Introduction

Connectivity has been critical to support emergency response, economic and social continuity in the Covid-19 crisis. At the same time, Covid-19 has been a stress test on the capabilities and resilience of fixed and mobile communications infrastructures and ecosystems.

With the onset of the crisis, communications networks have seen massive traffic increases due to heightened demand for work-at-home, video conferencing, cloud services, use of social media, live and streaming video, gaming, e-mail, and e-commerce.¹

For example since the crisis onset, in Spain traffic through IP networks has seen increases of nearly 40%; while mobile network use has risen by about 50% for voice and 25% for data. In Italy, Telecom Italia has experienced a traffic increase between 70 and 90% in the fixed and over 30% in the fixed and mobile network, respectively.

During the pandemic, telecom operators have worked to ensure continuity of their services in a reliable, stable and secure way, including to strengthen network capacity as needed and ensure resilience of emergency communication services and the integrity of networks, including – but not limited to – responding to a spike in misinformation about 5G and coronavirus.

Cloud computing, combined with new productivity, communication, and machine learning tools, all applications which the Covid-19 crisis has shown to be critical, require secure, reliable and affordable access to highspeed broadband services. In addition, enhanced digital literacy is vital to ensure that all of society make use of the tools offered by networks and application providers. This exceptional period has also shown the need to re-evaluate the appropriateness and flexibility of digital policies and regulatory frameworks.

Communications and network providers have been implementing proactive measures in the crisis:

- Increasing speeds for users
- Upgrading the transmission capacities of their networks
- Taking measures to expand Internet usage possibilities beyond purchased tariffs (increased data caps, zero rating, unlimited access at lower speeds …)
- Providing targeted relief on bill payment in the crisis for individuals and business
- Providing increased access and handsets for low income households
- Providing targeted support services for health providers, schools and SMEs
- Providing access to premium content (educational, entertainment, …)

¹ Since January 1, online retail orders have grown +96% in North America, 52% in Europe, 51% in APAC, and 162% elsewhere, as of June 14, 2020. See https://ccinsight.org/trends-by-location/#regional-trends
• Working with public administrations in support of eLearning/eSchooling activities and upgrading digital skills
• Working with content providers to use bandwidth of streaming services more efficiently as use rises
• Increasing the protection and compensation of frontline employees who have borne the brunt of increased workloads and risks

More broadly technology companies and network providers have also been implementing proactive measures:

• Developing applications useful for tracking of the spread of persons exposed or infected by the Coronavirus
• Deploying increased computing facilities to accommodate the surge in use of e-commerce and other digital applications
• Reducing certain bit rates for video streaming services and video game downloads
• Making donations of Wi-Fi devices, tablets and laptops, as well as construction of public Wi-Fi hotspots to assist with connectivity for unserved or underserved communities
• Deploying cloud contact centers to assist families and students with online learning
• Provisioning free use of online business applications for SMEs and free use of communications software to enable remote work
• Offering free sports, educational and entertainment including family centric content online

Demand for services, and deployment of next generation networks has remained significant in the crisis, including for low income and underserved areas. Companies continue working to ensure connectivity, to manage and augment networks in order that they continue to have sufficient capacity to absorb peak demand in the crisis.

Key policy issues for business:

• The widespread roll-out of communications networks should be a foundational building block of each country's recovery plan: High performing and resilient networks will support economic recovery in the midterm and also provide a basis for environmentally sustainable prosperity and well-being in the long term.

• Ensure policies support optimal network performance: It is critical that policies support well functioning systems and networks, including a flexible approach to traffic management, crucial network maintenance and continuity of supply chains.
• **Policies should boost investment in digital infrastructure to reduce the connectivity and access gaps:** This includes between individuals, organizations and countries, while supporting the build-out of digital networks with robust capacity to handle demand surges and meet the needs of society in times of greatest need.

• **Target policies to those in need:** Policies responding to economic impacts on individuals and business, including delayed paying of bills and free offers should be targeted to those in need and temporary in context of the crisis to ensure sustainability of service provision.

• **Implement temporary emergency measures:** Temporary suspension of reporting obligations to the regulator, freezing of the terms of the files and regulatory requirements as well as non-application of service quality obligations may be needed as long as the emergency situation continues.

• **Foster investment in the recovery:** In the recovery phase, support and investment to maintain and further develop high quality and sufficient capacity of secure digital infrastructure should be a priority

**OECD Role:**

• OECD should review demand and regulatory policies regarding connectivity in the mid term and recovery phase of the crisis, including upgrading of networks as well as policies that facilitate reaching more remote areas as a longer term investment issue.

• OECD should review policies focused on network deployments, such as reducing spectrum costs and making more efficient use of spectrum, and removing barriers to network infrastructure deployment

• The review of the OECD Broadband Recommendation should take into account experience of Covid-19 in light of possible future crisis and pandemics.

**Looking ahead towards recovery:**

Drawing on lessons learnt from the ongoing crisis, it is essential that policies in an integrated and holistic way support digitalization of public sector organisations, large and small business alike across sectors. This will not only help generate demand for digital communications services in the face of the expected economic slowdown, but also increase economic and operational resilience of these constituencies for the future.

As countries and regions have enforced confinement and deconfinement measures, digital inclusion, affordable access, remote access and quality of service remain a key concern.
Remote medical services and diagnostics, remote education and work have brought these issues into sharp focus. They are critical for recovery and to ensure greater preparedness and resilience for future crises.

An additional issue of concern is that it will be important to address the potential impacts on connectivity due to sharp slowdowns of commercial activity and business markets resulting from delayed or non-payments to network operators, and exposure to public debt or liquidity crises as a result of the pandemic.

We look forward to working with OECD to advance the needed evidence base and analysis to foster enhanced resilience and recovery from the Covid-19 crisis.

**Annexe: Business examples**

A compilation of business examples can be accessed here and on the Business at OECD Website Covid 19 Page. (link to be added)
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