

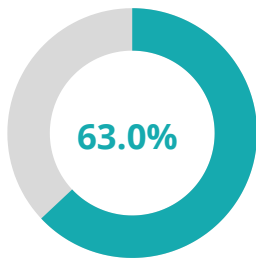


MALDIVES DIGITAL CONNECTIVITY BRIEF

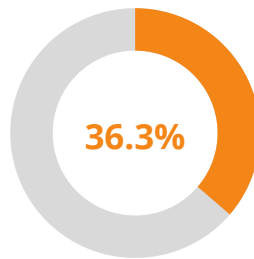


Country overview

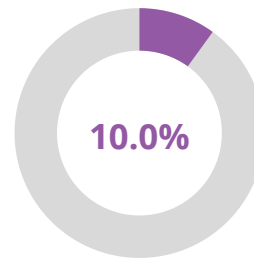
Two-thirds of the Maldives' population use the internet, yet only 36.3% of the population is connected to mobile broadband and about 10% connected to fixed broadband. Maldives' geography and the distribution of population, comprising 1,200 coral islands and sandbanks (around 200 inhabited) spread over 510 miles/820 kilometers from north to south, and small communities, pose unique connectivity challenges. Nationwide coverage of its 3G network is currently available to the whole population. Maldives has seen improvements considered to be remarkable over the past years, with international cables being deployed, and nearly all households own at least one smartphone, but gaps related to skills and literacy persist.



ONLINE POPULATION
Source: ITU, 2017

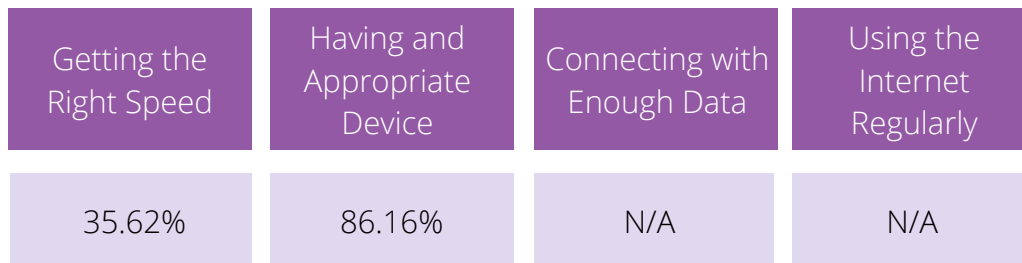


MOBILE BROADBAND PENETRATION
Source: GSMA, 2020



FIXED BROADBAND PENETRATION
Source: A4AI from ITU, 2019

Dimensions of Meaningful Connectivity

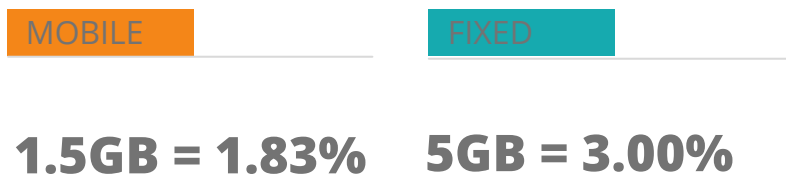


Source: GSMA, 2020

Meaningful connectivity to the internet implies having access to an appropriate device, enough data and speeds, and using the internet every day. Only 35.62% of people in Maldives have access to 4G compatible speeds, while 86.16% have access to smartphones. This scenario is better than other countries in South Asia, but still insufficient.

ICT Affordability

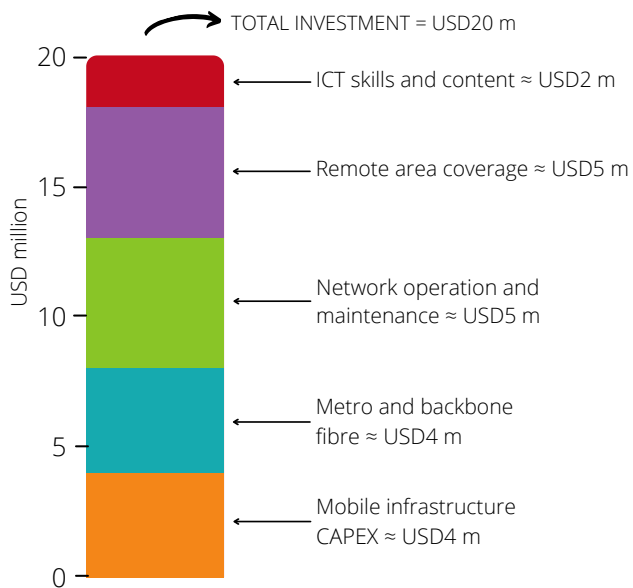
AS A % OF GNI P.C.



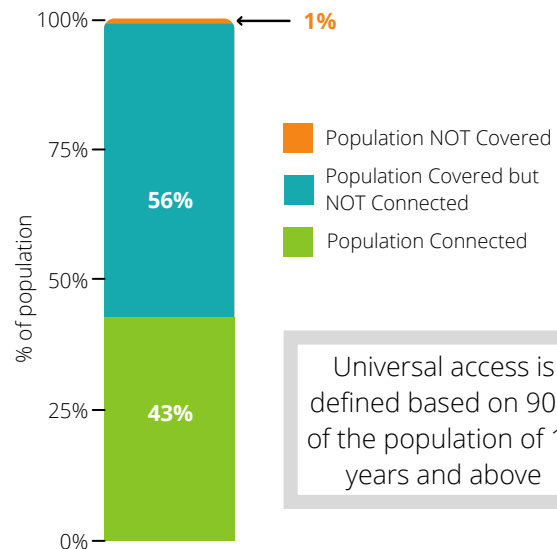
Source: A4AI & ITU, 2020

Maldives meets the affordability target established by the United Nations Broadband Commission, as 1.5GB corresponds to 1.83% of the monthly average income in the country. However, fixed 5GB is at 3% and not affordable. Prices have been falling in 2020 and 2021 due to a presidential request for change as a response to the pandemic.

Investments needed by 2030



Source: A4AI from ITU, GSMA, A4AI, operator and regulator, 2019



Source: A4AI from GSMA, Xalam and UN population data, 2019

Universal access is defined based on 90% of the population of 10 years and above

As shown in the figures above, 4G mobile coverage is not a problem in Maldives, although a much smaller percentage (43%) of the population is connected to 4G networks. In fact, even 5G is present in Maldives, with over 80% coverage. Our analysis shows that investments needed to achieve universal access by 2030 include identical amount related to mobile infrastructure, network operation and maintenance, and fiber deployment, as well as a relatively larger amount to connect remote areas. With over a third of the population living in the country's capital, remote areas still represent an important home to many in the country.

Policy Highlights

Regulatory Environment



The Communications Authority of Maldives has been established and has been active for six years. The authority has positively intervened, for example, when it has implemented floors for voice and SMS (not data).

Regulatory Environment



The Communications Authority of Maldives has a certain level of transparency through its website, although documents are not made available in English. Further, the website does not seem to be updated, as the late public announcements are from 2019.

Market structure



There are two main operators in the country and some small operators. The market structure is, therefore, relatively competitive.

Universal and public access



Information on digital literacy and skills is limited. Data is not disaggregated by gender.