

Mobile: Powering Progress

Mobile is the engine of digital development

84%

of internet connections in low- and middle-income countries are delivered over mobile broadband

\$7.6tr

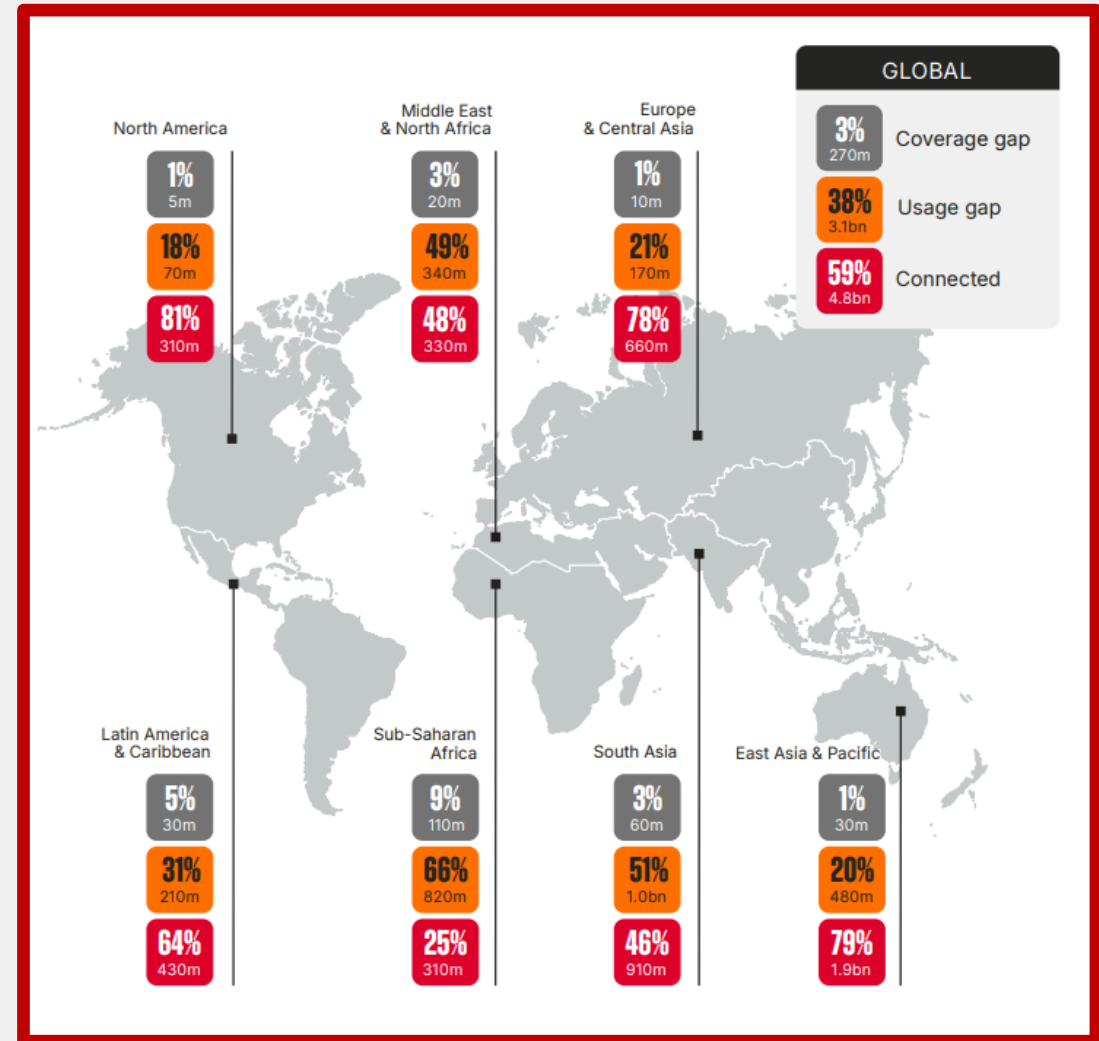
generated globally by mobile technologies and services in 2025

50m

jobs created and supported by mobile operators and the mobile ecosystem

\$800bn

contributed to public revenues in 2025



Sub-Saharan Africa

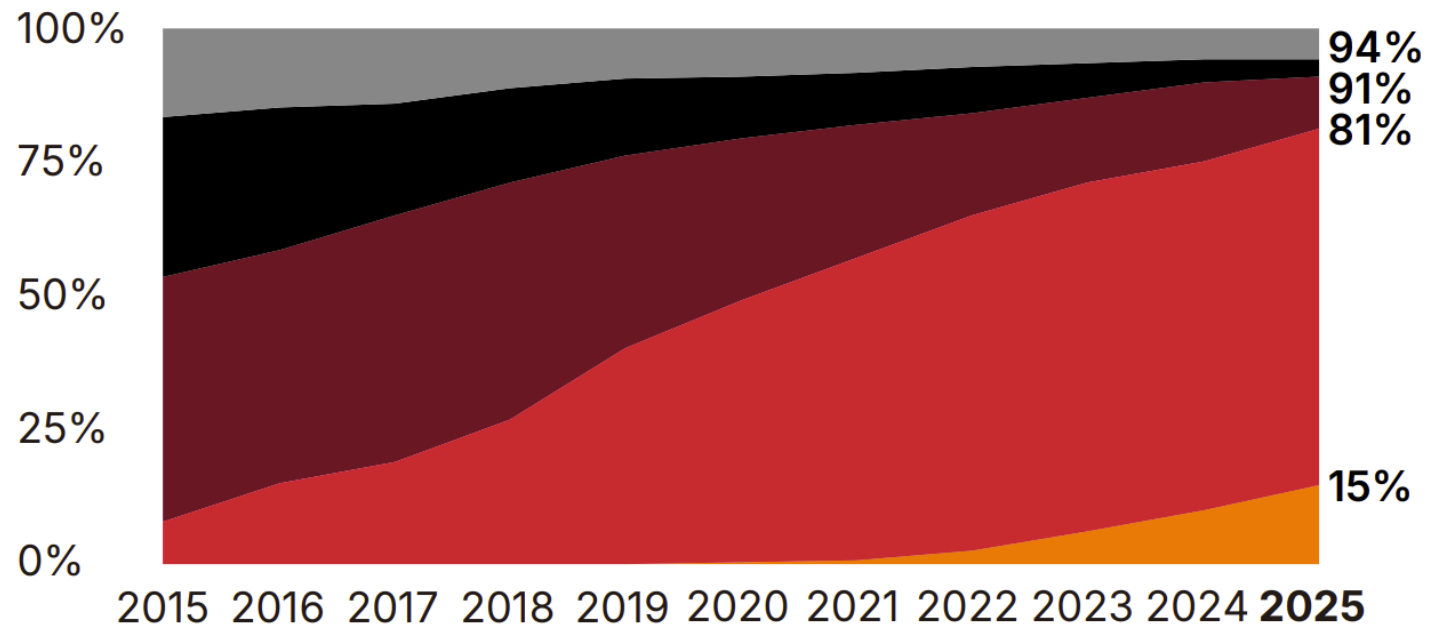
\$240bn

of economic value added to African economies by mobile technologies in 2025
– rising to \$290bn by 2030

\$45bn

contributed to public revenues in Africa in 2025

Sub-Saharan Africa



Sub-Saharan Africa coverage by technology, GSMA SOMIC Report 2026

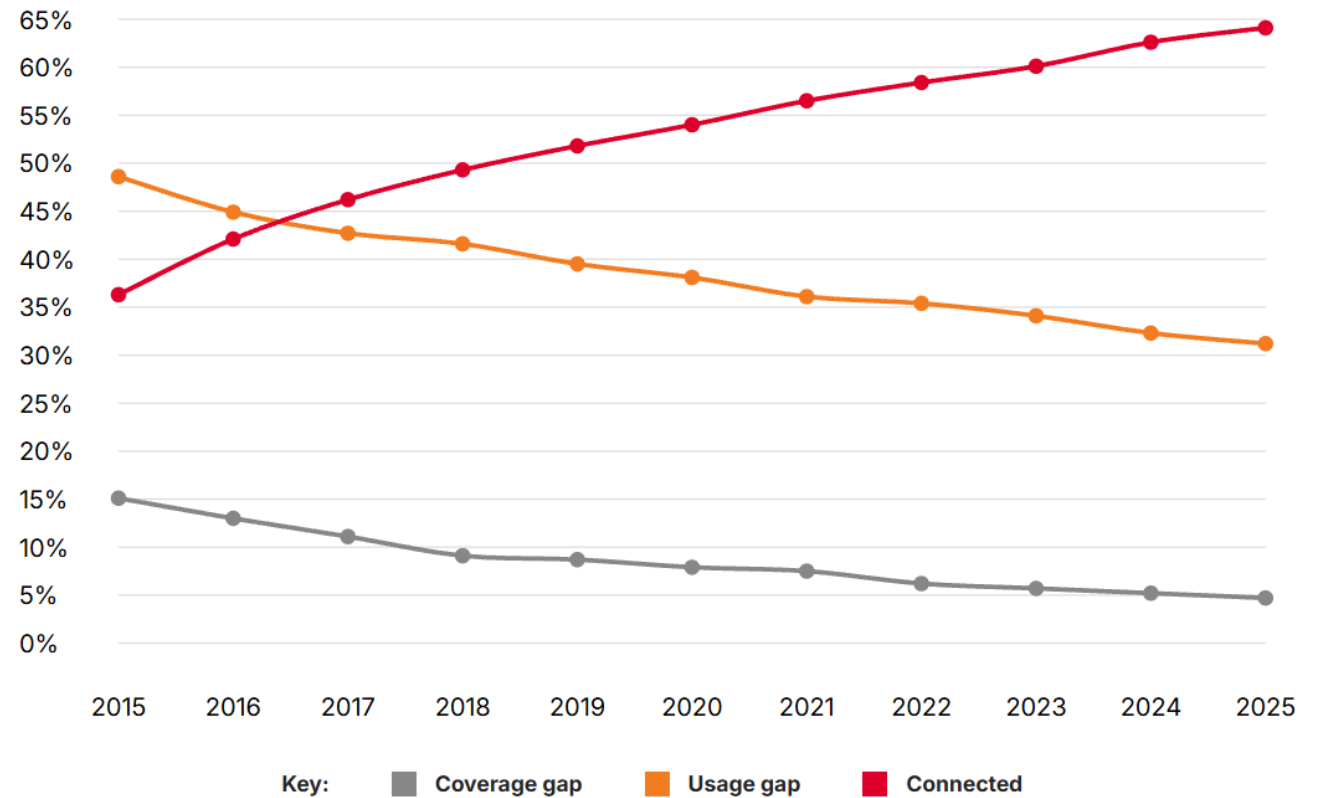
Latin America

\$600bn

of economic value added to LATAM economies by mobile technologies in 2025, forecast to reach \$700 billion by 2030

\$50bn

contributed to LATAM public revenues in 2025



Mobile internet connectivity in Latin America, GSMA SOMIC Report 2026

Asia and the Pacific

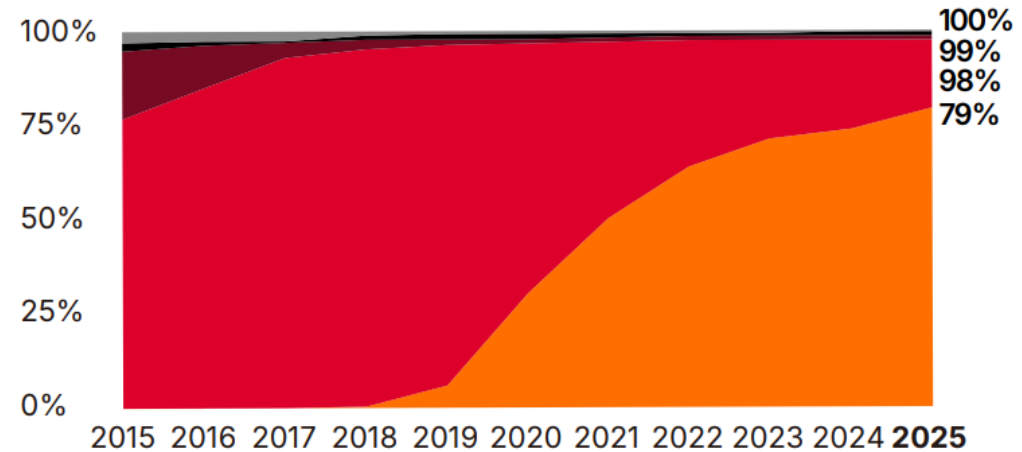
\$1 trillion

in economic value added to APAC economies by mobile technologies in 2025

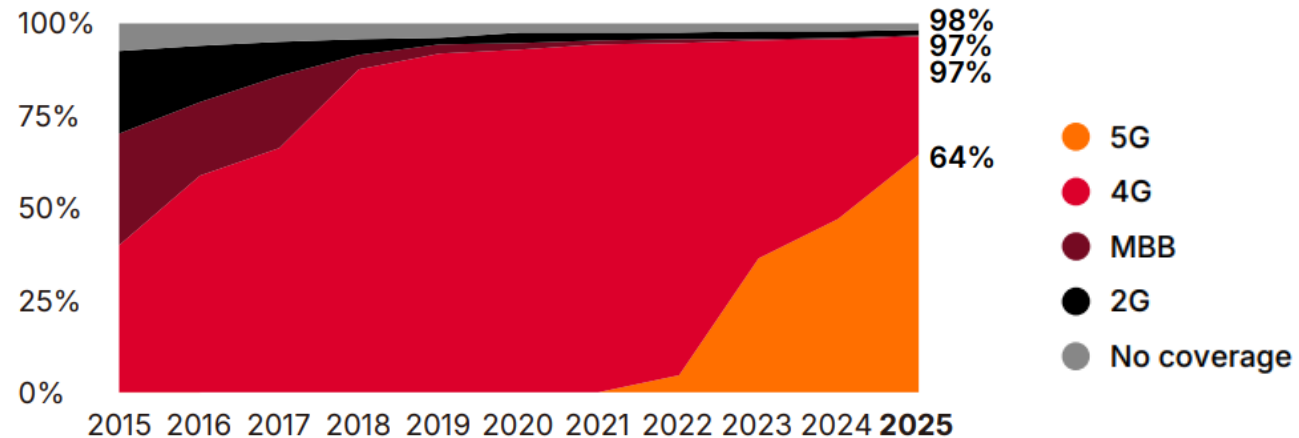
18m

jobs created and supported across the region by mobile operators and the mobile ecosystem

East Asia & Pacific



South Asia



The usage gap is now the biggest challenge

Globally, **3.1 billion** people live within mobile broadband coverage but do not use it – the **usage gap**.

Demand-side barriers need to be addressed to close the usage gap

1 Affordability (primarily of handsets)

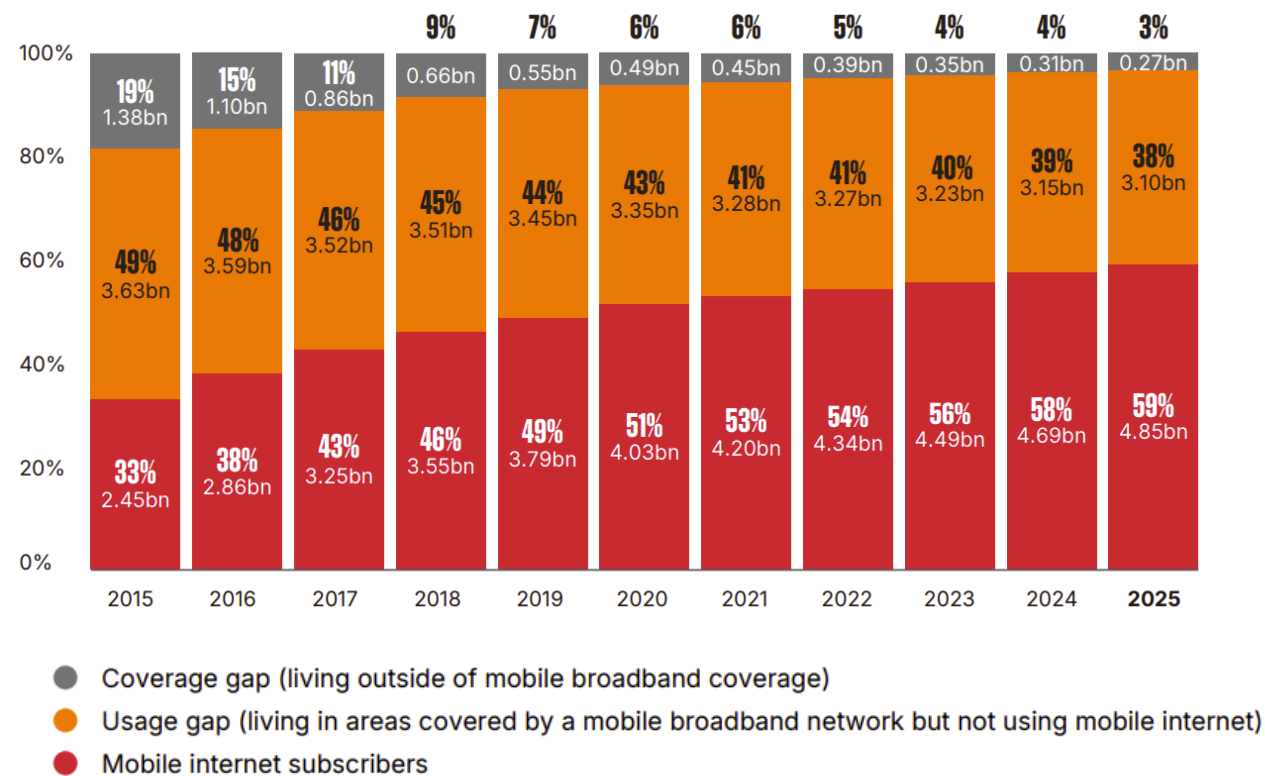
Device cost remains a top barrier

2 Literacy & digital skills

Users need the skills and capabilities to use the mobile internet.

3 Safety & security concerns

Trust and perceived risk can be a barrier to adoption.

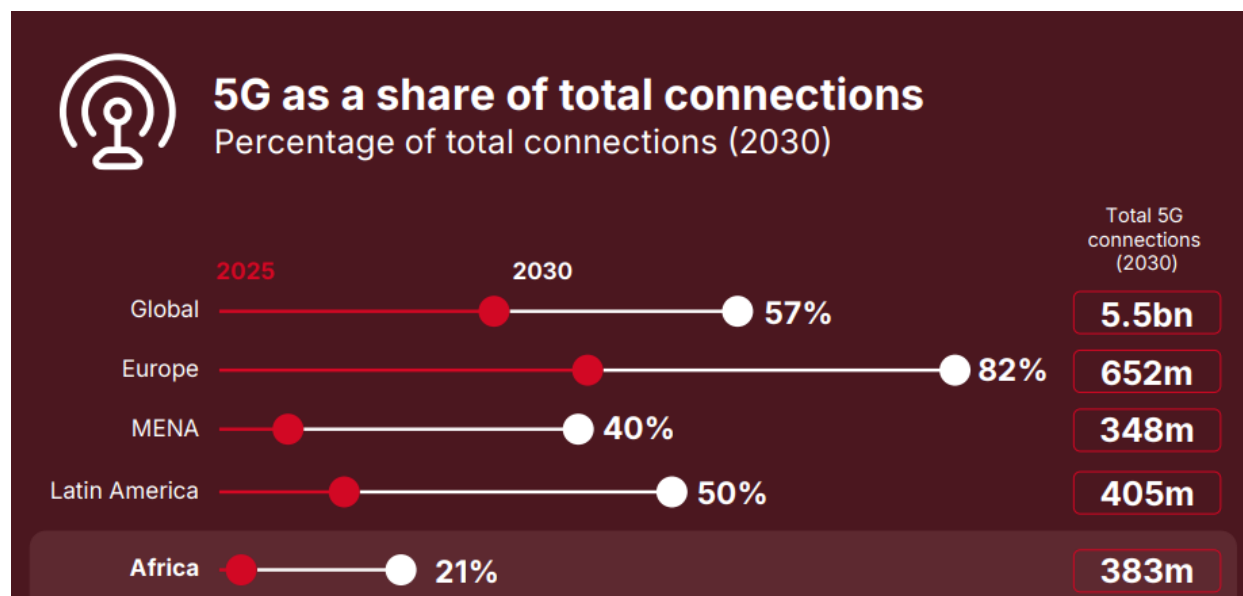


Global mobile internet connectivity, 2015–2025, GSMA SOMIC Report 2026

Creating an enabling environment for mobile deployment

High-quality, resilient networks are essential for accessing the benefits of digital innovation

Global mobile traffic is set to triple by 2030, driven by AI, video and data-intensive services. Meeting this demand requires networks that are high-capacity, adaptive and resilient to climate and cyber risks.



Global 5G coverage in 2030, GSMA SOMIC Report 2025

WHAT CAN POLICYMAKERS DO?



Streamline permitting

Simplify and digitise permit procedures — one-stop processes that cut rollout timelines and costs.



Accelerate approvals

Set statutory deadlines and deemed-approval rules for network infrastructure applications.



Remove deployment restrictions

Lift constraints on site access, rights of way and infrastructure sharing that hold back build-out.



Review sector-specific taxes

Rationalise levies and fees that inflate the cost of deployment and deter investment.



License for the long term

Provide predictable, long-duration licences that underpin sustained investment.

Satellite can help extend coverage – but cannot substitute for mobile

Satellite can add value



Extending network coverage

270 million people remain beyond the reach of any mobile broadband network today



Reaching the uncovered

Direct service in rural, remote and sparsely populated areas that terrestrial networks do not yet reach.



Making mobile ubiquitous

Backhaul that extends mobile coverage into remote and rural communities.

However...



The usage gap persists

It remains the biggest barrier to connectivity – more satellite coverage will not address it.



Satellite capabilities remain limited

Line of sight issues and capacity constraints remain persistent issues



Costs can be prohibitive

Cost-price equipment and subscription prices can put satellite out of reach for lower-income users.



Regulatory provisions should be based on the service provided to end-users, not the underlying technology – terrestrial or space-based. This applies to licensing, local legal presence, consumer protection, security and lawful intercept.

Sound policies can enable terrestrial/space integration

- Outdated satellite regulatory frameworks can be challenging for terrestrial operators seeking to integrate space capabilities in their networks
- Technology neutral regulatory approaches - based on service provided to end-users, rather than on underlying technology- can facilitate integration and preserve investment
- This applies to licensing, local legal presence, consumer protection, security and lawful intercept



Managing spectrum to drive investment and growth

Support mobile coverage in rural areas

Sub-1 GHz signals travel far and penetrate buildings, cutting the cost per person covered.

Assigning low bands to mobile is the single biggest lever for affordable, high-quality rural service.

Ensure networks can carry the AI economy

Data-intensive, AI-driven services will triple traffic by 2030.

Releasing sufficient mid-band spectrum lets networks keep pace without congestion, supporting innovation and competitiveness.

Provide certainty to sustain investment

Satellite services (including D2D) increasingly seek access to the same bands as mobile networks.

Policymakers should enable that innovation – but on terms that preserve operators' incentives to keep investing in terrestrial deployment.

Policy priorities for universal, meaningful connectivity

1

Addressing the Usage Gap

Address the demand-side barriers to digital inclusion – above all device affordability and digital skills – that prevent 3.1 billion people from using the networks already available to them.

2

Enabling Network Deployment

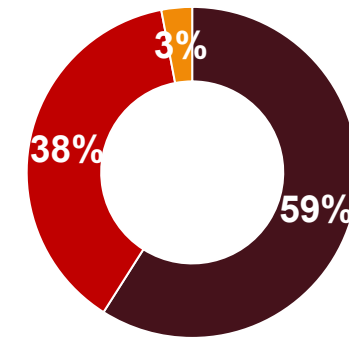
Adopt evidence-based, forward-looking policy approaches that protect the environment on which network investment, expansion, resilience and quality depend.

3

Managing Spectrum Effectively

Assign and manage spectrum efficiently so mobile networks can keep connecting billions of people and sustain surging traffic demand and innovation.

■ Connected ■ Usage gap ■ Coverage gap



Global connectivity in 2025, GSMA SOMIC Report 2026

\$3.5tn

added to global GDP by bridging the digital divide by 2030 - with over 90% flowing to LMICs

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