Transforming Connectivity: Azerbaijan's Digital Journey (2020–2025)

From Copper Networks to Fiber-Optic Infrastructure

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Azerbaijan Hospitality Connectivity Summit

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World Bank B-READY 2025: Azerbaijan Recognized

World Bank Business Ready 2025
Communal Services & Digital Infrastructure

- ✓ **#5 Globally** — Operational Effectiveness
  Internet Sub-Indicator (Top 5/101 economies)
- ✓ **#1 Regional Leader** — Regulatory Framework
  Among peer economies
- ✓ **Score: 83.05/100** — Communal Services
  Ranked #25 out of 101 economies

For Hospitality & Tourism

- Infrastructure parity with developed destinations
- Can support premium guest services
- De-risked for investors
- Regional competitive advantage

Key Recognition

Internet = Essential Infrastructure
(like electricity, water, transport)

Today's Story

How did we achieve this?
What does it mean for Azerbaijan's tourism future?

Source: World Bank Business Ready (B-READY) 2025 Report | October 2025

Overview

1. The Starting Point
2. Mobile Connectivity Progress
3. Fixed Broadband: The Main Story
4. Impact & Achievements
5. Future Outlook

Where We Started: A Digital Divide (2020)

Infrastructure Challenges

- Fiber coverage: **only 9%**
- 227K premises with access
- Legacy ADSL/DSL dominant
- 150+ fragmented ISPs

Performance Baseline

- Download: **10.5 Mbps**
- Upload: **11.1 Mbps**
- Inadequate for modern use

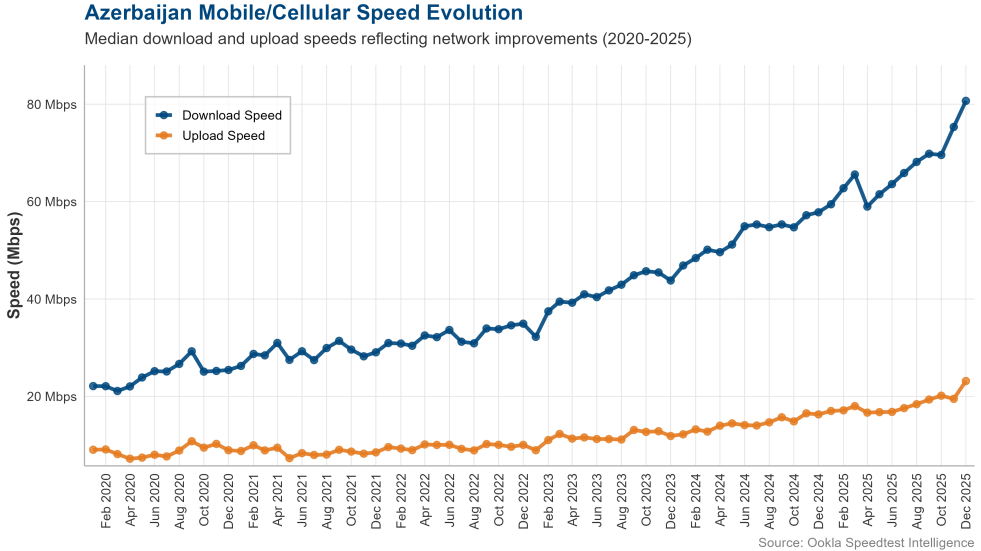
Digital Divide

- National avg: $\sim$76%
- Rural: $\sim$46%
- **Gap: $\sim$30 pp**
- Rural: 45.5% population

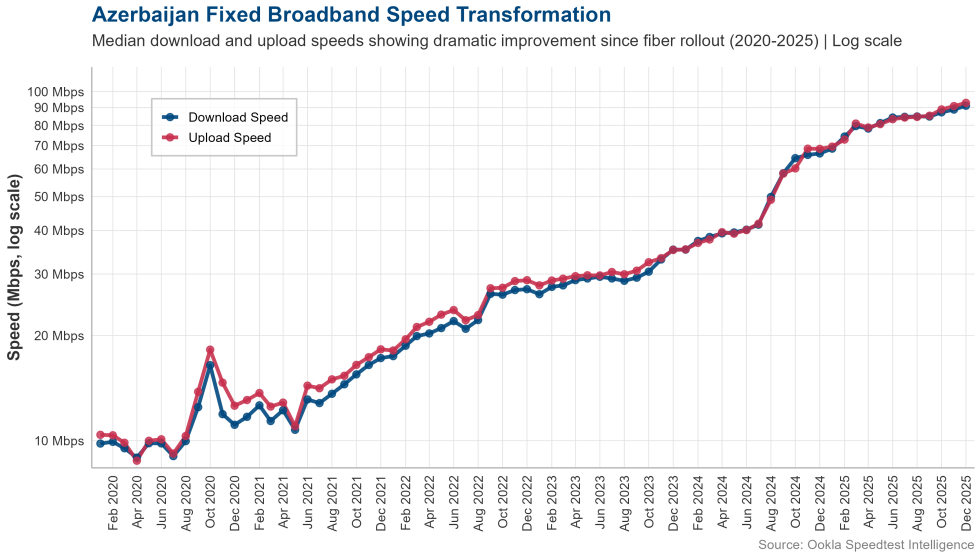
Key Insight

Connectivity was fragmented, slow, and spatially unequal.

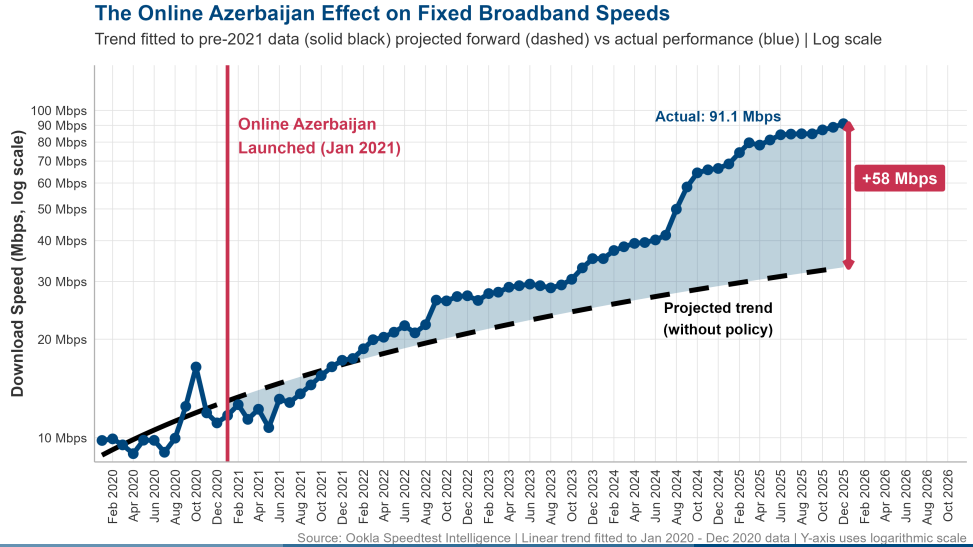
Mobile/Cellular: Download & Upload Speed Evolution



Fixed Broadband: Download & Upload Speed Evolution

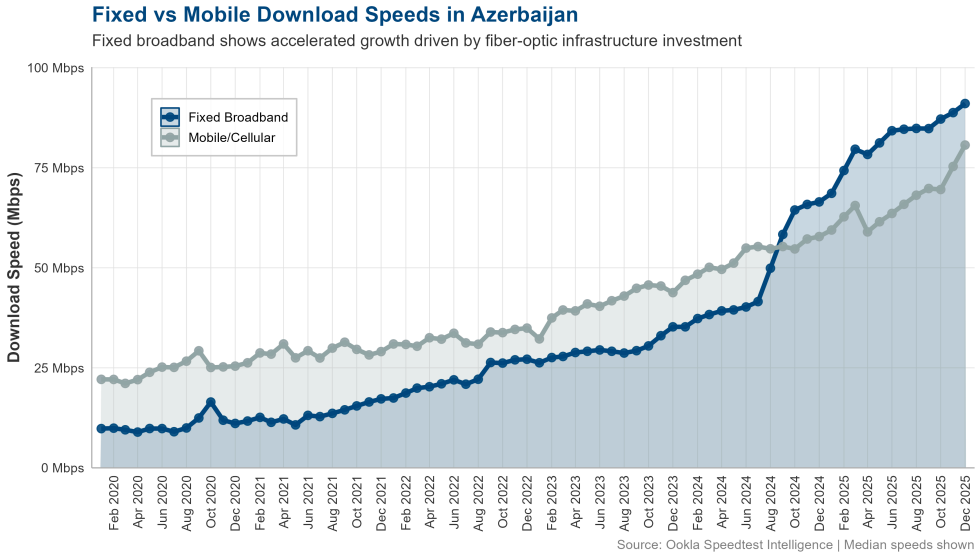


What If Online Azerbaijan Never Happened?



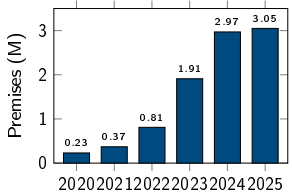
Source: Ookla Speedtest Intelligence | Linear trend fitted to Jan 2020 - Dec 2020 data | Y-axis uses logarithmic scale

Fixed vs Mobile: Fiber Investment Drives Fixed Broadband Growth



Remarkable Progress: 5-Year Transformation

Fiber Coverage Expansion



9% → ~100% (13x increase)

Speed Transformation

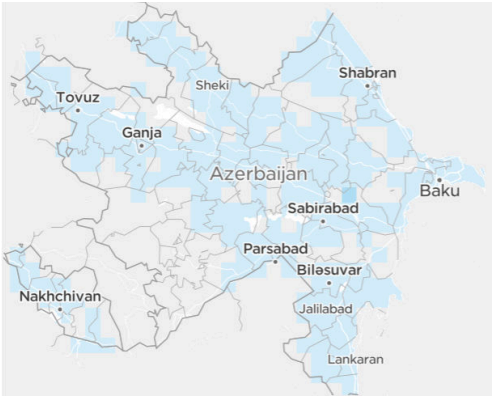
Metric	2020	2023	Q4'25
Download	10.5	29.8	**88.8**
Upload	11.1	30.8	**90.7**
Growth	*1x*	*3x*	***8x***

Fiber Subscriber Growth

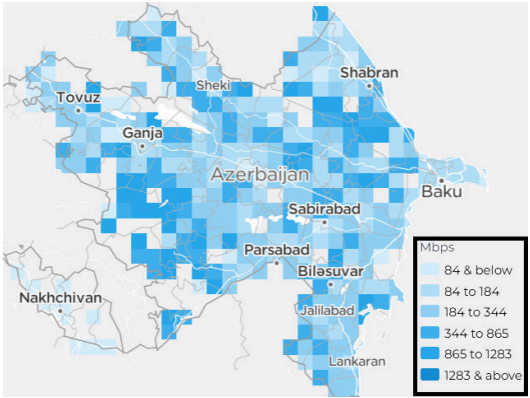
- 2023: 1.35M (71.1%)
- 2025 Q4: **2.30M (95.1%)**
- +950K new in 2.5 years

Geographic Transformation: Coverage Expansion

January 2022



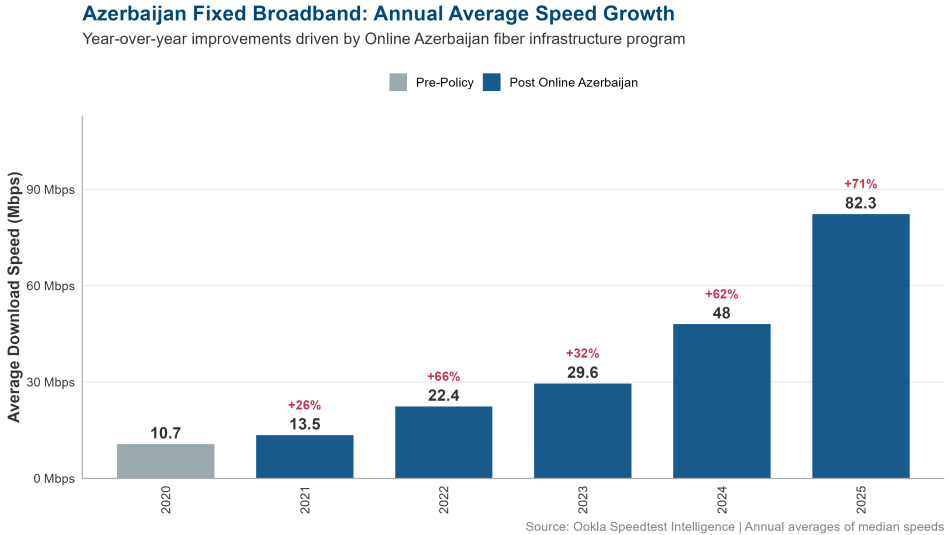
December 2025



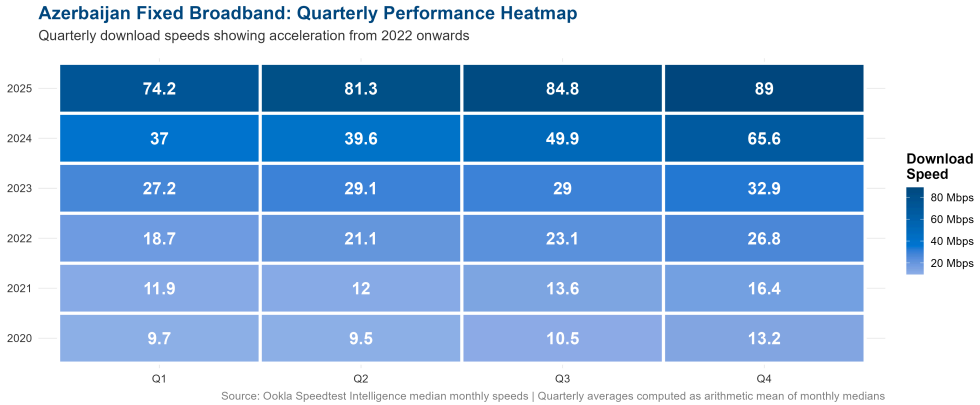
Source: Ookla Speedtest Intelligence®

Nationwide connectivity transformation across all regions

Annual Speed Growth: Pre vs Post Online Azerbaijan



Quarterly Speed Heatmap: Acceleration from 2022

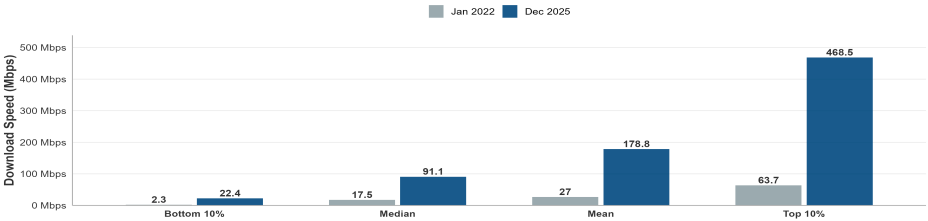


Darker colors = faster speeds | Clear acceleration visible post-2021 | Source: Ookla Speedtest Intelligence®

Speed Performance Evolution: 2022 → 2025

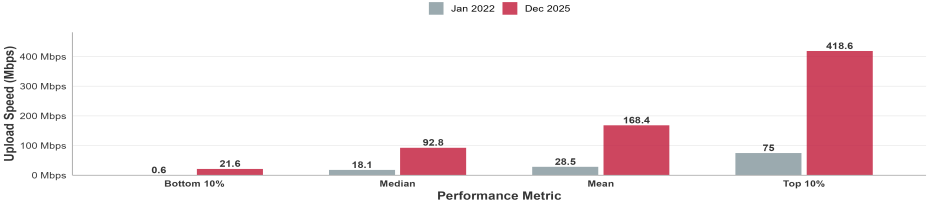
Download Speed Evolution: 2022 → 2025

Median: 5.2x growth (17.5 → 91.1 Mbps) | Top 10%: 64 → 468 Mbps



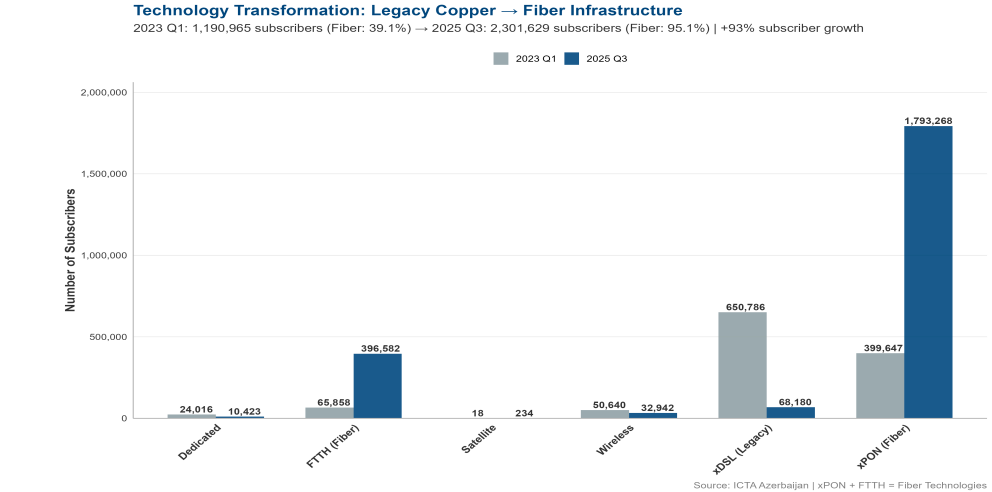
Upload Speed Evolution: 2022 → 2025

Median: 5.1x growth (18.1 → 92.8 Mbps) | Top 10%: 75 → 419 Mbps



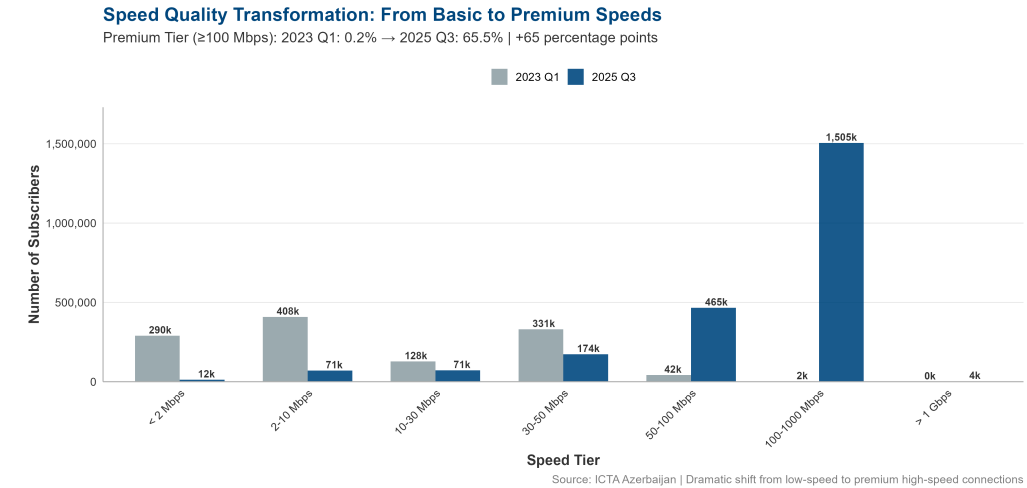
Source: Ookla Speedtest Data | All Providers Combined - Azerbaijan

Infrastructure Evolution: Legacy → Fiber



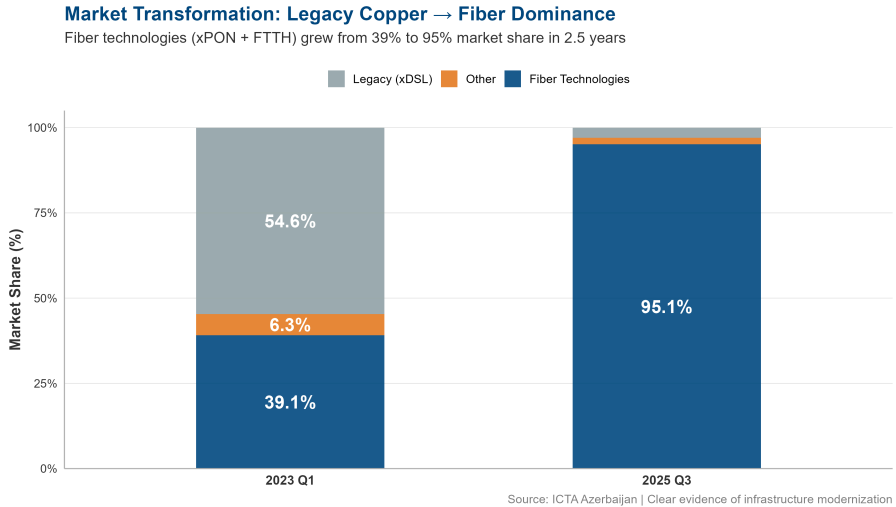
xDSL (copper) collapsed from 55% to 3% | Fiber (xPON + FTTH) grew to 95% | Source: ICTA Azerbaijan

Speed Quality Revolution: Basic → Premium



Premium tier ($\geq$100 Mbps) grew from 0.2% to 65.6% | Most subscribers now on world-class speeds | Source: ICTA Azerbaijan

Market Dominance: Fiber Takes Over



Complete market transformation in 2.5 years | Infrastructure modernization success story | Source: ICTA Azerbaijan

Connectivity as Competitive Advantage: Tourism

Why It Matters

- Tourism requires consistent, reliable connectivity
- Hotel guests expect fast Wi-Fi
- Business travelers need 25+ Mbps

Current Speeds

Location	Speed
Baku & major cities	73–85 Mbps
Tier-2 cities	58+ Mbps

Suitable for all hospitality applications

QoS Development

- ICTA QoS standards (2024–25)
- Focus on consistency
- Performance verification

Competitive Positioning

- Regional parity achieved
- International standards supported
- Regional areas upgraded

Opportunity

Connectivity is now a tourism asset

Azerbaijan's Digital Future

Key Achievements

- ✓ **13x** fiber coverage (9% → 100%)
- ✓ **8x** speed improvement (10.5 → 88 Mbps)
- ✓ Rural-urban divide **bridged**
- ✓ **Tourism competitiveness enhanced**

Strategic Vision 2025–2030

- Connectivity as tourism infrastructure
- Digital economy & hospitality hub
- Regional digital tourism leader

Call to Action

- **Hotels:** Market world-class connectivity as differentiator
- **Tourism Operators:** Design digital-first experiences
- **Government:** Promote Azerbaijan as "connected destination"
- **Venues:** Deploy smart tourism solutions

Closing Thought

"Connectivity is a strategic national asset."

Source: Ookla Research – Online Azerbaijan 2025

Thank You

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Azerbaijan Hospitality Connectivity Summit

Data powered by Ookla Speedtest Intelligence®