



Expanding Mobile Coverage Partnerships for a Connected Future

93%



of world's population is covered by Mobile Broadband

Mobile Broadband now connects

4BN

PEOPLE TO THE INTERNET¹



4BN

MORE PEOPLE ARE NOT CONNECTED BUT

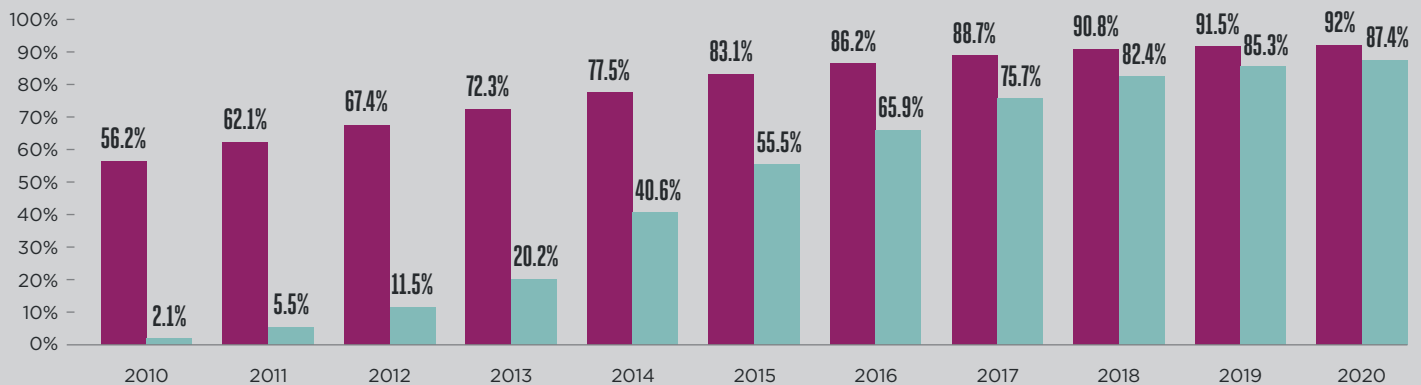


3.4BN

LIVE WITHIN MOBILE BROADBAND COVERAGE

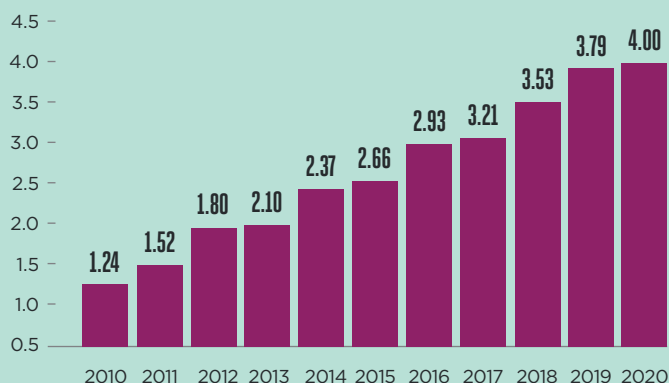
Global mobile broadband coverage
(% of population)

■ 3G network coverage by population
■ 4G network coverage by population



GSMA Intelligence (2020 figures estimates)

Unique mobile internet subscribers
(bn people)



GSMA Intelligence (2020 figures estimates)

While this tells a positive story in terms of population coverage and subscriber numbers, the last

7%

I.E. 600mn

OF THE WORLD'S POPULATION, REMAINS UNCONNECTED

This group has no internet access because they live in areas where there is no mobile broadband coverage, with people living in low- and middle-income countries

(LMIC), especially those living in rural areas, disproportionately impacted. In Sub-Saharan Africa, for example, this equates to almost 25 per cent of the population.

OF THE FOUR BILLION PEOPLE WHO DO NOT USE THE MOBILE INTERNET,

3.4BN LIVE WITHIN MOBILE BROADBAND COVERAGE

This mobile internet 'usage gap' is largely explained by affordability of devices and services, low levels of literacy and digital skills, a perceived lack of relevance, as well as safety and security concerns.



Our most recent Position Paper outlines the steps required to roll-out mobile infrastructure and enhance demand. To make network operations sustainable innovative partnerships between government and operators are needed

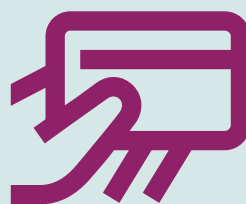


The paper highlights initiatives from countries across the world where this approach has resulted in improved coverage and access.

So why isn't everyone covered by mobile broadband?



Cost plays a big role. Mobile networks in remote areas can be twice as expensive as in urban areas, while revenue opportunities are as much as ten times lower due to smaller populations.



2x

What can be done today to improve mobile coverage and speed up rollout?

- **New technologies and deployment models:** newer mobile technologies are making improving coverage more affordable.
- **Network investment and rapid rollouts:** taxation, spectrum prices, long-term technology-neutral licences, and the early assignment of sufficient spectrum can have a major impact
- **Demand:** consumer taxes on mobile impact affordability, and digital skills training encourage use
- **A focus on rural and remote areas:** discounted spectrum, public-private partnerships and community networks are some interventions that can accelerate deployment



Industry and government must work together



To make rural network operations sustainable, real partnership is required between the government and the private sector, with clear objectives for better coverage. The need to reduce policy and regulatory barriers, create pro-investment environments, and examine new sources of financing and shared deployment models are just some of the options that can have lasting impact.

Key mobile industry recommendations include:

- Assignment of sufficient amounts of mobile spectrum to operators in a timely manner - including coverage bands;



- Accessible spectrum, including trade-offs between reduced spectrum fees and coverage obligations;



- Avoidance of licence terms and conditions that discourage network investment, innovation and increase costs;



- Reduced mobile-specific taxes and fees, to improve rollout and internet affordability;



- Provision of non-discriminatory and timely access to public infrastructure;



- Simplified and streamlined planning approval processes to incentivise and speed-up deployments;



- Competition policy which supports investment in high quality mobile networks;



- Voluntary infrastructure sharing; and



- State intervention only when all market-driven mechanisms have been exhausted.



Further details on all recommendations can be found in Driving the Digital Revolution with Improved Mobile Coverage - [gsma.com/expanding-mobile-coverage](https://www.gsma.com/expanding-mobile-coverage)

Industry and government partnership in action



Our research highlights a number of examples from countries across the world where a collaborative and innovative approach between industry and government has resulted in improved coverage and access. These include:

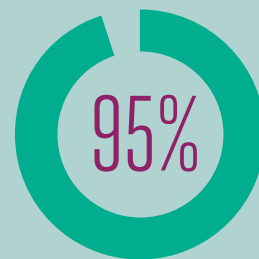
France's "New Deal Mobile" initiative has seen mobile operators taking on new and additional coverage obligations in exchange for a non-compete on renewals of spectrum in the 900 MHz, 1800 MHz and 2.1 GHz frequency bands, with an aim of providing



4G services on all sites by the end of 2020



The UK's voluntary "Shared Rural Network" brings together public and private funding, through a combination of investment and infrastructure sharing, to deliver



GEOGRAPHIC COVERAGE BY THE END OF

2026

In Tunisia the use of a Universal Service Fund with clear targets to improve rural mobile broadband coverage is



CONNECTING
180,000



people who live in rural areas

In Ghana, a partnership between the Ghanaian Investment Fund for Electronic Communications (GIFEC), Vodafone Ghana and the GSMA is funding mobile network equipment vendors to deploy innovative solutions to expand connectivity



GIFEC HAS ENABLED TAX AND DUTY EXEMPTIONS OF UP TO

30%

for imported equipment, to encourage reinvestment and enhance coverage



A collaboration of government funding and infrastructure sharing is improving rural coverage in New Zealand, providing coverage to the last



of the population that remain unconnected

Voluntary infrastructure sharing and innovative spectrum and regulatory policies have driven the expansion of rural mobile broadband in Peru, benefiting around



600,000
people across

2,000 
COMMUNITIES IN REMOTE AREAS