Connected Society
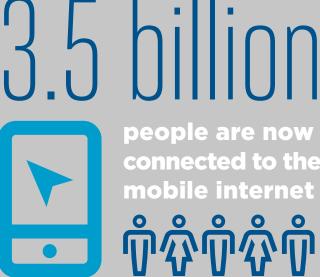## Delivering Digital Inclusion for All

The internet is connecting people to new opportunities and life enhancing services, driving economic growth and advancing progress towards the UN's Sustainable Development Goals.

For most of the world's population, mobile is the PRIMARY way to access the internet.

3.5 billion people are now connected to the mobile internet

Based on current trends, 40% of the population in low- and middle-income countries will still be offline by 2025.

Coverage gap

750m people live in areas that are not covered by a mobile broadband network.

Usage gap

3.3bn people live in areas that are covered by mobile broadband but are not using mobile internet services.

It can cost up to **2x** as much to deploy new base stations in rural areas with revenue expectations up to **10x** less than the urban equivalent.

Women are **20%** less likely than men to use mobile internet.

Policymakers have a key role to play in accelerating digital inclusion

Closing the coverage gap:
Our top 5 recommendations

1. Develop a policy and regulatory framework that is **clear**, **proportionate**, technology-neutral and **predictable** to encourage investments.

Did you know? The World Bank's Moonshot for Africa initiative report concludes that it will take $100 billion to reach all Africans with broadband by 2030.

Source: World Bank, "Digital Moonshot for Africa," 2019

2. Ensure timely access to the right amount and type of affordable **spectrum**, and under the right conditions, in particular by accelerating the release of sub 1GHz spectrum.

Did you know? Using spectrum below 1 GHz allows operators to cover from 2x to 2.7x more area than using 1800 MHz.

Source: ITU, "Radio aspects for the terrestrial component of IMT-2000 and systems beyond IMT-2000", ITU-R M.2074, 2006.

3. Reduce **red tape** and streamline approval procedures for mobile site roll-out, and facilitate non-discriminatory access to public infrastructure.

Did you know? OECD data shows that reducing red tape in the telecommunications sector can lead to savings equivalent to >5% of operators' annual CAPEX, enabling greater commercial investment in digital inclusion.

Source: GSMA, "Enabling Rural Coverage," 2018

4. Eliminate sector specific **taxation**, reduce any complexity and uncertainty in the overall tax framework, and introduce import duty exceptions on mobile infrastructure equipment.

Did you know? In the Mobile Connectivity Index, markets with higher tax uncertainty score lower on infrastructure provision; whereas rebalancing sector-specific taxes and regulatory fees can promote connectivity, economic growth, investment and fiscal stability.

Source: GSMA, "Rethinking mobile taxation to improve connectivity," 2019

5. Allow voluntary **infrastructure sharing** and only consider state intervention once all regulatory measures to maximise coverage through market driven mechanisms have been exhausted.

Did you know? Infrastructure sharing can reduce per operator costs of network coverage expansion by 50-80%.

Source: GSMA, "Unlocking Rural Coverage: Enablers for commercially sustainable mobile network expansion," 2016

Closing the usage gap:
Our recommendations to address the top 5 barriers to mobile internet usage

1.

Encourage greater accessibility of mobile internet by facilitating access to electricity to power handsets and power off-grid base stations, and by enabling all individuals to access formal identification.

Did you know? Globally 1.2 billion people lack access to electricity.

Source: World Bank, "Digital Moonshot for Africa," 2019

2.

Support greater affordability of mobile internet by removing sector-specific taxes which have an impact on the price of mobile devices and the costs of providing mobile internet.

Did you know? The top overall reported barrier to mobile phone ownership in low- and middle-income countries is handset cost.

Source: ITU, "Radio aspects for the terrestrial component of IMT-2000 and systems beyond IMT-2000", ITU-R M.2074, 2006.

3.

Invest in digital literacy and skills, for example by mainstreaming digital skills into school curriculums and by encouraging the use of mobile and digital public services across all levels of government and society.

Did you know? Among those who are aware of mobile internet, the lack of literacy and digital skills is the biggest perceived barrier to adoption.

Source: GSMA, "Enabling Rural Coverage," 2018

4.

Ensure a safe and secure online experience to all users by developing appropriate legal and policy frameworks that help to protect and safeguard digital infrastructure and data from cyber threats, recognise digital harassment, and make it easy to report online abuse.

Did you know? Women in many countries report feeling safer with a mobile phone[1] although in 74% of countries included in the Web Index, law enforcement agencies and the courts are failing to take appropriate actions in situations where ICTs are used to commit acts of gender-based violence.[2]

1. Source: www.gsma.com/mobilefordevelopment/wp-content/uploads/2016/02/Connected-Women-Gender-Gap.pdf
2. Source: https://webfoundation.org/research/womens-rights-online-2015/#fulldataset2019

5.

Encourage the development of relevant services showcasing the value of the internet, for example by making public services available online through eGovernment initiatives.

Did you know? Mobile phone ownership and internet access is associated with an improvement in how people rate their own lives.

Source: "The Impact of Mobile on People's Happiness and Well-Being," GSMA & Gallup, 2018.

Working with the GSMA Connected Society Programme

The Connected Society programme works with the mobile industry, tech companies, the development community and governments to increase access to and adoption of the mobile internet, focusing on underserved population groups in developing markets.

Insights and Tools for Policymakers

- **GSMA Mobile Connectivity Index:**

  How internet-ready is your country and how does it compare to others in your region? This index measures a country's internet readiness against four key enablers: infrastructure, affordability, consumer readiness and content, and covers 163 countries.

- **Mobile Coverage Maps Platform:**

  Where is coverage lacking in your country and how much investment is required to close the gap? Our coverage maps help operators and policymakers identify the most promising uncovered sites and understand where to target investments.

- **Capacity Building Course – 'Unlocking Rural Mobile Coverage':**

  What are policy best practices and where can you learn from other countries' experience in driving digital inclusion? This free course is certified by the UK Telecoms Academy and helps policy-makers keep pace with latest industry developments and regulatory best practices.

- **GSMA National Dialogues:**

  How can you engage local stakeholders around mobile-enabled digital transformation and drive action in your country? GSMA National Dialogues offer a structured platform for engaging key government ministries, mobile industry leadership and the development community to help countries achieve their SDG commitments and support digital transformation.

- **Innovation Fund for Rural Connectivity:**

  What are the innovations that can help to unlock rural connectivity? The GSMA Innovation Fund for Rural Connectivity demonstrates through private sector grants new models to encourage the development of innovative and commercially sustainable technology solutions to close the connectivity gap in rural communities.

- **Mobile Internet Skills Training Toolkit (MISTT):**

  How can you support digital literacy in your country? The MISTT offers a free set of resources, such as posters and videos, to help governments, operators and others develop digital literacy campaigns that seek to convey basic digital skills to citizens.