evidence-based decision-making, simplified licensing regimes

**Asian countries score lower than the global average**

- ✓ Some countries in the region, including Jordan and Pakistan, are taking steps to encourage competition, including through efforts to simplify licensing regimes and increase public consultation and transparency in decision-making.
- ✗ A number of obstacles to sound policy for competition remain, including complicated licensing regimes (e.g. Vietnam), little regulatory transparency (e.g., China), and limited evidence-based regulatory decision-making (e.g., Cambodia).

2

## Broadband Policy

Lays out clear, time-bound targets and interventions for reducing costs and increasing access

**Asian countries score higher than the global average**

- ✓ Nearly all Asian countries assessed (15 of 17) have broadband plans. Both Malaysia and Indonesia have good examples of national broadband plans that outline clear time-bound targets for connectivity.
- ✗ Broadband plans in a number of countries are as yet non-existent (e.g., Myanmar, Yemen) outdated (e.g., Turkey, Nepal), or lack clear, time-bound targets for reducing costs and expanding access (e.g., Pakistan).

3

## Public Access Policies + Use of Universal Service & Access Funds

Support for and use of public access programmes and Universal Service and Access Funds (USAFs) to expand access, support local content development, and increase digital skills

**Asian countries score lower than the global average**

- ✓ Nearly half of the Asian countries surveyed (8 out of 17) have active USAFs. Funds in Vietnam and Indonesia have been used to expand public access and connectivity in rural villages and institutions such as schools and libraries.
- ✗ Most countries surveyed, however, do not have a USAF in place, or have USAFs that are inactive, with funds sitting unused. Both Bangladesh and Cambodia, for example, lack clear strategies, specific targets, and regulatory guidelines for the implementation and use of USAF funds.

4

## Infrastructure Sharing

Government actively encourages and facilitates resource sharing across operators

**Asian countries score slightly higher than the global average**

- ✓ Programmes to support infrastructure sharing (primarily for passive infrastructure) among operators are on the rise in a number of countries, including Sri Lanka, Thailand, and Malaysia (which has also invested in a national broadband network that is shared on an open access basis).
- ✗ Across the region, more work remains to improve rights of way access and to encourage resource sharing among operators. In Myanmar, the promised one-window clearance for 'right of way' has not been implemented, and operators and infrastructure companies bear the responsibility for obtaining legal permissions from different local authorities to erect towers.

5

## Spectrum Policy

Detailed plan outlining the timely release of sufficient spectrum to meet projected increases in demand

**Asian countries score slightly higher than the global average**

- ✓ Overall, countries across the region are increasingly making needed spectrum available. India's spectrum policy provides for availability and allocation through market processes, including a recent harmonisation process which allowed additional spectrum to be made available for auction in 2016 (though India's regulator was criticised for setting high reserve prices).
- ✗ Despite recognition of the need for additional spectrum to meet growing demand, poor spectrum planning or allocation practices make investments in the sector difficult to realise. China lacks a national implementation plan for improving spectrum availability; the Philippines does not have a spectrum policy, and spectrum has so far been assigned directly to companies without the use of auctions.



# A global coalition working to make broadband affordable for all



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FOUNDATION