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Addressing the Digital Divide

a GSMA capacity building course

11 October 2024

GSMA Digital Inclusion

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Course Objectives

1. **Gain an understanding of the factors impacting the digital divide**

2. **Understand the policy levers that can help bridge the digital divide**

3. **Create an action plan to address the digital divide**

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Course Agenda

1. Explanation of the digital divide and the urgent need for action

– An introduction – the coverage and the usage gaps

2. Closing the digital divide through policy and regulation

– Coverage: Challenges & Policy Recommendations

– Usage: Challenges & Policy Recommendations

3. Creating a policy action plan

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1. The Digital Divide

An Introduction

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Access to internet has really helped me as a farmer.

The Digital Divide
Fridah's story

"Here in the rural areas, without internet, you're cut off from the modern world."
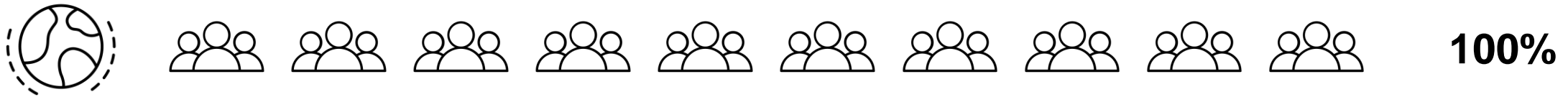
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The world is more connected than ever before

Global population

 100%

Mobile broadband coverage

 96%

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The world is more connected than ever before

Global population

100%

Mobile broadband coverage

96%

Unique mobile internet subscribers

57%
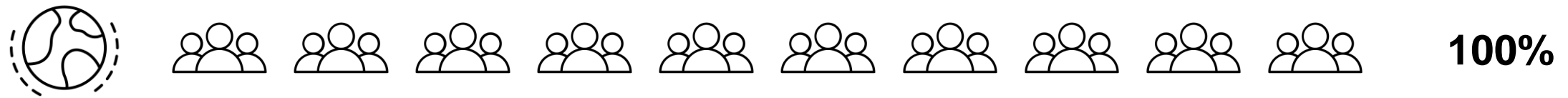
Source: GSMA (2024) The State of Mobile Internet Connectivity Report 2024

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Mobile adoption continues to rise globally

Unique mobile subscribers

2023: **5.6bn**
69% penetration rate*

2030: **6.3bn**
74% penetration rate*

CAGR 2023-2030 | **1.7%**

*Percentage of population

Mobile internet users

2023: **4.7bn**
58% penetration rate*

2030: **5.5bn**
65% penetration rate*

CAGR 2023-2030 | **2.3%**

*Percentage of population
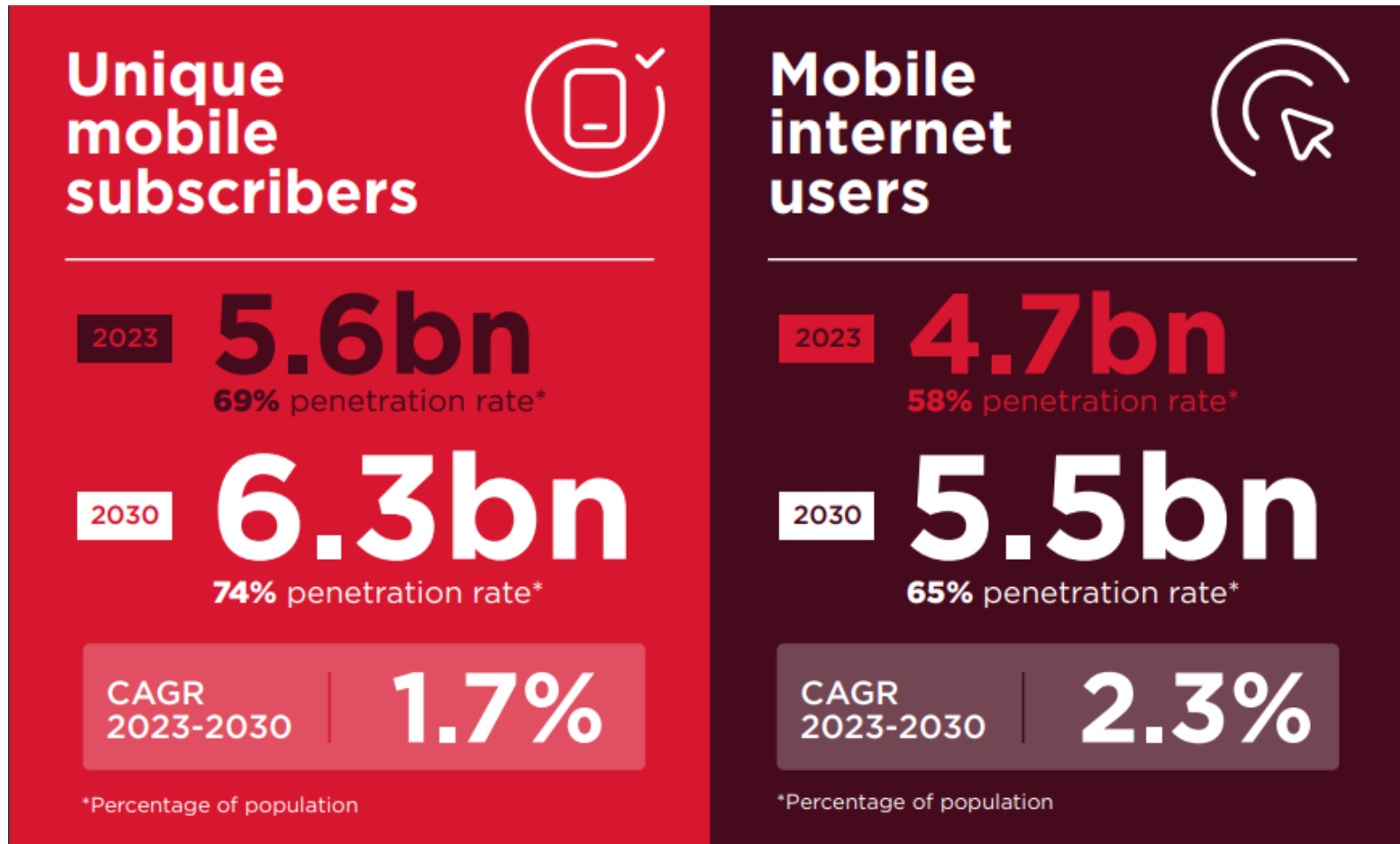
Source: GSMA (2024) Mobile Economy Report 2024

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This is changing lives and economic growth

Wellbeing

At a micro level, mobile broadband increases household consumption and reduces poverty (e.g. by 8% and -7pp, respectively, in Nigeria)*
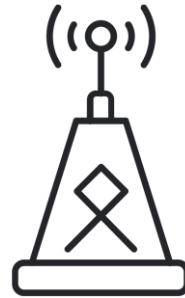
Industry

Connecting all women to mobile internet represents a $140 billion revenue opportunity to mobile operators over 5-year period in LMICs

Economy

At a macro level, mobile broadband adoption drives economic growth (e.g. GDP growth +1.98 pp in LMICs for 10% mobile broadband adoption increase)**

Source: GSMA, World Bank, The Welfare Effects of Mobile Broadband Internet : Evidence from Nigeria
** Source: Quiang et al, 2009, Economic impacts of broadband.

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Mobile internet is often driving the largest impact

Growth impact of an increase of 10% in broadband penetration
(in percentage of GDP)

0.77%	1.50%	1.98%	1.76%	0.00%
Worldwide fixed	Worldwide mobile	Countries < 12,000 USD (LMICs)	Countries 12,000 - 22,000 USD (HICs)	Countries > 22,000 USD
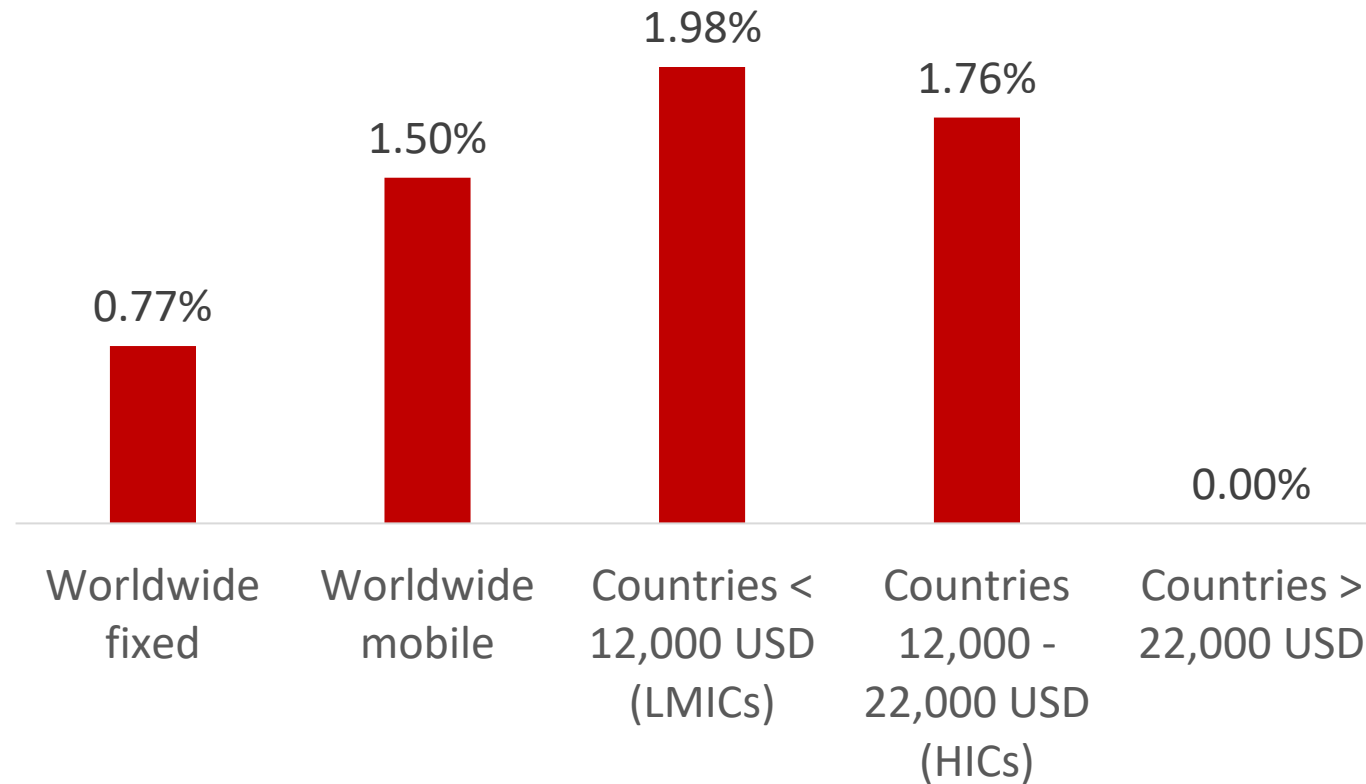
"The economic impact of mobile broadband is largest in developing countries. Such countries should therefore maximize mobile internet adoption."

- ITU, 2020

Source: ITU (2020) How broadband, digitization and ICT regulation impact the global economy

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The Digital Divide
 a poll

What % of the global population do you think is not yet covered by mobile broadband:

.

a)   4%

b)   15%

c)   30%

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Not everyone is covered by mobile broadband yet

Global population

100%

Mobile broadband coverage

96%
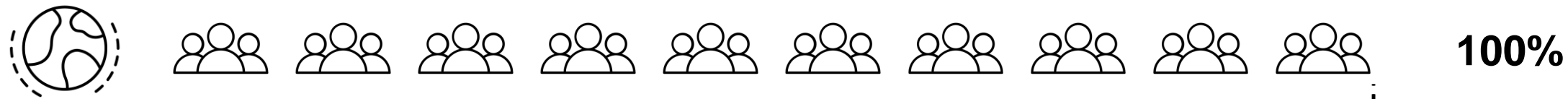
coverage gap

Coverage gap: 4% of the global population
(350 million people) live in areas without mobile
broadband coverage

Source: GSMA (2024) The State of Mobile Internet Connectivity Report 2024

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The Digital Divide
 a poll

If 96% of the population is covered by mobile broadband, what % of global population do you think is using mobile internet?

a)   57%

b)   70%

c)   85%

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The usage gap is the biggest challenge

Mobile broadband coverage

96%

Unique mobile internet subscribers

57%

usage gap

Usage gap: 39% of the global population (3.1 billion people) do not use mobile internet, despite living in areas already covered by mobile broadband

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The usage gap is large and only starting to narrow

With the majority of the world now covered by mobile broadband networks there are other barriers preventing people going online

While the coverage gap has narrowed the usage gap remains
(in percentage of the total population)

39%

4%
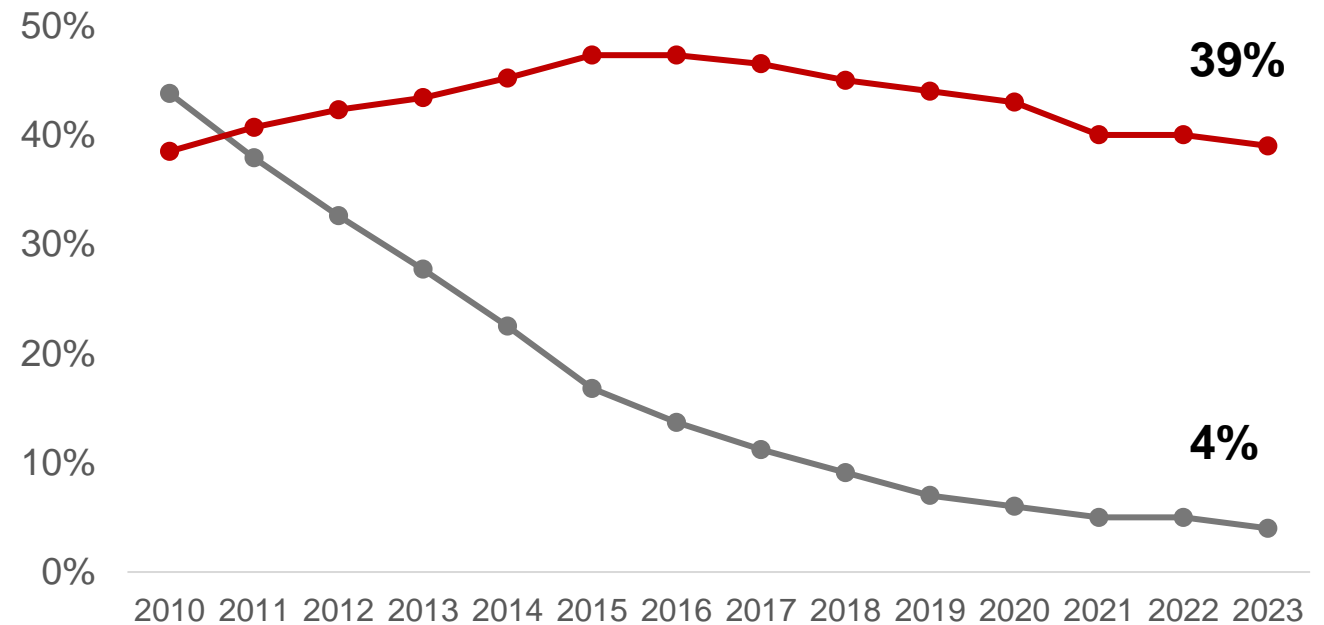
■ Usage gap: people covered by mobile broadband but not using the mobile internet

■ Coverage gap: people not yet covered by mobile broadband

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The unconnected: usage gap + coverage gap
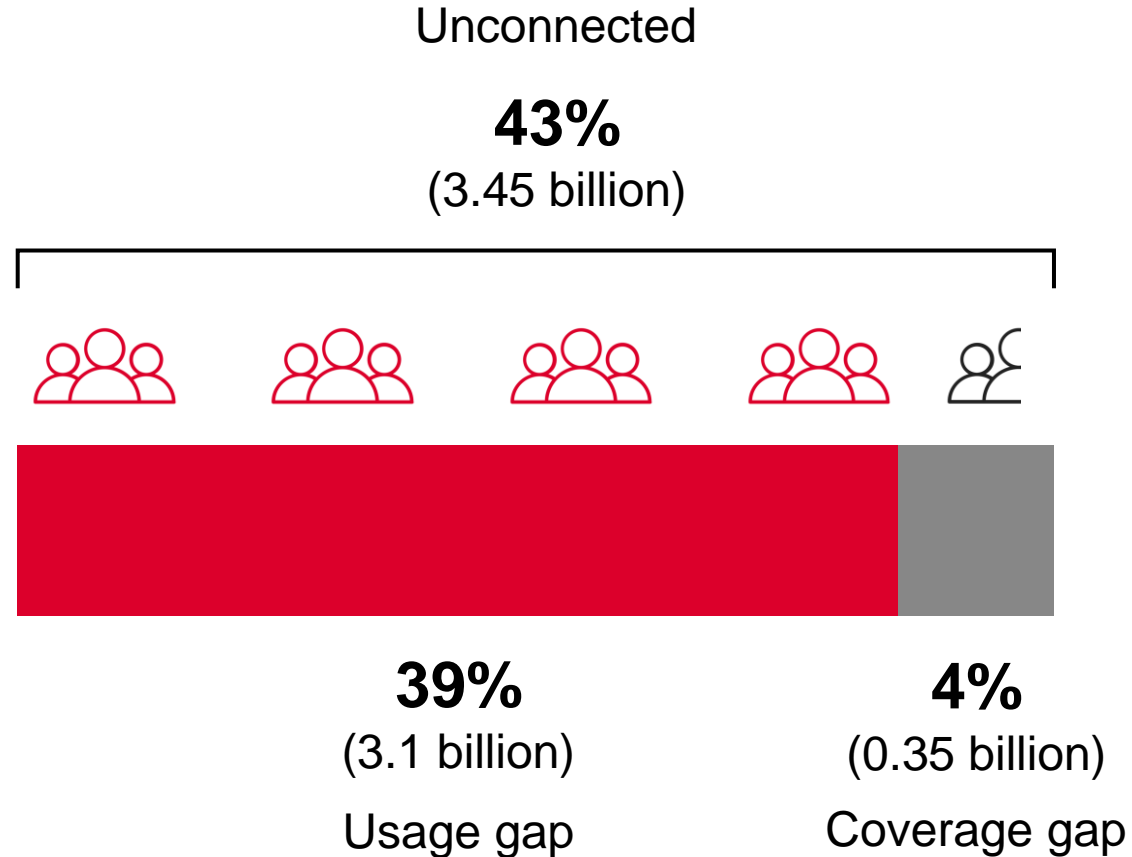
Unconnected

43%

(3.45 billion)

39%

(3.1 billion)

Usage gap

4%

(0.35 billion)

Coverage gap

Source: GSMA (2024) The State of Mobile Internet Connectivity Report 2024

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The usage gap is a challenge in all regions

Evolution of mobile internet connectivity by region, 2022
(in percentage of the total population)

	2%	2%	6%	5%	4%	15%
Usage gap	28%	19%	32%	44%	52%	59%
Connected	71%	79%	62%	51%	44%	25%
	East Asia & Pacific	Europe & Central Asia	Latin America & Caribbean	Middle East & North Africa	South Asia	Sub-Saharan Africa

■ Connected ■ Usage gap ■ Coverage gap
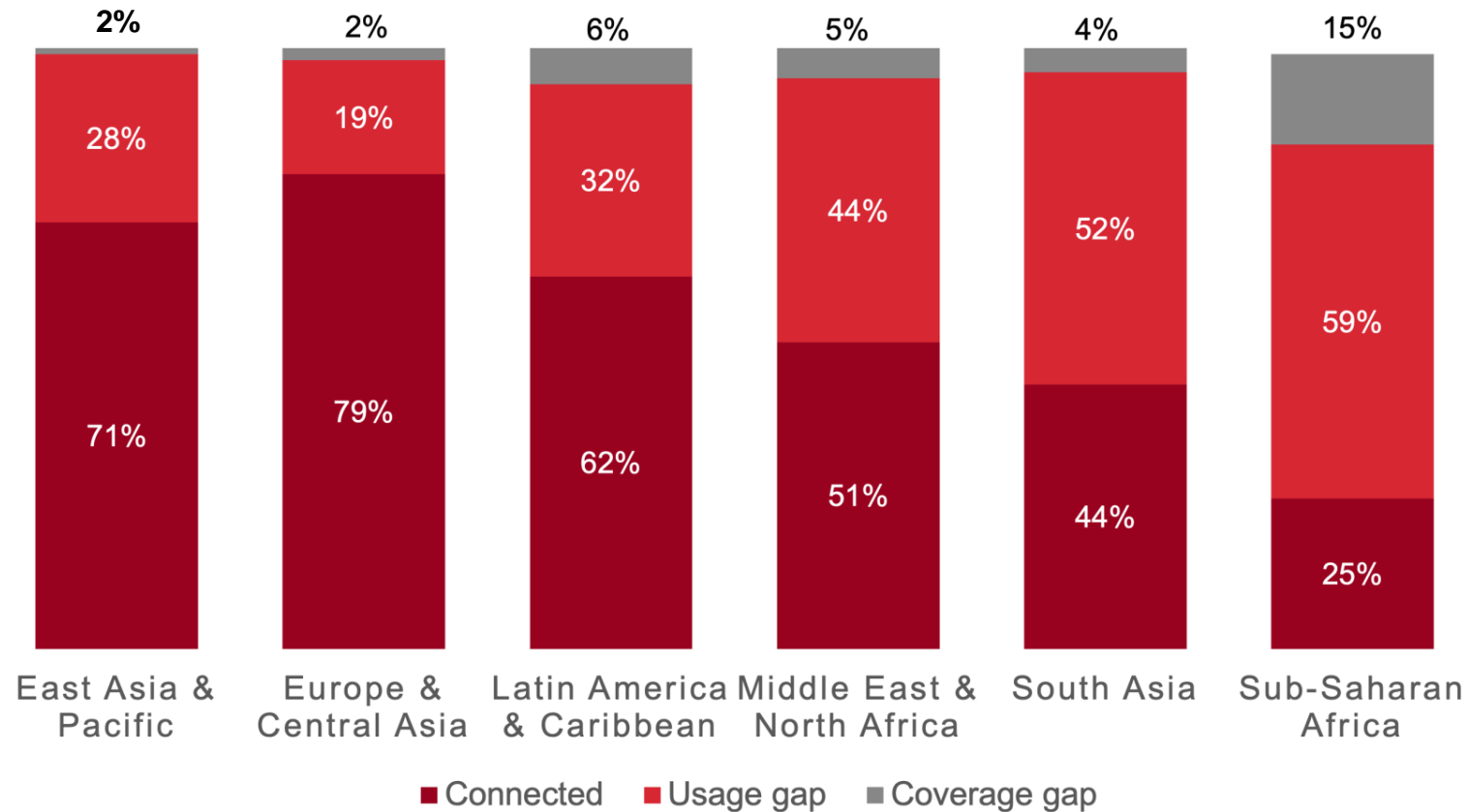
Source: GSMA (2023) The State of Mobile Internet Connectivity Report 2023

Base: Total population, 197 countries.
Note: Totals may not add up due to rounding.

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Group Discussion

1. Are you surprised by the usage gap? Is this a priority in your country?

2. Who do you think are most often excluded?

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Who are the unconnected?

Women
Women are 15% less likely than men to use mobile internet across LMICs

Poor
Internet adoption in LDCs is 25% compared to 85% in HICs

Rural
People in rural areas are 29% less likely to use mobile internet than those living in urban areas across LMICs
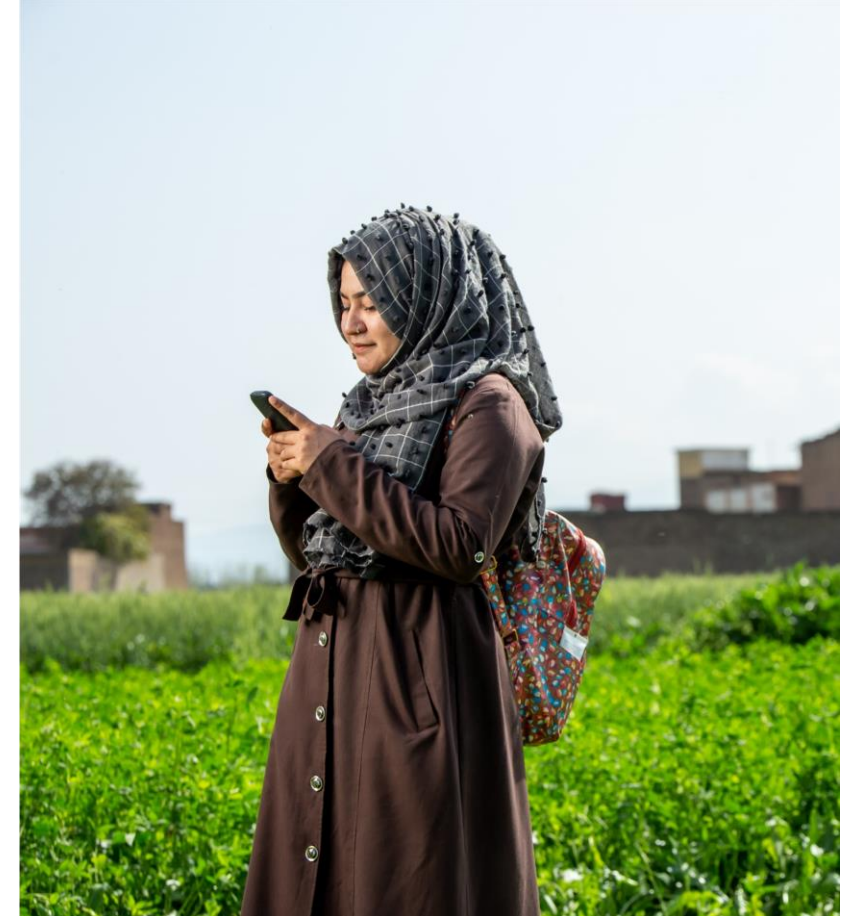
GSMA (2023) The State of Mobile Internet Connectivity Report 2023
GSMA (2024) The Mobile Gender Gap Report 2024

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This year's data shows that the mobile internet gender gap *has narrowed* for the first time since 2020

Gender gap in mobile internet adoption across low- and middle-income countries, 2017-2023

25%   23%   21%   15%   18%   19%   15%
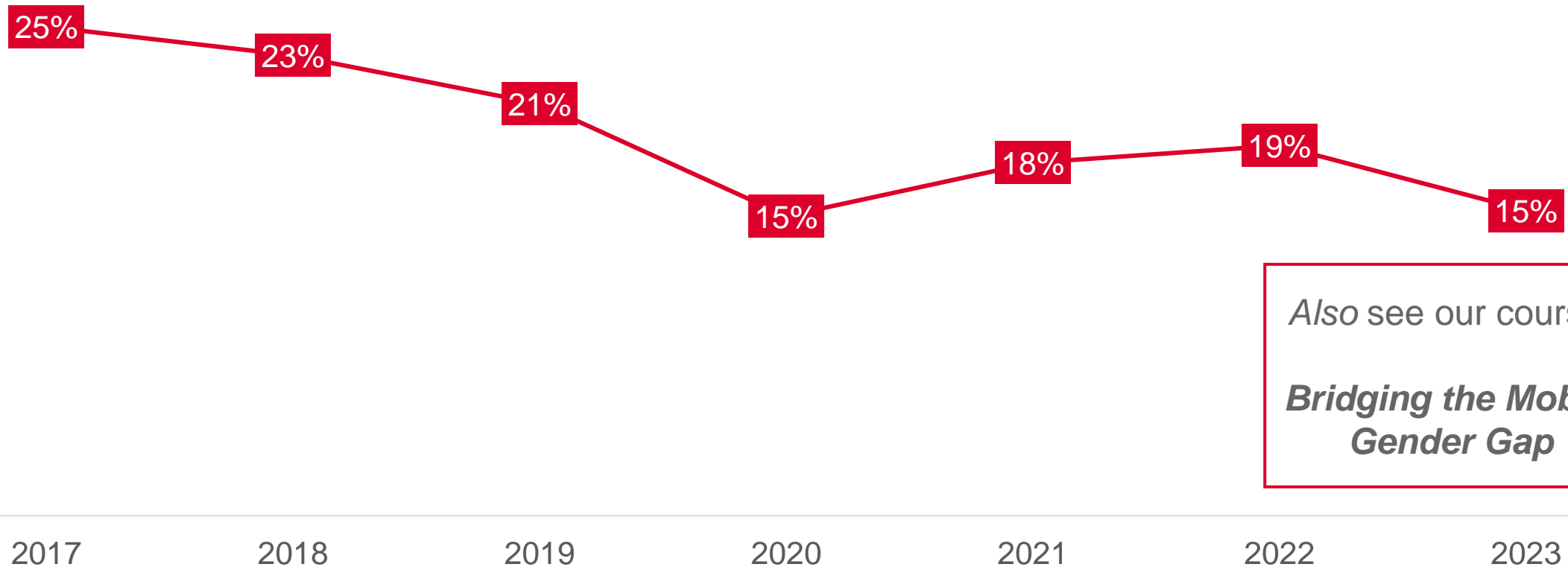
Also see our course:

Bridging the Mobile Gender Gap

2017   2018   2019   2020   2021   2022   2023

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Our research shows five barriers to digital inclusion

| Affordability | Knowledge and Digital Skills | Relevance | Safety and Security | Access |
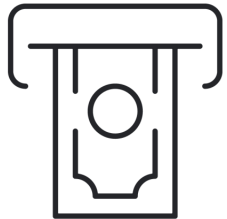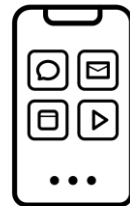
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2. Closing the digital divide through government policy

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A comprehensive framework for action to bridge the digital divide

4. Evaluate the impact of policy and adapt digital inclusion strategies

1. Gather data to understand the local context, set targets and allocate budgets

3. Address the barriers to mobile internet adoption and use

2. Follow a holistic and collaborative policy design process

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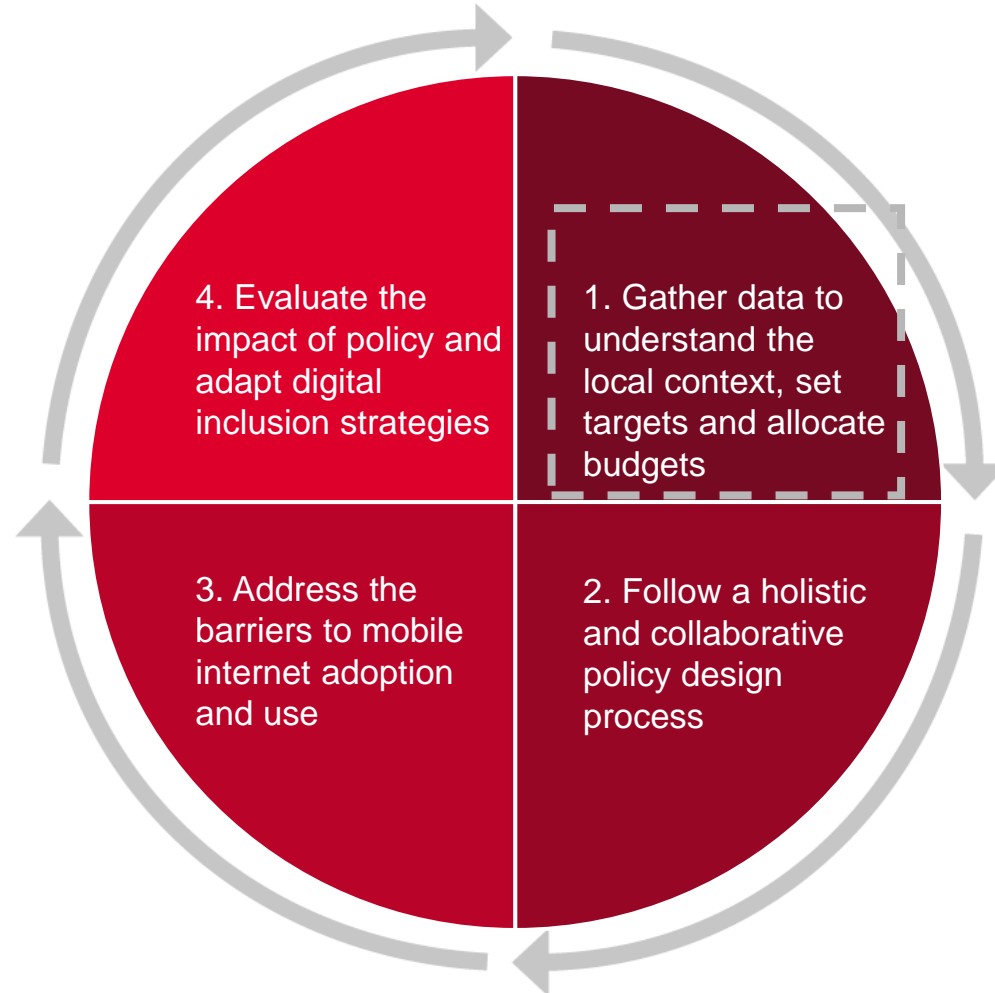
Evidence is key to drive impact

1 **Collect data**
Collect granular, reliable and gender-disaggregated data on a regular basis and in accordance with international guidelines and standards.

2 **Research context and needs**
Conduct and support research to better understand the context, circumstances, challenges and needs of individuals not yet using mobile internet.

3 **Set priorities and targets**
Decide on policy priorities, set clear and measurable targets, allocate budgets, measure progress and evaluate the effectiveness of interventions based on data and research.
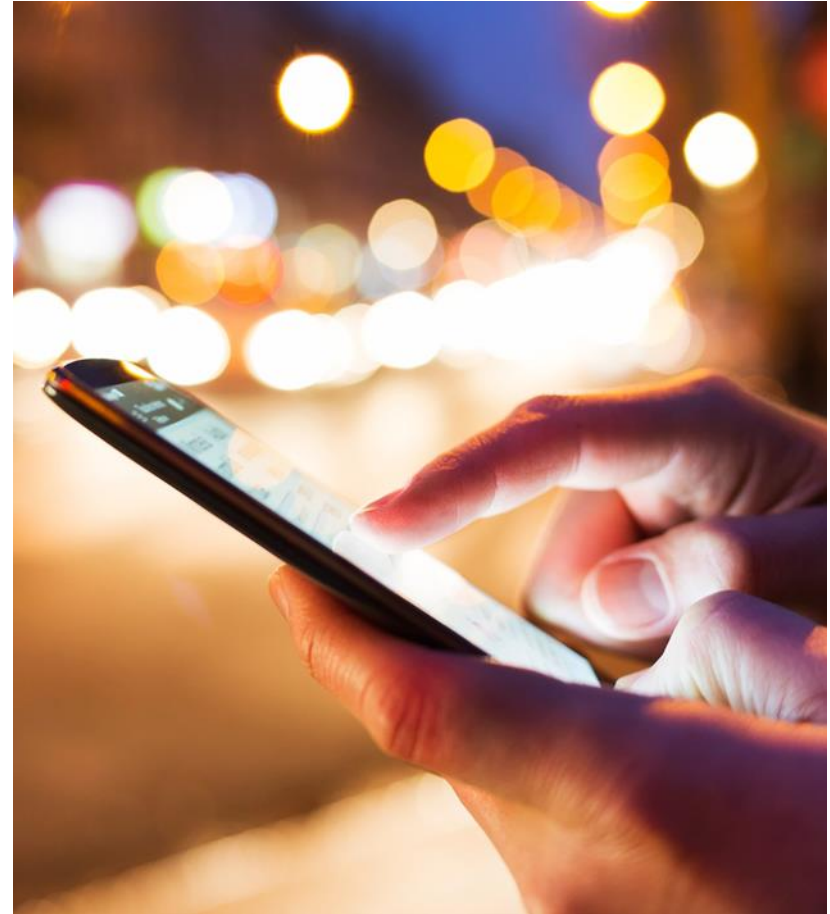
The GSMA has data tools to support policymakers
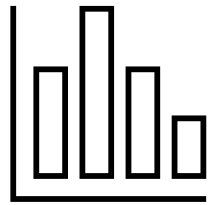
MCI

Consumer Survey

GSMAi Database (paid)

GSMA
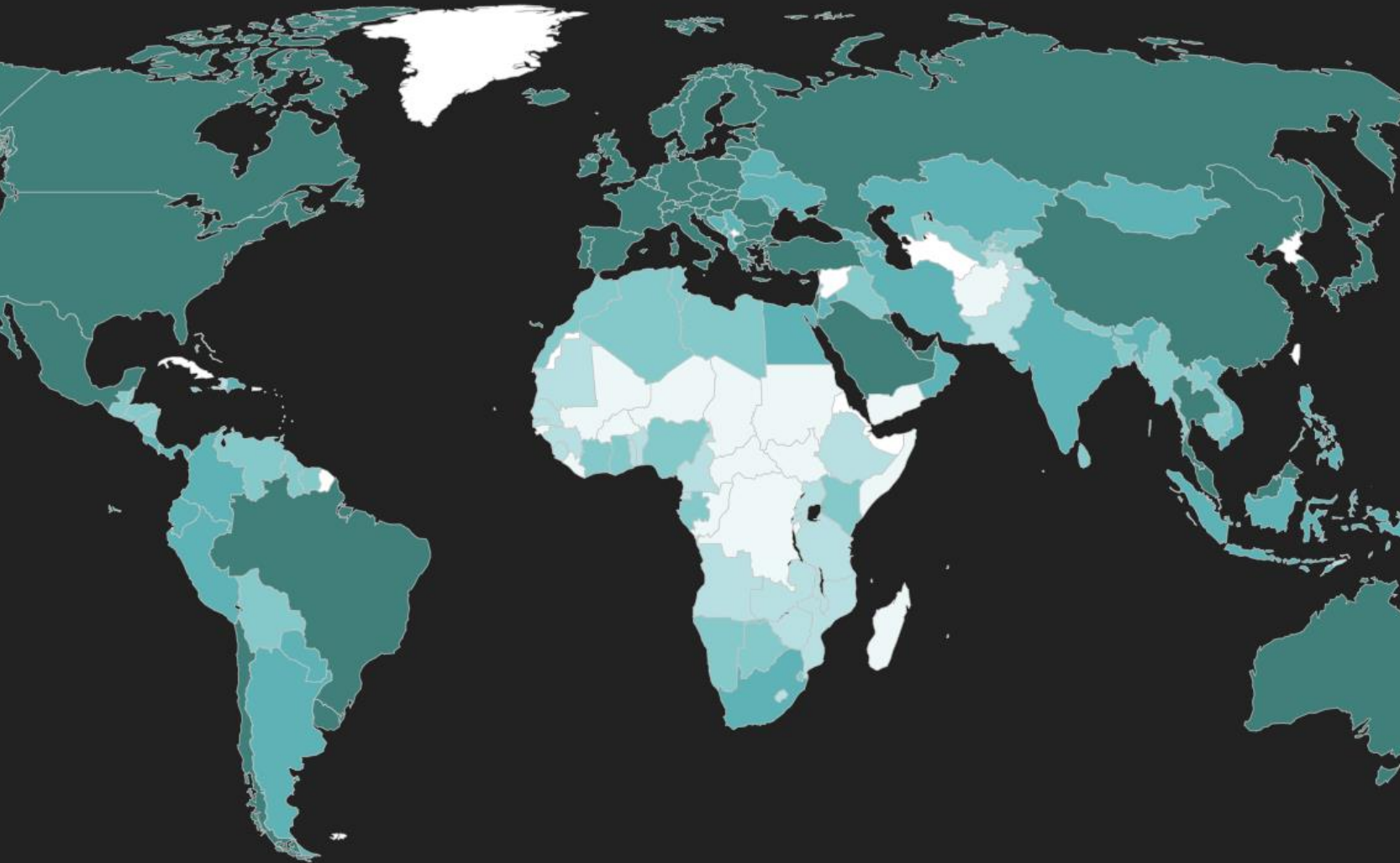
The Mobile Connectivity Index (MCI)

The MCI quantifies the barriers to mobile internet access **across four key enablers**.

The MCI covers **173 countries** representing **99% of the global population**.

The MCI has data going back to 2014 and is regularly updated. It allows for **comparison between countries and over time**.

2014 2015 2016 2017 2018 2019 2020 2021 2022 **2023**

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The MCI measures performance on 32 indicators

4 Enablers	Infrastructure	Affordability	Consumer Readiness	Content & Services
11 Dimensions	Network coverage	Mobile data affordability	Basic skills	Local relevance
	Network performance	Handset affordability	Gender equality	Online security
	Spectrum	Taxation	Mobile ownership	
32 Indicators	E.g. mobile download/upload speeds, literacy rates and mobile penetration			

Mobile Connectivity Index Score

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Index Score 2023

Nigeria's 2023 Scores

Index level

Enabler level

Dimension level

Indicator level

Workshop: MCI for policymakers

Using the GSMA Mobile Connectivity Index to drive digital inclusion

Guidelines for policymakers

Course content:

- Introduction to GSMA's Mobile Connectivity Index (MCI)

- Guidelines for using the MCI: a five-step approach

- Self-assessment exercise and group discussion

Group Discussion

1. How does your country perform on the MCI?

    (please visit www.MobileConnectivityIndex.com)

2. How is data and evidence used in policy making in your country?

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Collaborative policy design

4. Evaluate the impact of policy and adapt digital inclusion strategies

1. Gather data to understand the local context, set targets and allocate budgets

3. Address the barriers to mobile internet adoption and use

2. Follow a holistic and collaborative policy design process

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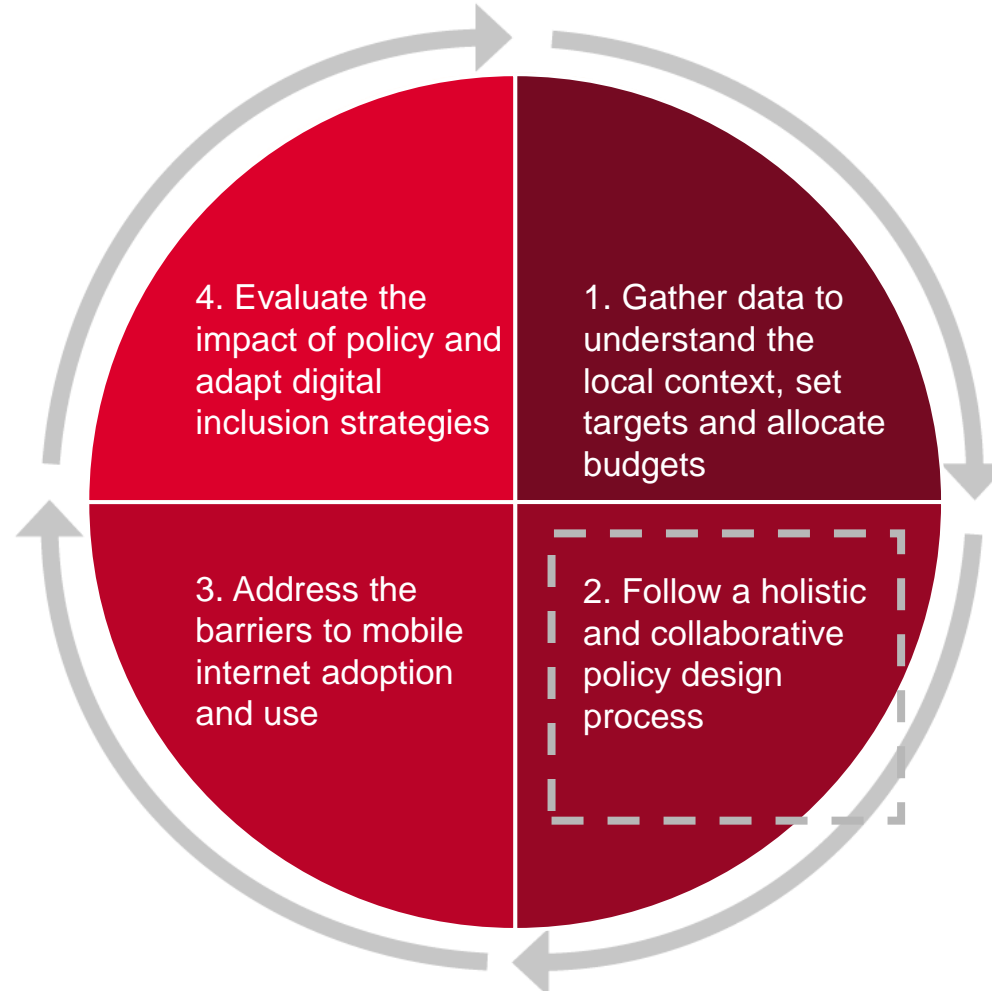
All stakeholders should be involved

1 Recognise the cross-cutting nature of digital inclusion and the need to address all barriers through a whole-of-government approach

2 Embed public consultations in the policy design process to encourage broad participation of stakeholders and include a formal process of considering contributions

3 Create a clear communications plan to inform all parties affected by policy and regulatory changes

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Example: Brazil's multistakeholder governance

Brazilian Internet Steering Committee

- Proposing strategies, policies and procedures regarding Internet regulation

- Collecting, organizing and disseminating statistics and information related to Internet services and use

- Recommending technical and operational standards for the Internet

9 Federal Govt

4 Private sector

1 Internet expert

21 members

3 Scientific community

4 Civil society

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Break

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2. Closing the digital divide through government policy

Coverage Gap

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Addressing barriers

4. Evaluate the impact of policy and adapt digital inclusion strategies

1. Gather data to understand the local context, set targets and allocate budgets

3. Address the barriers to mobile internet adoption and use

2. Follow a holistic and collaborative policy design process

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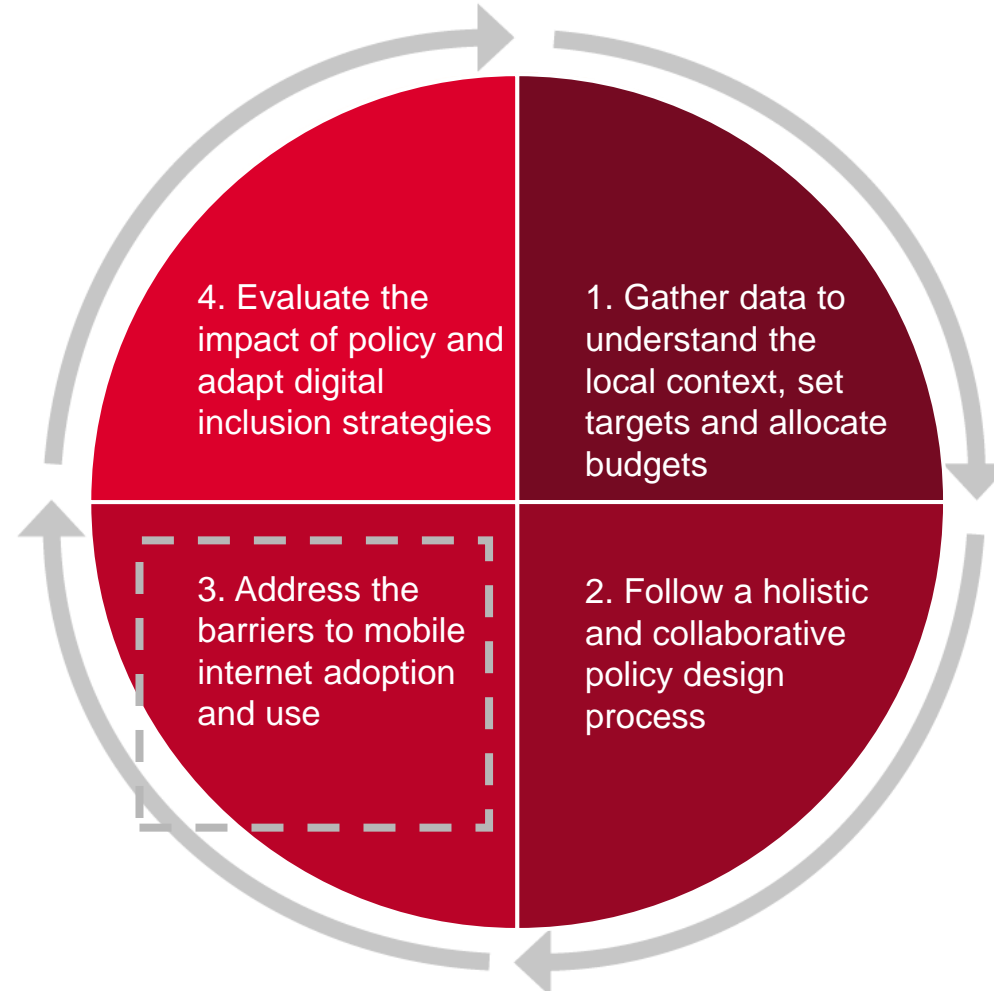
Lack of coverage can still be a challenge

Geographical spread of countries with a coverage gap of 20% or greater
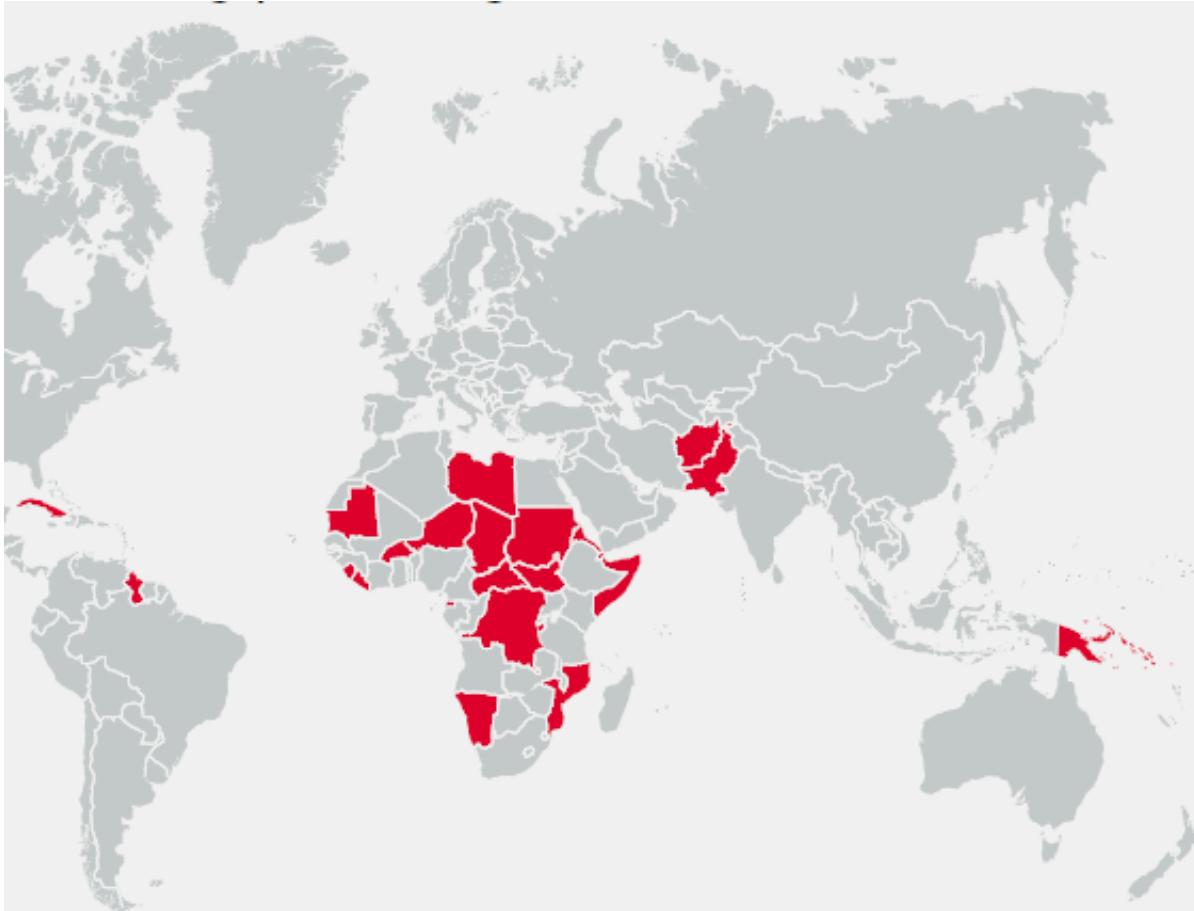
In 24 countries, at least 20% of the population are still uncovered (mostly low-income countries).

The remaining uncovered communities – which are predominantly rural, poor and sparsely populated – are the most challenging to reach in a financially sustainable manner.

Source: GSMA (2023) The State of Mobile Internet Connectivity Report 2023

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Challenge: rural and remote areas most costly

Annualised cost of mobile coverage sites in rural and remote locations
(relative to urban), by major component

■ Tower & civil works   ■ Active network costs   ■ Power   ■ Backhaul
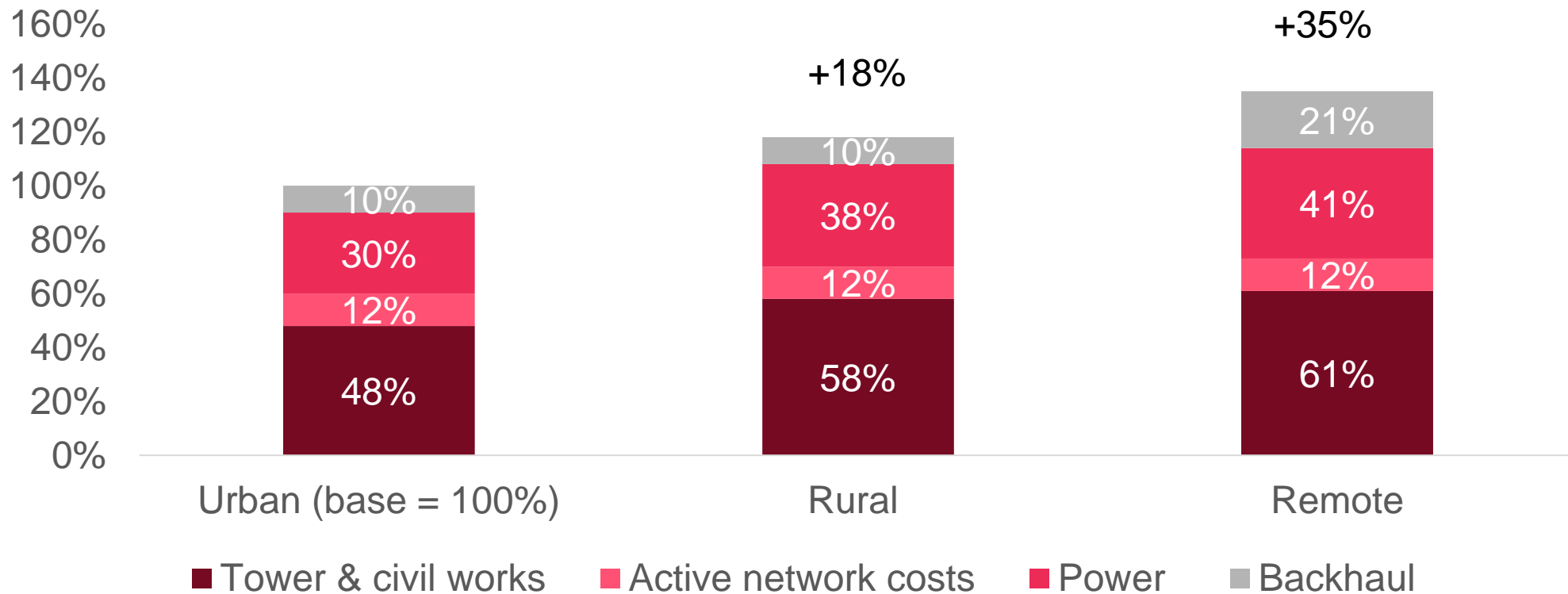
All figures are GSMA generalized benchmarks, taken from GSMA intelligence data

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What type of intervention?

Population coverage by commercial potential
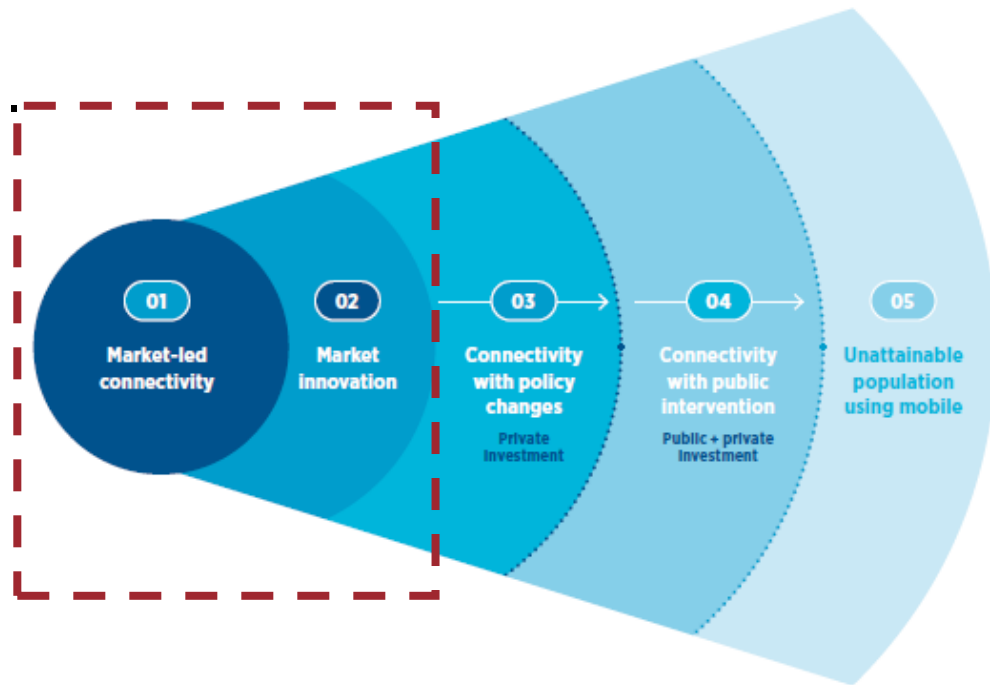
Type of intervention

Market-led connectivity: let market continue delivering connectivity

Market innovation: incentivize innovation to allow coverage growth

Connectivity with policy changes: areas that can be covered with investment-friendly policy framework

Connectivity with public intervention: co-investment and subsidies

Unattainable population with mobile networks: facilitate alternative technologies and business models

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The industry has various options to reduce costs

Decrease equipment costs
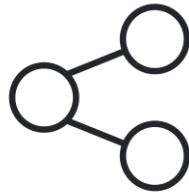
Share infrastructure

Increase coverage per unit
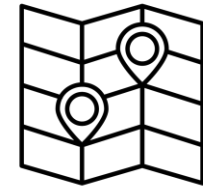
Optimise coverage per unit

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Example: innovation to expand rural coverage

An interview with the former CEO of MTN Uganda

Where should government intervene?

Population coverage by commercial potential
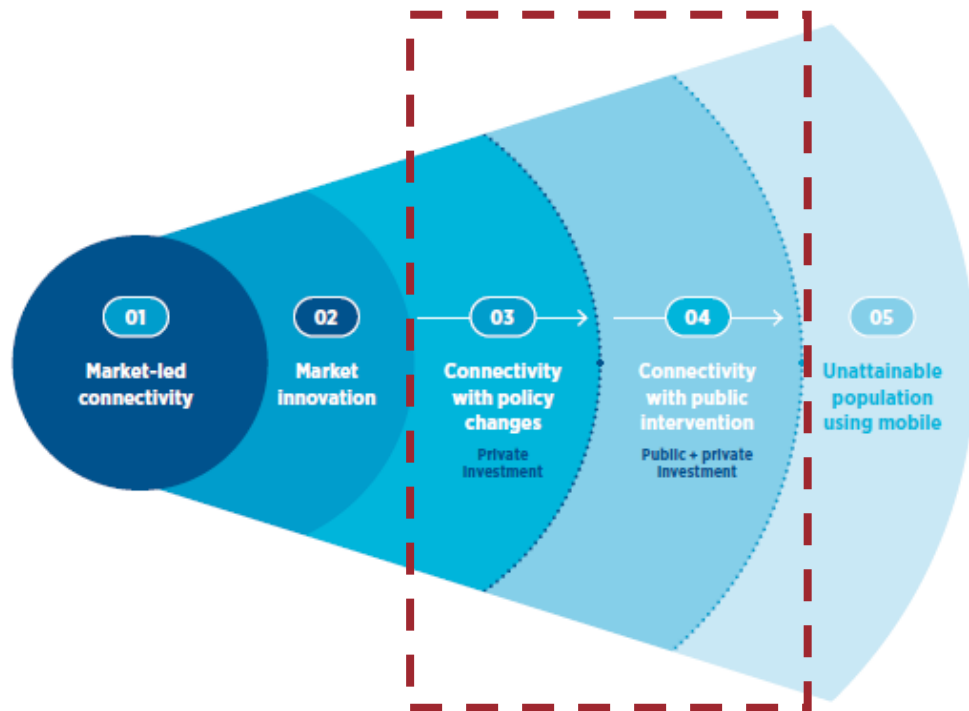
Type of intervention

1. Market-led connectivity: let market continue delivering connectivity

2. Market innovation: incentivize innovation to allow coverage growth

3. Connectivity with policy changes: areas that can be covered with investment-friendly policy framework

4. Connectivity with public intervention: co-investment and subsidies

5. Unattainable population with mobile networks: facilitate alternative technologies and business models

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Expanding connectivity with policy changes

Create a comprehensive investment-friendly policy framework

| Spectrum policy | Reduced red tape | Infrastructure sharing | Competition policy | Taxation |

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Key recommendations to help expand coverage
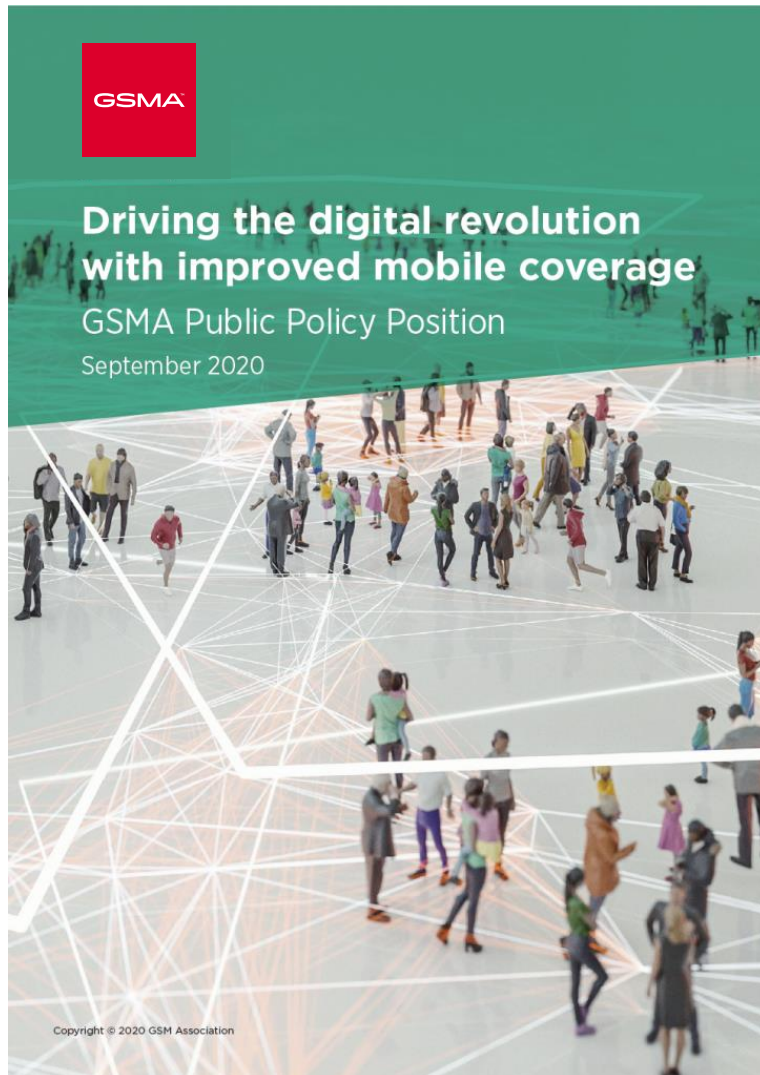
Driving the digital revolution with improved mobile coverage

GSMA Public Policy Position

September 2020

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1 Provide non-discriminatory and timely access to public infrastructure while simplifying and streamlining the planning approval process for new base stations

2 Assign sufficient amounts of mobile spectrum to operators in a timely manner and do not inflate spectrum prices

3 Adopt license terms and conditions that encourage network investments and innovation

4 Allow infrastructure sharing on a voluntary basis

5 Adopt competition policy that supports investment in high quality mobile networks

6 Remove mobile sector-specific taxes and fees that impede infrastructure rollout and harm affordability of data

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Expanding connectivity with public intervention

Only consider state intervention to support coverage once all regulatory measures to maximise coverage through market-driven mechanisms have been exhausted

| **Coverage obligations** | **Universal Service Funds** | **Single-Wholesale Network** | **Community networks** |
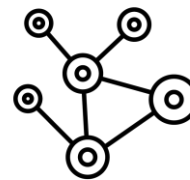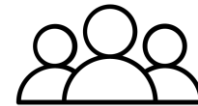
Universal Service Funds

Operational Improvements	Structural Reforms

Operational Improvements

- Incentives disbursement

- Evidence-Based Contribution Rates

- Clear and Measurable Targets

- Continuous Stakeholder Consultation

- Data-Driven Project Selection

- Regular Performance Monitoring and Reporting

Structural Reforms

- Sustainable project costing

- Explore Alternative Funding Mechanisms

- Capacity Building and skills development

- Independent Governance

Source: GSMA(2024) Universal service funds in Africa.

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Group Discussion

1. Go to www.MobileConnectivityIndex.com
   - What is your country's overall score on Infrastructure?
   - What is your country's score on 3G and 4G coverage?
   - How has this score evolved over time?

2. What policy options to expand mobile broadband coverage are being considered or pursued in your country?

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Lunch

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2. Closing the Mobile Digital Gap through Policy

Usage Gap

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Recap: the usage gap

Mobile broadband coverage

96%

Unique mobile internet subscribers

57%

usage gap

Usage gap: 39% of the global population do not use mobile internet, despite living in areas already covered by mobile broadband

Source: GSMA (2024) The State of Mobile Internet Connectivity Report 2024

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Recap: the usage gap is a challenge in all regions

Evolution of mobile internet connectivity by region, 2022
(in percentage of the total population)

Region	Connected	Usage gap	Coverage gap
East Asia & Pacific	71%	28%	2%
Europe & Central Asia	79%	19%	2%
Latin America & Caribbean	62%	32%	6%
Middle East & North Africa	51%	44%	5%
South Asia	44%	52%	4%
Sub-Saharan Africa	25%	59%	15%

■ Connected   ■ Usage gap   ■ Coverage gap
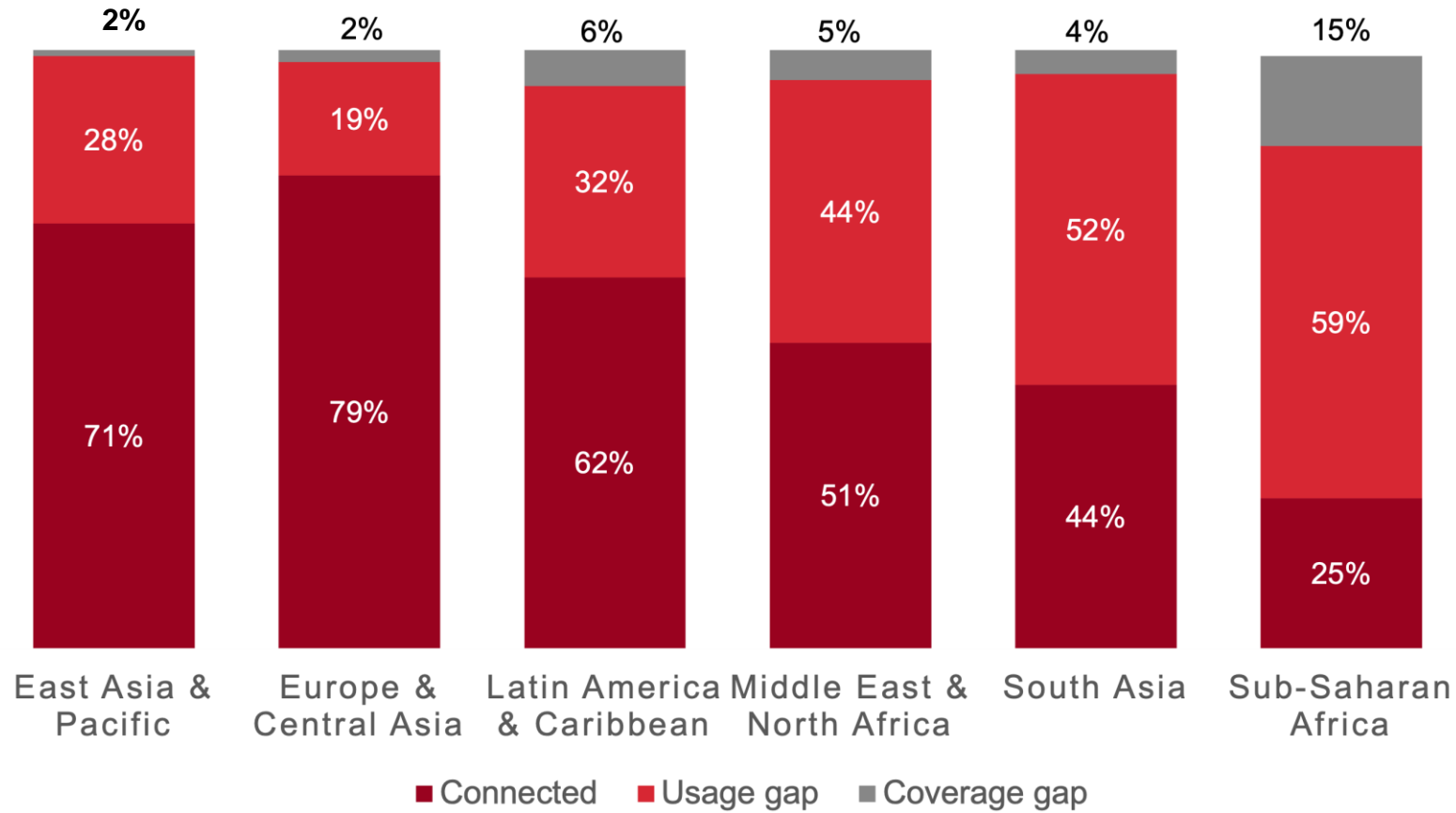
Source: GSMA (2023) The State of Mobile Internet Connectivity Report 2023

Base: Total population, 198 countries.
Note: Totals may not add up due to rounding.

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Addressing the usage gap also impacts coverage

A joint report with the World Bank showed that if uncovered areas had an expected 4G adoption rate of 40%, mobile operators could sustainably expand 4G coverage to more than 90% of the population

The main barriers to mobile internet use

Affordability	Knowledge and digital skills	Relevance	Safety and Security	Access

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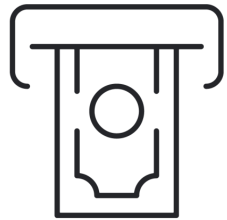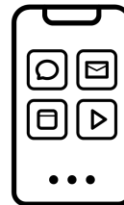
Policy Exercise

Refer to your handouts when we get to the chosen barriers. We will be doing the exercise shown in the following slides.

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Part I: Assessing the policy landscape

Barrier

Policy action 1	Policy action 2	Policy action 3
Specify the challenge ❑	**Specify the challenge** ❑	**Specify the challenge** ❑
Select policy recommendation(s) ❑	**Select policy recommendation(s)** ❑	**Select policy recommendation(s)** ❑
List factors to consider ❑ ❑	**List factors to consider** ❑ ❑	**List factors to consider** ❑ ❑
Identify relevant stakeholders ❑ ❑	**Identify relevant stakeholders** ❑ ❑	**Identify relevant stakeholders** ❑ ❑

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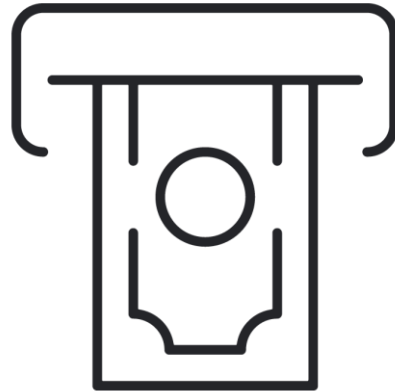
Affordability

Inability to afford internet-enabled devices, suitable data bundles or other fees

Handset Affordability: Challenges

Smartphone ownership grows but remains a challenge

Smartphone ownership of mobile internet users
(by technology), 2022
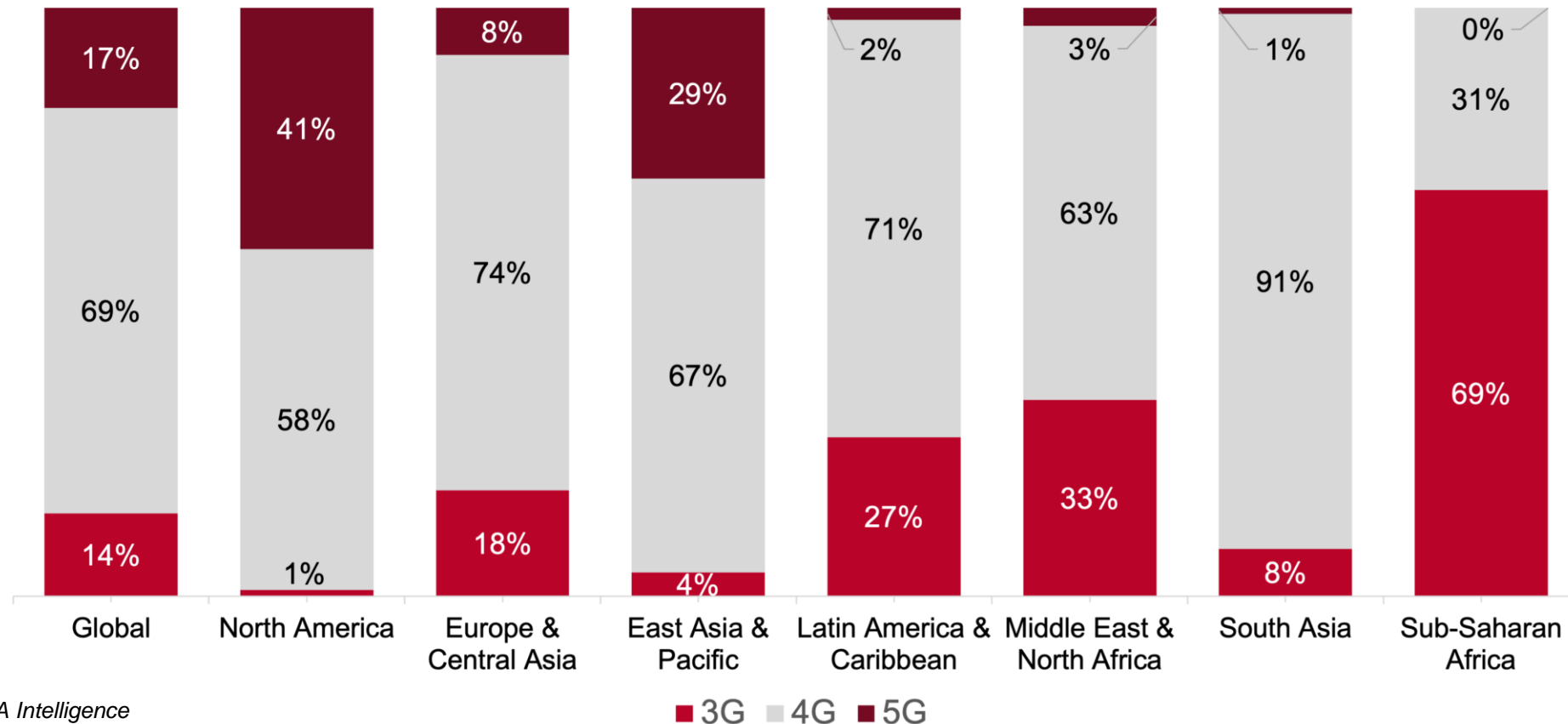
Source: GSMA Intelligence

■ 3G ■ 4G ■ 5G

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Handset Affordability: Recommendations

Reducing costs of ownership

1 Remove sector-specific taxes and fees

2 Refrain from imposing costly barriers to incentivise local production

Increasing financing options

3 Enable innovative financing mechanisms

4 Partner with the industry to provide device subsidies for targeted user groups

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Framework for addressing handset affordability

Ability to pay

$$\frac{\text{Handset cost}}{\text{income}}$$

Reduce costs

Improve access to financing

Improving handset affordability

Willingness to pay

Individual's preferences and perceived value

Address barriers to willingness to pay *(e.g. skills, social norms)*
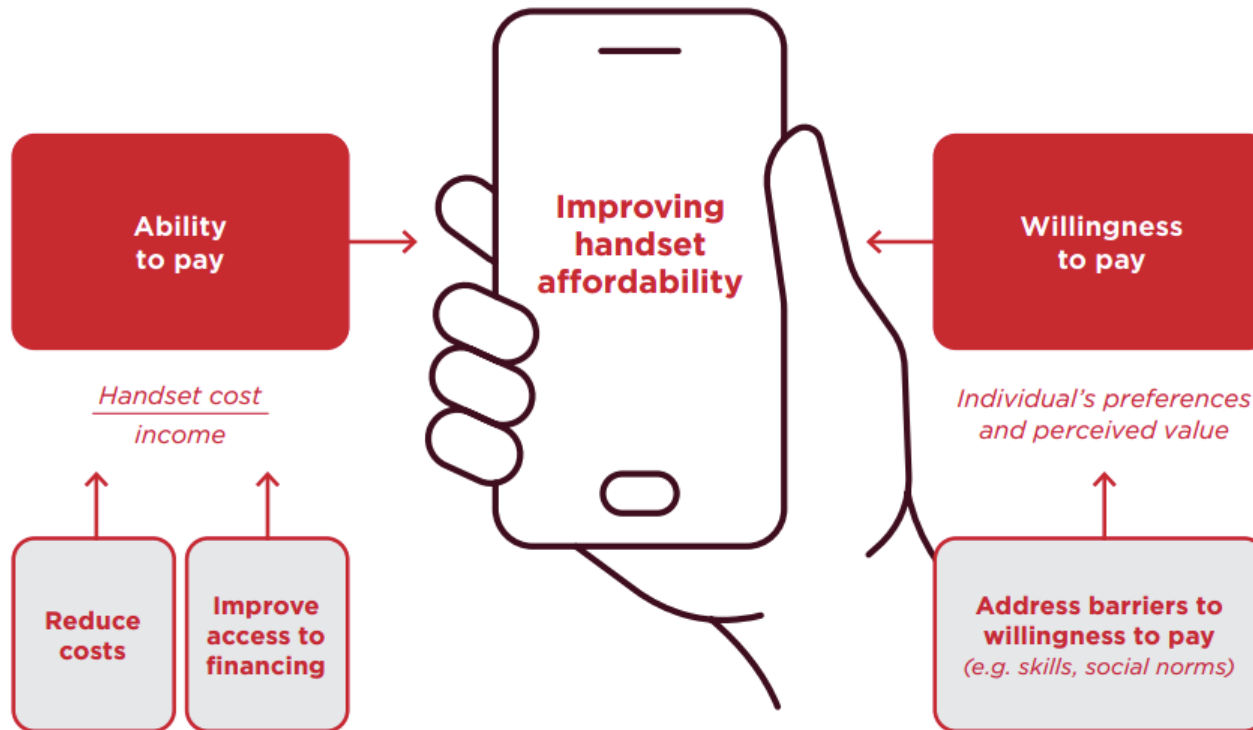
- Improving handset affordability requires addressing both people's ability and willingness to pay.

- **Ability to pay:** measures to reduce handset costs and those that help to increase access to financing for low-income people.

- **Willingness to pay:** the maximum amount a person is willing to pay for a device and is influenced by factors such as awareness of mobile and its benefits, perceived relevance, digital skills, device features, branding, and social norms.

GSMA. (2022). Making internet-enabled phones more affordable in low- and middle-income countries.

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Example: device subsidies

India

Over 13 million women will receive smartphones with 3 years of data

Rwanda

250,000 people will receive device financing support as part of the Digital Acceleration Project funded by the World Bank

Malaysia

Rebate system of $65 for youth to purchase an entry-level smartphone

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Handset subsidy toolkit for policymakers

Purpose, Resourcing, Evaluation

▪ Objectives, timeframe, resourcing, stakeholder management, evaluation factors and external factors that could impact the subsidy programme

Beneficiaries

- Eligibility criteria
- Application process
- Additional support for people to benefit

Devices

- Technical specifications
- Distribution process
- Apps, data bundle
- e-waste

Financing Model

- Financing structure
- Subsidy format
- Financing partners
- Funding sources

Sustainability & Risk Mitigation

▪ Risks to beneficiaries
▪ Risks to devices
▪ Risks to financing model
▪ Risks to overall project

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Data Affordability: Challenges

Affordability of 1 GB of data in LMICs (by region), 2022
(in percentage of monthly GDP per capita)

Legend: ■ 2020 ■ 2021 ■ 2022

Chart data:
- East Asia & Pacific: 2.1%, 1.4%, 1.4%
- Europe & Central Asia: 0.8%, 0.7%, 0.6%
- Latin America & Caribbean: 2.2%, 1.5%, 1.2%
- Middle East & North Africa: 1.9%, 1.6%, 1.5%
- South Asia: 0.5%, 0.4%, 0.5%
- Sub-Saharan Africa: 4.0%, 3.3%, 3.5%

★ **2%** UN target for 1GB by 2025
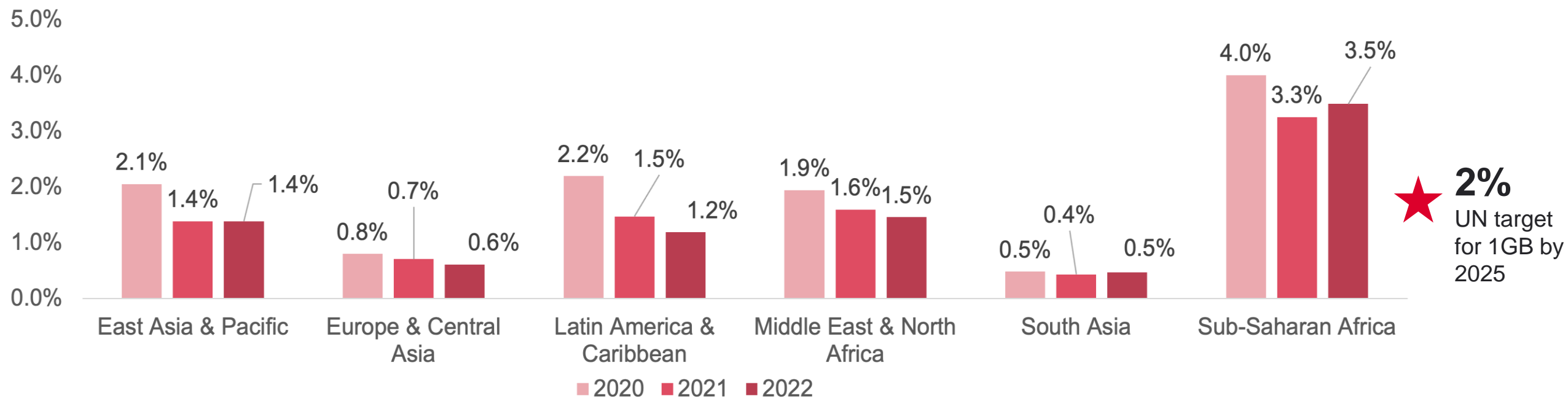
Source: GSMA (2023) The State of Mobile Internet Connectivity Report 2023

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Mobile operators need to balance their investment needs against costs for coverage expansion and better infrastructure to meet the surging demand for data

Ability to invest

Revenues

- Number of data customers
- Units consumed
- Data price per unit
- Other revenue

Costs

- Network costs
- Operating costs
- Financing costs
- Taxes & fees
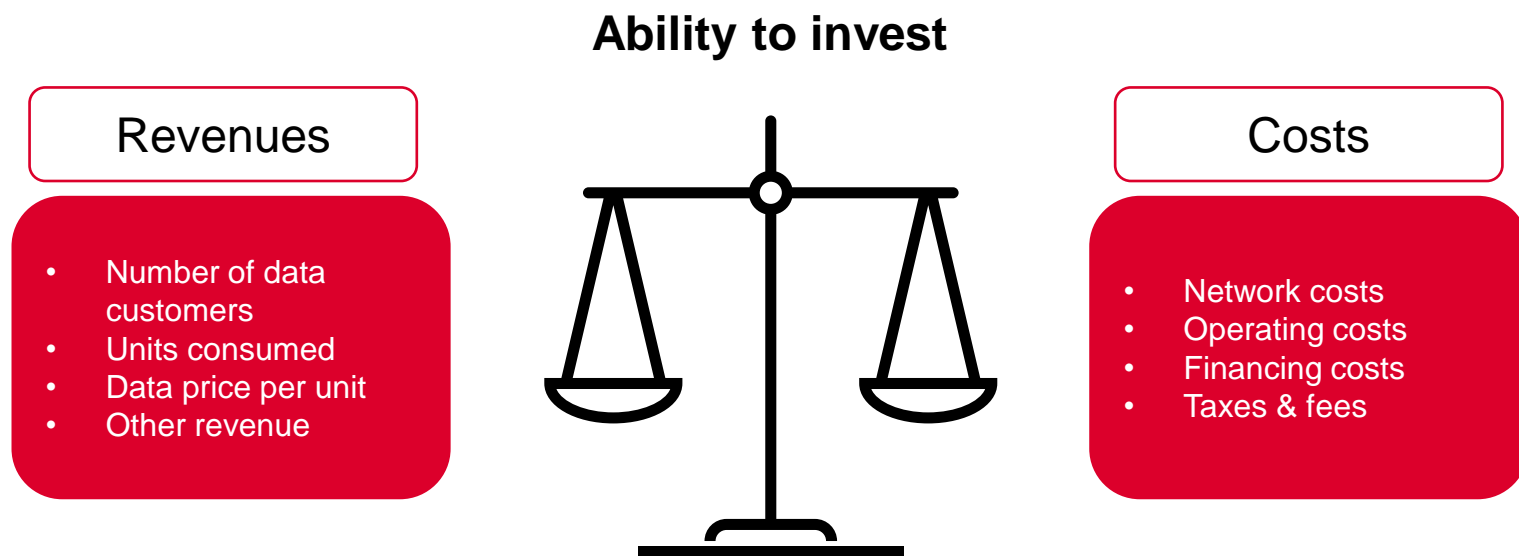
In countries where data is least affordable, data prices would have to come down by 80 per cent on average in order to achieve the two per cent affordability target if incomes don't change, highlighting the impact of poverty on affordability

GSMA (2021) Accelerating mobile internet adoption

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Data Affordability: Recommendations

Reducing cost of data

1 Create an enabling environment for MNOs to achieve cost efficiencies

2 Adopt tax principles that promote the uptake of mobile data services

Increasing purchasing power

3 Enable innovative data pricing strategies and pricing flexibility in competitive markets

4 Consider subsidies for targeted underserved user groups

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Taxes on usage of mobile services in Sub-Saharan Africa

COMBINED USAGE TAX RATES IN SELECTED COUNTRIES

Excise Tax on Usage   **VAT on Usage**
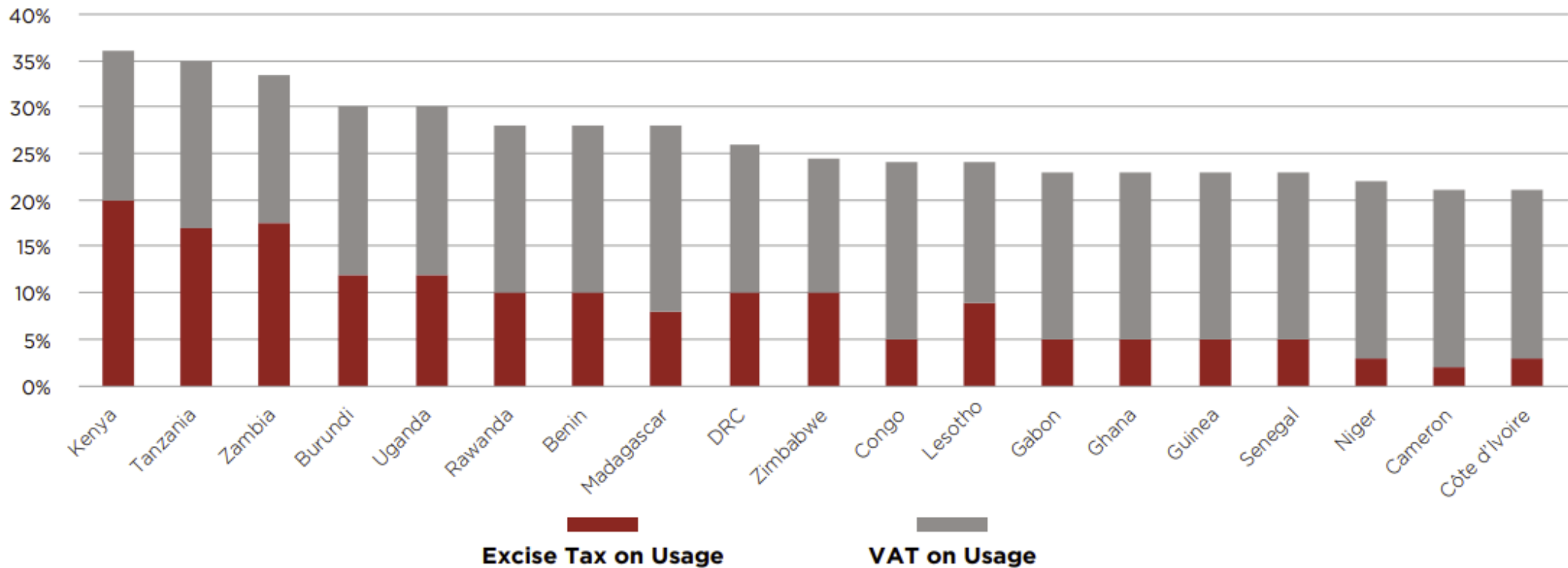
Source: GSMA Tax Database. Data for 2021.

GSMA (2023) Mobile Tax Policy and Digital Development

© GSMA 2024

Example

Barrier: Affordability of devices

Policy action 1

Specify the challenge
- ❑ **Devices are unaffordable in country X among specific user group (e.g.: rural farmers)**

Select policy recommendation(s)
- ❑ **Targeted device subsidy programme**

List factors to consider
- ❑
- ❑

Identify relevant stakeholders
- ❑
- ❑

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Group Discussion

What are the key affordability challenges in your country?

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Knowledge and Skills

People are unaware of mobile internet and its benefits and do not have the necessary skills to use it

Knowledge and Skills: Challenges

- **Awareness of mobile internet** and its benefits is growing but remains a critical initial barrier to mobile internet adoption in some countries.

- Women and those living in rural areas remain less likely to be aware of mobile internet.

- A **lack of literacy and digital skills** ranked as the second top barrier to mobile internet adoption among mobile users aware of mobile internet but not using it.

Top categories of barriers to mobile internet use in surveyed countries (*among mobile users who are aware of mobile internet but do not use it*)

Ranking	All countries
1	Affordability
2	**Literacy and digital skills**
3	Safety and security

GSMA (2023) State of Mobile Internet Connectivity

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Knowledge and Skills: Recommendations

1 Launch awareness campaigns on the benefits of mobile internet and how to address potential risks

2 Invest in training and capacity building initiatives, including through win-win partnerships with the private sector

3 Focus digital skills strategies on use cases that help targeted user segments meet their life goals and needs

4 Use a comprehensive framework to map digital skills involved in use cases, identify gaps, set targets and measure progress

5 Adapt digital skills strategies to local contexts to reflect how most users access the internet, which in LMICs is through a mobile device.

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Take user needs as the starting point for digital skills training

Legend:
- Mobile internet central to fulfilment of these needs
- Mobile internet plays a role for many in fulfilment of these needs
- Mobile internet plays a role only for some in fulfilment of these needs

GSMA (2024) A needs-based approach to mobile digital skills training.

Wheel of needs in Ghana shows different user needs

Legend:

- **Mobile internet central to fulfilment of these needs**
- **Mobile internet plays a role for many in fulfilment of these needs**
- **Mobile internet plays a role only for some in fulfilment of these needs**

Wheel segments: Work and income, Home and lifestyle, Education, Information and news, Faith and worship, Shopping and buying, Health, Travel, Public services, Social connection, Entertainment. Center: GHANA.

GSMA (2024) A needs-based approach to mobile digital skills training.

© GSMA 2024

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Example: mapping skills

Use case: selling a product online

	Entry-level	**Experienced**	**Expert**
Set-up and configuration	▶ Set up an account and password with help		
Information management	▶ Find and add friends on social media		
Digital communication	▶ Send messages to existing customers, based on their consent		
Digital content creation	▶ Post a comment or photo of a new product on sale	▶ Create a page or group on social media and use a third-party e-commerce platform	▶ Create a web-shop and presence on different social media platforms
Safety and security	▶ Recognise and block unsolicited messages		
Problem solving	▶ Recover forgotten password		

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The Mobile Internet Skills Training Toolkit (MISTT) is a comprehensive resource for advancing basic mobile digital skills

Implemented in more than 40 countries to train 70 million people, the MISTT has proven impact.
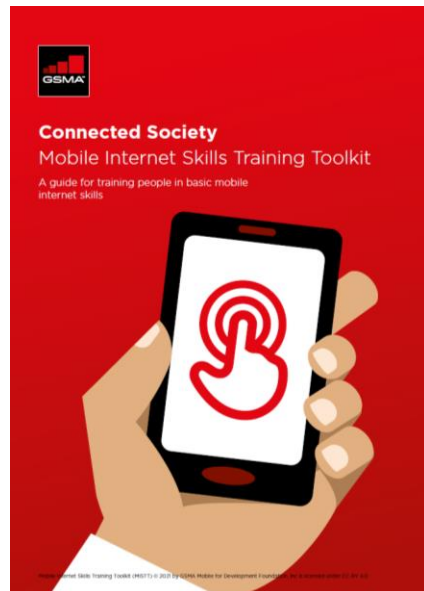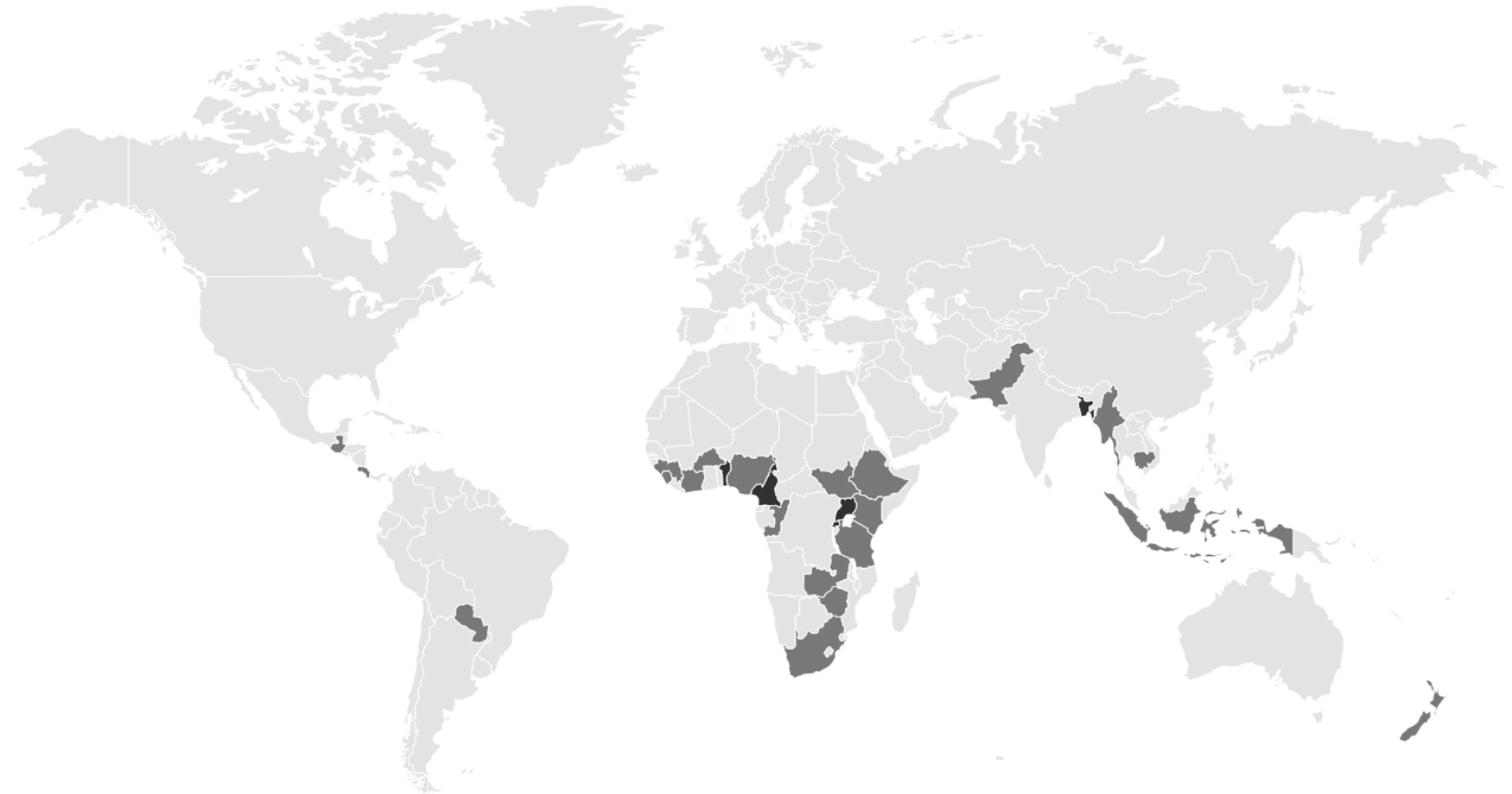
Group Discussion

1. How can the government, private sector and international community collaborate to advance digital skills in your country?

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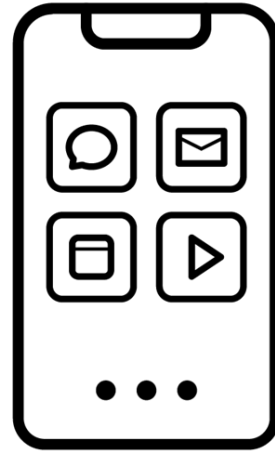
Relevance

Local digital ecosystems are underdeveloped and there is a lack of content, services and products that meet user needs and capabilities

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Relevance: Challenges

A lack of local relevance can limit adoption

Correlation between mobile internet use and relevant content and services
(Mobile Connectivity Index 'content & services' enabler and mobile internet subscriptions)
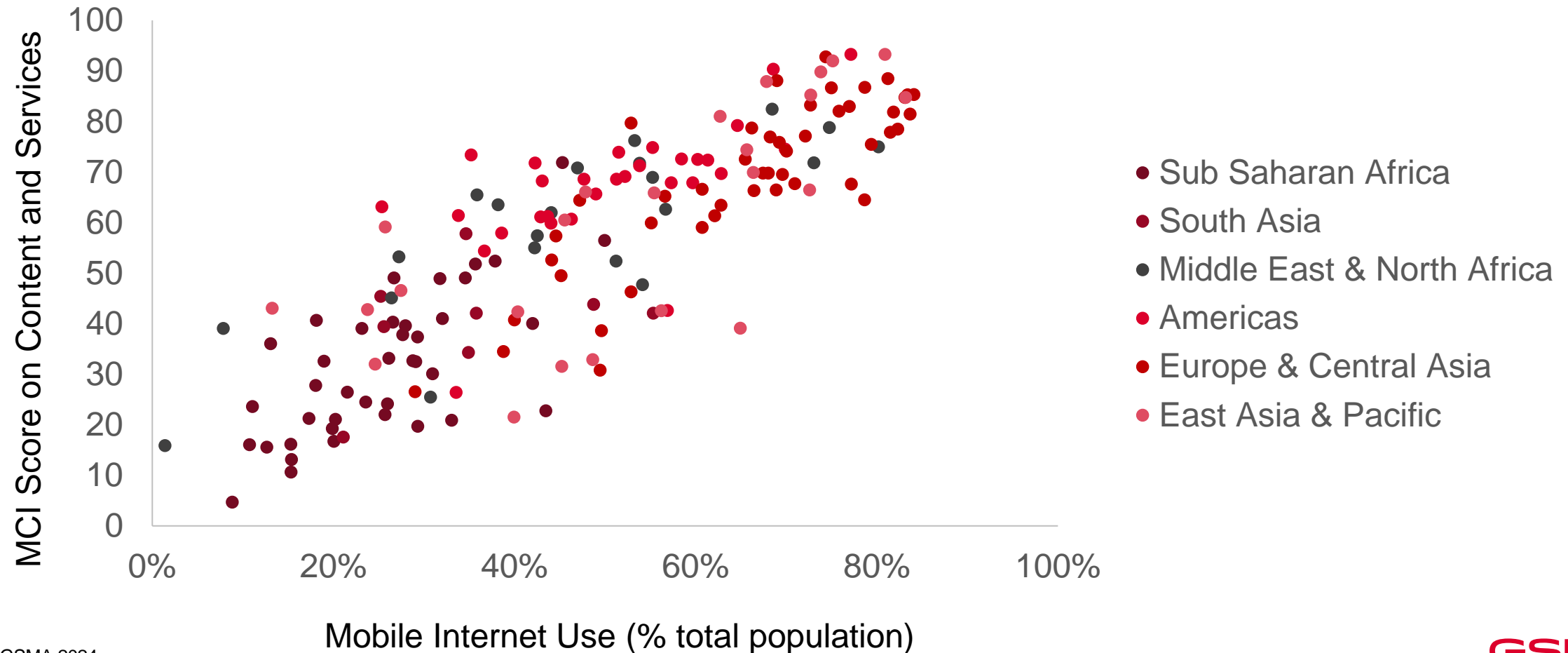
- Sub Saharan Africa
- South Asia
- Middle East & North Africa
- Americas
- Europe & Central Asia
- East Asia & Pacific

MCI Score on Content and Services

Mobile Internet Use (% total population)

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Relevance: Recommendations

1 Create an environment for digital businesses to thrive by ensuring regulation is dynamic, efficient and needs-based

2 Assess and benchmark the digital maturity of industries and enable the digital transformation of priority sectors and SMEs

3 Facilitate the growth of start-up ecosystems by improving ease of doing business and access to funding, training and professional services

4 Accelerate the digitalisation of public services and develop a mobile-first strategy to deliver services that meet user capabilities

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Many businesses also remain offline, especially those run by women

Micro-entrepreneurs who use mobile internet
% of micro-entrepreneurs surveyed

Working Group Report on Connectivity for MSMEs

Making Digital Connectivity Work for MSMEs
September 2023

	Bangladesh	India	Pakistan	Indonesia
Men	39%	48%	47%	70%
Women	28%	30%	30%	58%

■ **Men micro-entrepreneurs**   ■ **Women micro-entrepreneurs**

Source: GSMA (2023) Understanding women micro-entrepreneurs' use of mobile for business

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FOR SUSTAINABLE DEVELOPMENT

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Example: Malaysia Digital Blueprint

T1	T2	T3	T4	T5	T6
Drive digital transformation in the public sector	Boost economic competitiveness through digitalisation	Build enabling digital infrastructure	Build agile and competent digital talent	Create an inclusive digital society	Build trusted, secure and ethical digital environment
S1: Managing change for effective digital transition	**S1:** Facilitating **digital adoption**, access and effective use of digital technology across all firm sizes & digital maturity level	**S1:** Utilising **regulatory measures** to expand infrastructure coverage	**S1:** Integrating **digital skills into education** at primary and secondary level	**S1: Increasing inclusivity** of all Malaysians in digital activities	**S1: Strengthening safety and ethics** in digital activities and transactions
S2: Leveraging digital technology to improve workflow efficiency and productivity	**S2:** Accelerating industry development by **enhancing local participation**	**S2: Leveraging digitalisation** to address legacy challenges	**S2:** Shifting focus of vocational and tertiary education from job-specific skills to **competencies and adaptability**	**S2: Empowering special target groups** in the society to participate in the digital economy through entrepreneurship	**S2: Enhancing institutions commitment** to personal data protection and privacy
S3: Enhancing **digital skill sets of civil servants**	**S3: Streamlining regulatory requirements** to respond to digital economy and encourage innovative business models	**S3: Enhancing digital technology infrastructure** capabilities	**S3: Reskilling current workforce** with the digital skills needed to stay relevant		**S3:** Improving **cross-border data** transfer
S4: Utilising data to improve government services	**S4:** Developing **digital industry cluster** and driving entrepreneurial activity		**S4:** Ensuring that **gig workers are protected** and equipped with the right skills		**S4: Increasing cyber security uptake** among businesses
S5: Increasing scope and quality of online services for better user experience					

48 national initiatives | 28 sectoral initiatives

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Break

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Group Discussion

1. How are local digital ecosystems supported in your country?
2. What more can be done?

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Safety and Security

Individuals and communities are concerned about the negative aspects and risks of the internet

Safety and Security: Challenges

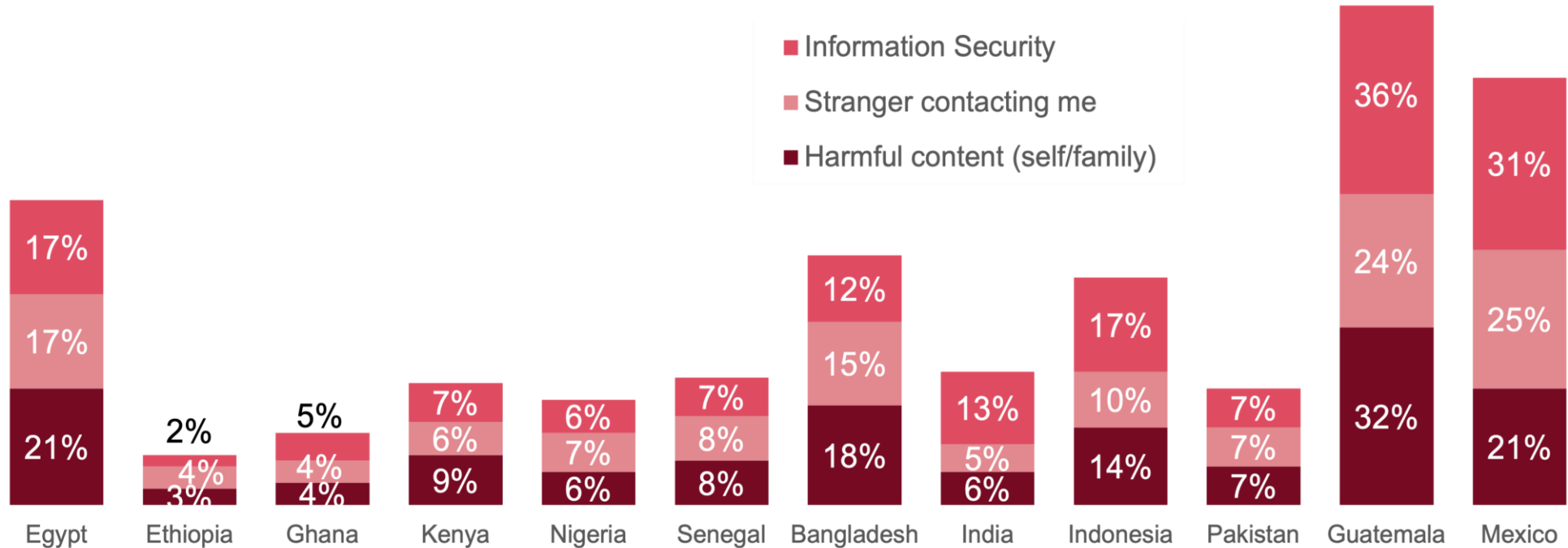**Proportion of mobile users aware of mobile internet who report barriers related to safety and security**
(LMICs, percentage of total population)

Legend:
- Information Security
- Stranger contacting me
- Harmful content (self/family)

Country	Harmful content (self/family)	Stranger contacting me	Information Security
Egypt	21%	17%	17%
Ethiopia	3%	4%	(2%)
Ghana	4%	4%	(5%)
Kenya	9%	6%	7%
Nigeria	6%	7%	6%
Senegal	8%	8%	7%
Bangladesh	18%	15%	12%
India	6%	5%	13%
Indonesia	14%	10%	17%
Pakistan	7%	7%	7%
Guatemala	32%	24%	36%
Mexico	21%	25%	31%

Base: Adults aged 18+ who have used a mobile phone in the last three months but not used mobile internet in the last three months, despite being aware of mobile internet. n= from 78 to 379
Note: Respondents were allowed to select multiple important barriers. The proportion of respondents selecting each barrier as important is therefore not mutually exclusive

Source: GSMA (2023) The State of Mobile Internet Connectivity Report 2023

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Safety and Security: Recommendations

1 Develop policy and legal frameworks that recognize online harassment and make it easy to report online abuse

2 Enable children and youth to lead safer digital lives and tackle child sexual abuse

3 Implement co-regulatory mechanisms to tackle disinformation

4 Implement horizontal data privacy frameworks that protect the fundamental right to privacy while also providing organizations the flexibility to create value accountably and responsibly

5 Support individuals to protect personal information and recognise fraud.

6 Implement effective strategies to tackle device theft and the trading in counterfeit devices

7 Refrain from the use of service restriction orders, such as mandating network or service shutdowns.
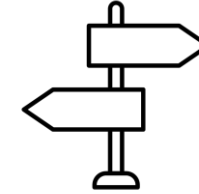
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Examples: Tackling online safety risks

Harassment

Example:
Reporting mechanisms through Cyber Crime Cells in Indian cities

Child Online Safety

Disinformation

Example:
European and Australian Codes of Practice on Disinformation
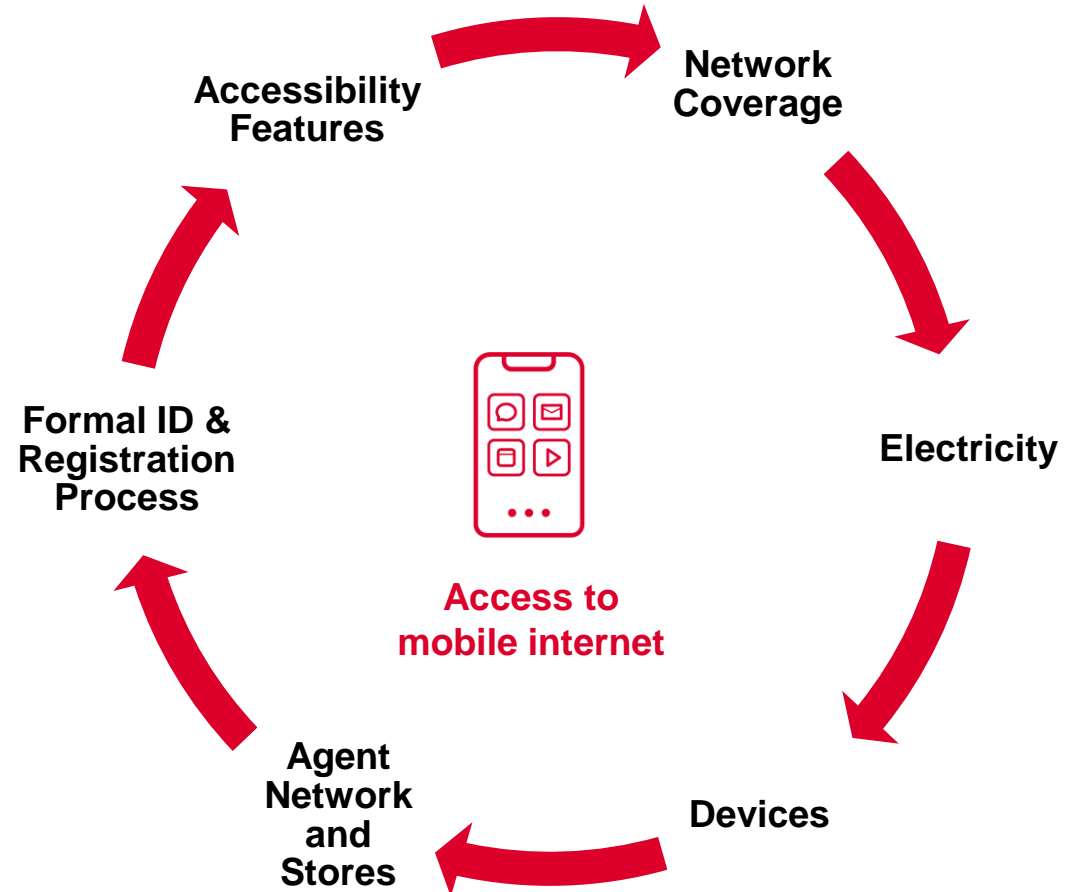
Group Discussion

1. What is the biggest perceived risk that policymakers should prioritise in your country?
2. What can be done to address it?

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Access

People do not have access to networks and enablers such as electricity and formal IDs, or devices and services are not accessible enough

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Access: Challenges

Accessibility Features → Network Coverage → Electricity → Devices → Agent Network and Stores → Formal ID & Registration Process → Accessibility Features

Access to mobile internet

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Access: Recommendations

1   Adopt investment and innovation-friendly policies to expand mobile broadband coverage

2   Improve access to electricity, including through off-grid energy solutions and smart metering technologies that enable PAYG consumption and improve energy efficiency

3   Ensure that sales and training facilities are accessible for underserved populations and include a gender and disability perspective in entrepreneurship and SME programmes

4   Ensure inclusive and transparent registration processes for mobile and digital services through harmonized consumer protection rules and improved access to formal IDs

5   Support the development of simplified product and service designs, as well as accessibility features, for individuals with low literacy and persons with disabilities

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Example: Kenya's National ICT Policy

Kenya's 2019 National ICT Policy strongly emphasizes access and accessibility

Mobile first: The policy stresses the importance of a mobile-first approach to accessing ICT, internet content and digital support.

Full accessibility: The government is committed to providing an ICT environment fully accessible to persons with disabilities.

It has committed to take measures such as:

– Ensuring accessibility of ICT services and emergency services for persons with disabilities;

– Collaboratively reviewing existing legislation and regulations to promote ICT accessibility for persons with disabilities;

– Promoting the design, production and distribution of accessible ICTs;

– Requiring public and private entities to render digital content, information and services in accessible and useable formats;

– Ensuring government websites comply with international web accessibility standards;

– Promoting and developing the use of community languages, and other communication formats and technologies accessible to persons with disabilities;

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Breakout Groups

Discuss with your colleagues the factors affecting the chosen policy areas, and who are the relevant stakeholders you assessed should be involved.

Retain your work for the second part of exercise in the 'Create an Action Plan' section

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Example

Barrier: Affordability of devices

Policy action 1

Specify the challenge
- ❑ Devices are unaffordable in country X among specific user group (e.g.: rural farmers)

Select policy recommendation(s)
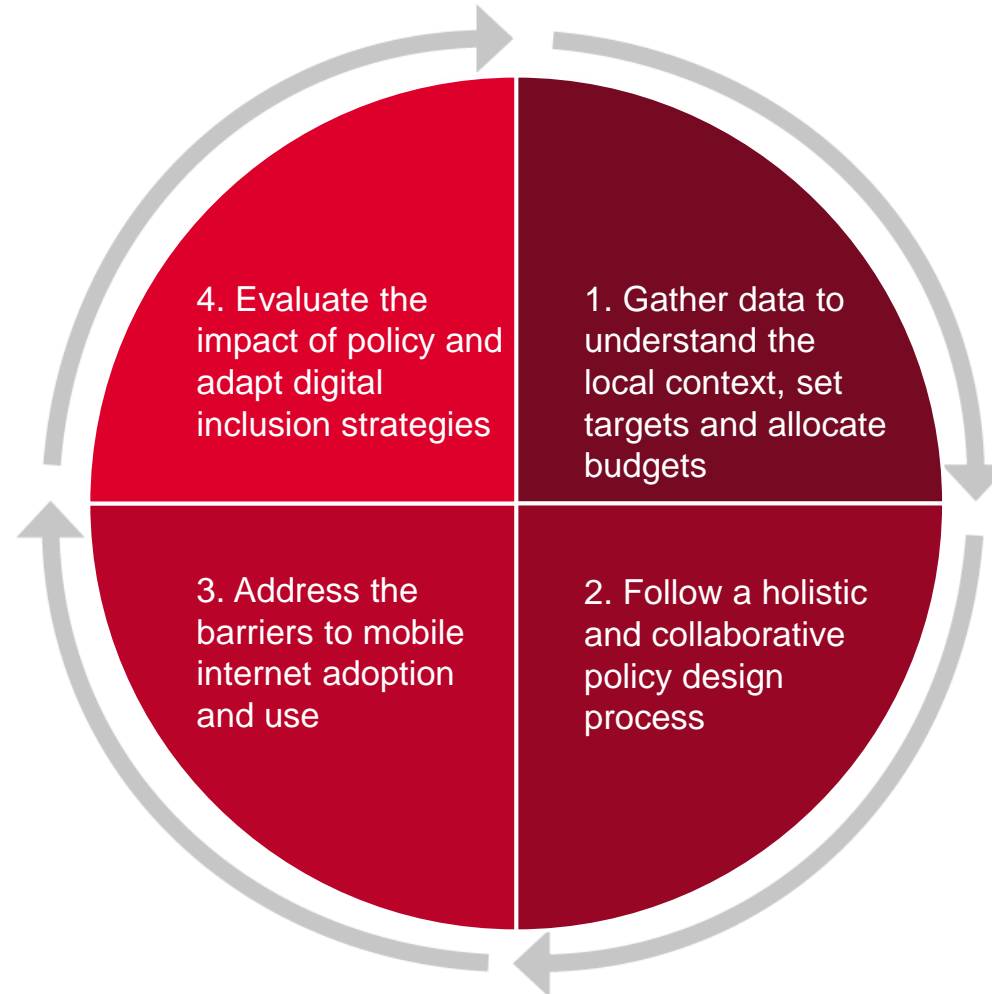- ❑ Targeted device subsidy programme

List factors to consider
- ❑ Budget cycle
- ❑ Policy cycle
- ❑ Beneficiaries
- ❑ Device type

Identify relevant stakeholders
- ❑ Mobile operators
- ❑ USF or regulator

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3. Creating a Plan of Action

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Recap: a comprehensive framework for action

4. Evaluate the impact of policy and adapt digital inclusion strategies

1. Gather data to understand the local context, set targets and allocate budgets

3. Address the barriers to mobile internet adoption and use
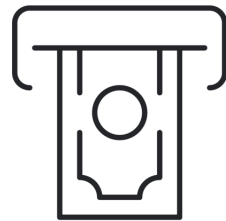
2. Follow a holistic and collaborative policy design process

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Recap: the main barriers to mobile internet use

Knowledge and Digital Skills	Affordability	Relevance	Safety and security	Access
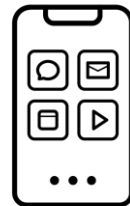
Policy Exercise

Taking action

Refer to the first part of the exercise and the policy landscape you explored

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Defining an action plan

Barrier

Policy action 1
❯

Needs for implementation
❑
❑
❑

Timeline & next steps
❑
❑
❑

Policy action 2
❯

Needs for implementation
❑
❑
❑

Timeline & next steps
❑
❑
❑

Policy action 3
❯

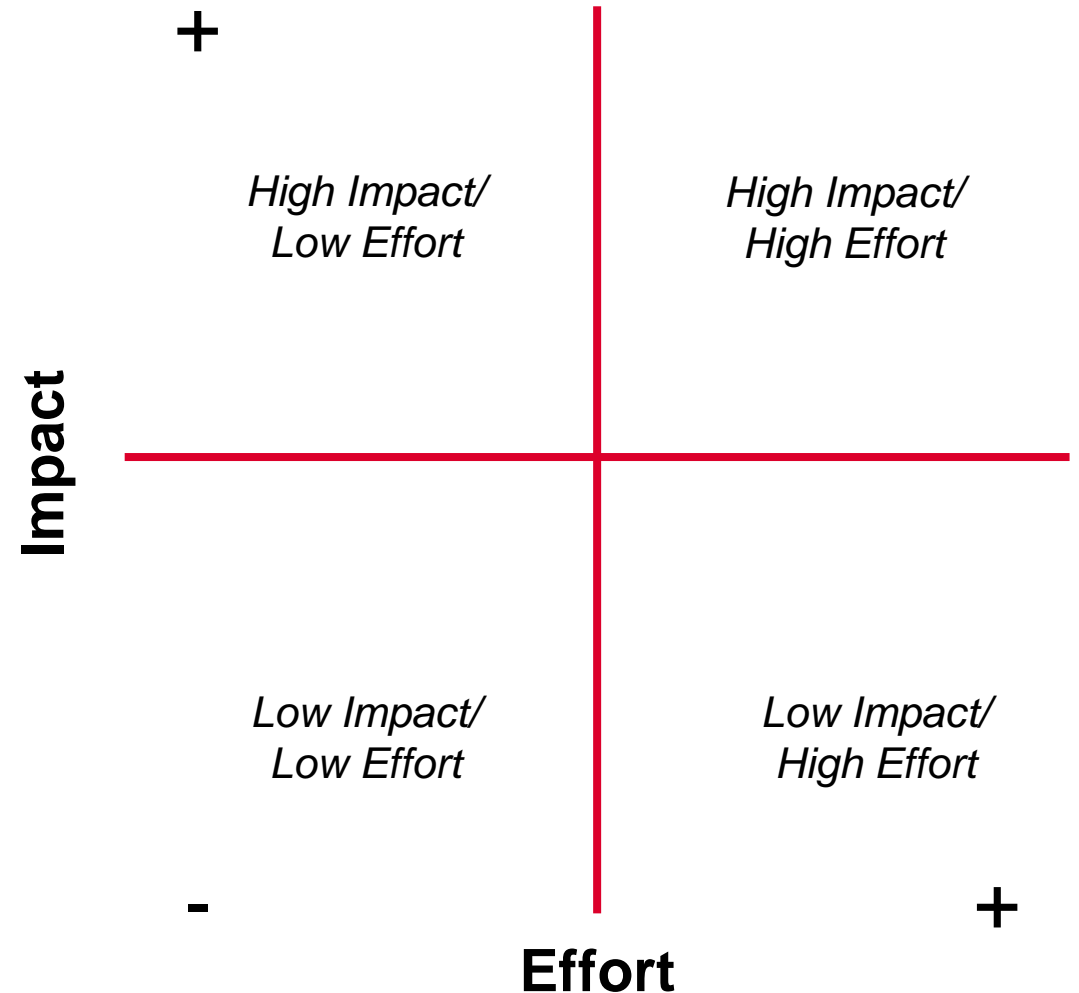**Needs for implementation**
❑
❑
❑

Timeline & next steps
❑
❑
❑

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Impact and effort matrix can help prioritizing action

Divide your policy actions into quadrants, depending on:

- Their level of impact on priority areas
- The amount of effort required for implementation. (effort being resources such as time and funding)

+

High Impact/ Low Effort

High Impact/ High Effort

Impact

Low Impact/ Low Effort

Low Impact/ High Effort

-

+

Effort

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Group Discussion

1. What policy actions are quick wins?
2. What visionary policy actions would you pursue if there were no constraints?

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Collaborate with the GSMA

Data

- Mobile Connectivity Index
- Consumer survey
- GSMAi database (paid)
- State of Mobile Internet Connectivity Report
- Mobile Gender Gap Report

Policy Expertise

- Drafting policies and input into consultations
- Capacity building courses
    - Gender Gap
    - Mobile Connectivity Index

Tools

- Mobile Internet training skills toolkit (MISTT)
- Handset subsidy toolkit

Implementation

- Joint policy review / gap analysis
- Industry-government workshop
- Advisory and technical support
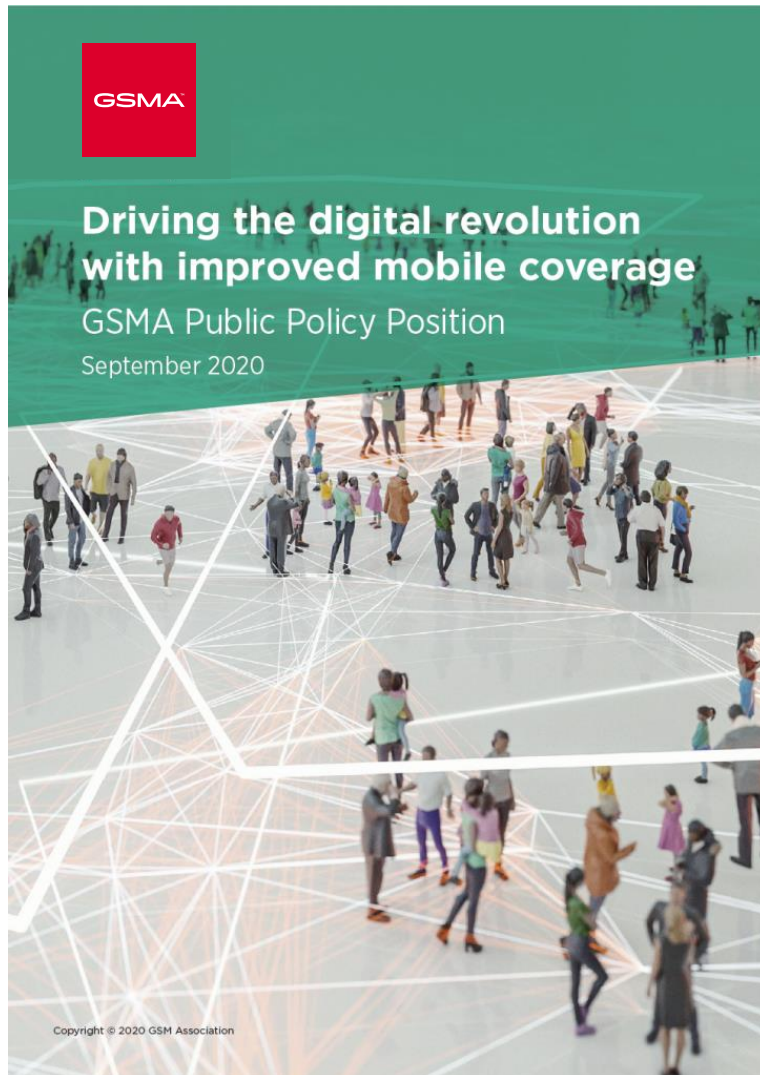
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Reflection

Looking back on this course:

– Was there anything surprising that you learned?

– Has this workshop inspired you to take any specific action?

– Are there areas where you would like additional support from the GSMA?

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Thank you

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To print

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Recommendations to help expand coverage

1 Provide non-discriminatory and timely access to public infrastructure while simplifying and streamlining the planning approval process for new base stations

2 Assign sufficient amounts of mobile spectrum to operators in a timely manner and do not inflate spectrum prices

3 Adopt license terms and conditions that encourage network investments and innovation

4 Allow infrastructure sharing on a voluntary basis

5 Adopt competition policy that supports investment in high quality mobile networks

6 Remove mobile sector-specific taxes and fees that impede infrastructure rollout and harm affordability of data

Affordability – Recommendations

Reducing costs of device ownership

1 Remove sector-specific taxes and fees

2 Refrain from imposing costly barriers to incentivise local production

Increasing device financing options

3 Enable innovative financing mechanisms

4 Partner with the industry to provide device subsidies for targeted user groups

Reducing costs of data

1 Create an enabling environment for MNOs to achieve cost efficiencies

2 Adopt tax principles that promote the uptake of mobile data services

Increasing purchasing power

3 Enable innovative data pricing strategies and pricing flexibility in competitive markets

4 Consider subsidies for targeted underserved user groups

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Knowledge and Skills – Recommendations

1 Launch awareness campaigns on the benefits of mobile internet and how to address potential risks

2 Invest in training and capacity building initiatives, including through win-win partnerships with the private sector

3 Focus digital skills strategies on use cases that help targeted user segments meet their life goals and needs

4 Use a comprehensive framework to map digital skills involved in use cases, identify gaps, set targets and measure progress

5 Incorporate digital skills development in education policies at all levels and provide students with access to suitable devices to learn

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Relevance – Recommendations

1 Create an environment for digital businesses to thrive by ensuring regulation is dynamic, efficient and needs-based

2 Assess and benchmark the digital maturity of industries and enable the digital transformation of priority sectors and SMEs

3 Facilitate the growth of start-up ecosystems by improving ease of doing business and access to funding, training and professional services

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Safety and Security – Recommendations

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Access – Recommendations

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4   Ensure inclusive and transparent registration processes for mobile and digital services through harmonized consumer protection rules and improved access to formal IDs

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