



Global Digital Inclusion  
Partnership

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# What **subsea internet cables** mean for **digital inclusion**

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# **What Subsea Cables mean for Digital Inclusion**





# Our theory of change

## New subsea cables

*Build new connections within the Internet and expand broadband coverage to new areas*



## More digital transformation

*With more people online, governments and businesses are able to do more online, leading to stronger digital economies and better public e-services.*



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## New international bandwidth

*Increase the availability of infrastructure to carry more Internet traffic to more places to more users, increasing the Internet's ability to connect people.*



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## Lower prices, better connectivity

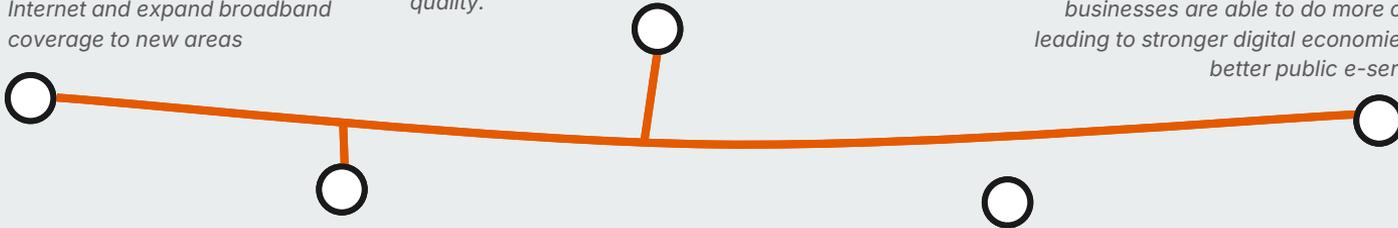
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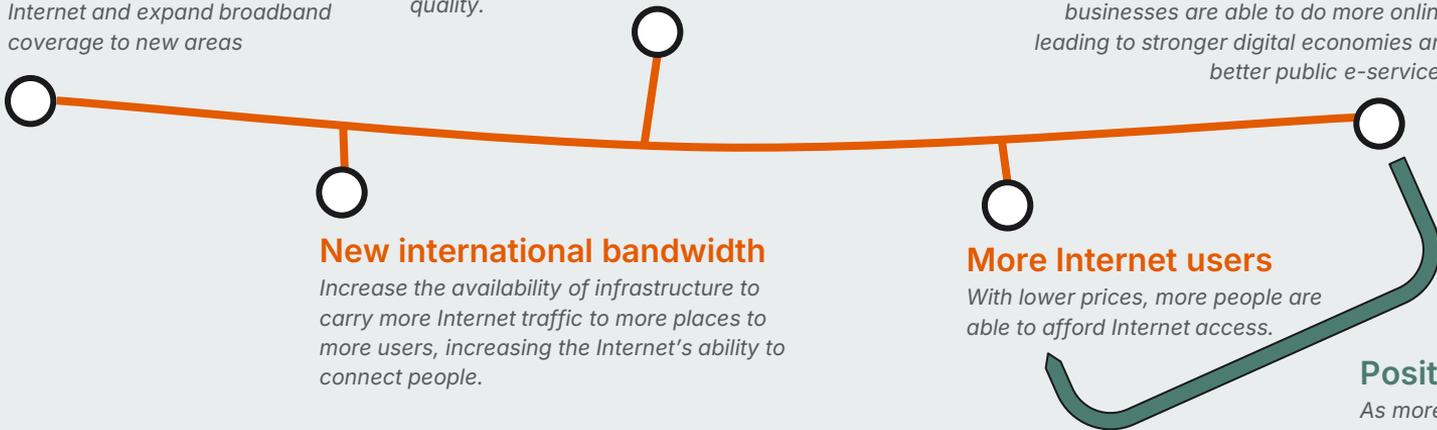
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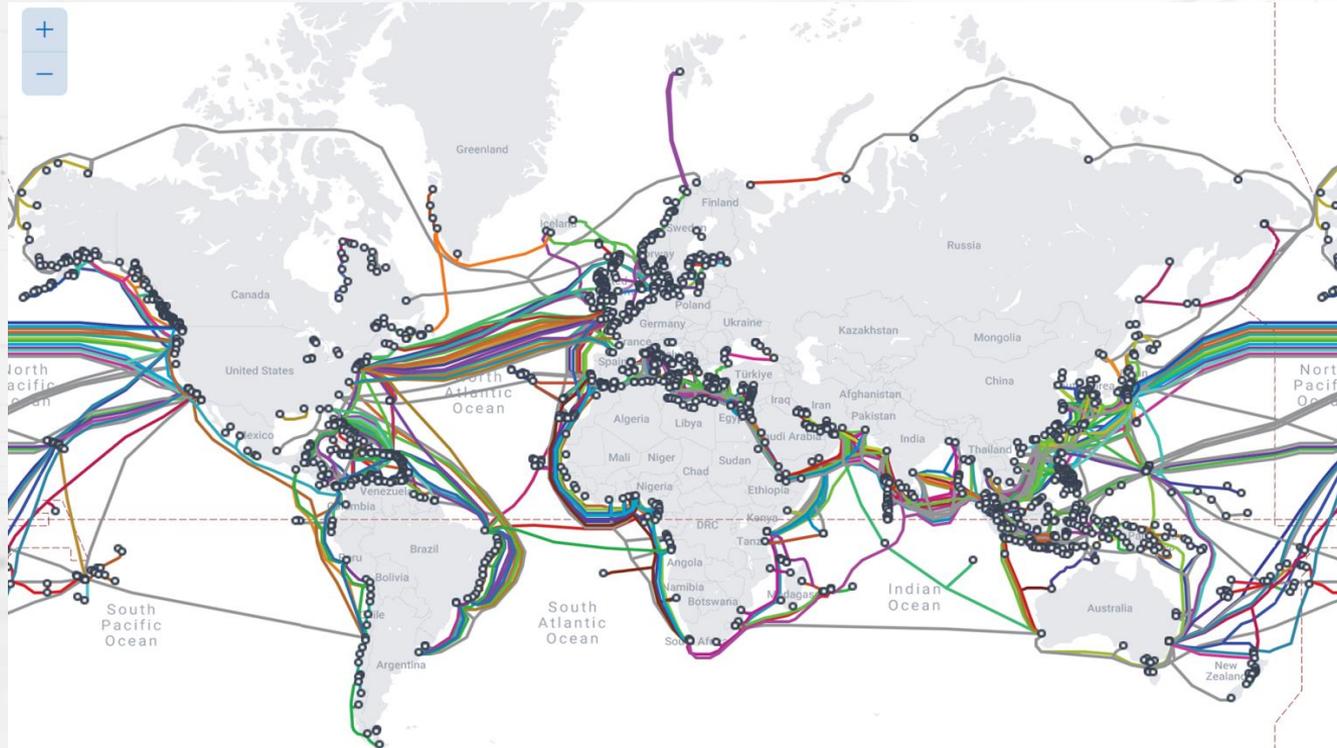
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## Positive feedback loop

As more of the world moves online, more people see the value in connecting and using the Internet in everyday life.



# Subsea Cables are the backbone of **global internet connectivity** – carrying 90% of traffic



**As demand for data traffic increases, there is greater need for high-capacity cost effective subsea cables –**  
the good news is that technology is advancing and so is capacity

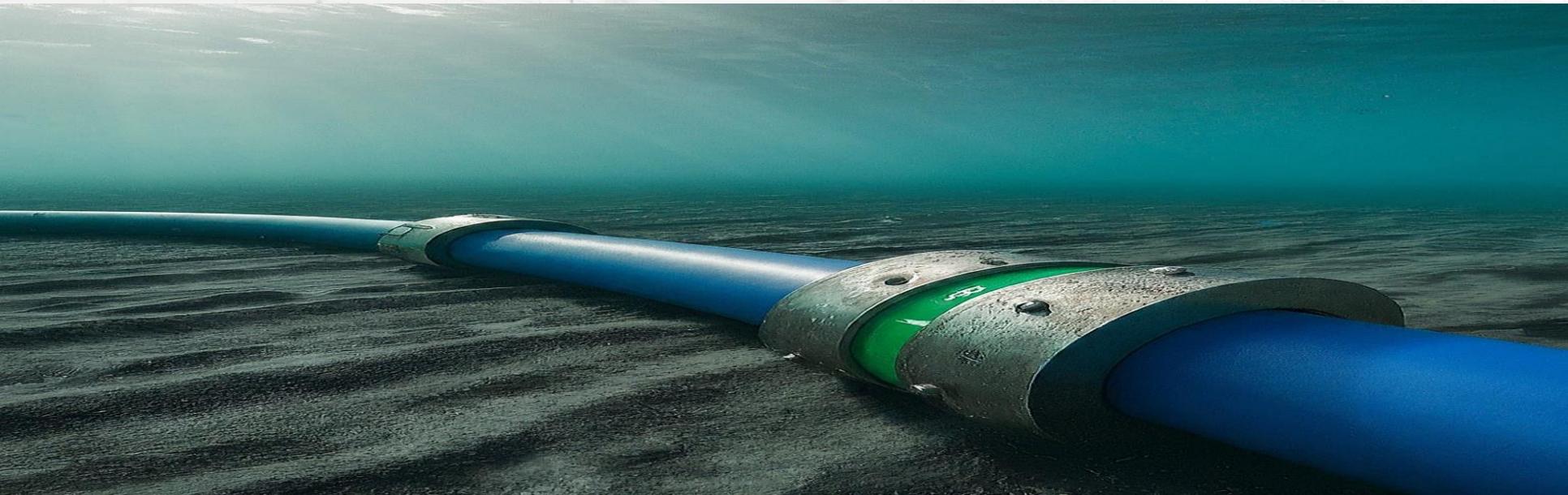


**Subsea cable connectivity** is key to closing the **global digital divide** and to achieving universal meaningful access

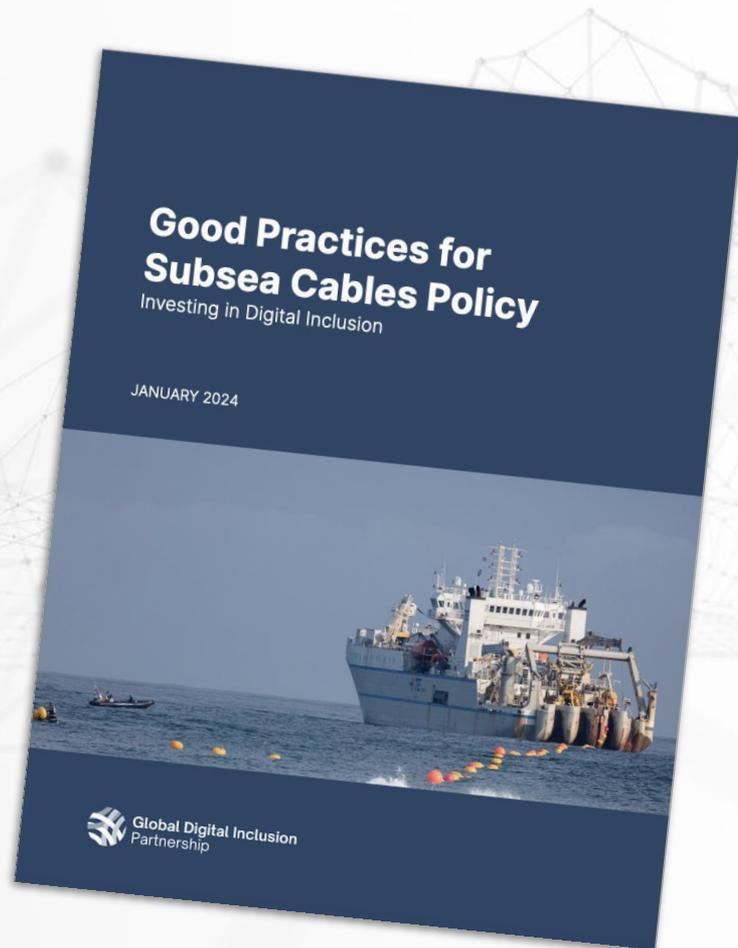
Yet much of the world remains offline or poorly connected, with less than 40% of Africans and about 55% of South Asians connected to basic internet



**Inclusive Connectivity** requires a conducive policy and regulatory environment to attract investment, facilitate the deployment and maintenance of submarine cables and to support growth and innovation



# Case Studies from our Good Practices for Subsea Cables Policy Brief





UNITED STATES



EUROPEAN UNION



FRANCE



ITALY



CAPE VERDE



GHANA



SINGAPORE



TONGA



COLOMBIA



PERU



SOUTH AFRICA



AUSTRALIA

**CASE  
STUDY  
LESSONS**

**COMPETITION  
& INNOVATION**

**REGULATORY  
CERTAINTY &  
EASE**

**INFRASTRUCTURE  
& MAINTENANCE**



## COMPETITION & INNOVATION

## REGULATORY CERTAINTY & EASE

## INFRASTRUCTURE & MAINTENANCE

### ITALY

#### **Open access cable landing options support healthy competition**

Open access cable landing stations that provide cost-based open access to competing backhaul providers and cost-based interconnection are critical to a robust connectivity ecosystem, as they spur competition and consequently help bring down bandwidth costs. The Genoa Lagaccio Open Landing Station “provides open interconnection capabilities and gives cable projects access to the numerous backhaul options from Genoa into northern Italy and beyond,” and is a good example of this good practice in action.

COMPETITION  
& INNOVATION

REGULATORY  
CERTAINTY & EASE

INFRASTRUCTURE  
& MAINTENANCE

**SINGAPORE**

**Regulatory certainty and efficiency with a nationally coordinated policy**

- Appointment of a single POC
- Whole-of-Government approach
- Clear guidelines related to deployment and maintenance of submarine cable systems
  - No direct or indirect foreign equity limits for entities seeking telecommunications licenses
  - Support for private use licensing exemptions
  - Promotes open and cost-effective landing stations
- End-to-end connectivity
- Wider investor and business-friendly environment

COMPETITION  
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## AUSTRALIA

### **Cable protection zones offer effective protection from potential cable damage**

The Australian Communications and Media Authority has declared three submarine cable protection zones in Australian waters on the east coast and west coast.

These protection zones mean that limited activities can occur in the area to ensure the cable is secure and reliable (e.g. no trawling, dredging, or any other activities likely to damage cables). It is a criminal offense to wilfully or negligently damage subsea cables in these zones, including up to ten years imprisonment. While cables can land in Australia outside these cable protection zones, most choose to land in these three zones to avail themselves of this protection.

**COMPETITION  
& INNOVATION****REGULATORY  
CERTAINTY & EASE****INFRASTRUCTURE  
& MAINTENANCE****CABO VERDE****Open access policy guided by ECOWAS supports competition and lower prices**

In Cabo Verde, the regulator's implementation of pro-competition access policies helps drive down wholesale internet service prices in the country. The country adopted an ECOWAS decree that helped set the conditions for accessing landing stations on fair, competitive terms. This policy helped drive down wholesale prices to just one-eighth of what they were before the policy interventions.

**COMPETITION  
& INNOVATION**

**REGULATORY  
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**INFRASTRUCTURE  
& MAINTENANCE**

**INDIA**

In June 2023, Telecom Regulatory Authority of India (TRAI) issued recommendations on 'Licensing Framework and Regulatory Mechanism for Submarine Cable Landing in India. Recommendations include:

- Identifying submarine cables within the Indian territory as critical and essential services
- Simplifying process for licensing and approvals across government agencies
- Identifying protection zones or corridors
- Making provisions for an Indian-flagged vessel to address repairs in a timely manner

COMPETITION  
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## TONGA

### **Diversity of landings can reduce vulnerability**

Tonga's near-total digital isolation from the world in 2022 following a volcanic eruption demonstrates the unique vulnerability that small island states face for international connectivity. Given their comparative isolation and small market size, island states may struggle to obtain the redundancies in connectivity that reduce this vulnerability, but stress the importance of allowing for the diversity of landings that can reduce potential disruptions to service.



## COMPETITION & INNOVATION

**Encourage open-access  
cable landing stations.**

**Enforce against  
monopolistic behavior.**

**Eliminate 'one-size-fits-all'  
licensing arrangements.**

**Adapt to accommodate  
new technologies.**

## REGULATORY CERTAINTY & EASE

**Create and maintain a  
stable cabling policy  
framework.**

**Coordinate permitting, etc.,  
at various levels of  
government.**

**Allow private and foreign  
investments.**

## INFRASTRUCTURE & MAINTENANCE

**Engage a wide range of  
stakeholders.**

**Allow diverse  
routes/landings.**

**Streamline repair  
processes.**

# **What can Governments/Policy Makers and Industry do**



## Governments play a critical role

- Analyze what's working in other countries/regions
- Engage with industry and investors to understand their challenges
- Work with others in government to prioritize their support for submarine cable connectivity needs
- Encourage regional and international collaborations



## And so does the industry...

- Invest - of course – but collaboration is key
- Consider new business models and new partnerships
- Prioritize rural connectivity
- Consider green and sustainable technologies
- Share knowledge and information



# Moving Forward Together



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# From cables to transformation

“The policy decisions made today will influence the investment choices made tomorrow. These investment choices will, in turn, influence the availability of reliable and affordable broadband services around the world. Policymakers and regulators need to step up their leadership roles to eliminate investment barriers and guide market development that will enable digital inclusion at a global scale and will result in global economic growth and development.”

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# Thank you.

**Sonia Jorge**, Executive Director



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