Measuring digital development **The affordability of ICT services** 2024





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Measuring digital development

The affordability of ICT services



Foreword



I am pleased to present the 2024 edition of this annual publication on the affordability of ICT services. Based on the most comprehensive and authoritative global dataset on consumer prices for connectivity services, developed and maintained by the International Telecommunication Union (ITU), this report offers timely insights into where we stand and the challenges that remain.

This edition's findings highlight important progress: in 2024, mobile broadband services have become more affordable in most regions and for most income groups, and a growing number of countries are meeting the Broadband Commission's target of entry-level broadband

services costing less than 2 per cent of monthly GNI per capita. These gains reflect the efforts of governments, regulators, and industry to expand access and reduce cost barriers.

Yet for far too many people around the world, the cost of connectivity services continues to account for a disproportionate share of income. This prevents them from fully participating in the digital economy, accessing vital services, or exercising their rights in an increasingly digital world. Fixed broadband remains largely unaffordable for vast segments of the population, especially in low-income countries. Even where services are affordable on average, significant gaps persist within countries, disproportionately affecting those who are already marginalized. And as digital services become more bandwidth-intensive, affordability must be assessed not just in terms of price, but also in relation to the quality and adequacy of the service.

At the ITU's Telecommunication Development Bureau, we are committed to supporting our Member States in addressing these barriers. Reliable data and rigorous analysis are essential tools in this effort. By understanding the evolving affordability landscape, policymakers, regulators, development partners and industry stakeholders can design more targeted and effective interventions to drive down costs, foster investment, and expand connectivity to all.

I would like to express my sincere appreciation to the members of the Expert Group on Telecommunication/ICT Indicators (EGTI) for their dedication and invaluable contributions. Their expertise has been instrumental in updating and overseeing the methodology of the ICT price baskets that underpin this work.

As we move forward, let us keep affordability at the forefront of our efforts to build inclusive digital societies where everyone can connect, participate, and thrive.

Aclony

Dr Cosmas Luckyson Zavazava Director of the Telecommunication Development Bureau International Telecommunication Union

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Introduction

The concept of universal and meaningful connectivity (UMC) has emerged in recent years as a vital policy objective. UMC is defined as enabling everyone to enjoy a safe, enriching and productive online experience at an affordable cost. UMC does not mean everyone must be connected all the time but describes a situation where everyone can access the Internet optimally and affordably whenever and wherever needed.

Affordability is one of the main barriers to UMC. It includes both the price of a device needed to connect and the recurrent cost of telecommunication services. While device costs are important, the focus of this report is on the recurring costs of accessing telecommunication services, i.e. the use of Internet data, minutes of voice calls and text messaging, which represent a more persistent financial barrier.

Affordability is measured by taking the consumer price of a minimum set of telecommunication services relative to a given income, using monthly gross national income (GNI) per capita as a proxy.¹ This measure enables consistent and meaningful comparison across countries, accounting for differences in income levels.

The analysis is based on five ICT price baskets, as defined in 2021 by ITU's <u>Expert Group on</u> <u>Telecommunication/ICT Indicators</u> (EGTI):

- the **data-only mobile-broadband basket**, requiring a minimum of 2 GB of data and at least 3G network technology;
- the mobile data and voice lowconsumption basket, including a minimum of 500 MB of data, 70 voice minutes and 20 SMS messages;
- the mobile data and voice highconsumption basket, with a minimum of 2 GB of data, 140 voice minutes and 70 SMS messages;
- the **mobile cellular low-usage basket**, measuring the price of 70 voice minutes and 20 SMS messages based on specific on-net/off-net/fixed ratios; and
- the **fixed-broadband basket**, which represents a monthly subscription with at least 5 GB of data and a download speed of at least 256 kbit/s.

Together, the four mobile service baskets and the fixed-broadband Internet service basket reflect the diversity of services that are available globally, and thus allow a meaningful global comparison of affordability. At the time of their adoption, most of the baskets represented entry-level services (except for the mobile data and voice high-consumption basket).²

This publication addresses two main questions:

- 1) How affordable are ICT services worldwide and how has affordability evolved in recent years?
- 2) What are the main affordability divides across and within countries that continue to hamper connectivity?

¹ More specifically, the basket price is the total of the monthly recurrent charges of the plan(s) and, if necessary, add-ons or pay-as-you-go rates used to reach the minimum allowance thresholds. This is divided by the monthly GNI per capita, both expressed in local currency. In the rest of the report, prices as a percentage of GNI per capita rates are assumed to refer to monthly rates. The plans used for the baskets need to adhere to strict data collection rules, such as excluding promotions, considering breakout fees in case of commitment periods exceeding a month, on- and off-net availability, technology used, etc. See the Annex for details.

As technology evolves, EGTI revises the basket definitions to align with market realities. Given that changes occur gradually, it is possible to map basket definitions across methodologies, e.g. the data-only mobile-broadband basket with 1.5 GB (2018-2020) and the one with the 2 GB allowance (2021-2024). The last revision took place in September 2024, which will form the basis of ITU's 2025 ICT data collection. This is the last report presenting findings for the baskets using the 2021-2024 definitions.

The first section presents affordability trends for each basket at the global, regional and income-group levels. It then assesses progress of countries towards the target of the ITU/UNESCO Broadband Commission for Sustainable Development for 2025: that entry-level broadband services in developing countries should cost less than 2 per cent of GNI per capita. To complement these findings, the section also examines absolute price levels using purchasing power parity (PPP) adjustments, which account for local price levels and inflation.

Subsequent sections provide in-depth analysis of affordability trends for each of the five baskets, drawing attention to the unique challenges faced by least developed countries (LDCs), landlocked developing countries (LLDCs) and small island developing States (SIDS). Metadata collected alongside price data offer additional insights into service quality and pricing structures.

Recognizing that national averages often conceal vast disparities within countries, the report also assesses affordability for different population segments based on income distribution. This analysis shows that many individuals continue to face costs well above the 2 per cent threshold – even when the national average appears affordable.

Changes in affordability occur against a backdrop of fast-changing digital connectivity. The final section explores correlations between affordability and other key dimensions of digital development, such as access, use and economic variables relevant for telecommunication operators and regulators.

The final section explores the interplay between affordability, network access, Internet use and telecommunication sector investment. Grouping countries by their 2019 affordability levels helps to track how affordability improvements have - or have not - translated into greater access and use. The findings suggest that price reductions alone are not sufficient. Structural constraints such as low income levels, weak demand and limited investment continue to impede digital progress.

Affordability matters because it has a direct influence on Internet use. Figure 1 illustrates this relationship: in countries - typically low- or lower-middle-income economies - where only a limited share of the population can afford an entry-level data-only mobile-broadband basket, Internet use is low. As affordability improves, a larger portion of the population comes online. Yet, the figure also highlights that affordability alone cannot fully explain Internet adoption. Some countries, such as Kiribati, Jamaica, and Fiji, exhibit high use rates despite high relative prices, suggesting that many people are willing to prioritize connectivity even at significant personal cost. Conversely, some South Asian countries show limited use despite affordable services, pointing to other barriers such as digital literacy, infrastructure quality or cultural factors. These findings underscore the need to better understand and address the multifaceted nature of digital exclusion.

Figure 1: Affordability and Internet use



% of population for whom the mobile broadband basket costs less than 2% of monthly income

Source: ITU

As digital connectivity becomes indispensable for participation in education, work, health care and public life, it remains out of reach for millions. Faced with high costs, many are forced to make difficult trade-offs between connectivity and meeting other essential needs. Making connectivity more affordable is critical to achieving UMC and ensuring that no one is left behind in the digital age.

Global and regional trends

This section discusses global and regional trends for the five ICT price baskets. The first part discusses affordability, followed by a discussion on progress towards achieving the Broadband Commission target, while the last part features a short analysis of absolute price levels.

Affordability trends

Figure 2 shows the affordability of the five price baskets for the world and the six ITU regions.

The figure shows that the five baskets have all become more affordable since 2018. The four

mobile baskets improved by between 9.2 and 11.1 per cent on average per year between 2018 and 2024, approximately three times as much as that of the fixed-broadband basket (3.1 per cent on average per year). The trend was interrupted in 2020-2021, corresponding to the peak of the COVID-19 pandemic, when income levels fell.

Affordability gains picked up pace between 2022 and 2024: mobile basket prices as a percentage of GNI per capita fell by between 14.1 and 17.9 per cent annually, while the fixed-broadband basket price fell by 9.4 per cent annually.





Note: Regions correspond to the <u>regional grouping</u> of the ITU Telecommunication Development Bureau (BDT). Median values shown in the chart were calculated as a percentage of GNI per capita for the set of economies for which data were available for all years between 2018 and 2024 for a given basket in order to adjust for the effect of changing data availability. The chart for Africa is shaded to highlight the different vertical scale from the rest of the charts.

Source: ITU

In 2018, the <u>Broadband Commission for</u> <u>Sustainable Development</u> set seven "ambitious but achievable" targets, including one that states that by 2025, entry-level broadband services should be made affordable in developing countries, at less than 2 per cent of GNI per capita. This target represents a useful benchmark when assessing the affordability for a region. Of course, a median price below 2 per cent in a region does not mean that every country in that region has met the target. Indeed, a median price of 2 per cent means that the price in half of the countries is above 2 per cent.

The global median for both mobile-broadband baskets including at least 2 GB data was below the 2 per cent target. The most expensive mobile basket – mobile data and voice highconsumption – fell below the target for the first time in 2024. In contrast, the global median of the fixed-broadband basket price stood at 2.5 per cent.

Affordability improved across all baskets in all ITU regions, with a few exceptions. Africa recorded the greatest gains, but the cost of all mobile baskets for consumers still ranged between 3 and 7 per cent of average income, while fixed broadband remained high at 14 per cent.

In the Americas, the mobile data and voice high-consumption basket became more expensive in 2024 and remained above 2 per cent. The other three baskets became more affordable and cost now all less than 2 per cent. The price of the fixed-broadband basket recorded a large drop to reach 3.2 per cent of GNI per capita.

In the Arab States and the Asia and the Pacific regions, the affordability of all baskets improved. The mobile baskets were all below 2 per cent, while the fixed-broadband basket in both regions remained above this target.

In the Commonwealth of Independent States (CIS) region, the cost of the fixed-broadband basket for consumers as a percentage of GNI per capita declined in 2024, following a sharp increase in 2023.³ This basket was still above the 2 per cent target, while the four mobile baskets were between 0.7 and 1.2 per cent of GNI per capita, even if affordability of the mobile data and voice low-consumption basket and the mobile cellular low-usage basket decreased slightly.

Finally, the Europe region is the only one where all baskets were well below the 2 per cent target. The fixed-broadband basket stood at 1.1 per cent of GNI per capita in 2024, up by 0.1 percentage point from the previous year. The four mobile baskets cost less than 0.5 per cent of GNI per capita.

When the Broadband Commission targets were established, it was still common to refer to developing and developed countries. In recent years, however, this practice has been abandoned. Instead, countries can be grouped according to their income level, which also improves the analysis of social and economic data.

³ With the CIS region consisting of only nine countries, median scores for the region can be more volatile than those for regions with (many) more countries.



Figure 3: Affordability trends by income groups (basket prices as a % of GNI per capita)

Note: Income groups correspond to the World Bank's 2024 classification. Median values shown in the chart were calculated as a percentage of GNI per capita for the set of economies for which data were available for all years between 2018 and 2024 for a given basket to adjust the effect of changing data availability. Source: ITU

Figure 3 shows that in high-income economies, the fixed-broadband basket cost only 1 per cent of GNI per capita in 2024, while the four mobile baskets were between 0.4 and 0.6 per cent. In upper-middle-income countries, the fixedbroadband basket stood at 2.6 per cent of GNI per capita, above the Broadband Commission target, while the four mobile baskets ranged from 1 to 1.7 per cent. Affordability is already a barrier to connectivity in lower-middle-income countries, where only the entry-level mobile basket (1.5 per cent) was below the target, while the other four baskets ranged from 2 to 6.4 per cent. In low-income countries, mobile basket costs ranged from 6.2 per cent (mobile cellular low-usage) to 13.3 per cent (mobile data and voice high-consumption). At 29.2 per cent, the fixed-broadband basket is totally unaffordable to most people.

Encouragingly, affordability improved for all baskets and all income groups. As progress was more pronounced among lower-income groups, the affordability gap between income groups shrank. For the mobile data and voice high-consumption basket, for instance, the affordability gap between high-income and low-income countries decreased from 50.1 percentage points in 2018 to 12.7 percentage points in 2024.





Fixed broadband

2023 2% target 2024 chieved *LDCs* 78 78 55 54 29 24 20 18 18 14 <=2% 2-5% 5-10% 10-20% >20% Basket price (as a % of GNI per capita)

Note: The two charts show the distribution of economies by affordability for 2023 and 2024, defined by the price of the data-only mobile-broadband and fixed-broadband baskets as a percentage of monthly GNI per capita. The LDC component for each year is shown hatched with lines. Only those economies that had basket data available for 2023 and 2024 for mobile broadband (208 economies) and fixed broadband (194 economies) are considered.

Source: ITU

Progress towards the Broadband Commission target

Assessing the progress of individual countries towards the 2 per cent affordability target for 2025 reveals a mixed situation. Although more countries met the target for the lowest benchmark (data-only mobile-broadband basket) in 2024, one-third did not, and many will fall short by the time the deadline expires.

In 2024, for the data-only mobile-broadband basket, a record 138 of the 208 economies for which data were available met this target, up from 127 in 2023 (Figure 4). The situation was most difficult in LDCs:⁴ in 2024, only 7 of 45 LDCs met the 2 per cent target for mobile broadband, three more than in 2023. For three LDCs, the cost still exceeded 10 per cent.

⁴ For the list of LDCs, see <u>https://www.un.org/ohrlls/ content/list-ldcs</u>. For this publication, Sao Tome and Principe, which graduated from LDC status in December 2024 – after the price data collection finished – is still included. Fixed-broadband subscriptions are typically shared by multiple members of a household, whereas an entry-level data-only mobilebroadband subscription generally gives access to only one person, and an assessment of the affordability of the two baskets may therefore differ as households may have more than one member with income and can share costs. Nevertheless, when applying the same 2 per cent threshold for the more costly fixedbroadband basket, of the 194 economies for which data are available, only 78 economies - or 40 per cent - met the 2 per cent target, the same count as in 2023. For 32 economies, the cost exceeded 10 per cent. Among the 30 LDCs with available data, only Bangladesh met the target.



Figure 5: Evolution of broadband affordability (percentage of economies)

Note: The two charts show the distribution of economies by affordability, defined by the price of the dataonly mobile-broadband and fixed-broadband baskets as a percentage of monthly GNI per capita. Only those economies that had basket data available for all years between 2018 and 2024 for mobile broadband (180 economies) and fixed broadband (164 economies) are considered. Source: ITU

Figure 5 shows the evolution in the distribution of countries by affordability categories, including those meeting the affordability target, since 2018. Despite a dip during the COVID-19 pandemic in 2021, the percentage of countries meeting the 2 per cent target increased from 52 per cent in 2018 to 67 in 2024. For fixed broadband, on the other hand, only very modest progress was recorded, from 38 per cent of countries in 2018 to 41 per cent in 2024, with a similar decrease in 2021 as seen with mobile broadband.

Price levels

It is critical to understand what underpins the significant variations in service affordability: the price of the service (the numerator in the affordability equation) or the income level (the denominator). Therefore, in addition to affordability, which is a measure relative to income, it is also useful to examine the actual price of ICT services. The most intuitive unit of comparison is a world currency, such as United States dollars (USD). However, prices collected in local currency converted to USD using market exchange rates may be distorted by rates kept at artificial levels, by differences in local price levels, etc. An advantage of comparing ICT prices in purchasing power parities (PPP) rather than in USD is that PPP provides a more accurate comparison of absolute price levels across countries, accounting for differences in local costs and price levels. This makes PPP particularly useful for international comparisons where the focus is on the actual cost of services rather than affordability relative to income. To correct for inflation, basket prices are shown in constant 2023 USD PPP.



Figure 6: Trends in ICT price levels, by income group and basket (prices in constant 2023 USD PPP)

Note: The 2024 World Bank income groups were applied. Median values shown in the chart were calculated as a percentage of GNI per capita for the set of economies for which data were available for all years between 2018 and 2024 for a given basket in order to adjust the effect of changing data availability.

Figure 6 provides an overview of the price of the five baskets, expressed in constant 2023 USD PPP, at the global level and in the four income groups.

Noteworthy is that, at the global level, the price of the fixed-broadband basket has hardly decreased, from USD PPP 47.5 in 2018 to 44.5 in 2024, an annual average decline of just 1.1 per cent. The section Affordability of fixed broadband below offers further insights, including on quality improvements in the entry-level fixed-broadband service underlying these trends. The fixed-broadband basket is also two to three times more expensive than the four mobile baskets, which all recorded notable price drops between 2018 and 2024 (even if there was a slight uptick for the mobile data and voice high-consumption basket in 2024), with annual average real decreases between 7 and 10 per cent.

The figure also shows another notable trend, namely that in low-income countries the four mobile baskets have moved from most expensive in 2018 to second least expensive in 2024, still behind lower-middle-income countries, where the mobile baskets are the cheapest. In these two income groups, prices for the mobile baskets have decreased between 8 and 14 per cent on average annually since 2018.

The fixed-broadband basket is also least expensive in lower-middle income countries, just ahead of upper-middle- and high-income countries. In low-income countries, though, this basket is 1.7 times as expensive as in lower-middle-income countries. The price of this basket has been very sticky since 2018, especially in upper-middle- and high-income countries, where prices have even increased somewhat between 2018 and 2024.

These findings suggest that while absolute price levels have converged to some extent, this trend has not been matched by a similar convergence in income levels. As a result, large affordability gaps persist between highand low-income countries.

Affordability of mobile services

This section reviews the most recent affordability changes for the four mobile-based baskets for different country groups.

Data-only mobile-broadband basket

The **data-only mobile-broadband basket** refers to the cheapest non-promotional option to access mobile-broadband services providing at least 2 GB of monthly data using at least 3G network technology.

The data-only mobile-broadband basket is the entry-level basket typically used for comparing mobile-broadband service prices. From 2023 to 2024, the global median price of this basket decreased from 1.2 per cent of GNI per capita in 2023 to a historic low of 1.1 per cent in 2024 (Figure 7).

Figure 7: Data-only mobile-broadband basket (2 GB) prices by country groups, as a percentage of GNI per capita



Note: Medians based on the 208 economies for which data were available for both years. Economies are benchmarked according to the price of an entry-level data-only basket, defined as the cheapest data-only mobile-broadband subscription available domestically, with 3G technology or above and a minimum monthly data allowance of 2 GB.

Source: ITU

As mentioned above, income status is a better predictor of performance: affordability gaps for this basket are far larger across income groups than across regions, which include countries from different income groups. In high-income economies, the basket price amounted to 0.4 per cent of GNI per capita. This is almost 20 times more affordable than in low-income economies (7.4 per cent), although the gap between the two groups shrank by more than half between 2018 and 2024. The median price in Europe (0.3 per cent), home to most high-income economies, was 12 times more affordable than in Africa (4.2 per cent), home to a majority of low-income economies. Half of LLDCs and nearly half of SIDS met the 2 per cent target in 2024, whereas the cost still amounted to 4.6 per cent of income in LDCs.

In a data-hungry world, 2 GB of data is becoming insufficient for most online activities. In 2024, average monthly data use per subscription amounted to over 13 GB worldwide.⁵ In addition to the 2 GB basket, as part of desk research using the same methodology, ITU collected prices for different minimum allowance thresholds: 1 GB, 5 GB and 10 GB. This provided further insights into the affordability of "meaningful" mobilebroadband connectivity.⁶ As shown in Figure 8, the global median price of a 10 GB and a 5 GB data-only basket, at 1.8 and 1.5 per cent of GNI per capita, are well below the 2 per cent target, and in many regions where economies belong to the upper-middle- or high-income groups, the difference between the baskets was very low. However, in lower-middle-income, and especially in low-income economies, the gap was substantial. In low-income economies, even a 1 GB basket amounted to 5.5 per cent of GNI per capita, a 5 GB basket to 12.3 per cent and a 10 GB basket to 20.4 per cent. Considering that actual mobile data use in these economies averaged around 2 GB per month per subscription, the lack of affordability is clearly a barrier to universal and meaningful connectivity.

Figure 8: Data-only mobile-broadband basket prices by country groups and minimum data allowance, as a percentage of GNI per capita



Note: Medians based on the 205 economies for which data were available for 2024. Source: ITU

⁵ See ITU (2024), <u>Measuring digital development:</u> <u>Facts and Figures 2024</u>.

⁶ From 2025, the benchmark data-only basket in ITU's data collection will be the 5 GB basket, following the adoption of the new methodology by EGTI in 2024. A new, detailed <u>ICT Price Basket</u> <u>Manual 2025</u> serves as the reference for future data collection.

Mobile cellular low-usage basket

The **mobile cellular low-usage basket** refers to the price of the cheapest nonpromotional mobile cellular subscription available domestically with a minimum monthly allowance of 70 minutes of voice calls and 20 SMS messages.

2024 was the last year for which ITU collected data globally for this basket. EGTI agreed in 2024 to focus on mobile-broadband baskets to better reflect recent changes in global consumption patterns.

The mobile cellular low-usage basket gives access to the most basic form of connectivity. Its monthly allowance amounts to hardly more than a two-minute call a day and a message sent every weekday. The price of this basket decreased in all regions and all income groups, with the global median falling to 0.9 per cent of GNI per capita in 2024 (Figure 9). The service remains most relevant for low-income economies where smartphone ownership is limited and connectivity infrastructure is weaker, and SMS serves crucial, cost-efficient functions, providing access to services such as mobile money. In this context, it is concerning that the median price of this basket still amounted to 5.2 per cent of income and 3.4 per cent for both the Africa region and the LDCs, despite price drops. In other regions and income groups, the median price was below 2 per cent.



Figure 9: Mobile cellular low-usage basket prices, as a percentage of GNI per capita

Note: Medians based on the 209 economies for which data were available for both years. Economies are benchmarked according to the price of the cheapest mobile cellular subscription available domestically with a minimum monthly allowance of 70 minutes of voice calls and 20 SMS messages. Source: ITU

Mobile data and voice baskets

The **mobile data and voice low-consumption basket** refers to the price of the cheapest, non-promotional mobile-broadband subscription available domestically with a minimum monthly allowance of 70 minutes of voice calls, 20 SMS messages and 500 MB of data, using 3G or more advanced network technology. The **mobile data and voice high-consumption basket** includes 140 minutes of voice calls, 70 SMS messages and 2 GB of data.

ITU monitors the prices of two combined data, voice and SMS mobile-broadband services, the low- and high-consumption baskets, which were defined to reflect differences in usage profiles.

The subscription plans used for these baskets may be bundles combining all three services within one product, but can also include addons, or pay-as-you go solutions as well as any combination, depending on what results as the cheapest option to meet the requirements (see Box 1 for further insights).

The price of both baskets continued to decline worldwide in 2024. The global median price for the low-consumption basket was 1.2 per cent of GNI per capita, while the highconsumption basket amounted to 1.7 per cent of GNI per capita (Figure 10). The price difference between the baskets has dropped in most places but still remains significant in lower-middle- and low-income economies. The gap between the two baskets increased in various regions, but for different reasons. In the Africa and the Arab States regions, the price of both baskets dropped, but the lowconsumption basket showed a steeper decline than the high-consumption one. In LDCs and the Americas region, however, the price of the high-consumption basket increased while the low-consumption basket decreased. The gap between the two baskets has become negligible in mature markets because the cheapest plans have allowances that far exceed the low-consumption basket threshold criteria and often also that of the high-consumption basket.





Note: Medians based on the 208 economies for which data were available for both baskets from 2023 to 2024 as a percentage of GNI per capita. Bars show the difference between the price of the mobile data and voice low- and high-consumption baskets. The low- (and high-) consumption baskets are defined as the cheapest data and voice subscription available domestically, with a minimum of 70 (140) minutes, 20 (70) SMS messages and 500 MB (2 GB) monthly data allowance with 3G technology or above. Some labels were removed for ease of readability.

Source: ITU

Another gap of interest is the difference between the price of the mobile-cellular lowusage basket (discussed in the previous section) and the data and voice low-consumption basket, which in practice reflects the addition of 500 MB of monthly data use (where bundles are used for the basket, the "addition" may, in practice, already be included). At the global scale, the addition of data results in an increase of 0.3 percentage points, but the distribution is uneven. The gap between the two baskets is 2.3 percentage points in lowincome economies and 0.1 percentage points in high-income economies, showing that the inclusion of data in mobile plans has become the standard in mature markets.

Box 1: Off-the-shelf bundles or do-it-yourself combinations?

Consumers in different parts of the world face very different offers when looking for what constitutes the mobile-broadband high-consumption basket. Bundles covering a combination of data, voice and SMS services have become prolific in mature markets. In fact, 69 per cent of the high-income economies had bundles covering all the elements of the high-consumption basket (Figure 11). In these economies, bundles are generally cheaper than the pay-as-you-go rates and contribute to lower basket prices. Yet, in low-income economies, the cheapest option to meet the basket requirements relies on consciously combining complex solutions (such as multiple compatible plans, add-ons, pay-as-you-go options, etc.). Interestingly, as SMS is becoming less and less used, it shows up as an extra that consumers need to pay for in addition to a bundle.

The low share of all-in-one bundles (or *combo packages*, as they are sometimes called) in low-income economies in Figure 11 does not mean that consumers cannot find bundled services. Rather, it shows that combined services are marketed in the premium segment, often with additional minutes, SMS messages and data allowance exceeding basket requirements by far, and thus were found more expensive than a careful combination of plans (often weekly ones, in combination with add-ons).



Figure 11: Percentage of economies with all-in-one bundles used for the highconsumption basket by income level

Note: Based on the type(s) of plan(s) identified as the cheapest solution during the 2024 ICT price data collection to meet the mobile data and voice high-consumption basket requirements. All-in-one bundle refers to cases where a monthly allowance of at least 2 GB of data, 140 minutes of voice and 70 SMS messages is included in a single plan available "off the shelf" from the representative mobile operator. Bundle + extra SMS refers to cases where a monthly use of 70 SMS messages requires, in addition to a single bundle, an additional add-on or package, or a specific amount at pay-as-you-go rates.

Source: ITU

Affordability of fixed broadband

ITU collects and publishes statistics for the price of an **entry-level fixed-broadband basket**. The basket price refers to the recurrent monthly charge for a non-promotional plan that allows at least 5 GB of monthly data use, at speeds of at least 256 kbit/s.

The global median price of the fixedbroadband basket amounted to 2.5 per cent of GNI per capita, down from 2.7 per cent in 2023 (Figure 12). The basket price declined for all groups monitored; the most significant drops were observed in lower-middle-income economies, where a fixed-broadband basket amounted to 6.5 per cent of GNI per capita.



Figure 12: Fixed-broadband basket prices, as a percentage of GNI per capita

Note: Regional and other country group medians are based on the 194 economies for which data were available as a percentage of GNI per capita from 2023 to 2024. Economies are benchmarked according to the price of an entry-level fixed-broadband basket, defined as the cheapest fixed-Internet subscription available domestically, with a minimum of 5 GB monthly data allowance and an advertised download speed of at least 256 kbit/s. Source: ITU

Significant affordability gaps remain between countries for this basket, primarily driven by income levels. The entry-level fixed-broadband basket cost just 1 per cent of monthly income in high-income economies, but as much as 29.3 per cent in low-income economies.

In the poorest countries, fixed broadband remains largely inaccessible, limited to affluent households and to businesses. Its lack of affordability perpetuates a vicious cycle of high prices and low demand. In 2024, for instance, there were only 0.5 subscriptions per 100 inhabitants in low-income countries. The Africa region reported just two subscriptions per 100 inhabitants.⁷

While the affordability of fixed broadband has improved only gradually, the quality of connections has progressed significantly. The deployment of new technologies has enabled faster speeds and more data traffic. ITU has estimated that global fixed-broadband traffic increased from around 140 GB per subscription per month in 2019 to 310 GB in 2024.⁸ The metadata collected for the fixed-broadband basket provide additional evidence for the improvement of connection quality, reflected in connection technology and speeds.⁹ The number of economies using optical fibre or hybrid fibre-coaxial (HFC) technology for entry-level connections increased from 78 in 2019 to 122 in 2024, but there was no increase in low-income economies (Figure 13).

Figure 13: Share of countries in which the reference fixed-broadband plan is based on optical fibre or HFC cable technology



Note: Shares (in percentages) compared to the respective group of the 169 economies for which information on connection technology is available for both years.

Source: ITU

⁷ For fixed-broadband penetration, see ITU (2024), <u>Measuring digital development: Facts and Figures</u> <u>2024</u>.

⁸ For traffic data, see ITU (2024), <u>Measuring digital</u> <u>development: Facts and Figures 2024</u>.

⁹ It is useful to recall that the data collection rule for the fixed-broadband basket is referred to as entry-level because of the low thresholds defined: the cheapest plan including at least 5 GB data a month and with a connection speed of at least 256 kbit/s. While in theory, this would not require ADSL, cable or fiber-optic connections providing high speeds, as markets and technologies matured, the cheapest available plans actually by far "overshoot" the minimum requirements.



Figure 14: Median advertised download speeds for entry-level fixed-broadband baskets for income- and special groups and regions (Mbit/s)

Note: Medians based on available data for 2019-2024 on advertised speed for the plans used for the basket. Source: ITU

Median advertised download speeds increased as well, from 5 Mbit/s in 2019 to 30 Mbit/s by 2024. In just the last three years, the number of economies with over 100 Mbit/s speed grew from 36 to 64, the typical speed for high-income economies since 2022. However, progress remains uneven and the gap between high-income economies and the rest remains wide. The typical speed in one in two low- and middle-income economies (55) did not exceed 10 Mbit/s in 2024, a threshold which hampers meaningful connectivity. Regional variation also remains significant, with the Arab States, CIS and Africa regions lagging far behind Europe and the Americas (Figure 14).

Although the fixed-broadband basket definition requires a monthly allowance of at least 5 GB of data a month in the selected plan, this threshold is exceeded almost everywhere. In fact, in 142 economies, the plan used for this basket included *unlimited data allowance*. This reflects a broader trend in which Internet service providers (ISPs) now differentiate fixedbroadband offerings by speed rather than data allowance. In addition to the recurrent monthly charges, new subscribers to a fixed-broadband connection also face a one-time connection charge. This can include the cost of delivery, installation and/or equipment (e.g. modem, router or optical network terminal). In many cases, some or all of these charges are waived as part of a promotion or amortized over longer commitment periods, but can also be retained as hidden fees locking in consumers for years. However, since ITU methodology requires collecting non-promotional prices, it is possible to assess the levels of these charges. In 2024, the connection charges represented an additional two-thirds of a month's charge, but the costs differred significantly by country and amounted to over a month's charge in 72 economies. In 21 economies, they amounted to more than three months' charge (Figure 15). These high connection charges represent a significant deterent to fixed-broadband adoption.

Figure 15: Distribution of countries by one-time connection charges for fixed broadband as a percentage of recurrent monthly charges, 2024



Note: Non-promotional connection charges are expressed as a percentage of the recurrent monthly subscription fees. The chart shows the number of countries within each range. Source: ITU

Affordability gaps within countries

Affordability gaps exist not only between countries but also within them. Even where a basket is considered affordable (i.e. defined as costing less than 2 per cent of income) based on the *average* GNI per capita, income inequality can mean that lower-earning segments of the population spend much more than 2 per cent of their income.

Calculating affordability by income decile helps reveal the extent of these inequalities. Figure 16 shows that in African countries with available income inequality data, the majority of the population cannot afford an entry-level mobile-broadband plan. Even in Côte d'Ivoire and Kenya, where the basket price relative to the average GNI per capita is lower than 2 per cent (light blue in Figure 16), only around 40 per cent of the population would spend less than 2 per cent of their actual income, because of the highly unequal income distributions. The figure shows that in other regions, significant shares of the population face similar challenges.

Although the entry-level mobile-broadband basket is generally affordable for the vast majority of the population in high-income economies, affordability can act as a barrier even there. For instance, in Panama the basket is affordable only to 40 per cent of the population. In Bulgaria, Canada, Greece, Romania, Uruguay and the United States, the poorest 10 per cent of the population has to pay more than 2 per cent of their income.



Figure 16: Share of population paying less than 2 per cent of their monthly income for mobile-broadband in low- and middle-income economies

Note: The length of the bars shows the percentage of the population (rounded down to the nearest decile) having access to the data-only mobile-broadband (2 GB) basket for less than 2 per cent of their respective income in low- and middle-income economies. Bars are shaded based on whether the basket is affordable considering the average income in the country, light blue if GNI per capita rates do not exceed 2 per cent, dark blue otherwise. 2024 ICT prices were combined with World Bank inequality survey data no older than five years old. Countries are grouped by ITU regions.

Source: ITU calculations based on World Bank PIP and ITU price basket data.

Affordability, access and use

The price of ICT services evolves alongside network access and use. As new mobile- and fixed-broadband networks are deployed, more people gain connectivity and the market expands. This growth generates scale and network economies, allowing operators to reduce prices. Lower prices in turn improve affordability, attracting more consumers. This enables a virtuous circle of rising demand for connectivity and supply of services and coverage.

Yet this dynamic is not guaranteed: operators still face challenges financing network expansion or upgrading existing networks, and many users lack the devices or skills to get online. Policy plays a key role in addressing these barriers, improving affordability and accelerating uptake.

This section analyses the developments in the mobile-broadband segment, providing recent evidence for these dynamics. Economies were grouped in three categories according to the affordability of the data-only mobile-broadband basket in 2019. Group 1 consists of economies with prices amounting to not more than 2 per cent of GNI per capita in 2019. In Group 2 economies, prices were between 2

and 5 per cent, and in Group 3, prices were above 5 per cent. For each of the three groups, a selection of indicators shows the levels of affordability, ICT access and use, and the financial performance of operators changed between 2019 and the latest available year (2023 or 2024).

As the left panel of Figure 17 shows, from 2019 to 2024, median prices fell across all groups, narrowing the affordability gap. The Group 2 median dropped below the 2 per cent target, leaving only seven small island states above it. Group 3 saw a 40 per cent price drop, but the median remained high at 5.6 per cent, with wide variation – from under 2 per cent in a few cases to over 20 per cent in one.

Network access improved across all groups but at different paces (Figure 17, middle panel). Countries in Group 1 were not only already leaders in 4G in 2019 but also led 5G roll-out over the period, which reached 85 per cent median population coverage by 2023. Group 2 caught up on 3G and 4G, but 5G remained limited - only 10 of the group's 40 economies had any 5G in 2023. Group 3 saw notable gains in 4G (35 to 75 per cent coverage) but continues to lag in 5G deployment.



Figure 17: Mobile-broadband affordability, access and use by affordability group

Note: Median values for the three groups were defined by mobile-broadband prices in 2019. Group 1 consists of 95 economies (prices up to 2 per cent of GNI per capita in 2019), Group 2 consists of 48 economies (prices between 2 and 5 per cent of GNI per capita in 2019) and Group 3 consists of 40 economies (prices above 5 per cent of GNI per capita in 2019).

Source: ITU DataHub

Internet use mirrored affordability levels (Figure 17, right panel). In Group 1, use grew from 82 to 89 per cent; Group 2 advanced from 60 to 76 per cent, approaching saturation. Group 3 made the largest gains but still lagged far behind at 34 per cent in 2023. The gap between Internet use and mobile-broadband penetration suggests multiple factors at play, including use of fixed connections, and differences across markets depending on how common it is for individuals to have multiple SIM cards.

Affordability differences largely reflect disparities in economic development. The median GNI per capita of Group 1 was almost triple that of Group 2 and over 12 times that of Group 3 (Figure 18). These gaps widened between 2019 and 2024.

Mobile operators in Group 1 countries, where the disposable income was the highest, generated about twice as much revenue per subscription as in the other two groups (Figure 18). With revenues per subscriptions declining over time worldwide, by 2023, the difference between Groups 2 and 3 nearly disappeared. At USD 150, operators in Group 1 still earned around twice the typical amount for Group 3 (at USD 73 per subscription). While telecommunication service prices are a key factor in determining revenues, the relationship between prices and revenues is moderated by a complex interplay of market dynamics, customer behaviour, company strategies, the regulatory environment and technologies. Nevertheless, with prices relatively aligned globally (as shown in the section on price levels), such low revenues reduce operators' ability to invest, slowing progress on both affordability and access.

In fact, the difference in investment levels is striking (Figure 18): Group 1's median telecommunication investment in 2023 was USD 808 million, versus USD 192 million in Group 2 and just USD 58 million in Group 3. Catching up in connectivity infrastructure would have required Group 3 to boost investments; however, investment levels in this group declined from 2019 to 2023. Only Group 2 managed to attract more investment in the same period.

Motivations for investment in telecommunication services are manifold: expanding the network, modernizing it for efficiency gains, or improving services to



Figure 18: GNI per capita, mobile network revenues and investments by affordability group

Note: Median values for the three groups defined by mobile-broadband prices in 2019 (see in text). In line with corporate financial reporting practices, revenue and investment figures are provided in USD. Source: ITU DataHub.

meet consumer needs. Operators in less mature telecommunication markets, with weaker consumer bases and less developed infrastructure not only have to be more selective in their investment strategies but also need to wait longer to recoup their investments. For instance, an operator in a developing economy that recently deployed 3G or 4G networks will prioritize optimizing the services before investing in a more advanced network generation. These constraints help explain why, despite falling prices, the benefits of connectivity have not reached all countries equally. Countries that started with high mobile-broadband prices in 2019 saw slower improvements in network coverage, Internet use and investment, even as prices fell. This suggests that price reductions alone are not enough: structural challenges such as low income, limited investment and weak demand must also be addressed to unlock the full potential of connectivity.

Conclusion

The affordability of ICT services has generally improved since 2018, in particular for mobile services. Prices for all four mobile baskets have declined significantly, and a growing number of countries have reached the Broadband Commission's 2 per cent affordability target for entry-level broadband services. By 2024, two-thirds of countries had met this benchmark for entry-level mobile broadband, up from just over half in 2018. However, progress on fixedbroadband affordability has been slower and remains out of reach for many, especially in low-income countries.

Affordability gaps remain stark, both between and within countries. While the price of mobile services has dropped across all income groups, the gap between rich and poor countries remains wide due to slower income growth in lower-income economies. Within countries, national averages often conceal significant disparities, with large segments of the population still facing high connectivity costs.

The decline in mobile-broadband prices must also be viewed in context. Since 2020, global

data consumption has increased sharply, and digital services have become more bandwidthintensive. What was once considered "entrylevel" is now insufficient for meaningful participation in the digital economy. In this evolving landscape, affordability must be redefined not just in terms of cost but also in relation to the adequacy of service levels.

To keep pace with these changes, EGTI plays a critical role in ensuring that the measurement framework remains relevant. The updated basket definitions agreed in 2024 and reflected in the 2025 data collection represent a necessary evolution. They account for shifting usage patterns, technological advancements and user expectations and will allow for a more accurate assessment of the real cost of meaningful connectivity.

As digital services become increasingly essential to economic and social inclusion, ensuring that everyone can afford adequate connectivity must remain a top policy priority.

Annex: ICT price data collection methodology

This report is based on the methodology in force at the time of 2024 data collection, which was agreed by ITU's Expert Group on Telecommunication/ICT Indicators (EGTI).

For non-tradable services such as telecommunications, international price comparisons require well-defined and consistent benchmarks. To this end, ITU employs a basket-based approach, where comparable units of services are identified and priced across countries.

Establishing a single benchmark for global comparison is challenging. Countries differ widely in size, geography, population distribution and level of economic development. People also access and use ICT services in diverse ways, depending on local market conditions and socioeconomic factors. To reflect this global diversity, the ITU methodology covers both fixed and mobile services, voice and messaging, as well as data traffic. The result is a set of five ICT price baskets, each defined according to specific monthly allowance thresholds, technology and validity requirements to maximize consistency and comparability across countries. Figure A1 presents the baskets and their respective allowances, while Table A1 provides an overview of the data collection rules. The details of the data collection methodology are available <u>online</u>.¹

Figure A1: ITU ICT price baskets (2021-2024)



¹ <u>https://www.itu.int/en/ITU-D/Statistics/Documents/publications/prices2021/ITU_ICT_Prices_Methodology</u> _pdf

Basket (Minimum allowance)	Fixed- broadband (5 GB)	Mobile- cellular low usage (70 + 20)	Data-only mobile- broadband (2 GB)	Mobile data and voice low-cons. (70 + 20 + 500 MB)	Mobile data and voice high-cons. (140 + 70 + 2 GB)
Market leader	By fixed-broad- band subscriptions	In terms of mobile-cellular subscriptions [any technology]			
Currency	Prices to be collected in the currency advertised (local currency or world currency (such as USD) where inflation is high)				
Taxes	Include all taxes (VAT, digital, other levies, etc.) (Note: "accounting units" /e.g. flex, etc./ often exclude tax!)				
Validity period	Plan(s) should b offer	be in force at tir	ne of data colle	ection; not a limi	ted time
	1 month	30 days or 4 v	veeks		
Territorial validity	Entire territory; if prices vary, largest city (by population); if unavailable: capital city				
Prepaid/Post- paid?	Not specified (typically, postpaid)	Cheapest modality; if postpaid, consider commitment period (so: typically, prepaid)			
Commitment period	12 months preferred	1 month preferred (if longer, add early termination fees)			
Non-promotional	Non-promotional, residential, individual (not businesses), no user restric- tion (e.g. not intended for students, youth, retired, etc. only)				
Technology, speed Dominant tech.; at least 256 kbit/s At leas		At least 3G, 2	east 3G, 256 kbit/s dl		
Time of day	Should not be limited	Collect peak/ off-peak Hours should not be limited prices if different			
On-/off-net	(not applica- ble)	Collect on-/off-net prices if different	(not applica- ble)	On-net prices	
Zero-rated services, social media	excluded	(not appli- cable) excluded from minimum data allowance			
Cheapest option	Cheapest solut	ion that meets	(or exceeds) th	e requirements	
All details from the same plan(s)	Use the same plan [and compatible add-on(s), as required] for collecting all metadata				

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