



m-POWERING
DEVELOPMENT
INITIATIVE



mPowering Advisory Board: Advocacy Working Group

Friday 2nd February, 2017



Foundation

Advocacy Working Group Session

- **Session Objective**
 - Agree top-level messaging framework
- **Agenda**
 - Introduction and overview
 - Presentation on GSMA Advocacy
 - Review and refine top-level messaging points
 - Wrap up and next steps

Connecting the World's Populations

Key message

3.2 billion people are online through mobile, directly benefiting from and contributing to the digital economy. Around 4 billion people remain offline, unable to participate and unaware of the opportunities.

Data points

- More than 60% of the world's population now has a mobile subscription, up from just one in four people 10 years ago.
- The number of individuals accessing the internet over mobile devices has doubled over the past five years to 3.6 billion, and will rise to 4.7 billion, equivalent to 60% of the global population, by 2020.
- 50% of the world's population is within the reach of a 4G network and 84% are covered by 3G. Despite this, there is a connectivity gap of 3.8 billion people who remain offline and excluded from participating in the digital economy and unreachable by e-government services.

Digital Identity

Key message

Proof of identity is a prerequisite to socio-economic development and essential to accessing basic services. Mobile can provide a scalable and trusted solution to providing a unique and secure identification leading to greater social, political and economic inclusion, bringing visibility to the people and places where it matters most.

Data points

- It is estimated that, globally, more than 1 billion people do not have access to formal identification, with India and sub-Saharan Africa alone accounting for around 900 million.
- There are an increasing number official digital identity systems being used or mandated by governments, including in Uganda, Nigeria (15 million births registered), Tanzania, Senegal and Pakistan, where mobile network operators are partnering with government and organisations such as UNICEF to provide mobile solutions to address the identity gap.

Mobile Financial Services

Key message

The mobile industry is bringing affordable and scalable mobile financial services to a growing number of previously unbanked and underserved people across the developing world. Mobile money offers customers more secure and convenient ways to send and receive money and make payments, and provides customers with greater financial inclusion and economic empowerment.

Data points

- Mobile money is now available in two-thirds of low and middle income countries.
- Registered accounts surpassed half a billion in 2016.
- Mobile money providers are processing an average 30,000 transactions per minute, or more than 43 million per day
- In Sub-Saharan Africa, there were 277 million registered accounts in December 2016 – more than the total number of bank accounts in the region.

Rural Communities

Key message

38% of the people in the world do not yet have a mobile subscription, and most of these unconnected people have low incomes, live in rural regions of Asia and sub-Saharan Africa, and make up the majority of the 4.2 billion not yet on the internet. Governments share the responsibility, with industry, to enable a digital future for all, and this is dependent on mobile broadband connectivity as well as value-added services that empower and lift the lives of the underserved.

Data points

- Despite rapid urbanisation over the past few decades, there are currently 3.4 billion people living in rural areas, 3.1 billion of whom are in developing countries.
- Mobile networks cover 90% of the global population, delivering at least a 2G signal to 4.6 billion unique mobile subscribers.
- By 2020, 65% of mobile subscribers will have mobile broadband service. Despite this, there remains a significant number of people who live in a coverage gap, 10% lack 2G access (and therefore lack access to voice and SMS) and 22% lack 3G or better connectivity.

Women and Mobile

Key message

Mobile can unlock a substantial market opportunity for women, delivering significant socio-economic benefits, and transforming lives. In today's increasingly connected world, women are being left behind. A significant gender gap in mobile phone ownership, and usage, in low and middle income countries is hindering growth for the mobile industry and means women are missing out.

Data points

- Women in low and middle income countries were 14% less likely than men to own a mobile phone – and 38% less likely in South Asia
- Ensuring women in low- and middle-income countries own and use mobile phones on par with men could unlock an estimated \$170 billion market opportunity for the mobile industry over the period 2015-2020.

Young People and Mobile

Key message

Mobile is a great enabler of children's rights – for example, enabling access to new and richer opportunities for education, to access and share information, as well as to relax, play and take part in a wide range of cultural and artistic opportunities. It is vital that we empower young people with the skills and knowledge to manage this power and use it in a sensible and enriching way.

Data points

- Of the next billion users connecting to the internet, it is estimated that 300 million of them will be children.
- Children have the right to learn and to access information, they have the right to be heard and the right to peaceful assembly. All of these rights, and many more, can be enabled through mobile services and the internet.

Economic Impact

Key message

Mobile technology has had a profound and positive economic impact on developing economies, generating GDP growth, employment, value-added services and substantial contributions to government revenues. If policymakers and regulators encourage investment, competition and innovation, the digital economy will expand, generating prosperity, opportunity and employment.

Data points

- Internet access could account for as much as 10% of total GDP – equivalent to US\$300 billion - by 2025 and up from only 1% today.
- Mobile broadband connections will account for more than 70% of the global base (excluding cellular M2M) by 2020.
- The developing world—driven by the increased affordability of devices—that will produce most of the future growth, adding a further 2.6 billion smartphone connections by 2020.
- The mobile ecosystem directly employed nearly 17 million people in 2015, rising to over 20 million by 2020.
- In 2016, approximately US\$450 billion in taxes was contributed by the industry. In addition, almost \$19 billion was raised in government revenue through spectrum auctions in 2016.

Mobile and Utility Services

Key message

In emerging markets, many people cannot access basic utility services that are essential to life. The coverage of mobile connectivity is greater than the coverage of basic utility services, such as electricity, improved drinking water and improved sanitation facilities.

Data points

- The slow growth of energy, water and sanitation access (between 1% and 2% per year for energy) compared to the rapid expansion of GSM mobile networks (approximately 11% per year) mainly in rural locations, has widened the gap between access to mobile and access to utility services.
- Ineffective billing and payment collection in the energy sector accounts for an annual loss of US\$500 million.
- Some 40% of people using infrastructure services do not pay for them, including 20% of the most affluent customers.

Emergency Response

Key message

From natural disasters to complex humanitarian emergencies, mobile technology can be a vital tool for those impacted by crisis. Multiple examples, from the 2015 earthquake in Nepal, to the ongoing refugee crisis in the Middle East and Europe, highlight the critical role of mobile networks and the communication and access to information they facilitate.

Data points

- 75% of refugee households already have a phone, and the most significant function of a phone is for connecting them to friends and family
- NTT Docomo has operated the Area Mail Disaster Information Service since 2008, broadcasting earthquake and tsunami warning messages and evacuation information issued by national and regional public institutions.
- In Nepal, Ncell provided free services to those in affected areas following the 2015 earthquakes, to ensure they could communicate with loved ones.

Mobile and Education

Key message

The use of mobile technologies in education can make learning and assessment more personal, collaborative, convenient and engaging for learners, while improving their attendance and learning outcomes. Institutions benefit from more flexible delivery of education, reduced costs, better communication with students, teachers and parents and better results.

Data points

- 15–17% of titles at the major app/eBook/audio stores are education-related. Education is the second most popular download category behind games.
- Africa has the highest mobile learning growth rate in the world with a five-year compound annual growth rate (CAGR) of 38.9%.
- \$8,000–\$12,000 savings in tuition fees per family via technology-enhanced learning in South Korea.
- In developing regions, mobile education could provide 180 million children the opportunity to stay in school.