

Measuring the Information Society Report 2014



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Foreword

I am pleased to present to you the 2014 edition of the *Measuring the Information Society Report*. Now in its sixth year, this annual report identifies key information and communication technology (ICT) developments and tracks the cost and affordability of ICT services, in accordance with internationally agreed methodologies. Its core feature is the *ICT Development Index* (IDI), which ranks countries' performance with regard to ICT infrastructure, use and skills. The report aims to provide an objective international performance evaluation based on quantitative indicators and benchmarks, as an essential input to the ICT policy debate in ITU Member States.

Over the past year, the world witnessed continued growth in the uptake of ICT and, by end 2014, almost 3 billion people will be using the Internet, up from 2.7 billion at end 2013. While the growth in mobile-cellular subscriptions is slowing as the market reaches saturation levels, mobile broadband remains the fastest growing market segment, with continuous double-digit growth rates in 2014 and an estimated global penetration rate of 32 per cent – four times the penetration rate recorded just five years earlier. International bandwidth has also grown steeply, at 45 per cent annually between 2001 and 2013, and the developing countries' share of total international bandwidth increased from around 9 per cent in 2004 to almost 30 per cent in 2013. Overall, almost all of the 166 countries included in the IDI improved their values in the last year.

Despite this encouraging progress, there are important digital divides that need to be addressed: 4.3 billion people are still not online, and 90 per cent of them live in the developing world. Fixedbroadband penetration stands at 6 per cent in developing countries, compared with 27.5 per cent in developed countries, and growth rates are slowing. Mobile broadband is growing fast, but the difference between developed and developing regions remains large, with 84 per cent penetration in the former as against 21 per cent in the latter. Increasing ICT uptake in the world's least connected countries (LCCs), which are home to some 2.5 billion people, should therefore be the policy focus for the years to come. In these countries, the share of population living in rural areas is often high, reinforcing the urban-rural digital divide. As this report finds, ICT performance is better in countries with higher shares of the population living in urban areas, where access to ICT infrastructure, usage and skills is more favourable. Yet it is precisely in poor and rural areas where ICTs can make a particularly significant impact. New analysis featured in this report shows that many of the indicators of the Millennium Development Goals (MDGs) show significant correlation with the IDI, notably those related to poverty reduction and health improvement. Furthermore, the report finds that progress in ICT development is linked to progress in achieving some of the MDGs, yet another testimony to the role of ICT as a development enabler.

One reason for the limited uptake of ICT in the developing world is the price of the service, which is often unaffordable for poor segments of the population. While the prices of fixed and mobile services continue to decrease globally, in most developing countries the cost of a fixed-broadband plan represents more than 5 per cent of GNI per capita, and mobile broadband is six times more affordable in developed countries than in developing countries. Income inequalities within countries are one of the reasons why broadband – in particular fixed broadband – remains unaffordable to large segments of the population. The report finds that in 40 per cent of countries a basic fixed-broadband



subscription still represents more than 5 per cent of household income for over half of the population. For these income groups, mobile broadband may be the affordable alternative.

An enabling telecommunication regulatory environment can significantly influence the affordability of services. The report finds that the price of ICT services falls with better market regulation and increased competition. For example, in developing countries, fixed-broadband prices could be reduced by 10 per cent and mobile-cellular prices by 5 per cent if competition and/or the regulatory framework improved. International regulatory best practices, such as the ones adopted by the ITU Global Symposium for Regulators (GSR), may serve as a guideline for effective regulatory frameworks which can lay the foundations for affordable fixed-broadband services.

In this fast-changing digital era, one of the key challenges in measuring the information society is the lack of up-to-date data, in particular in developing countries. ITU is joining the international statistical community in looking into ways of using new and emerging data sources – such as those associated with big data – to better provide timely and relevant evidence for policy-making. Calls for a "data revolution" are prominent in the international debates around the post-2015 development agenda, and ICTs have an important role to play in view of their capacity to produce, store and analyse huge amounts of data, as well as being a major source of big data in their own right. Big data from mobile operators, for example, are real-time and low-cost and have one of the greatest development potentials in view of the widespread use and availability of mobile networks and services. This report provides the reader with a comprehensive and critical overview of the role of big data from the telecommunication sector, for use in social and economic development policy and for monitoring the future information society.

I trust that the data and analysis contained in this report will be of great value to the ITU membership, including policy-makers, the ICT industry and others working towards building an inclusive global information society.

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