

# Policy Challenges in Embracing Mobile Technology to Promote Socio-economic Development: The case of Myanmar

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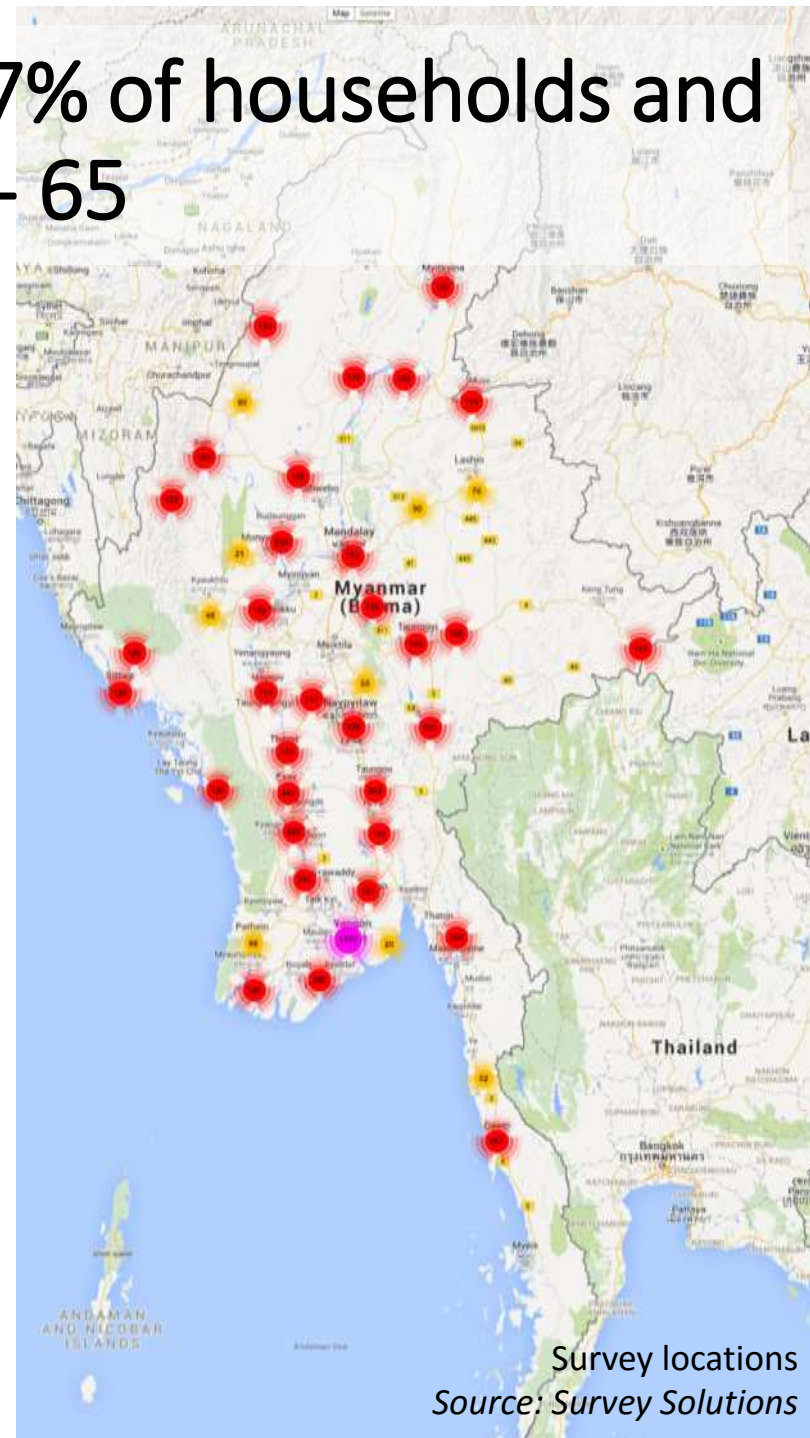
Socio-economic development associated with  
mobile technology

# LIRNEasia studies teleuse

- In 2014, before rollout accelerated, we studied teleuse by urban, poor micro-entrepreneurs
- In 2015 February-March, a nationwide baseline quantitative teleuse study that included interviews with government officials closest to the citizens
- In July 2015 extensive gender-focused qualitative studies in multiple locations in Myanmar
- We plan to do another nationwide study in 2016

# Baseline: Representative of 97% of households and 96.3% of population aged 15 - 65

- At 2.5% margin of error, representative of
  - 96.3% population aged 15-65
  - 97% of total households
  - 91.8% of total population
- In all accessible areas of Myanmar
  - 32 townships excluded due to security concerns
- Stratified four stage PPS cluster sampling design used; stratification by:
  - 1) Population size (big cities; other major cities; smaller townships)
  - 2) Geographic region (Delta, Eastern hills, Long coast, etc.)
  - 3) Urban/rural
- For full sampling details, see Methodology Note at: <http://lirneasia.net/wp-content/uploads/2015/07/LA-MM-baseline-methodology-note.pdf>



# Data collection at multiple levels

Sampling Stage	Sampling Unit	Number selected
Stage 1	Township	70 townships
Stage 2	Wards (urban) + VTs (rural)	2 wards + 4 VT per township
Stage 3	Segment: Street/block (urban) + Village (rural)	2 streets per ward + 2 villages per VT
Stage 4	Household	10 HH per Segment

n=420

n=8,138

2a. HH head interview

1a. Ward / village administrator interview



1b. OpenSignal network data collection



1c. Grocery price collection

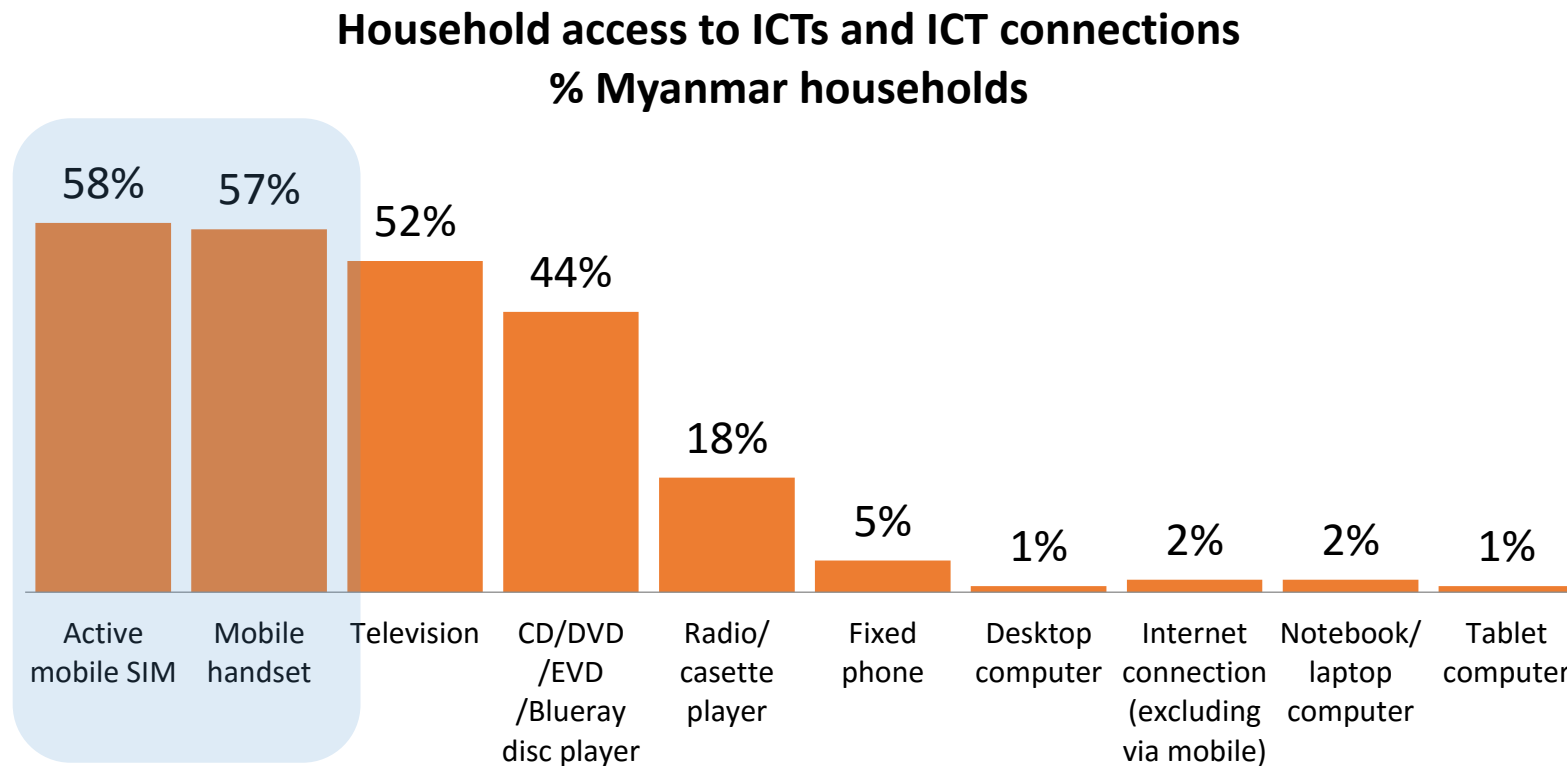


2b. Randomly selected HH member interview



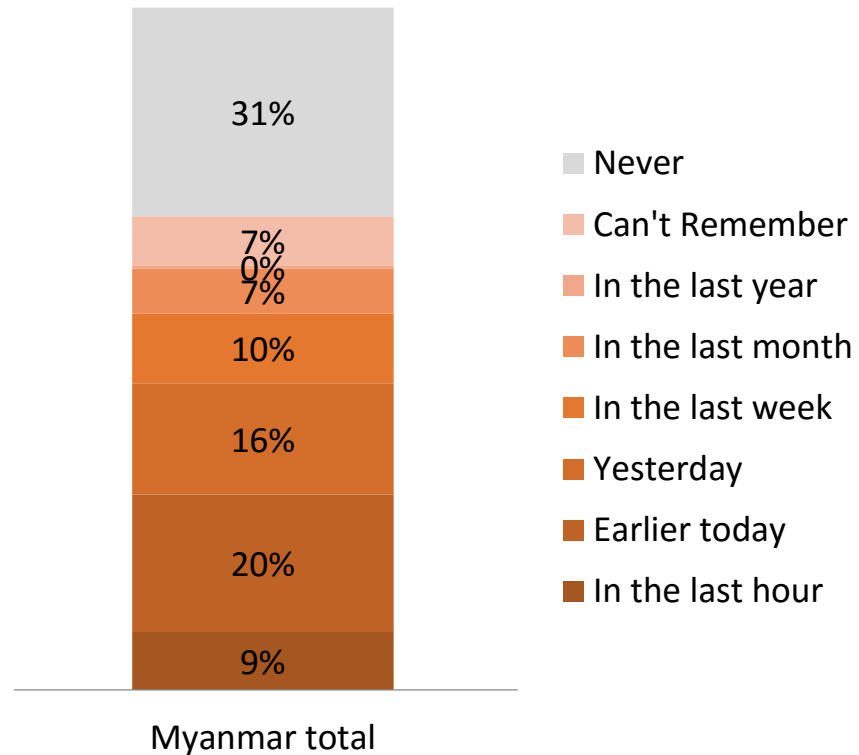
# Mobiles the most common ICT in Myanmar

- By Feb-Mar 2015
  - At ward level: 90% of wards and villages received mobile signal
  - At household level: the mobile phone was dominant ICT device



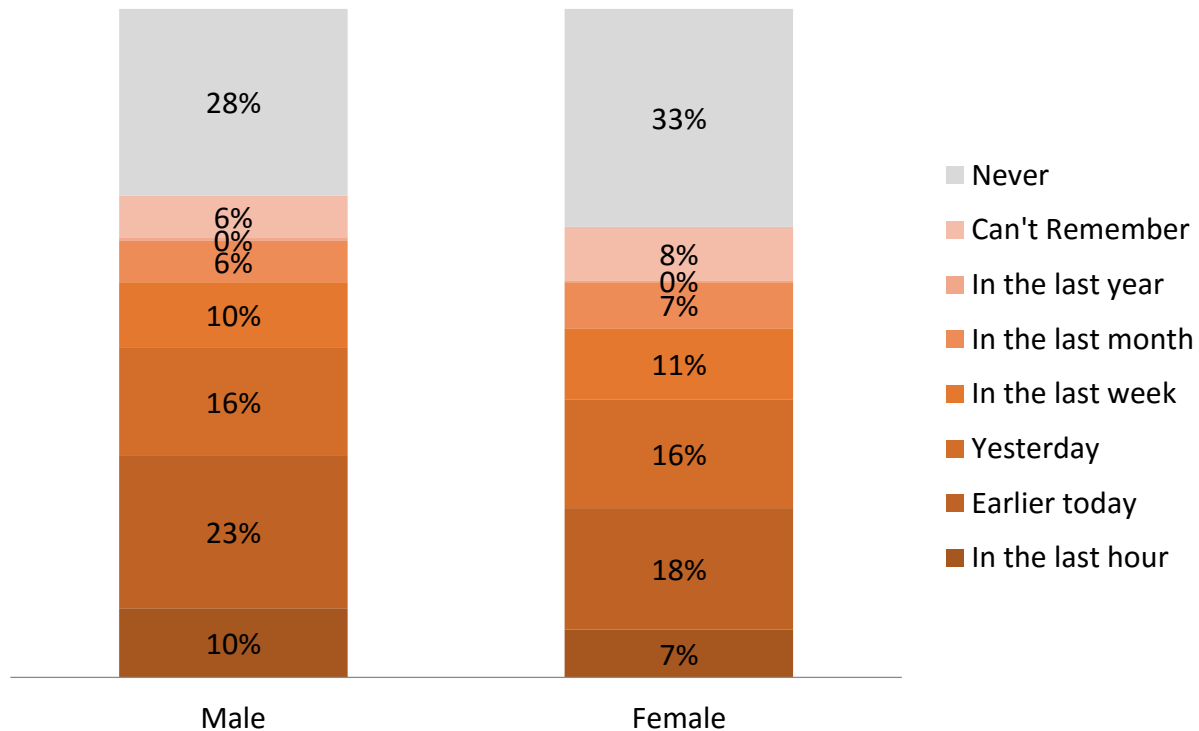
# Access/use: 69% of 15-65 year olds in MM had used a phone (teleusers) at time of survey

When was the last time you used a phone? (% of 15-65 year olds)



# Access/use: Gender difference is small, though males are slightly more frequent teleusers

When was the last time you used a phone? (% of 15-65 year olds)

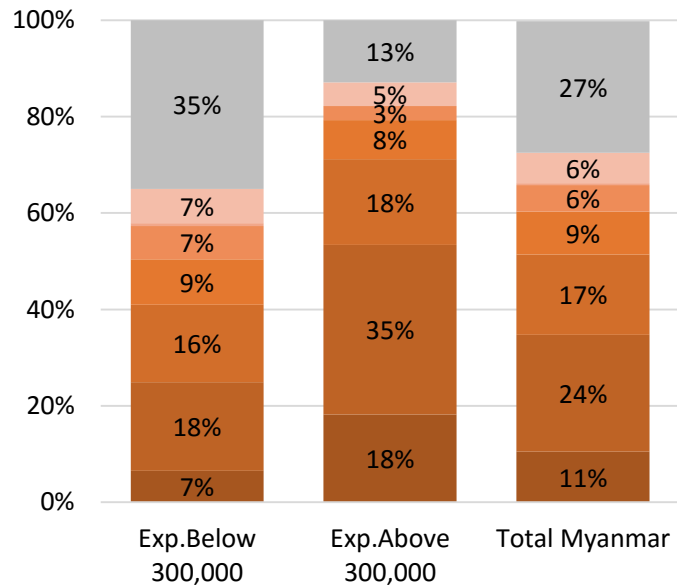


Q: When did you last use a phone to take or receive a call? It could be through your own phone, a neighbors' phone, a friend's phone, communication kiosk/shop or any other. It also need not be paid for?

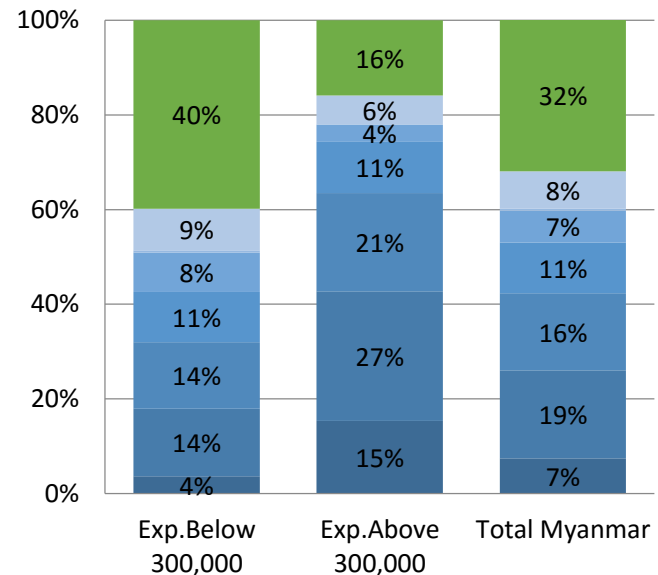


# Income effects dominate – use by poor women similar to that by poor men

**Males - When was the last time you used a phone? (% of 15-65 year olds)**



**Females - When was the last time you used a phone? (% of 15-65 year olds)**



- In the last hour
- Earlier today
- yesterday
- During the last month
- During the last year
- Can't Remember
- Never

- In the last hour
- Earlier today
- yesterday
- During the last month
- During the last year
- Can't Remember
- Never

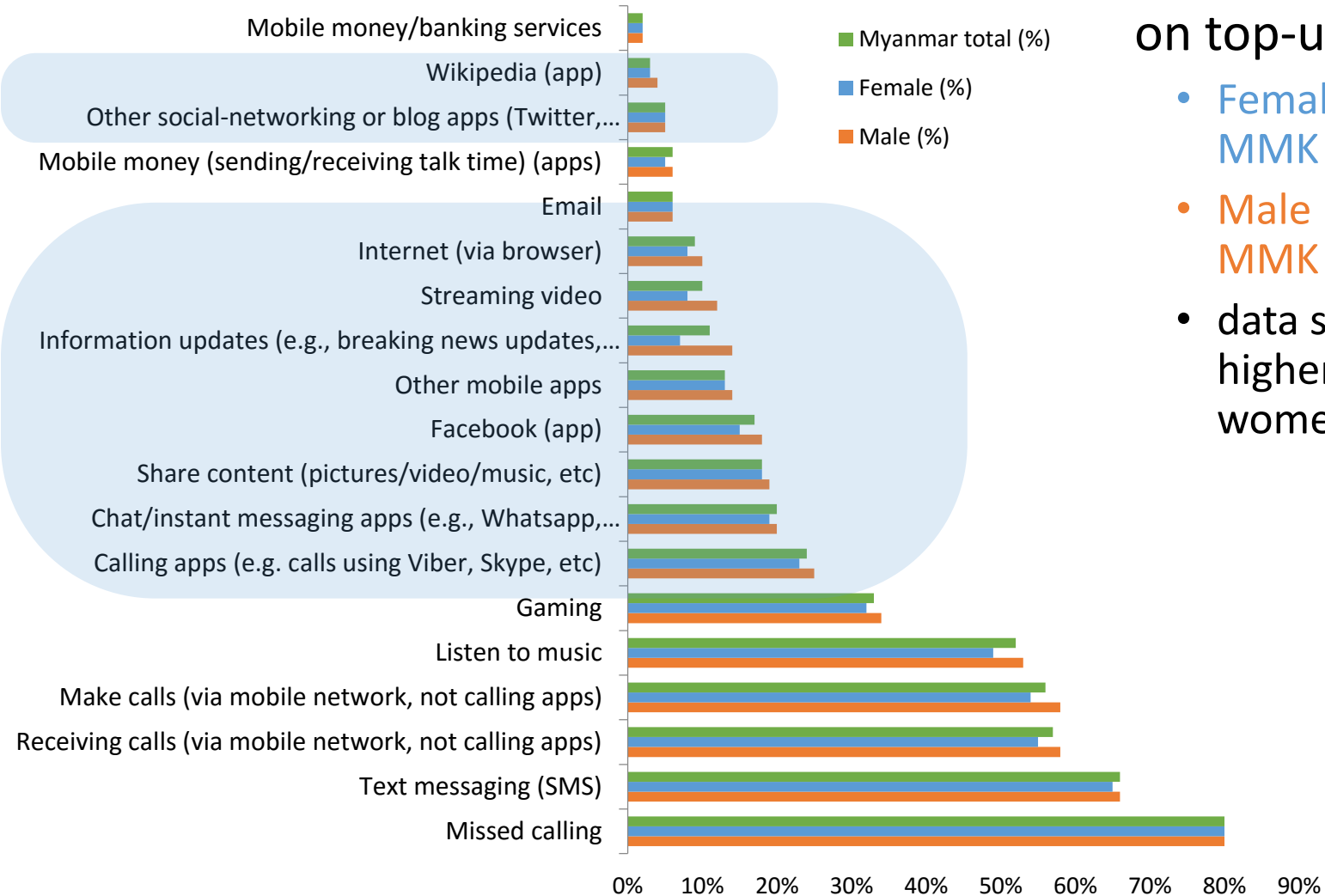
Base: All respondents

Q: When did you last use a phone to take or receive a call? It could be through your own phone, a neighbor's phone, a friend's phone, communication kiosk/shop or any other. It also need not be paid for?

Base: All respondents

# Female and male owners' mobile use is very similar. "Internet" use has room to improve

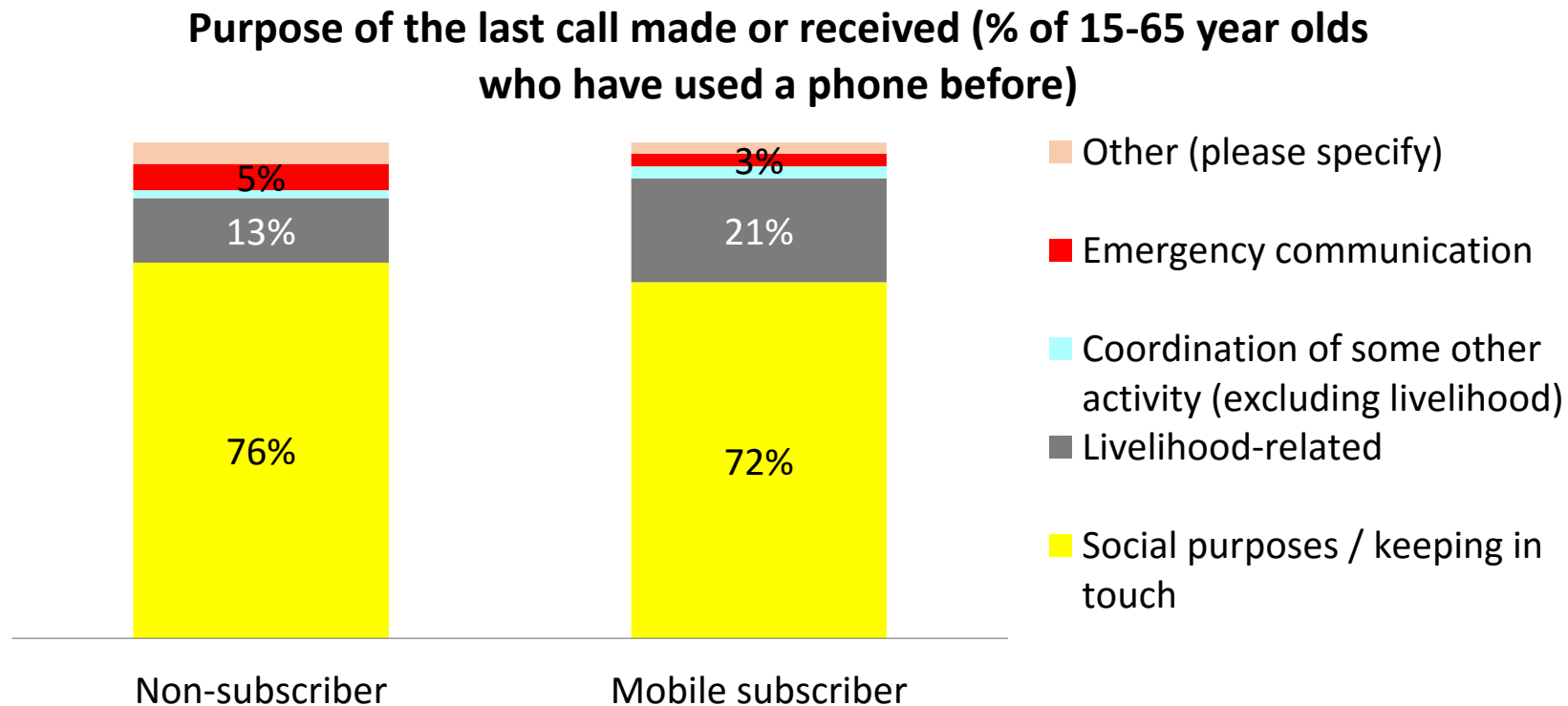
## What mobile owners do with their mobiles % of mobile owners



## • Mean monthly spend on top-ups:

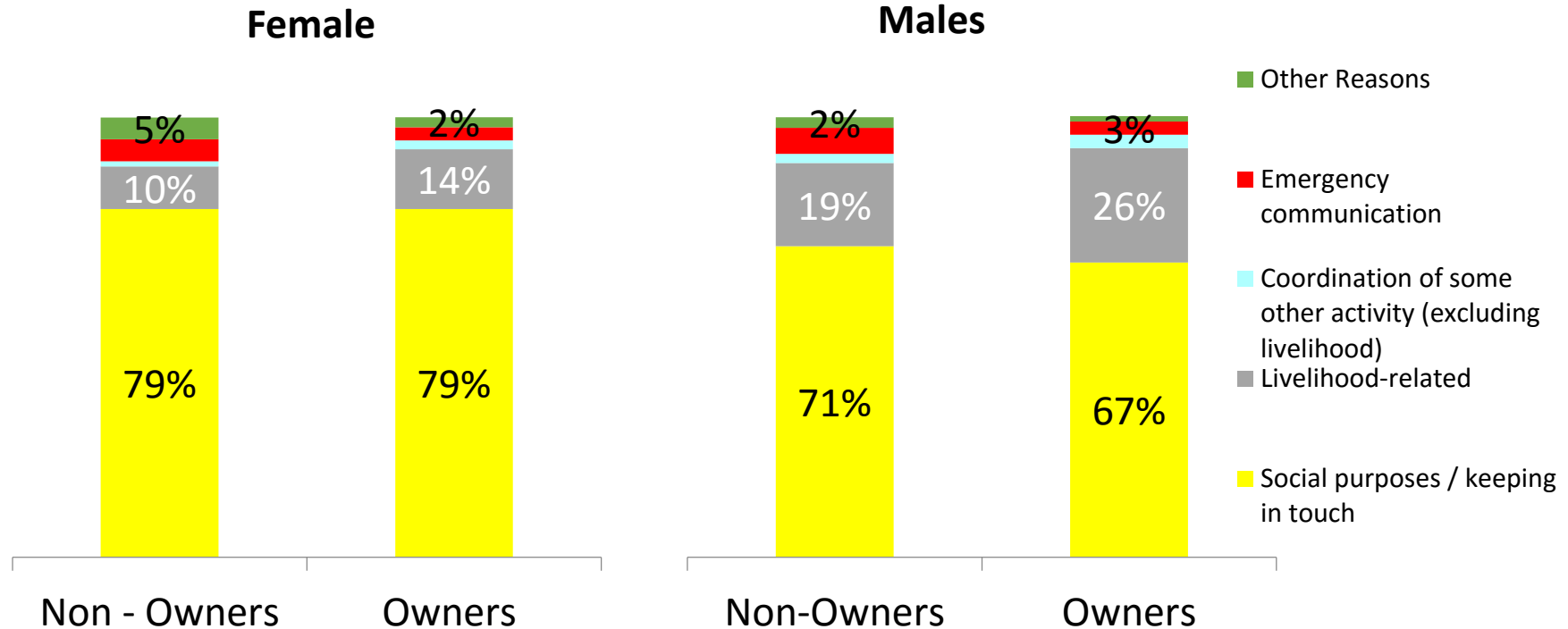
- Female mobile owners: MMK 8,682
- Male mobile owners: MMK 9,254
- data service use drives higher spend (men and women)

# A different type of use when you own a phone vs. when you are using someone else's: livelihood calls by owners



# Need to increase livelihood calls by women?

Purpose of the last call made or received (% of 15-65 year olds who have used a phone before)



Q: Can you tell us the purpose of your call?

Base: Respondents who had ever used a phone before

# Those that have become mobile owners do see the benefits...

Perceived benefits of mobile phone use and access on various aspects of life (mean response)

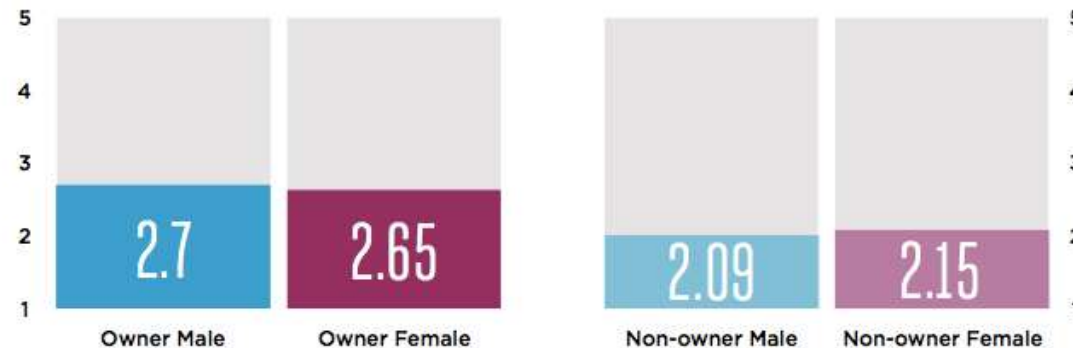
1=No change 5=Improved greatly



Your economic / financial status or well-being



Your level of knowledge and skills



Base: All respondents

Source: LIRNEasia Baseline Survey (2015)

(continued)

“Before I just listened to what others said. Now I read the news on my phone so I can tell my parents and even talk back to others. I am more up to date.

-Female owner, 25, SEC C, Yangon



Your social and familial relations and relationships



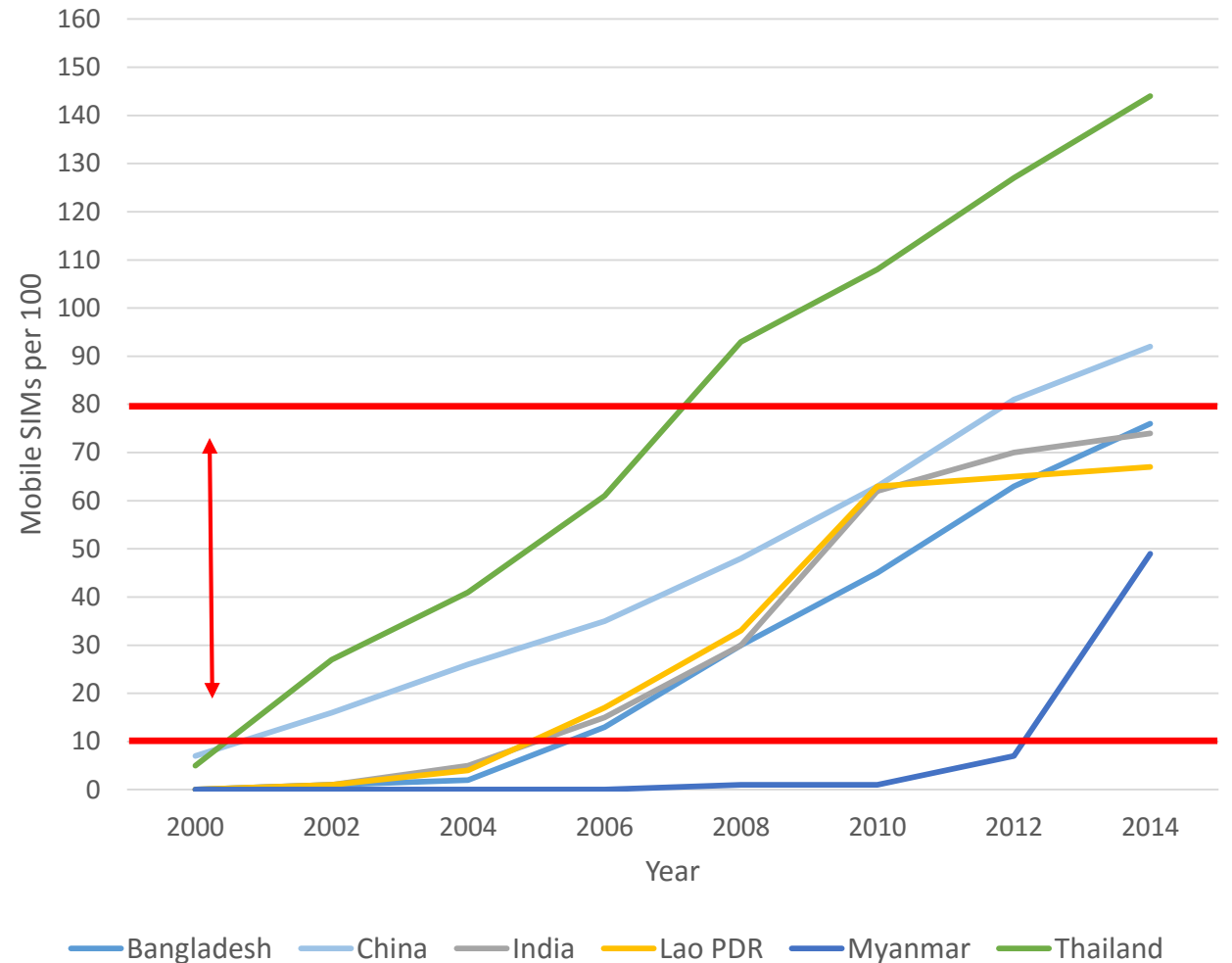
Your emotional well-being and happiness



What has been done in Myanmar?

# Progress toward achieving goal of Myanmar ICT Policy

10 SIMs per 100 people in 2012 to 80 SIMs per 100 in 2017



Source: World Bank

Comparators are countries sharing borders with Myanmar



# Policy actions

- New Law enacted and subsidiary legislation approved
- Two new 100% foreign-owned telecom operators licensed
- Incumbent paired with Japanese partner for capital and management skills
- 4<sup>th</sup> operator (VietTel, military associated company and host of domestic firms) about to commence operations
- Post & Telecom Department still acting as regulator

Principal challenges

# Establishing regulatory agency

- S. 86: “In order to be able to implement this law on telecommunications services, the Union Government shall establish an independent Myanmar Telecommunications Commission, led by an appropriate individual at the Union level, within two years of the effective date of this law.”
  - Two years was up 2015 October
- Close analysis of Law and Rules shows substantive amendments are required

# Capacity for regulatory functions (MTC) and policy functions (Ministry)

- Does the capacity exist within the country?
- Can expatriate Myanmarese be attracted?
- Can adequate compensation packages and career paths be provided?
- Can Ministry obtain required expertise other than from MPT?
- Will telecom be neglected in new Ministry of Transport and Communication?