

A4AI-Myanmar
Multi-stakeholder Coalition
Objectives and Plans

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Agenda

- What is A4AI?
- The A4AI national multi-stakeholder coalition model and objectives
- A brief look at internet affordability in Myanmar
- Starting the dialogue with stakeholders!



WHAT IS A4AI?

Who is A4AI?



We are the
world's broadest technology sector alliance
working to
drive down the price of broadband
to the UN target of less than 5% of average
monthly income by
transforming policy and regulatory
frameworks.

A global multi-stakeholder coalition



Global sponsors



Private sector



Strength in diversity

Public Sector / Academia



Civil Society / Foundations



Focus on local partners



How do we work?



**We partner
with governments, companies and not-for-profits
to shift policies and regulations,
and deliver open, competitive and innovative broadband markets.
This unlocks the power of technology and forces prices down.**



We have 70+ members from the private sector, public sector & civil society



We build consensus via a blend of advocacy, research and consultancy



We work directly with national governments around the world



We create strong in-country coalitions to develop solutions tailored to local realities

Aligned around policy and regulatory best practices



- These diverse organizations have all endorsed a best practices document
- Practices aim to ensure open, competitive markets, plus policies/regulations in place to lower cost structure for the industry
- Grounded on principles of Internet freedom and the fundamental rights of expression, assembly, and association online

Robust research to support evidence based decision making



Annual Affordability Report

Newest edition
published
March 2015

Case studies

Ghana, Nigeria,
Cameroon,
Peru, Brazil,
Dominican
Republic,
Myanmar

Thematic briefings

Universal
Service Fund
& others
forthcoming

Where are we working?



Today Myanmar becomes first Asia Pacific country to join A4AI!



THE A4AI NATIONAL MULTI-STAKEHOLDER COALITION MODEL AND OBJECTIVES

The National Coalition Concept



- A4AI recognizes that sustainable change requires workable approaches to the proposed reforms, but also clear consideration of the acceptability of the reforms to key stakeholders.
- The process of multi-stakeholder coalition building will seek to ensure that public, private, academic, media and CSO sectors are represented in the national multi-stakeholder coalitions.
- It will be grounded upon the principles of consultation, collaboration and open dialogue.

The National Coalition Concept



- This will also ensure that the policy and regulatory reform proposals developed by the national coalitions are informed and shaped by the views and concerns of all stakeholder groups in each country.
- A multi-stakeholder coalition aims to work through an inclusive process where collaboration and participation are most critical.

Objectives of the National Coalition Forum



- To establish an A4AI-Myanmar multi-stakeholder coalition that will contribute towards the government policy to bring about affordable Internet access to all people in Myanmar.
- To outline the coalition action plan and timeline of activities (priority areas to tackle, coalition meetings, workshops, seminars, proposal development, etc.)
- To agree on coalition work methods and tasks (online channels, F2F, frequency, etc.)

Objectives of the National Coalition Forum



- To identify key priority areas/issues for coalition engagement
- To develop concrete proposals for the implementation of policy objectives, including regulations that create the right incentives for lowering cost structures and eliminating barriers to affordability
- To support the policy and regulatory reform process with evidence and solid research



A BRIEF LOOK AT INTERNET AFFORDABILITY IN MYANMAR



ALLIANCE FOR
AFFORDABLE INTERNET



5 Minute Guide to
Internet in Myanmar

POPULATION

51.4 million



TOTAL GDP (2013/14)

\$56.8 billion



POPULATION LIVING UNDER POVERTY LINE

up to 37.5%



GDP PER CAPITA

\$1,105



Sources: Myanmar National Census, 2014; World Bank, 2014

TELECOMS TIMELINE

2013

LIBERALISATION OF
TELECOMS SECTOR

2014

TELEKOM & DURECOM BEGIN
OFFERING VOICE & MOBILE
INTERNET SERVICES

2015

BECOMES FIRST ASIA
PACIFIC NATION TO
JOIN A4AI

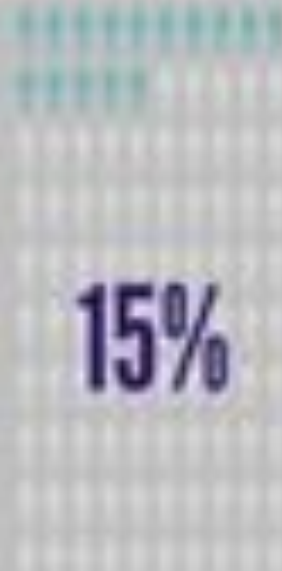
INTERNET USE

INTERNET USERS IN 2013



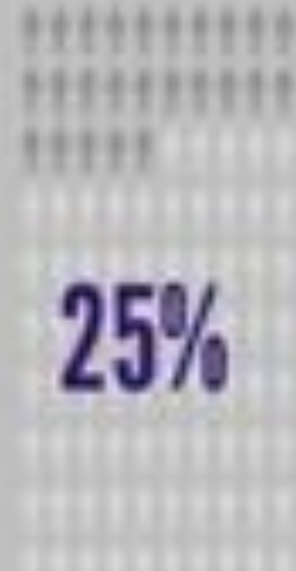
1.2%

INTERNET USERS IN 2015



15%

2018 TARGET



25%

Source: ITU, 2013

Source: Government of India, 2015

Source: NCF report

MOBILE SECTOR

FAST GROWING

25%

YEAR-ON-YEAR
GROWTH

SIM CARD PRICE

\$150

(2013)

\$1.50

(2014)

12%

MOBILE NETWORK
POPULATION
COVERAGE

11.7 MILLION

MOBILE
CONNECTIONS

IN 2014

MOBILE TARGETS

The Ministry of Communication and Information Technology (MCIT) has set ambitious targets for Myanmar's mobile operators.

**10
MILLION**

FEMALE MOBILE
SUBSCRIBERS BY END
OF 2015

Source: MCIT targets

7,600
MOBILE BASE
STATIONS
BY END OF 2015

17,300
BY 2017

Source: MCIT targets

70%
MOBILE NETWORK
POPULATION COVERAGE
BY 2017

95%
BY 2020

Source: MCIT targets

22 MILLION
MOBILE CONNECTIONS
BY 2017

Source: MCIT targets

AFFORDABILITY ENVIRONMENT

2013

TELECOMMUNICATIONS
LAW

mandated the establishment of the

**MYANMAR
COMMUNICATIONS
COMMISSION (MCC)**

as an independent ICT regulator

A4AI RANKED
MYANMAR

**36 OUT OF 51
COUNTRIES**

IN ITS 2014
AFFORDABILITY INDEX

2013

TELECOMMUNICATIONS
LAW

mandated the creation of a

**UNIVERSAL
SERVICE FUND**

to support services in rural &
underserved areas of the country

THE ROAD AHEAD



EXPAND INFRASTRUCTURE



SUPPORT EFFECTIVE REGULATORY OVERSIGHT



DEVELOP ROBUST OPEN ACCESS FRAMEWORK



BUILD HUMAN & INSTITUTIONAL CAPACITY

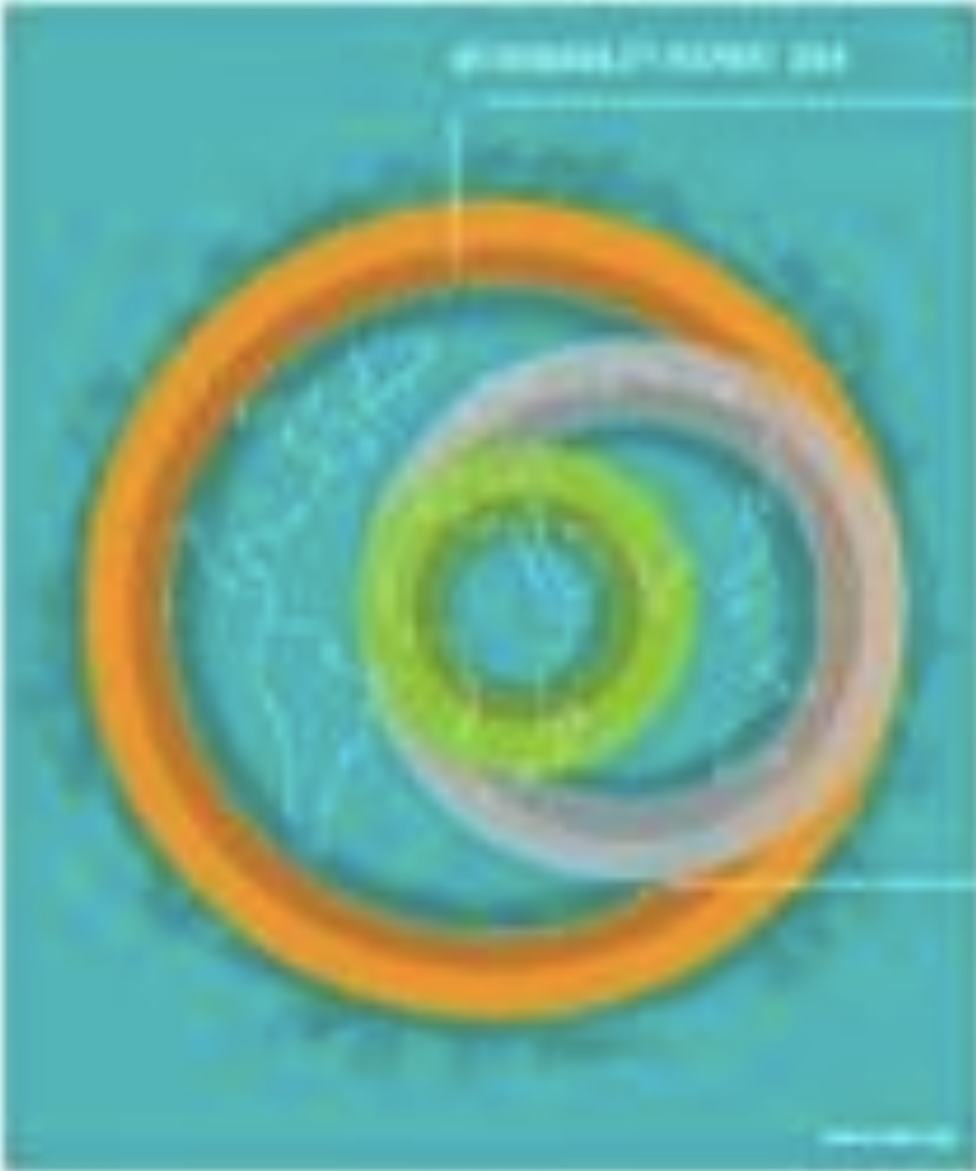


STARTING THE DIALOGUE WITH STAKE-HOLDERS



Because...

- Policy and regulation is the key, and active participation of all stakeholders in hammering out a concrete plan of action is perhaps the single most important step to move from high prices and low uptake to low prices and high demand.



A4AI Affordability Index

Not one of the 51 developing or emerging countries surveyed for the Affordability Report can claim to meet the UN target of broadband priced at less than 5% of monthly income for those 2 billion people living in poverty (on less than \$2 a day).

Who is hit the hardest?

- Women and rural populations
- Number of countries studied: **51**
 - Number living in poverty (< \$2/day): **2 billion+**
 - Number able to access Internet affordably: **0**
 - Average cost of entry-level mobile broadband: **25%**

The foundations of affordability



AFFORDABILITY

**Healthy
competition**

**Infrastructure
sharing**

**Non-
discriminatory
access to
spectrum**

**Universal
access to
rural and
underserved
populations**

**Effective
broadband
strategies**

LEADERSHIP



Thank you!

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