Connected Society

Telenor's mobile internet training projects in India: raising awareness of the benefits from getting online

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About the GSMA

The GSMA represents the interests of mobile operators worldwide, uniting nearly 800 operators with almost 300 companies in the broader mobile ecosystem, including handset and device makers, software companies, equipment providers and internet companies, as well as organisations in adjacent industry sectors. The GSMA also produces industry-leading events such as Mobile World Congress, Mobile World Congress Shanghai and the Mobile 360 Series conferences.

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Connected Society

The Connected Society programme works with the mobile industry and key stakeholders to improve network coverage, affordability, digital skills and locally relevant content, in pursuit of the wider adoption of the mobile internet.

For more information, please visit
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Summary

In a market where mobile internet usage is at a nascent stage and only 35% of the population are online[1], offering digital skills training to consumers can be a key lever to accelerating mobile internet adoption and usage. In India, Telenor are focussing on customer education to raise awareness of the benefits from getting online via mobile.

To address the digital skills barrier the GSMA worked with partners in India to create the Mobile Internet Skills Training Toolkit (MISTT). The toolkit provides guidance and materials for conducting mobile internet training and was implemented by Telenor India as part of their customer education programme.

This 'snapshot' captures learnings from the pilot implementation of the MISTT in four of Telenor India's stores in Maharashtra State.

During the trial, Telenor India educated novice mobile internet users in their stores, using the visual and interactive training modules of the MISTT. Following the project implementation, the following recommendations can be made to organisations wishing to introduce mobile internet training programmes into their markets:

Key learnings for successful implementation of a mobile internet skills training programme – a mobile operator's perspective

- Training specific KPIs are a valuable driver for successful performance.
- 'Train the Trainer' sessions ensure trainers can confidently deliver training to their audiences.
- Incentives for trainers who deliver training provides staff motivation.
- Translation presents huge challenges that need to be integrated into the design phase.
- Make sure training programmes align with organisational goals and objectives.

"This is a very good initiative that aligns us with the Digital India mission of the government. By promoting internet through training modules like MISTT and Internet Iskool, new customers and first time users will find it easy to use the internet. Such initiatives help us prepare our subscribers for a digital lifestyle. I'm sure it will help the overall economy and the global society at large."

– Sharad Mehrotra, CEO, Telenor India Communications

[1]TRAI, 2016

1

The mobile market
in India
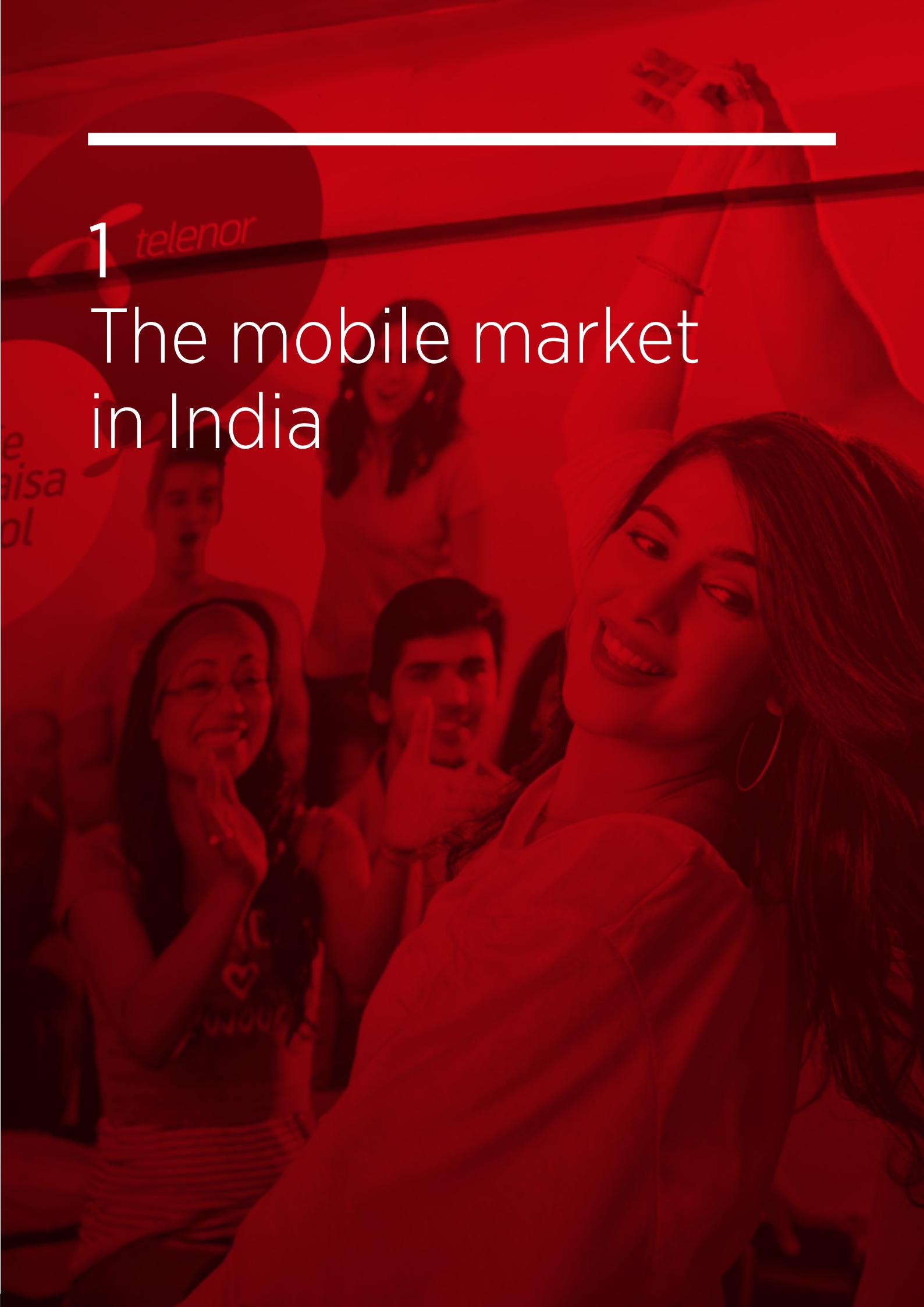
1. The mobile market in India

India is the world's second largest mobile market, with 412 million people subscribing to mobile internet, a figure that is expected to grow to 668 million - nearly half of the population, over the next four years. Moreover, by the end of 2016 India will be the second largest smartphone market in the world, with 320 million smartphone connections.[2]

Mobile broadband has seen limited roll out to date, with 3G and 4G connections accounting for only 20% of connections.[3] However, this will more than double by 2020.

FIGURE 01

Proportion of connection technologies used in India, as percentage of total connections.

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
4G	0%	0%	0%	0%	0%	0%	2%	7%	11%	16%	20%
3G	1%	3%	5%	7%	11%	15%	18%	21%	23%	26%	28%
2G	99%	97%	95%	93%	89%	85%	80%	72%	65%	58%	52%
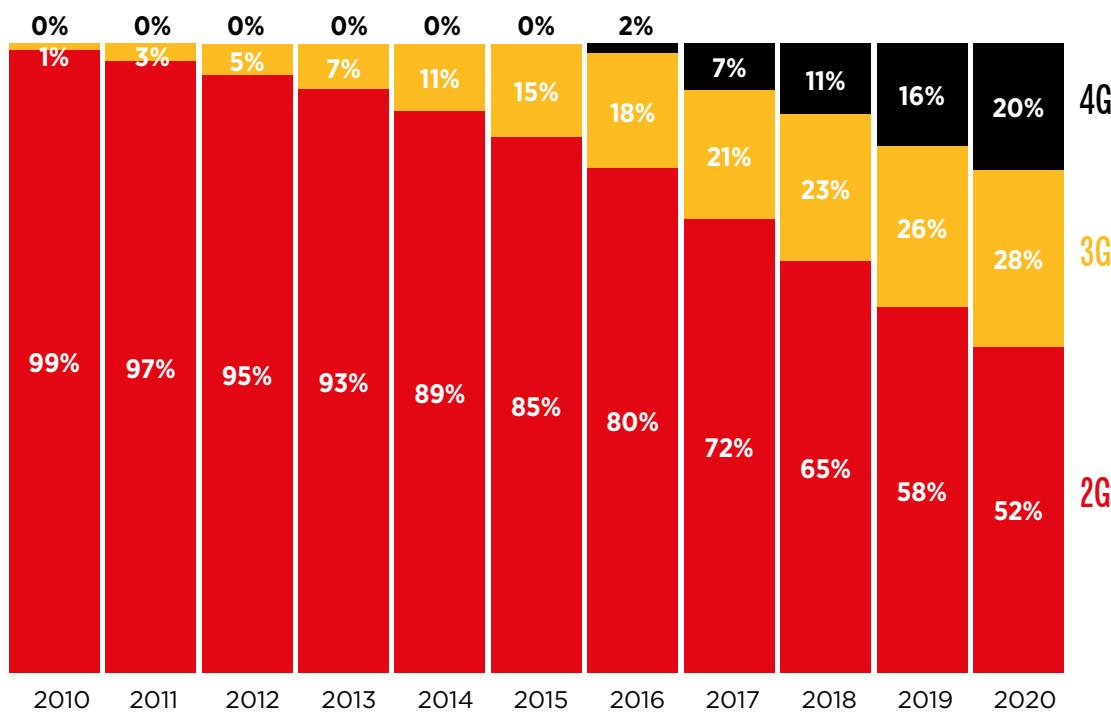
Source: GSMA Intelligence, 2016

While growth in mobile internet connectivity in recent years has been spectacular, less than half of the Indian population is currently connected to mobile internet. This is not primarily due to lack of network coverage. In India, 67% of non-mobile internet users are already covered by mobile networks.[4]

This group are not subscribing to mobile broadband services for other reasons.

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2. GSMA Intelligence, The Mobile Economy Asia Pacific 2016
3. GSMA Intelligence
4. GSMA Intelligence

FIGURE 02

Mobile broadband network coverage and subscription rates, as percentage of population.

Percentage of population

India	7%	67%	26%
Asia	27%	53%	21%

Subscribe to mobile broadband

Covered but do not subscribe to mobile broadband

Not covered by mobile broadband (3G + 4G)
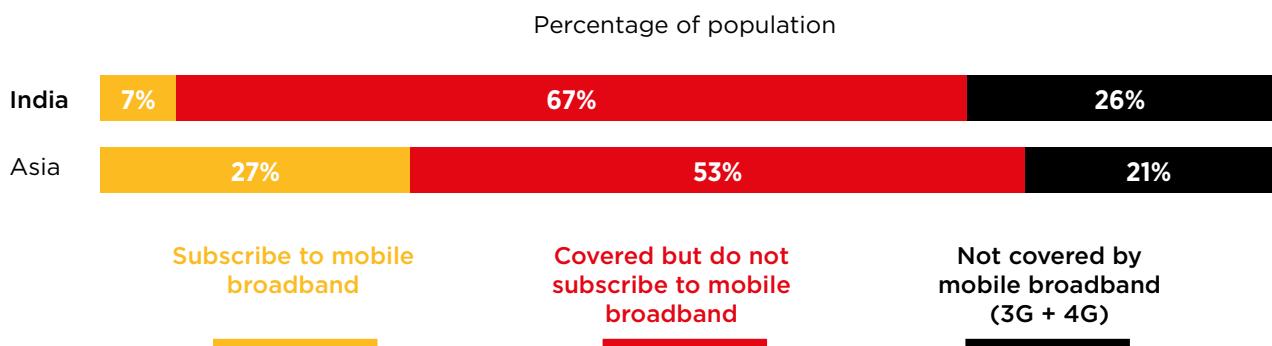
Source: GSMA Intelligence, 2015

2
The mobile
skills barrier

2. The mobile skills barrier

There are several barriers to mobile internet adoption in India; lack of awareness, affordability, and locally relevant content, plus privacy and security concerns being a few of them. The lack of relevant digital skills has also been recognised as a key barrier: 21% of non-users in India surveyed in the GSMA consumer survey perceived a lack of digital skills as the main hurdle to using mobile internet.[5] These findings resonate with the GSMA's Mobile Connectivity Index, which measures the barriers and enablers to mobile internet connectivity in markets.[6] India scores a low 42 out of 100 on the consumer readiness category of the index, compared to neighbouring country Myanmar who scores 60 out of 100, indicating a lack of awareness and necessary skills for people to come online via mobile in India.[7]

Digital skills has also been recognised as a crucial part of efforts to connect the unconnected. The UN's Sustainable Development Goal 4: Quality Education, has a sub-section - 4.6 that targets literacy specifically as a key lever to lift people out of poverty, and is intermittently linked to people's ability to adopt digital skills.

Recognising the relationship between low literacy and low digital skills levels, a Telenor employee recently developed a machine learning algorithm that predicts whether individuals can read or write by analysing their mobile phone records. The algorithm is currently 70% accurate and will help facilitate the mapping of areas with low literacy rates.[8]

Further, research by the GSMA Connected Women team has found that the problem of digital illiteracy is disproportionately affecting women. The team has identified a gender gap for mobile phone ownership in emerging markets at 14% and how women are lagging behind men in usage, especially of more sophisticated services like mobile internet.[9] Estimates by the ITU suggest women are 12% less likely to use the internet on mobile and fixed lines compared to men.[10]

Consequentially, it is essential to increase mobile internet literacy of men and women in emerging markets, in order to improve user readiness for adopting and using mobile internet services.

2.1 Vision of bridging the skills gap in India

In India, the Government has recognised the internet skills gap and are beginning to try to improve awareness and knowledge of internet services. In 2015 they launched 'Digital India'- their flagship digital inclusion programme with a vision "to transform India into a digitally empowered society and knowledge economy". One of the three core vision areas of the programme is universal digital literacy. Through its National Digital Literacy Mission, the government aims to make at least one person per household e-literate.

The government's vision of digital empowerment in India is shared by the mobile industry. A core pillar of Telenor Group's global strategy is 'Internet for All'. This aims to bring internet access to unconnected population targeting a total of 200 million active internet users by 2017.[11] In 2015 Telenor India began to provide dedicated spaces for customer engagement and education, with the aim to improve customers' mobile internet skills and their awareness of what is available online. As of June 2015, 26% of Telenor India's customers were active mobile data users; they aim to increase this to 50% by 2017.

5. GSMA Connected Society, GSMA Intelligence, 2016, Consumer Barriers to Mobile Internet Adoption in Asia
6. Indicators used include: literacy rate, mean years of schooling, tertiary enrolment, school life expectancy, and gender labour force-, income-, and literacy ratio.
7. Mobile Connectivity Index
8. MIT Technology Review, 2016, Mobile Phone Data Reveals Literacy Rates in Developing Countries
9. GSMA Connected Women, 2015, Bridging the gender gap: mobile access and use in low- and middle income countries
10. ITU, 2014, "The World in 2014: Global ICT Statistics"
11. Telenor Group, Internet for All

3

Addressing the lack of mobile internet skills in India

3.1 Telenor India and GSMA MISTT partnership

In order to address the lack of mobile internet skills in India (and elsewhere), the GSMA created the Mobile Internet Skills Training Toolkit (MISTT), aimed at helping mobile operators, Non-Governmental Organisations, development organisations and Governments, demonstrate to end-users the value of accessing the mobile internet. The toolkit provides guidance and materials for conducting user training sessions on mobile internet services.[12]

Having identified the need for this kind of tool, Telenor and the GSMA forged a partnership to test the MISTT in the Maharashtra State. Telenor India saw the value in the training approach of the MISTT, as a tool to reach unconnected populations with access to the internet. For Telenor, the primary objective of this partnership, was to raise awareness of mobile internet and its

benefits among its customer base. Presently, Telenor are predominately a 2G operator, so rather than focussing efforts in driving data revenue, they aimed to equip their loyal customer base with digital skills now, to enable them to make use of the mobile internet in the future.

3.2 Testing of the MISTT and trainer preparation

As part of the testing of the MISTT, several Telenor Trainers contributed their expertise to the development of the training materials and provided feedback on whether they felt these resources would be credible and usable in the field.

The first part of the testing workshops was a 'train-the-trainer' session, to rigorously test if the trainers had the right tools and resources to demonstrate the value and functionality of the internet on a mobile phone.

Creating this training environment for the trainers gave them the opportunity to understand how best consumers like to learn about new technologies, providing them with real-time examples, to impart to their network of trainers and support their tutelage as they provide training to customers at the store level.

This was followed by live testing workshops with the trainers and participants to test the modules and training materials were practical and easy to understand.

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12. For more information about the MISTT and to download the training material: gsma.com/mobilefordevelopment/programmes/connected-society/mistt

4
Telenor's pilot of the MISTT in India

4.1 Approach and planning

Building on the success of developing and testing the MISTT, Telenor India and the GSMA strengthened their MISTT partnership and developed a plan to integrate the MISTT into Telenor India's mobile internet training programmes. Telenor India is the first mobile operator partner to have implemented the MISTT in their market. Their journey of adopting the training toolkit and conducting customer training through a pilot in their retail stores, provide an example of applying the MISTT for other operators.

Telenor was able to leverage their experience of providing customer internet training at their customer education hubs across India. They knew lack of literacy and internet awareness were key problems throughout the country, particularly in peri-urban and rural areas.

It was decided to test applying the MISTT curriculum in a select number of the education centres. Four distributers in Pune, Maharashtra state, were selected to adopt the MISTT, based on the criteria of a respectable customer footfall and relatively high sale revenues. The internet education was provided free of charge both to first time and existing mobile internet users who wanted to improve their skills and level of usage.

The Telenor Trainers were equipped with the learnings from the train-the-trainer session at the MISTT testing workshops, and were responsible for disseminating training to the MISTT store owners. Train-the-trainer sessions could then be included within the Telenor India training schedule to prepare the Telenor India store owners with the skills needed to deliver MISTT training to their customers.

4.2 MISTT training launch

In June 2016, Telenor India launched the MISTT across the four distributers for a three months' pilot. The first day of customer training was held on the 10th of June, and was subsequently conducted on a weekly basis until the end of August, advertised through SMS blasts as well as to customers who came in to stores and were interested in improving their mobile internet skills. The SMS blasts were sent out one to two days in advance of the scheduled training days, to customers that Telenor India had identified as non-data users based on usage rates of no more than 0-50KB of data.
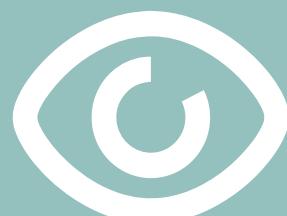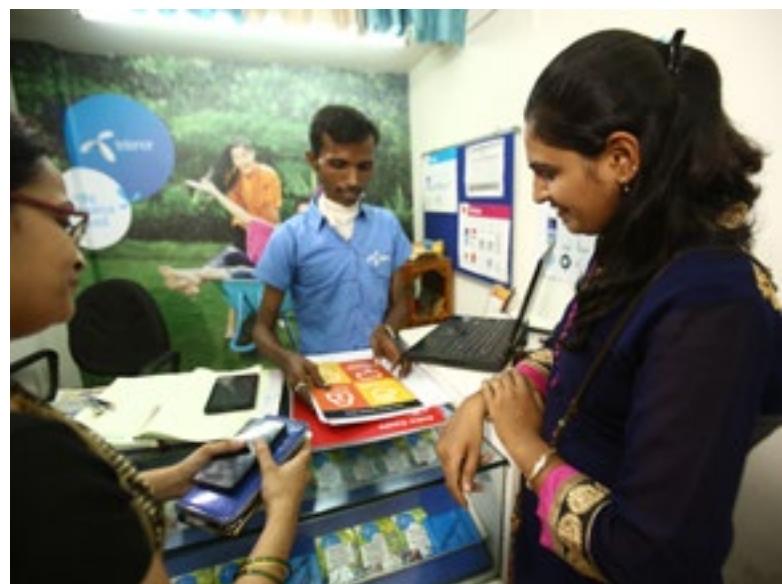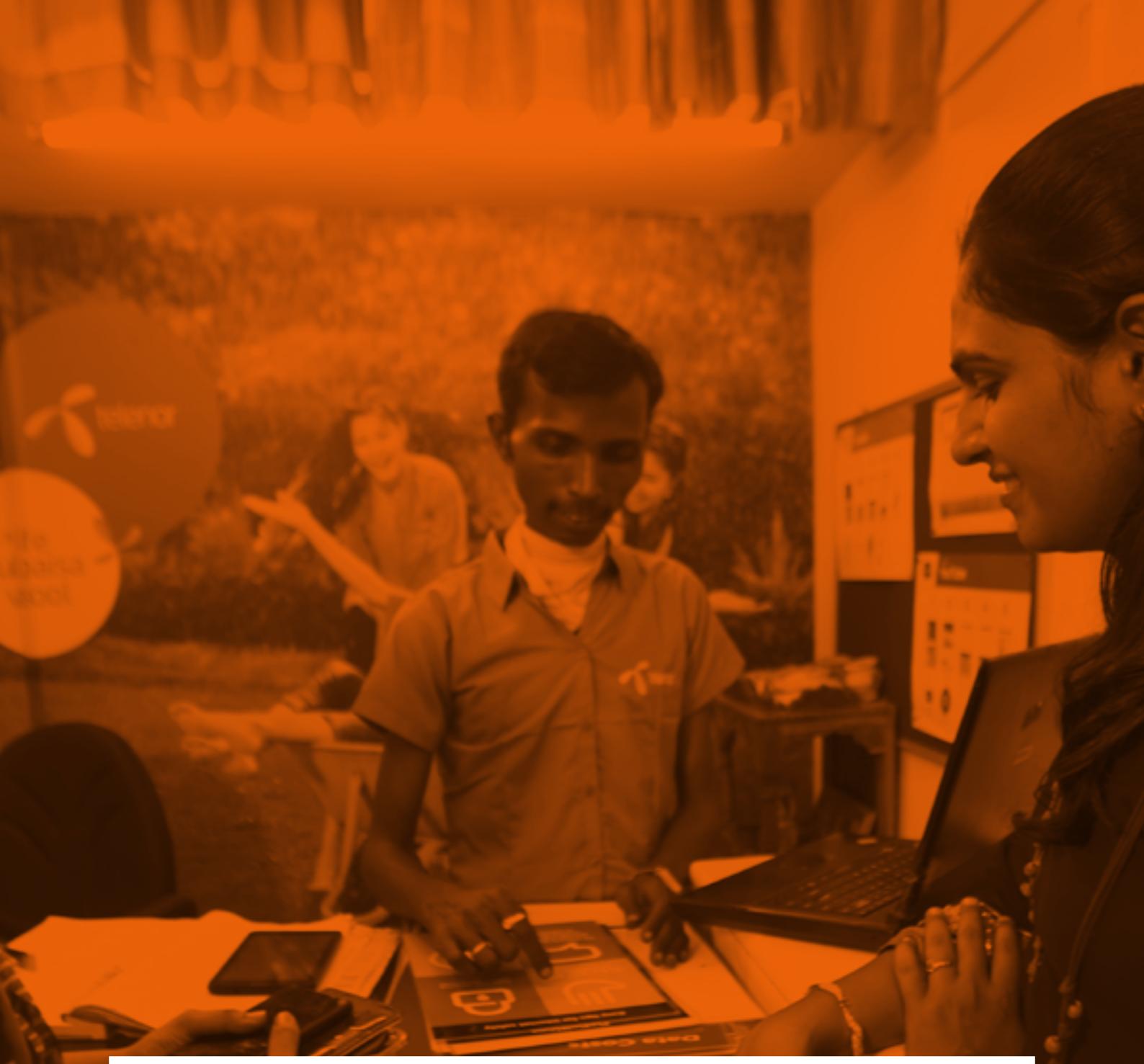
5
Insights

5. Insights

During the three months of delivering the MISTT training, the training material achieved its ambition of being a helpful tool in educating customers on the benefit of accessing and using the mobile internet. With limited literacy levels among Telenor India's more rural and peri-urban customer base, the visual training aids, i.e. 'how-to' posters and internet icons, used throughout training sessions, proved particularly impactful.

Further, Telenor India found that the MISTT training pilot was beneficial for brand awareness, as customers received an opportunity to improve their internet awareness and skills for free.

"At home, I will tell all my friends and family about this place and the teacher. I will tell them how this place has helped me learn about using Google so that they can also come and learn from this store."

- Female trainee

"I got to learn today that if I am not able to type, I can just speak to the phone app to get my list. I am very happy. I want to learn many more things myself and then I want to teach my family and friends."

- Male trainee

"The teacher was really good and he made it easy for us to understand. I really liked Google as it does not require any typing. Whatever we have to search for, we can click on the microphone icon and speak to get the necessary results."

- Female trainee

"I would like to learn more about the internet as it would help me with searching for jobs and other information such as sports information on cricket and football."

- Male trainee

The Telenor India and GSMA partnership proved to be mutually productive in the developing, testing and producing of the MISTT. During the pilot, the partnership continued to be a supportive collaboration with a robust working method open to ideas and dialogue.

Telenor India achieved their objective of raising awareness of mobile internet and its benefits across its customer base. During the three month pilot, training was delivered to an average of 7-10% of all customers frequenting the MISTT stores. With operators in India, including Telenor with focus on mass market customers, starting to extend 4G network access across the market, the benefit of preparing their customer base with the required digital skills will be key for mobile broadband uptake.

Telenor India therefore plans to take parts of the MISTT modules and integrate them into their digital skills training programme, Internet Iskool.[13]

5.1 Recomendations

- ■ **Assigning relevant training KPIs is a valuable driver for successful performance**.
  In order to ensure good results, training-specific KPIs should be embedded in the store trainer's general performance management. In addition, Telenor Trainers would benefit from KPIs around training the store trainers.

- ■ **Train the Trainer sessions ensure trainers can confidently deliver training to their audiences.** It is important to recognise that store sales agents are not necessarily educated in how to provide training. Agents providing mobile internet training need to be equipped with the right skills as trainers through dedicated 'Train the Trainer' workshops, to ensure standardised quality of training delivery.

- ■ **Integrating incentives for trainers to deliver training, provides staff motivation.** Providing agents with incentives for training delivery, elevates the training of customers to the same level of priority and importance as the sales of mobile services and products.

- ■ **Translation presents huge challenges that need to be integrated into the design phase.** Given the importance of getting the nuances and colloquialisms of language right, it is preferable that translation of training materials is owned by relevant local stakeholders and developed in conjunction with the main training materials.

- ■ **Organisational goals and objectives.** It is important to align training programmes with the company's vision, to ensure the right approach is adopted to reach target customer groups. Further, establishing resources and management buy-in for training programmes ensures smooth integration and implementation of programmes. Being open to course correction in the initial phase of designing and implementing training programmes, allows for the development of tools that are meaningful.

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13. Concurrently to working with the GSMA on the MISTT, Telenor India also created another mobile internet training programme called the Internet Iskool. The stores providing Internet Iskool days offer training on Google, WhatsApp, YouTube and Facebook as well as information on; how to pay bills on line, railway ticket booking and what an email account is. Post attending the training, the users are provided with free internet packs to encourage their use of mobile internet services.

To download the Mobile Internet Skills Training Toolkit please visit the GSMA website at www.gsma.com/mobilefordevelopment/programmes/connected-society/mistt

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