



The State of Mobile Internet Connectivity 2023

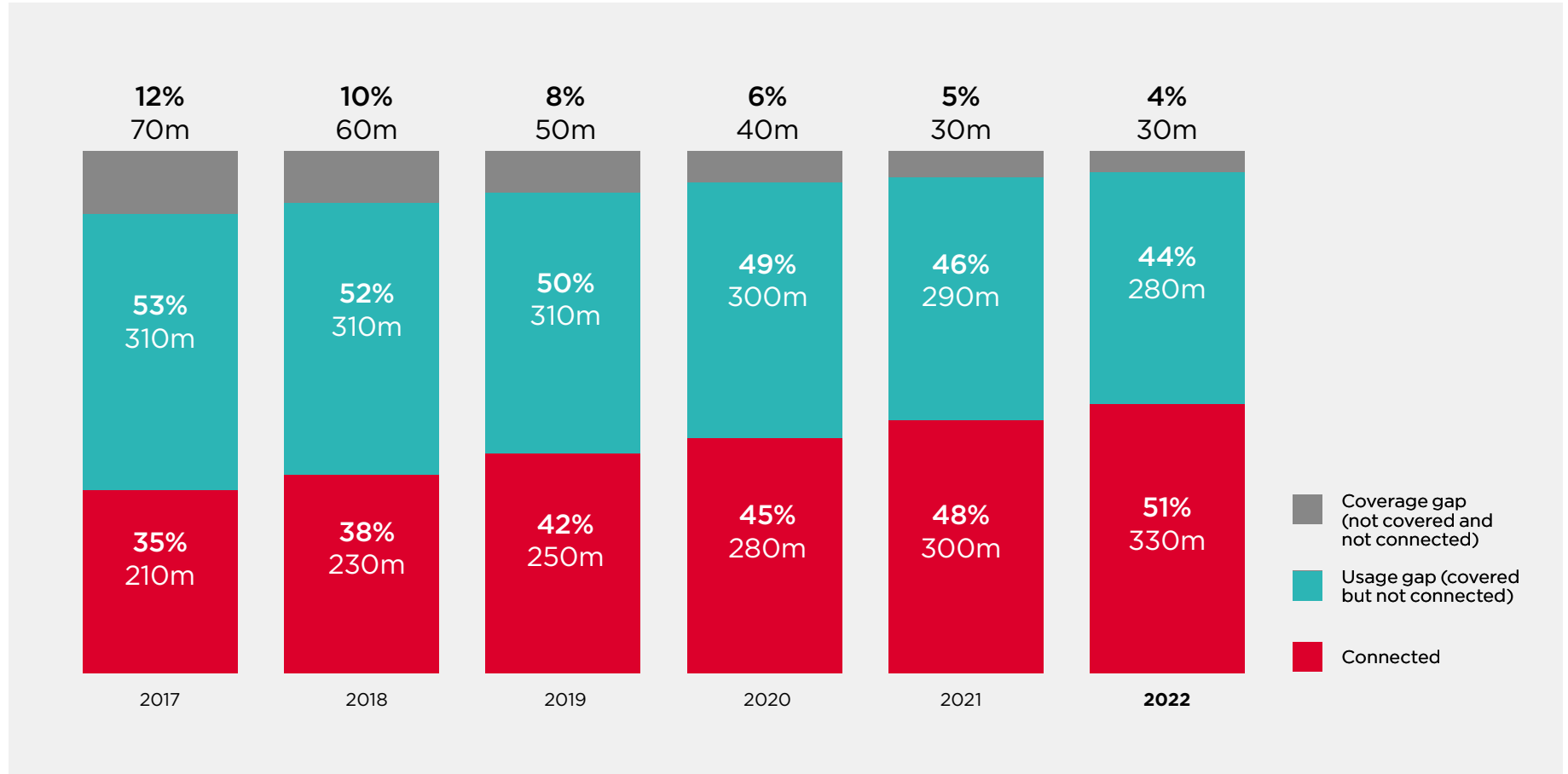
Middle East & North Africa
key trends

GSMA

Mobile internet connectivity in Middle East & North Africa

→ In 2022, almost 30 million people started using mobile internet in the MENA region. However, most of the growth in mobile internet adoption was in the high-income countries in the region.

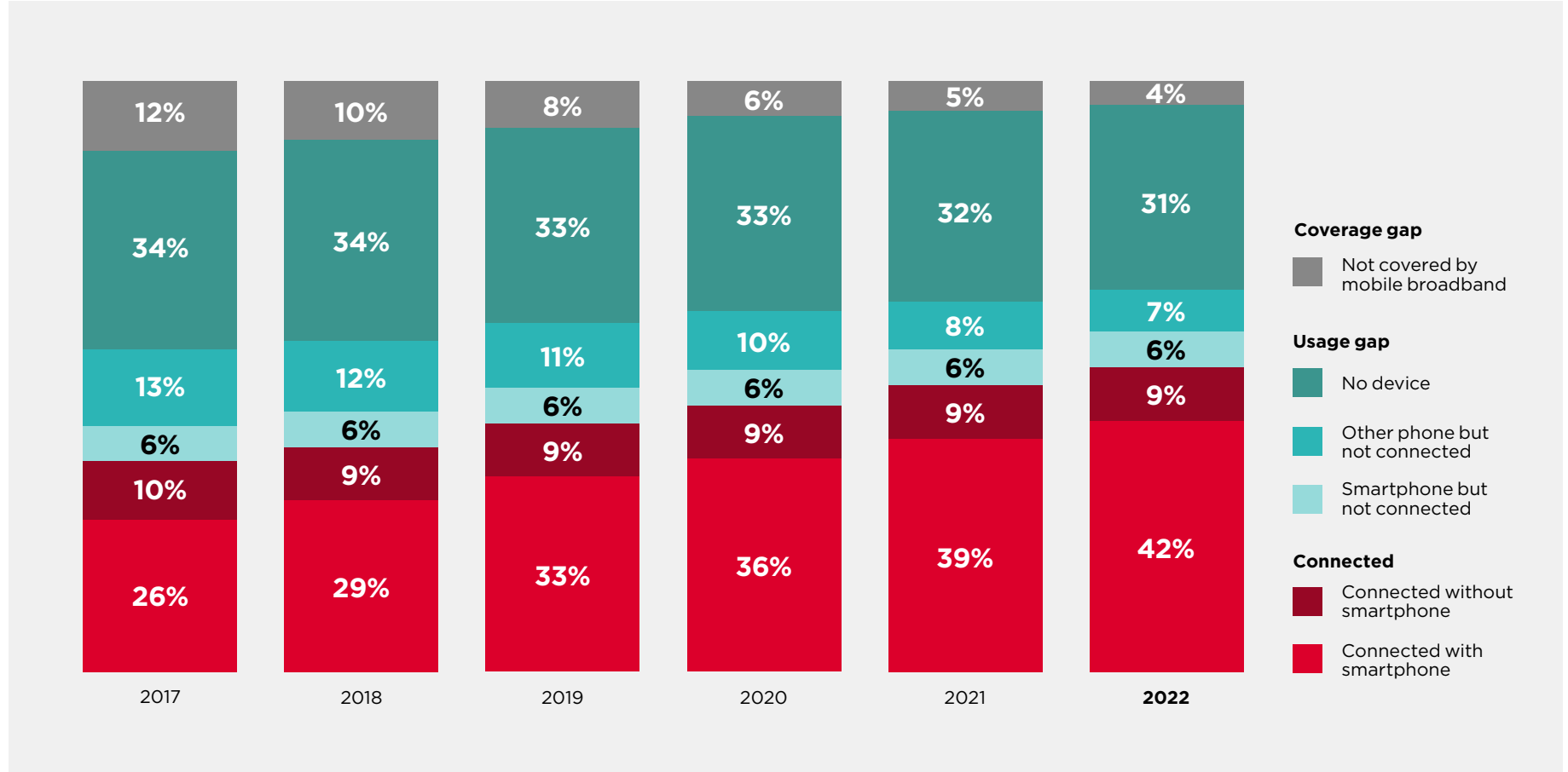
→ 44% of the population in MENA are living within mobile broadband coverage but not using it, and 4% of the population are not covered by a mobile broadband network.



Source: GSMA Intelligence. 'Usage gap' refers to populations that live within the footprint of a mobile broadband network but who are not using mobile internet. 'Coverage gap' refers to populations that do not live within the footprint of a mobile broadband network (3G or above). NB: totals may not add up to 100% due to rounding.

Mobile internet connectivity breakdown in Middle East & North Africa

- At the end of 2022, 42% of the MENA population were connecting to mobile internet via a smartphone.
- Almost one-third of the population in MENA lives within the footprint of a mobile broadband network but does not own a mobile.

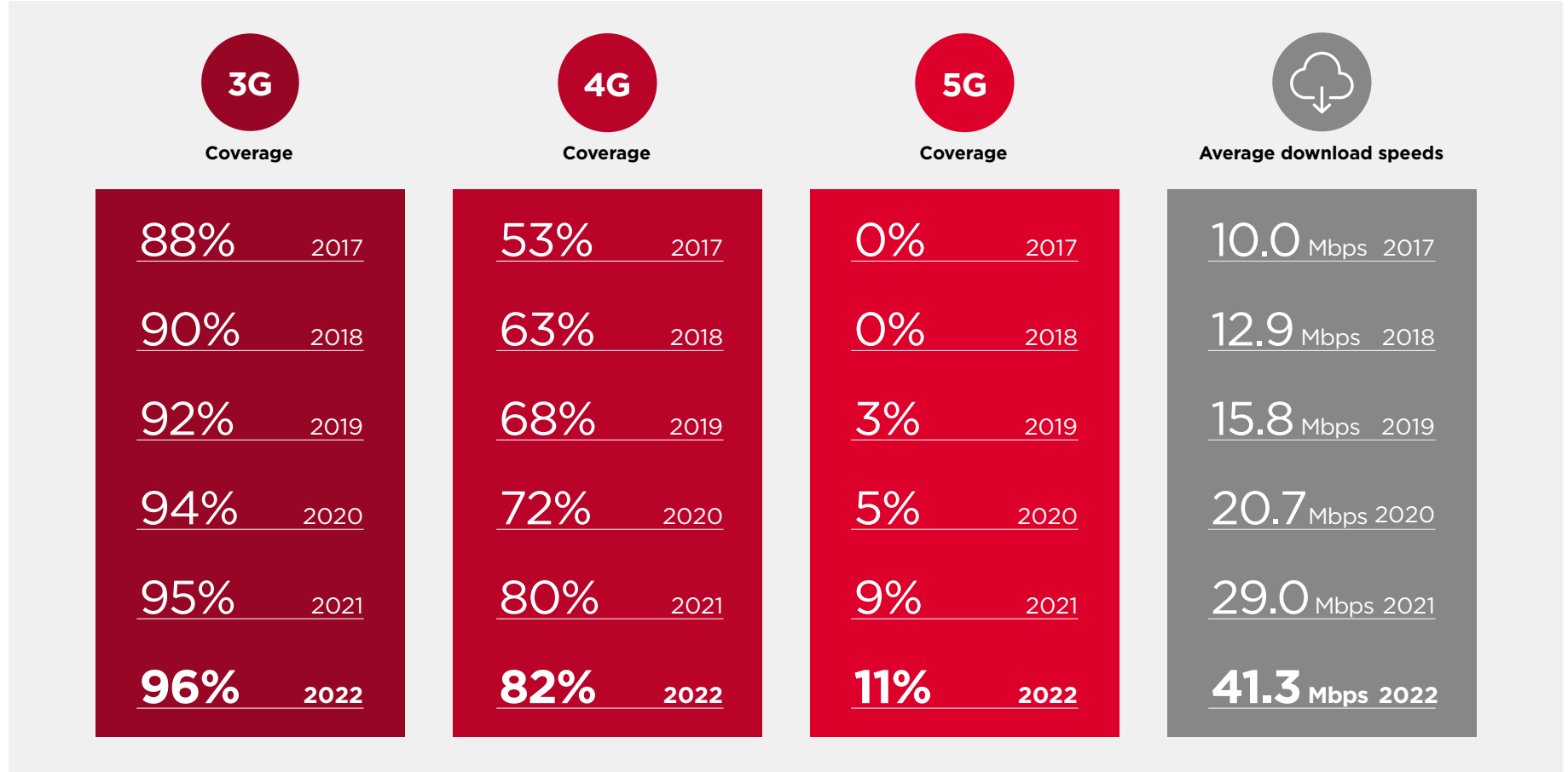


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Coverage and download speeds in Middle East & North Africa

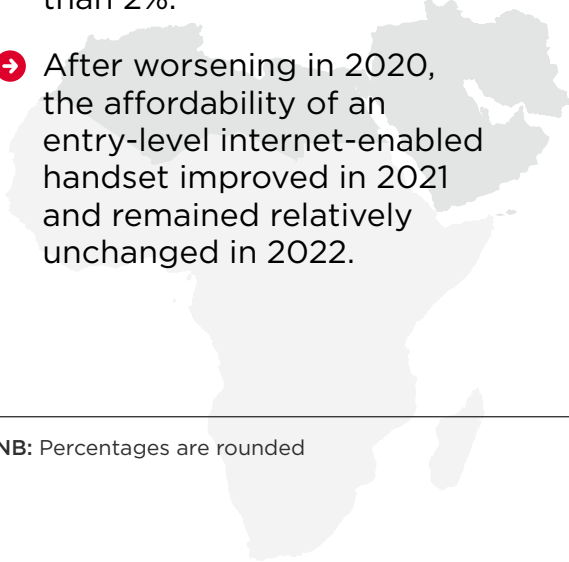
- Coverage of 3G, 4G and 5G have significantly increased since 2017, with the highest growth observed across 4G.
- Average download speeds have significantly improved from 10Mbps in 2017 to 41.3Mbps at the end of 2022.



Affordability of data plans and cheapest internet-enabled handsets across low- and middle-income countries in Middle East & North Africa

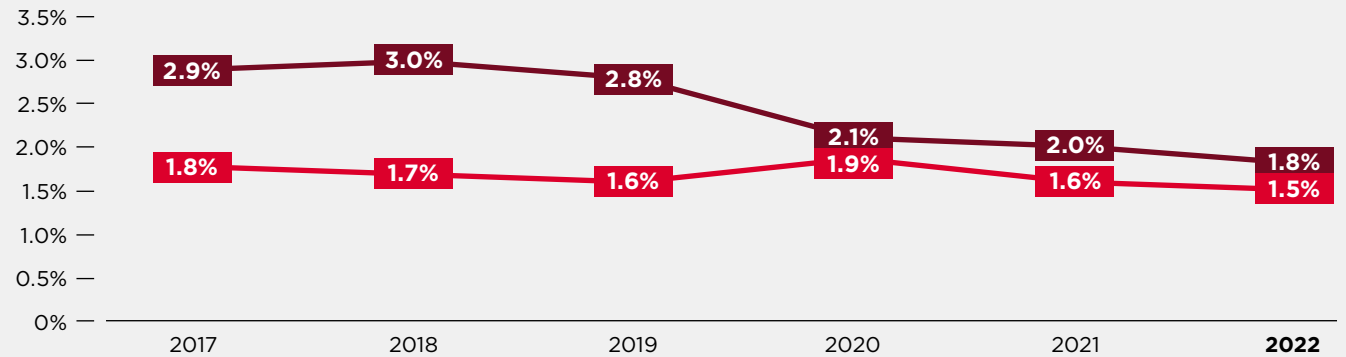
➔ Affordability of 1GB and 5GB of data bundles continues improving. In 9 out of the 16 countries for which there is data, the cost of 1GB of data is below the UN Broadband Commission affordability target of less than 2%.

➔ After worsening in 2020, the affordability of an entry-level internet-enabled handset improved in 2021 and remained relatively unchanged in 2022.

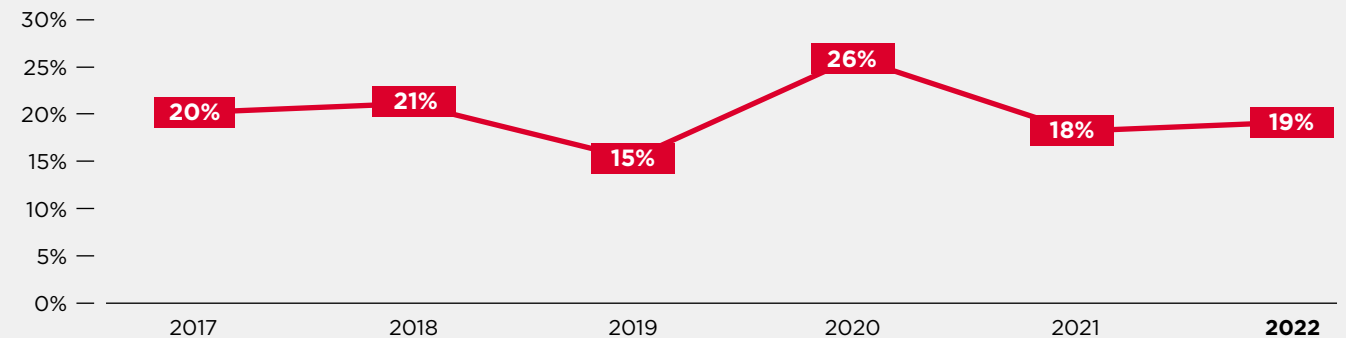


Cost of 1GB and 5GB of data as % of monthly GDP per capita

— 1GB
— 5GB



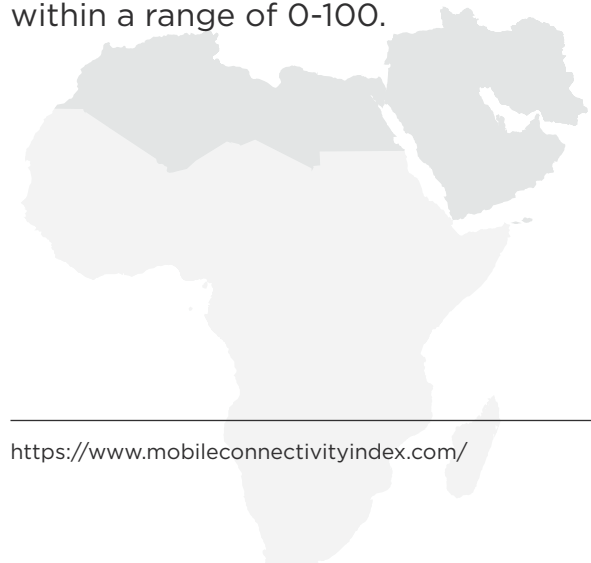
Cost of cheapest internet-enabled handset as % of monthly GDP per capita



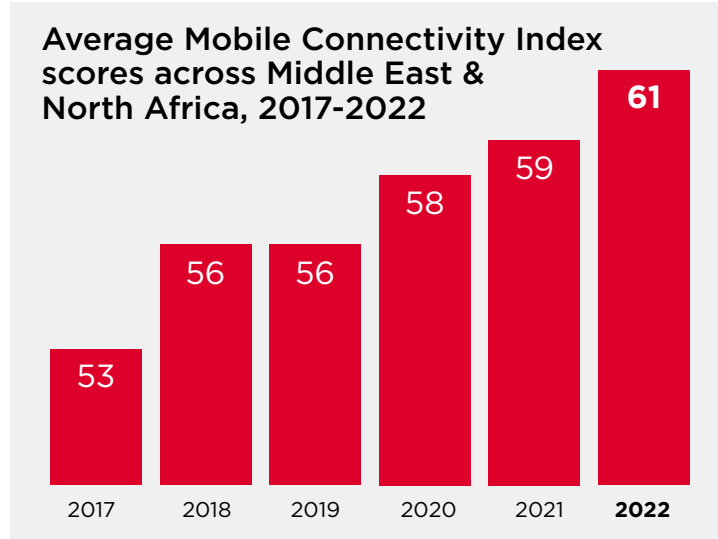
NB: Percentages are rounded

Middle East & North Africa Mobile Connectivity Index scores

The **Mobile Connectivity Index (MCI)** measures the performance of 170 countries against the four key enablers of mobile internet adoption: infrastructure; affordability; consumer readiness; and content and services. The index is built up through 32 indicators that are aggregated to give a score for four enablers. Scores fall within a range of 0-100.

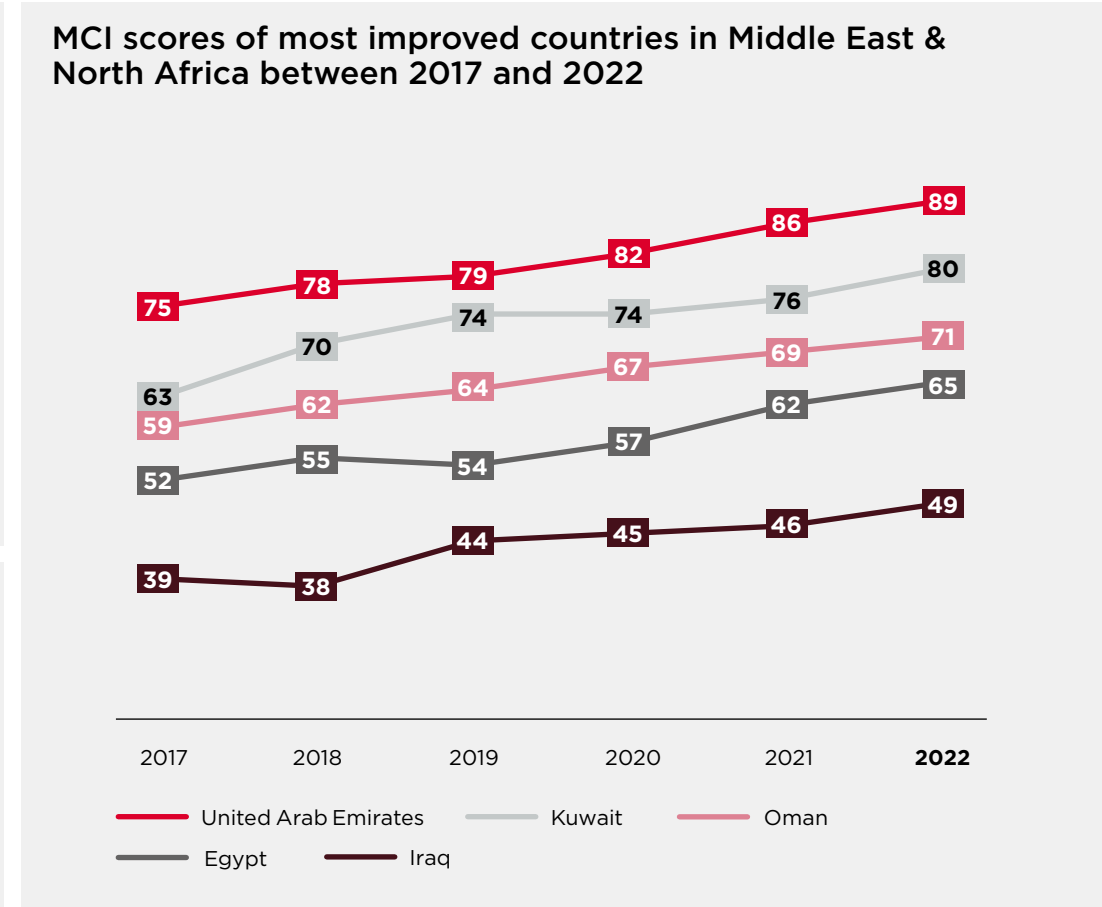


<https://www.mobileconnectivityindex.com/>



Countries at the top of the MCI in MENA in 2022

1	UAE
2	Qatar
3	Israel
4	Kuwait
5	Bahrain



GSMA

The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

We invite you to find out more at gsma.com
Follow the GSMA on Twitter/X: [@GSMA](https://twitter.com/GSMA)

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GSMA Connected Society

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

For more information, please visit
www.gsma.com/connectedsociety

To get in touch with the Connected Society team, please email connectedsociety@gsma.com

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GSMA Intelligence

GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide — from Afghanistan to Zimbabwe. It is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third-party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself. Our team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

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