

Mobile Internet Connectivity 2019 Middle East and North Africa Factsheet



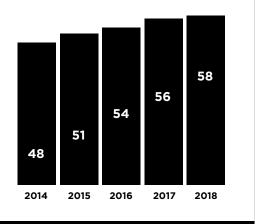
THE MOBILE CONNECTIVITY INDEX

There are now more than 3.5 billion mobile internet subscribers globally, representing 47 per cent of the world's population. In the Middle East and North Africa, the proportion of the population not covered by a mobile broadband network fell by more than half between 2014 and 2018 and now stands at 11 per cent. However, almost half of the population are not connected to the mobile internet even though they are covered by a 3G or 4G network.

The GSMA Connected Society's Mobile Connectivity Index (MCI) supports the mobile industry's commitment to connect everyone and everything to a better future by measuring the performance of 165 countries – representing 99 per cent of the global population - against the four key enablers of mobile internet adoption: infrastructure; affordability; consumer readiness, and; content and services. The data the MCI provides can help focus the deliberate and strategic efforts that are required by the mobile industry, governments and the international community to accelerate mobile internet uptake.

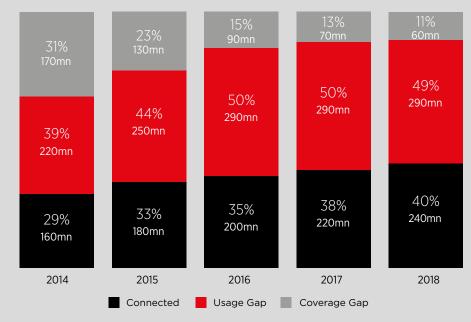
STATE OF MOBILE INTERNET CONNECTIVITY

Middle East and North Africa Mobile Connectivity Index Scores over time



The index is built up through 38 indicators feeding into 14 dimensions that are aggregated to give a score for each of the four enablers. Scores fall within a range of 0-100.





Source: GSMA Intelligence, 2018. 'Connected' refers to the number (in millions) of unique people who have used internet services on a mobile device. Mobile internet services are defined as any activity that consumes mobile data. 'Usage' gap refers to those who live within the footprint of a mobile broadband network but are not using mobile internet. 'Coverage gap' refers to those who do not live within the footprint of a mobile broadband network.

The GSMA Connected Society programme works with the mobile industry and key stakeholders to increase access to and adoption of mobile internet and all the benefits that it can deliver. Get in touch to find out more: **connectedsociety@gsma.com**



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KEY STATISTICS

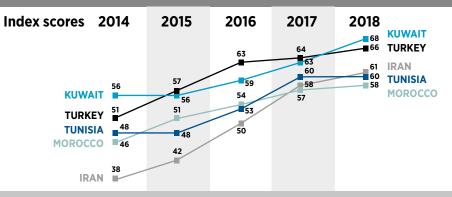
ucture	3G COVERAGE	4G COVERAGE	Content and Services	MOBILE SOCIAL MEDIA PENETRATION
Den Infrastructure	<u>87% 2017</u> 89% 2018	<u>51% 2017</u> 62% 2018		43% 2017 44% 2018
以 ら Affordability	Average Affordability of 1GB	₹ 2% 1.2%	adiness	MOBILE OWNERSHIP
	(% of monthly income)	2017 2018 33.4% 2017 17.1% 2018	36 Consumer Readiness	63% 2017 64% 2018

- Significant investments by operators have accelerated 4G coverage in recent years.
- Mobile continues to become more affordable, both in terms of data tariffs and device costs.
- Mobile internet adoption is not equitable – in low- and middle-income countries in the region, women are 20 per cent less likely than men to use mobile internet.
- Rural populations are 36 per cent less likely to use mobile internet than urban populations.

Highest Scoring Countries by Index and Enabler (2018)

Mobile Connectivity Index	((例) Infrastructure	≫ Affordability	PC Consumer Readiness	Content and Services
Israel	Oman	Israel	Bahrain	Israel
Kuwait	Qatar	Kuwait	Iran	Qatar
Qatar	Saudi Arabia	Qatar	Israel	Saudi Arabia
Saudi Arabia	Turkey	Saudi Arabia	Turkey	Turkey
United Arab	United Arab	United Arab	United Arab	United Arab
Emirates	Emirates	Emirates	Emirates	Emirates

Most Improved Countries (2014-2018)



	2014 Mobile Internet Penetration		2018 Mobile Internet Penetration	
KUWAIT	50%		53%	
TURKEY	37%		42%	
TUNISIA	35%		53%	
IRAN	32%		49%	
MOROCCO	25%		40%	

How does your country score? Visit: www.mobileconnectivityindex.com