

A global coalition  
working to make  
broadband  
affordable for all



Regional Snapshot:

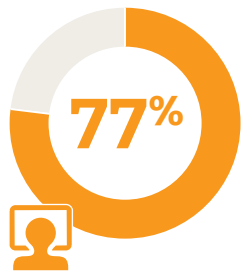
# Americas

## Affordability Report 2019



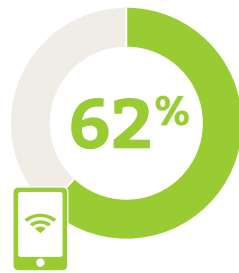
The Affordability Report is an annual report published by the **Alliance for Affordable Internet**. It examines the policy and regulatory frameworks that have allowed some countries to make broadband internet access more affordable, accessible, and universal and seeks to understand what others can do to catch up quickly. The 2019 Affordability Report explores the policy progress made across 61 low- and middle-income countries and 15 countries in the Americas.

## In the Americas...



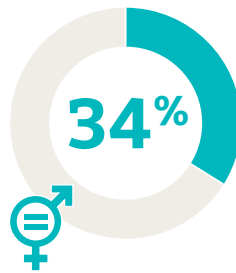
**ONLINE POPULATION**

(ITU, 2019)



**MOBILE INTERNET SUBSCRIBERS**

(A4AI/GSMA, 2019)



**WOMEN UNCONNECTED**

(GSMA, 2019)

## Americas 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 (AMERICAS)	GLOBAL ADI RANK	COUNTRY	ACCESS SCORE	INFRASTRUCTURE SCORE	ADI SCORE (OUT OF 100)
1	2 ●	Colombia	85.4	74.1	83.1
2	3 ▲ 1	Costa Rica	88.6	63.4	79.2
3	4 ▼ 1	Peru	81.2	68.4	78.0
4	5 ●	Mexico	78.2	68.2	76.3
5	7 ●	Argentina	76.1	63.1	72.5
6	10 ●	Dominican Republic	74.4	59.2	69.6
7	11 ●	Ecuador	73.7	59.3	69.2
8	12 ▲ 1	Brazil	72.7	58.2	68.2
9	17 ●	Jamaica	67.0	53.4	62.7
10	30 ▲ 2	Bolivia	53.6	51.1	54.6
11	34 ●	Honduras	52.3	48.2	52.4
12	47 ▼ 5	Venezuela	41.0	44.3	44.4
13	51 ▼ 4	Guatemala	41.5	37.1	40.9
14	55 ●	Nicaragua	36.7	29.8	34.7
15	59 ●	Haiti	14.2	18.3	16.9

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



**In Mexico**, regulators have built special rules for community networks to build in rural areas where investment is less profitable for major operators, if at all. These networks have expanded coverage for some vulnerable groups – predominantly rural and indigenous communities – and helped narrow the country's digital divide.

## 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 the Americas?

# 10 out of 20

countries we track have affordable internet:



Argentina  
Brazil  
Colombia  
Costa Rica  
Dominican Republic  
Ecuador  
Jamaica  
Mexico  
Paraguay  
Peru



1GB of data costs an average person just over

# 1.9%

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.

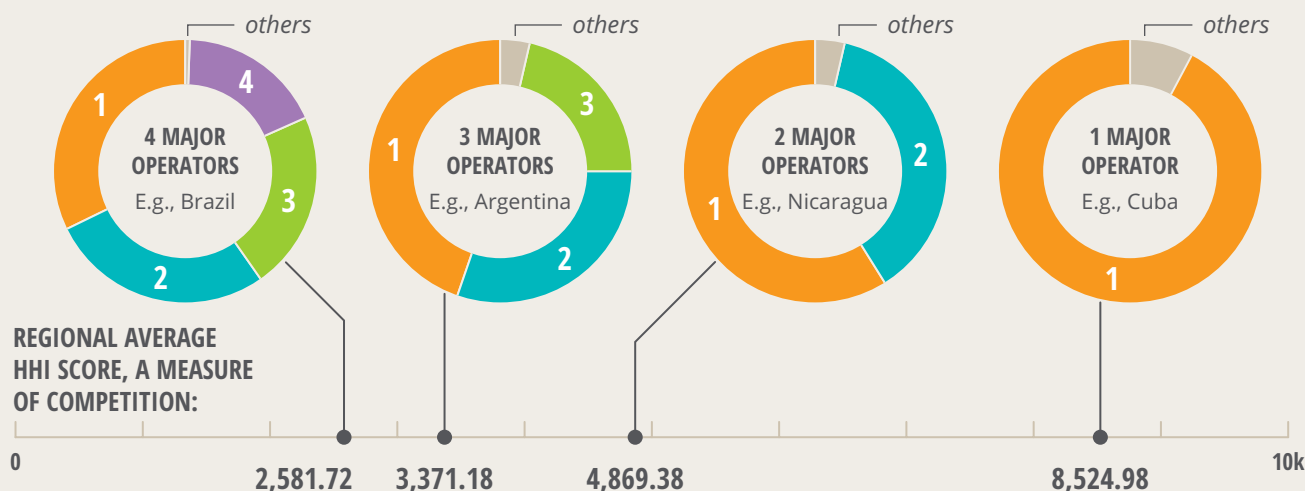
### 2 Evidence-Based Policies

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 the Americas



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.



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