



M4D Impact Products and Services Landscape

Quarterly Report May 2015

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1. Executive Summary

There have been a number of discussions in the run up to 2015, when the Millennium Development Goals (MDGs) will be assessed, and a new agenda decided. There is no denying that technology and innovation will be a significant consideration when identifying how any future goals can be met.

In this first edition of 2015, the M4D Impact Products and Services Quarterly Report looks to identify the ways in which the Mobile for Development (M4D) industry continues to evolve and diversify into new areas, contributing to the development of countries across the emerging world.

Our previous report, [**The M4D Impact Products and Services Landscape Annual Review 2014**](#), highlighted products and services that were launched in more than one geography. In this edition, we look at those products and services that cover more than one subject area, or 'vertical', e.g. health, education and agriculture. This includes for instance the growing number of services who have integrated mobile money into their offering.

We have noted before that although the number of M4D products and services is increasing, the number that scale is not. This report highlights that these services, and the people that create them, continue to need additional support, which builds on the findings of the [**Emerging Market Entrepreneurs and Silicon Valley Report**](#). The M4D Impact Programme has identified over 150 innovation spaces, such as technology hubs, incubators and accelerators, that are working towards creating an infrastructure that can support technology, entrepreneurship and innovation in emerging markets. However, in order for innovation spaces to serve entrepreneurs, they too need support, and so attention is needed to determine how innovation spaces can be sustainable.

The integral part of mobile in the day-to-day lives of citizens in the developing world has led to more organisations considering the role of mobile in promoting transparency and good governance, increasing accountability, and addressing corruption. [**The M4D Impact Tracker**](#) is now showcasing products and services that are attempting to tackle these challenges. It is a pertinent time to look at the potential role of mobile in this space, as March 2015 saw the world's focus turn to the Nigerian elections, and the crucial role that mobile played in accountability and citizen engagement.

2. Organisations - Innovation spaces supporting entrepreneurs

The Mobile for Development Impact Products and Services Landscape Annual Review highlighted that M4D products and services are rising, but the number that scale is not. As a result, these services, and the people that create them, continue to need additional support.

- The number of innovation spaces* has been increasing over the last three years, with 150 tracked on the M4D Impact site
- In 2012, [Africa Hubs](#) estimated that there were 36 innovation spaces* working in Africa to help entrepreneurs and start

- ups succeed. We have now identified 66 innovation spaces up and running in Africa
- Many emerging market entrepreneurs lack experience in effective marketing, sustainable business models, and data collection and analysis to steer growth and development
- Innovation spaces are beginning to bridge this gap, creating an infrastructure that can support technology, entrepreneurship and innovation through co-working space, mentoring, training, access to investors and facilitating networking opportunities

- But innovation spaces, like the entrepreneurs they aim to help, still face challenges of funding, sustainability, and scalable impact
- For these spaces to sufficiently support the technology community, they too must establish sustainable business models. From the innovation spaces we have spoken to, sustainability in some cases, has been achieved through membership fees. However, this is something early stage entrepreneurs may struggle to afford and it is crucial that alternative models for sustainability are found



Villgro

India

Many entrepreneurs in emerging markets continue to pursue initiatives that promise larger commercial rewards, rather than those that focus on socioeconomic impact. However Villgro, a social enterprise incubator in India, is proving that innovation-based social enterprises can also return a profit.

[Villgro](#) funds and incubates, early-stage innovation-based, for-profit social enterprises that have significant impact on the lives of India's poor. While these initiatives target the lower to middle income population, this is not just about social impact, given the population size in India there is a huge opportunity for entrepreneurs to make a difference, while making a profit. This has been seen with [Biosense Technologies uChek](#) initiative, which Villgro directly supported, a semi-automated

urinalysis system, that has a mobile app that processes and monitors urine analysis using conventional dipsticks. uChek has now been commercially launched and has received further investment from Wellcome trust, Grand Challenges Canada and ICMR.



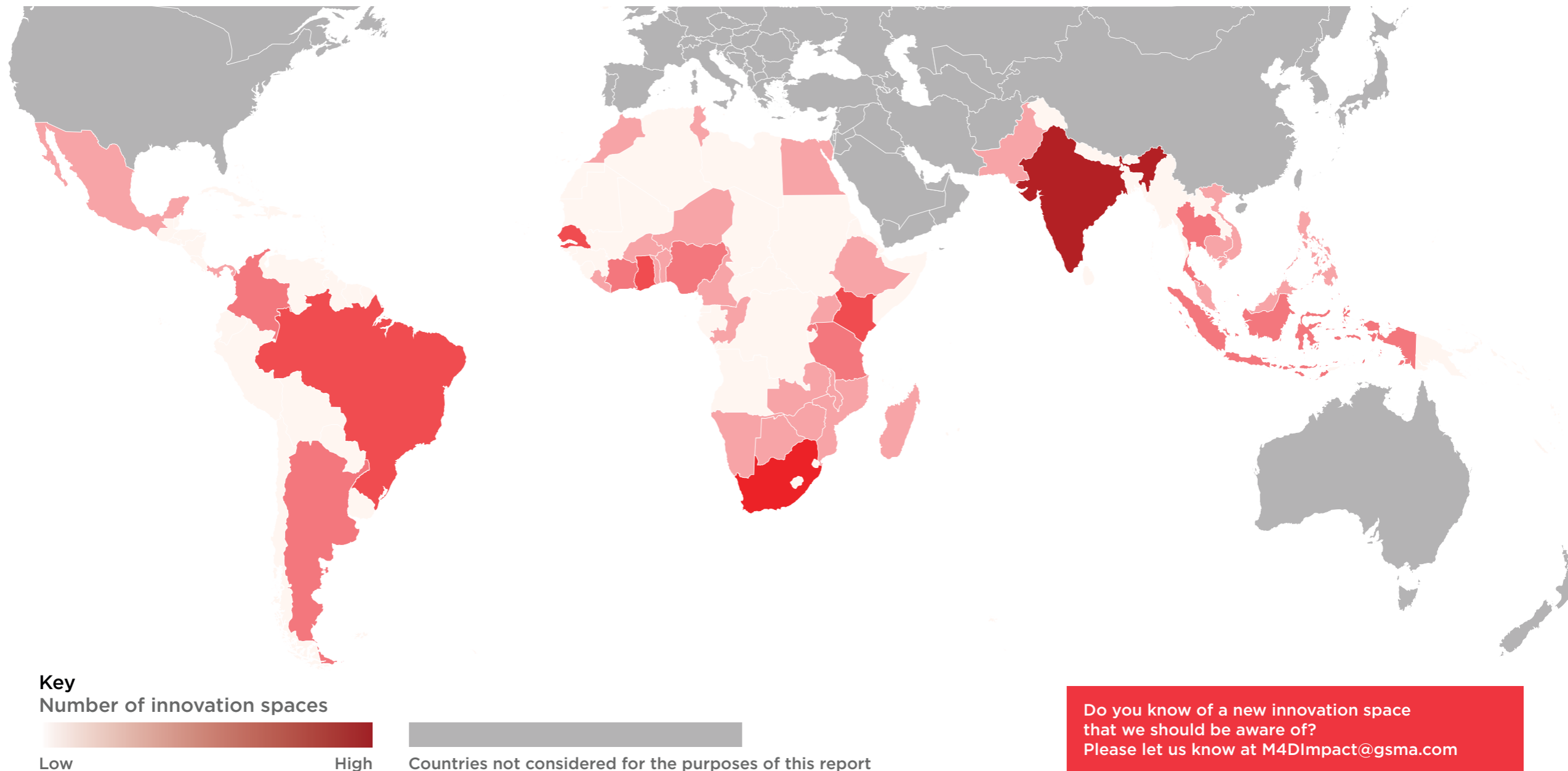
To learn more about the entrepreneur landscape in emerging markets read the [M4D Impact Emerging Market Entrepreneurs and Silicon Valley Report](#)

See [glossary](#) for the different types of innovation spaces that exist

2i. Organisations - Innovation spaces in emerging markets

The M4D Impact Programme has identified over 150 innovation spaces that are supporting the entrepreneurship ecosystem across the developing world

Given the well known reputation of India, Kenya and South Africa in the technology arena, it is not surprising that they are leading. However other markets, that are not as commonly recognised, have also begun to offer established innovation spaces, with Somalia, Burkina Faso and Benin as notable examples.



2ii. Spotlight - Helping innovation spaces to succeed

In order for innovation spaces to serve entrepreneurs, they need to be supported too.

In 2014, World Bank noted that there were 91 innovation spaces across Africa. However, a year on only 66 of these still exist and are actively running.



SPOTLIGHT

Technology Lab for
Innovation Spaces

Afrilabs: 26 technology innovation hubs in 18 countries across Africa

There is a tendency to view innovation spaces as competitors, which often results in innovation spaces not interacting with one another.

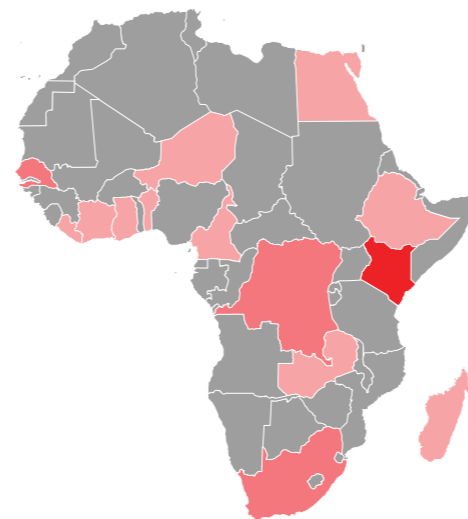
The founders of Afrilabs identified the need for a network to be created around innovation spaces and so in 2011, Afrilabs was founded in order to offer support and a stronger network to innovation spaces.

Afrilabs has attempted to remove the isolation of innovation spaces by working across these spaces to build an innovation infrastructure that will encourage the growth of entrepreneurs, start ups and tech innovation.

While Afrilabs has labs in multiple markets, they are all locally run and anchored with on the ground engagement and local ownership. Building from the ground up, the entrepreneurs using these spaces, and the labs that service them, set the mandate, which ensures they are best placed when serving the varying needs of the technology sector in these 26 locations



Key
Number of Afrilabs



3. M4D organisation highlight: Vodafone - Ghana

The value of M4D for Mobile Network Operators (MNOS) continues to gain momentum. Ghana is progressive in the mobile space and Vodafone Ghana is playing a leading role.

The Products and Services Tracker identifies 56 Mobile for Development services in total, that have been deployed in Ghana.

With three clicks on our Tracker, you can see this snapshot of information about Ghana Vodafone's products and services who have deployed 13 M4D services in Health and Education, with plans to launch other services in:



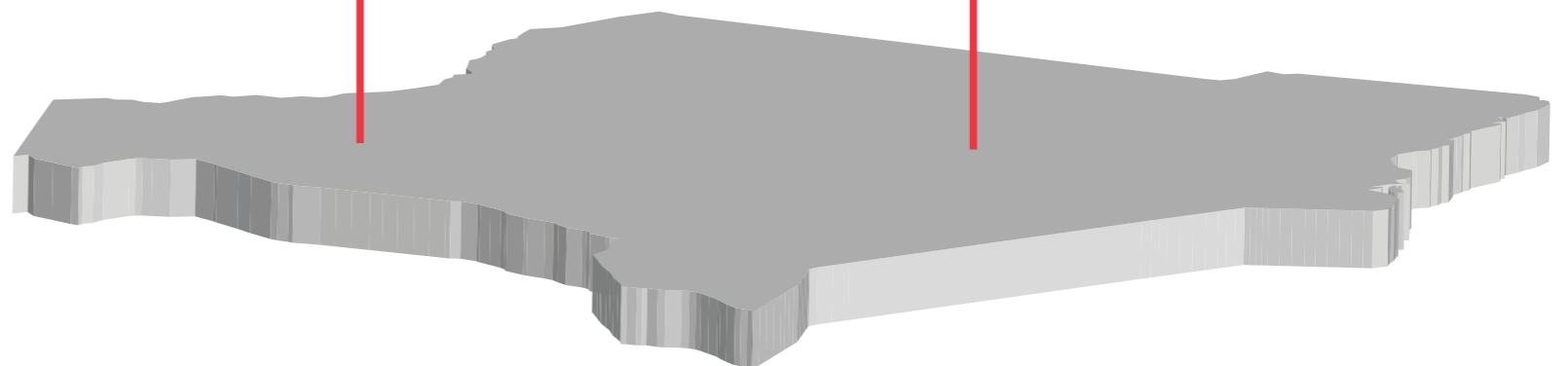
Health

- Health App
- Healthline
- Healthline 255
- MDNet
- Mobile for Good Initiative
- Mobile Product Authentication (MPA)
- Maternal & Child Educationbola
Public Health
Education



Education

- mLearning4RuralHealth
- Phonics Ghana



Do you know of an M4D organisation
Please let us know at M4DImpact@gsma.com

4. Mobile Government and Citizen Engagement

In recent years mobile technology has demonstrated its potential for promoting transparency and good governance, increasing accountability, and addressing corruption.

Mobile phones have the potential to reach citizens through direct and interactive channels of communication, they allow rapid data collection, access to information, and offer more innovative ways for social mobilisation and participation.

The M4D Impact site is now tracking Mobile Government and Citizen Engagement as an area of focus and has identified over 40 products and services that have been deployed in developing markets.

The Tracker is also showcasing products and services that have been used to facilitate the reporting of corruption. Filter on our [Products and Services Tracker](#) to find the full list.

Governments and their citizens are increasingly viewing technology as a tool that can be used for social accountability, empowering local communities to engage with the decision-making process, and as a mechanism to hold local officials accountable.

However, it has not yet reached its full potential in the anti-corruption arena. Success in this regard depends on the local political, social and economic context as well as operational considerations such as access, anonymity and costs.



Number of services currently identified

CORRUPTION REPORTING

Mobile services that allow citizens to anonymously report incidents of corruption. This can be at the level of national government, but can also include education and health facilities.

18

NEWS SERVICES

The delivery and creation of news using mobile. This can be done via SMS, by specialised applications, or using mobile versions of media websites.

4

CITIZEN EDUCATION

Mobile services that educate citizens on the electoral process, government policies, local laws and civil rights, in their country.

3

mGOVERNMENT

Mobile services that are run or owned by government which benefit citizens, businesses and government units in a particular country. These initiatives allow government to actively engage with citizens as well as disseminate information on government related matters. E.g: paying taxes via mobile, reporting damages on the roads or registering to vote via your mobile phone

6

ELECTION MONITORING

Interactive mobile based services, allowing citizens to report on election activity.

8

HUMAN RIGHTS REPORTING

The use of mobile to track and report human rights violations. E.g: reporting case of human trafficking, violence against women.

6

CITIZEN ENGAGEMENT

Mobile services that offer citizens the opportunity to be involved in matters concerning civil life. E.g Opinion Polls

8

4i. Spotlight: UNDP anti-corruption service, Papua New Guinea

While the role of mobile in anti-corruption initiatives has significant potential, it is essential that governments adopt appropriate methods to best serve the people in a transparent and anonymised manner.



SPOTLIGHT

Mobile Government and
Citizen Engagement

Phone Against Corruption,
Papua New Guinea (PNG)



Despite significant budget increases to all levels of government over the last two years, these added resources have not translated effectively into improving the lives of the population in Papua New Guinea (PNG). One reason for this inefficiency is corruption. PNG features 145th out of 175 in Transparency International's Corruption Index.

Encouraging the reporting and prosecuting of corruption is difficult in a culture bound by community loyalty and a complex environment consisting of over 850 languages. Most citizens do not know where or how to report corruption or bribery and often fear being attacked.

The “Phones Against Corruption” initiative was launched by United Nations Development Programme (UNDP) in partnership with PNG's Department of Finance (DoF) in 2014.

The pilot initiative involves reporting cases of corruption via SMS anonymously and is free of charge, without the need for internet. All that is required is for the sender to report Where, When and What the case of corruption was. Reported cases are then sent for investigation by the DoF.

The service has been introduced to 1200 staff of the DoF. Since its launch in July last year, more than 6000 text messages have been received from 1500 different users.

Plans for scaling this service at a national level are underway, with plans for the DoF to handover this responsibility to the PNG's Independent Commission Against Corruption in late 2015. In partnership with UNDP, the initiative will be opened to the general public. While PNG is a relatively small market, UNDP works in more than 170 countries and territories, and they have begun exploring ways for this service to be replicated.

4ii. Country highlight: Nigeria

Mobile was crucial in the April 2015 elections in Nigeria. Technology is now considered an invaluable tool for ongoing citizen engagement



SPOTLIGHT

Examples of M4D Services in Nigeria's Election

While 2011 saw the birth of social media in the Nigerian electoral process, its impact was limited by the number of people who were still not connected. However the 2015 election, which focused more on engaging with younger generations, witnessed how technology amplified peoples desire to vote, whether through mobile enabled citizen engagement, citizen education, election monitoring, or mobile based news sources.

While a number of app based solutions were launched for the elections, smartphone penetration is still emerging in Nigeria (around 20- 25%). These are two examples of how SMS and IVR based mobile services were used in the elections last month

1. Transition Monitoring Group (TMG)

corroborated election results using a system of text messages. The SMSs are coded so they cannot be intercepted, and also to ensure the data can be organised and communicated quickly.

TMG deployed 4,000 citizen observers across Nigeria to monitor the elections. With technical assistance from the National Democratic Institute (NDI), observers were given mobile phones or tablets to send information back to an Information Centre located in Abuja. This enabled real time observation reports to be collected.

Throughout the observation, TMG reported that 3600 text messages containing 21,600 individual pieces of information about the conduct of the election day processes, were sent.

For broader information sharing among deployment teams, an internal communication service, **Yapp**, was included on tablets as well as downloaded to staff phones.

2. Go vote is a platform created by Co-Creation Hub Nigeria using text messaging, Interactive Voice Response (IVR) and a web platform, Govote gave voters access to the necessary information they needed regarding the election process.

The initiative was adapted into a number of technology channels in order to engage with as many people as possible. Voters could either text (sms) or call (IVR) referencing their card number to receive information on where to pick up their voting card on election day.

Co-Creation Hub Nigeria have stated that the IVR channel received over 2000 calls within the first 24 hours.



5. Products and services in more than one vertical

While M4D activity in the emerging world still continues to grow, with over 1800 products and services included in the M4D Impact tracker, we are beginning to see a transition from initiatives with a single vertical focus, to initiatives that serve several needs of users.

The M4D Impact Products and Services Tracker is actively tracking mobile products and services in 10 verticals that have often worked in silos to one another.

Three years ago, we identified 800 M4D products and services, with the majority serving one single need for users in emerging markets.

With more initiatives serving several needs of users in one single product or service (see example below), it means this is more convenient and valuable to the user, as well as reducing the duplication of services in different verticals.

In addition, the maturity of mobile financial services has led to an increased number of products and services now offering mobile money payments. Pay-as-you-go (PAYG) solar is a significant example, with over 20 players now operating in this space, which depend on mobile money systems in order to offer affordable energy and water to low income communities.



Spotlight: Human Network International 3-2-1 – Madagascar and Malawi

The lack of timely, actionable information negatively impacts health and other development outcomes in countries like Madagascar and Malawi.

3-2-1 is an example of how one service can offer information on a range of topics for the varying needs of users.

3-2-1 is a mobile phone information service to prepare resource-poor individuals to take action on improving their health and well-being. The service can be accessed via IVR, USSD or SMS. People can retrieve information across a range of topics without the need for an internet connection.

To learn more see our recent case study on [HNI 3-2-1](#).

Madagascar



Launched October 2014

Offering users information on health, gender, agriculture, microfinance, water and sanitation, and emergency preparedness and first aid.

Malawi



Launched October 2014

Offering users information on health, gender equality, and agriculture.

6. M4D Impact - Programme Vision

Evaluation Services

Goal: To offer evaluation services (focused around analysing raw mobile customer usage data to improve uptake) to M4D Service Providers to help them address barriers to scaling crucial services to underserved populations in order to increase the social and commercial impact of these services.

Partnering with MNOs through Value Added Services (VAS)

Goal: To help close the knowledge gap between the international development community regarding how best to engage with MNOs and the mobile industry to partner to deliver M4D services at scale.

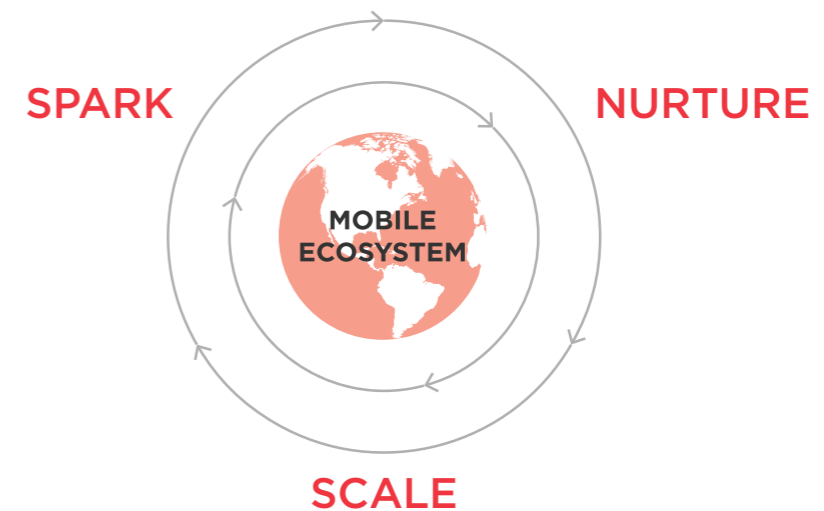
Local Content

Goal: To drastically increase the amount of locally relevant content available to consumers in emerging markets, work to ensure a more open internet for emerging markets who will receive it predominantly through mobile - which is currently dominated by mostly closed platforms.

Platform and Web Development

Goal: To provide a freely available, online resource that serves as a portal for all stakeholders in the M4D ecosystem. Thought leadership is provided through open access to data and insights to inform investment and design decisions, in order to drive scale and impact of mobile products and services in emerging markets

OBJECTIVES & OUTPUTS



Insights & Analysis

Market Trends,
Thought Leadership,
Data and intelligence

Community

Collaboration and
partnerships via
convenings





Mobile for
Development Impact

Questions? Feedback?
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