

Emerging Asian Trends in WSIS outcomes

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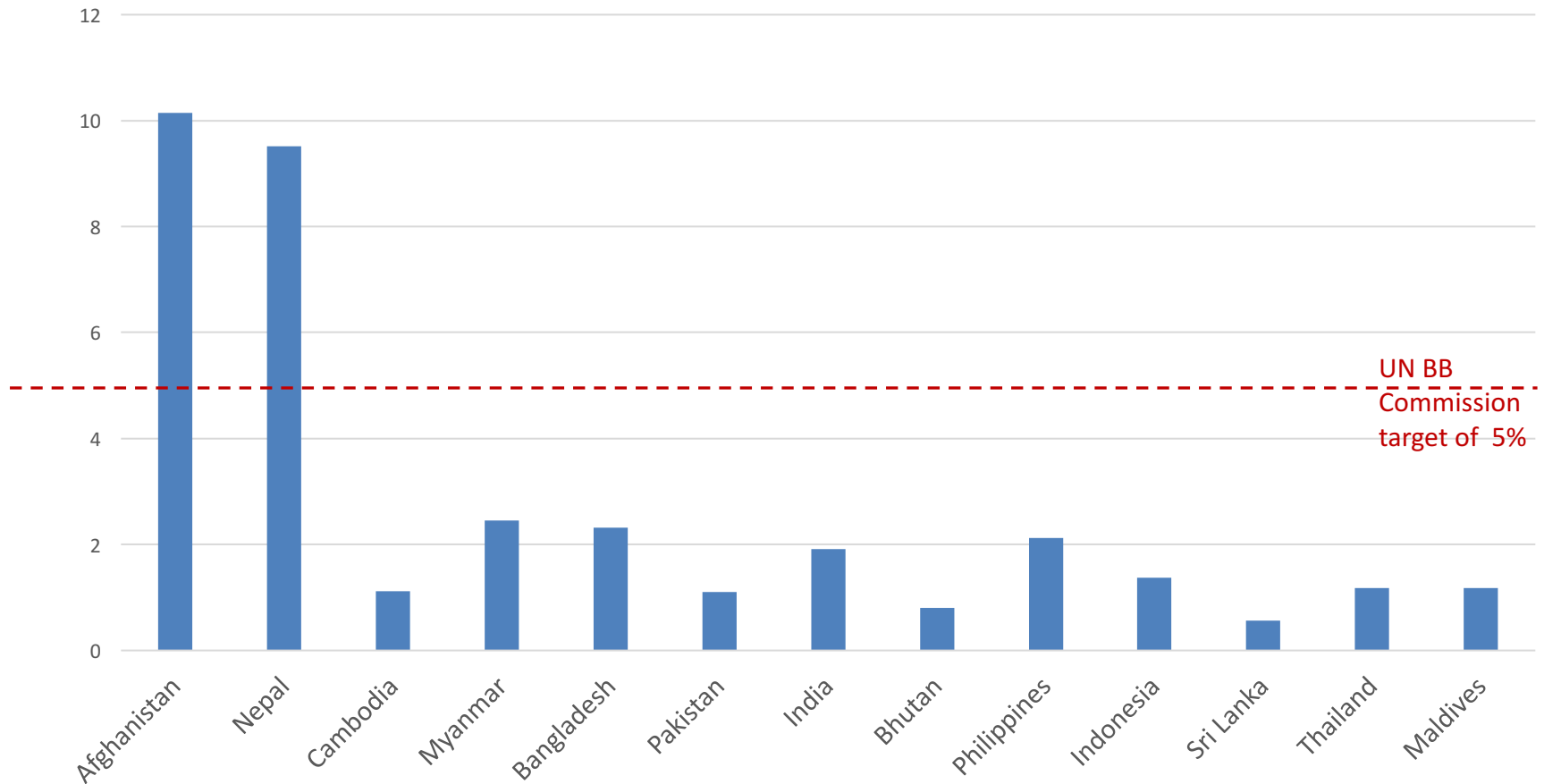
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**BASIC ACCESS & USE, IN THE
CONTEXT OF LOW SKILL**

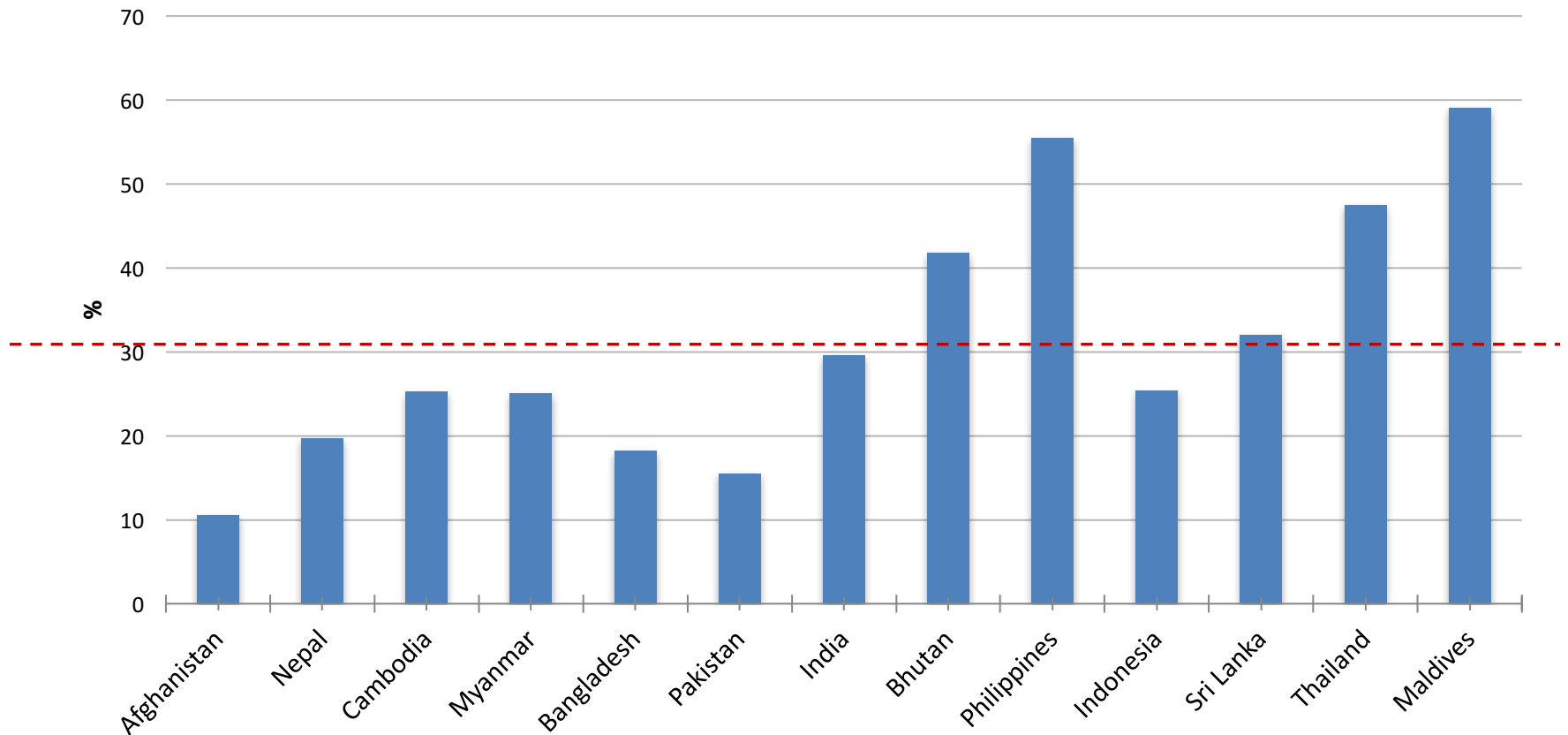
(Entry-level) Internet is “affordable” in most countries

Cost of 500 MB capped pre-paid mobile data as % of GNI



Many S & SE Asian countries had less than 30% of their population online. But newer data is essential

% population using the Internet



- **Ownership of a smart phone** is key driver of Internet use.
- Most of these countries have around 30% smart phone penetration

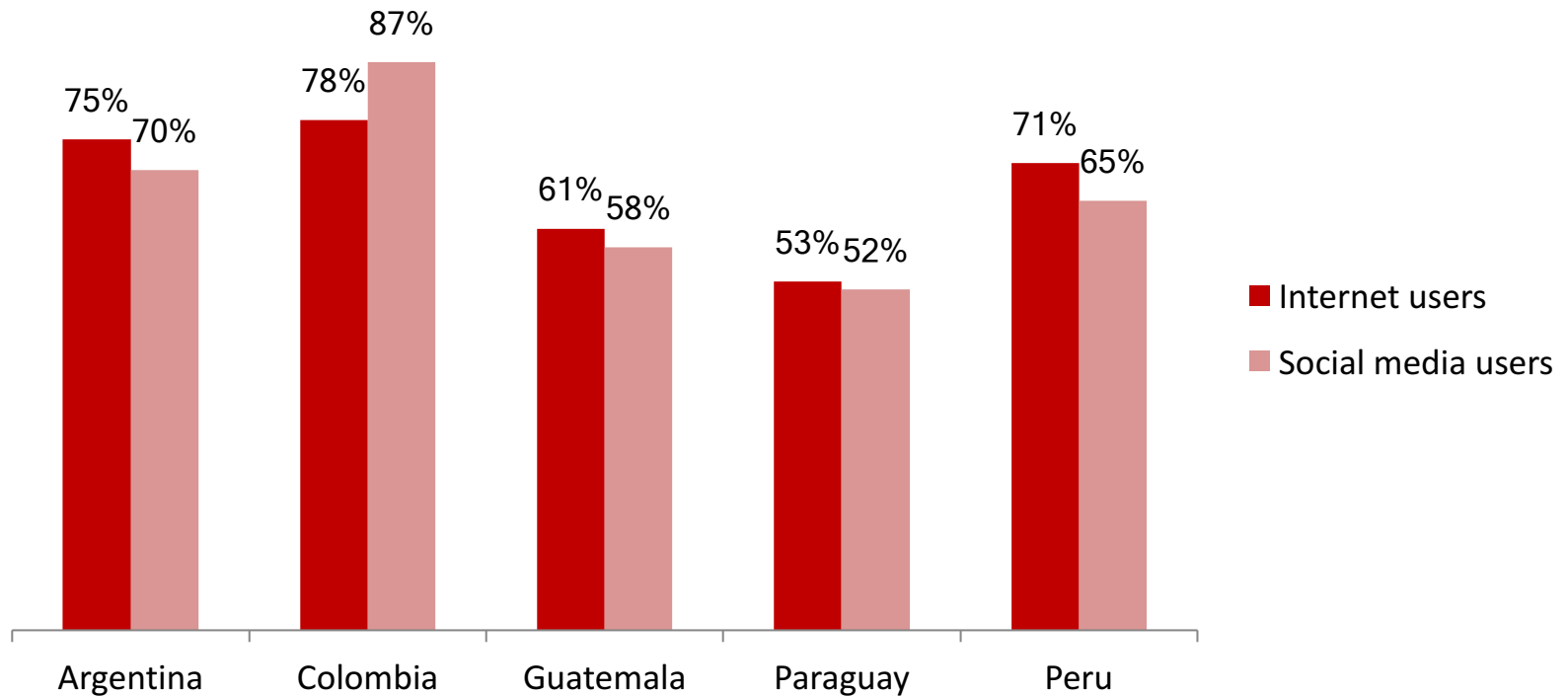
Social media is the killer app and drives use (even if we admit that most Internet/social media use data is problematic)

Country	Mobile Subscriptions/100	Internet Users/100	Facebook Users/100
	2016	2016	2017
Pakistan	71.4	15.51	15.8
Bangladesh	77.9	18.3	15.8
India	87.0	29.6	15.9
Myanmar	89.3	25.1	29.2
Philippines	109.2	55.5	59.7
Sri Lanka	118.5	32.1	25.0
Indonesia	149.1	25.37	44.4
Thailand	172.7	47.5	70.3

Sources: <http://www.itu.int/net4/itu-d/icteye/AdvancedDataSearch.aspx>; <http://datatopics.worldbank.org/hnp/popestimates>; Facebook advertising portal;

Nationally representative data from Latin America shows huge progress in Internet use by 2017. Data from Asia (due Dec 2017) hopefully shows the same

Internet and Social Media use by population aged 15 years or above, July 2017

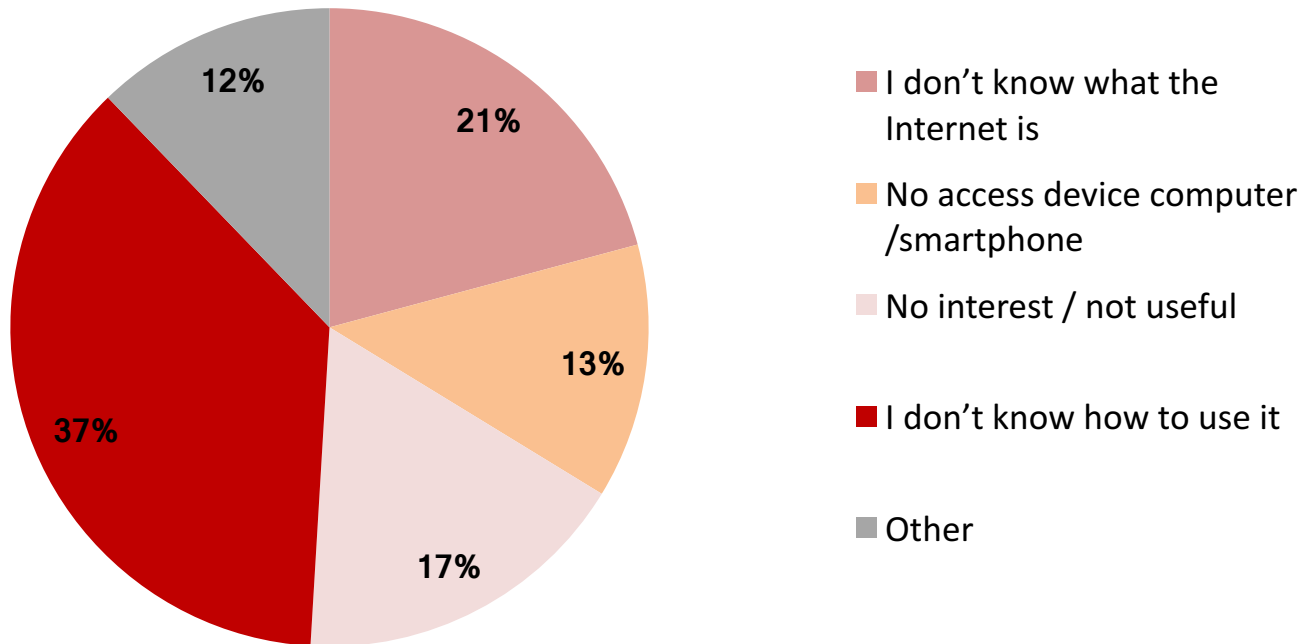


Question 1: Have you ever used the internet in your mobile phone, computer or any other device? (explain and give examples: Facebook, WhatsApp, mail, google, YouTube, Hotmail, etc.)

Question 2: Do you use social media like Facebook, WhatsApp, twitter, etc.?

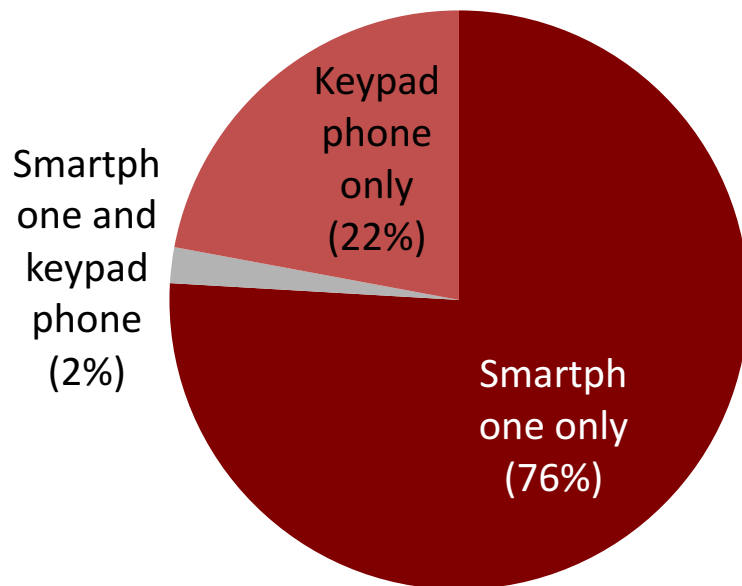
Lack of skill is #1 reason for NOT using the Internet

Reasons for not using the Internet/social media by population 15 years or above, Argentina, Columbia, Guatemala, Paraguay Peru



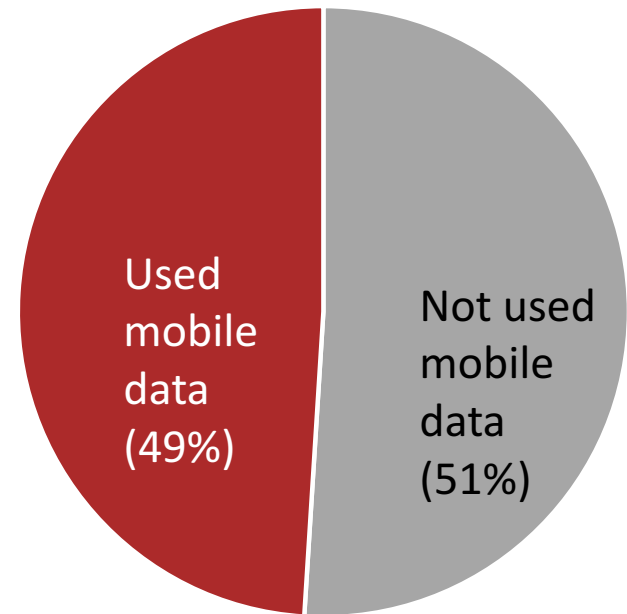
The exception to low use in Asia is Myanmar. 48% of population own a smart phone. Half of all phone owners are online

Mobile handset type
(% of mobile owners aged 15-65)



Base: Mobile phone owners

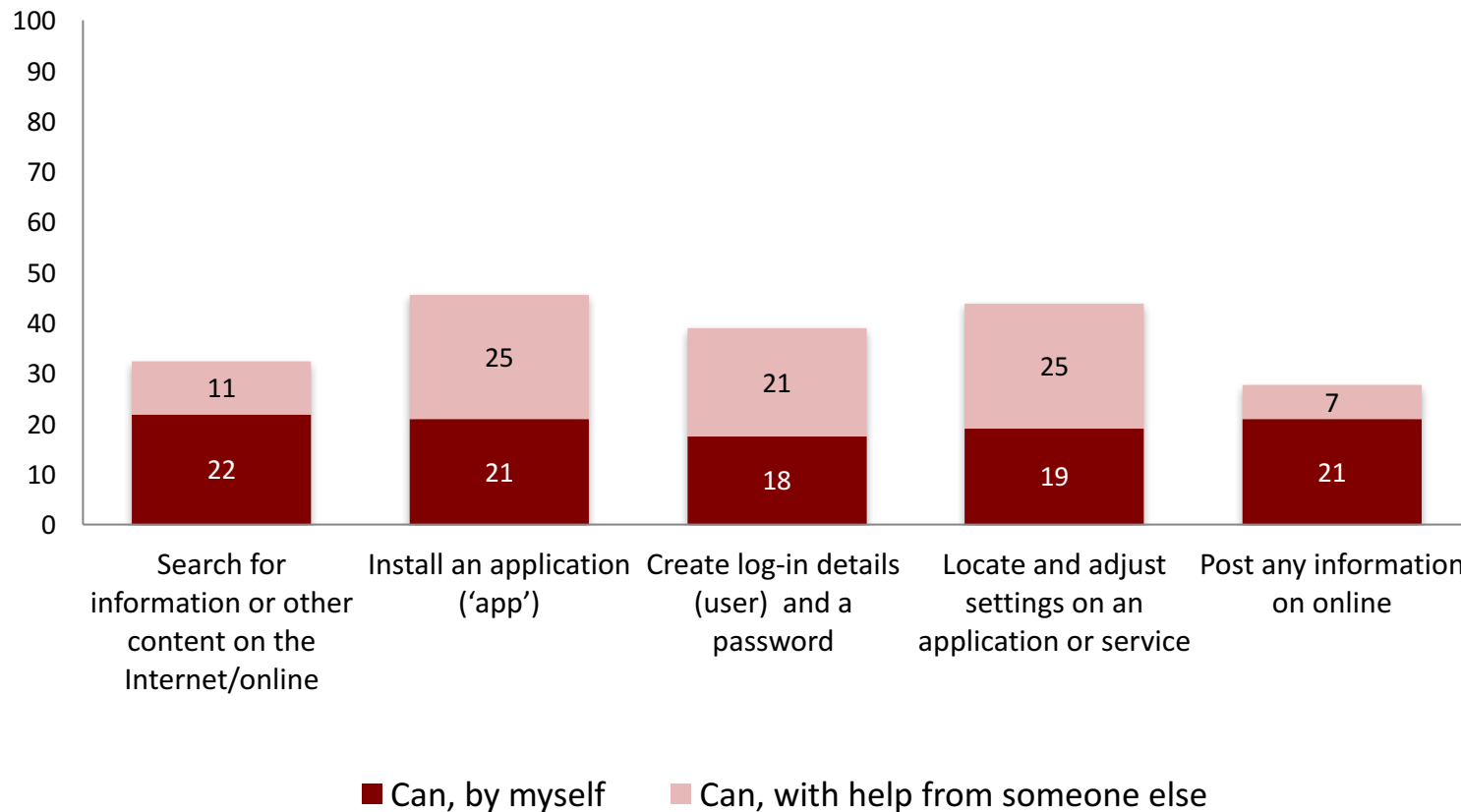
Use of mobile data for Internet
(% of mobile owners aged 15-65)



Base: Mobile phone owners

High use in Myanmar is in the context of low digital skills. Many in Myanmar manage with someone's help

Digital skills (% of mobile handset owners who can perform the tasks by themselves or with help)

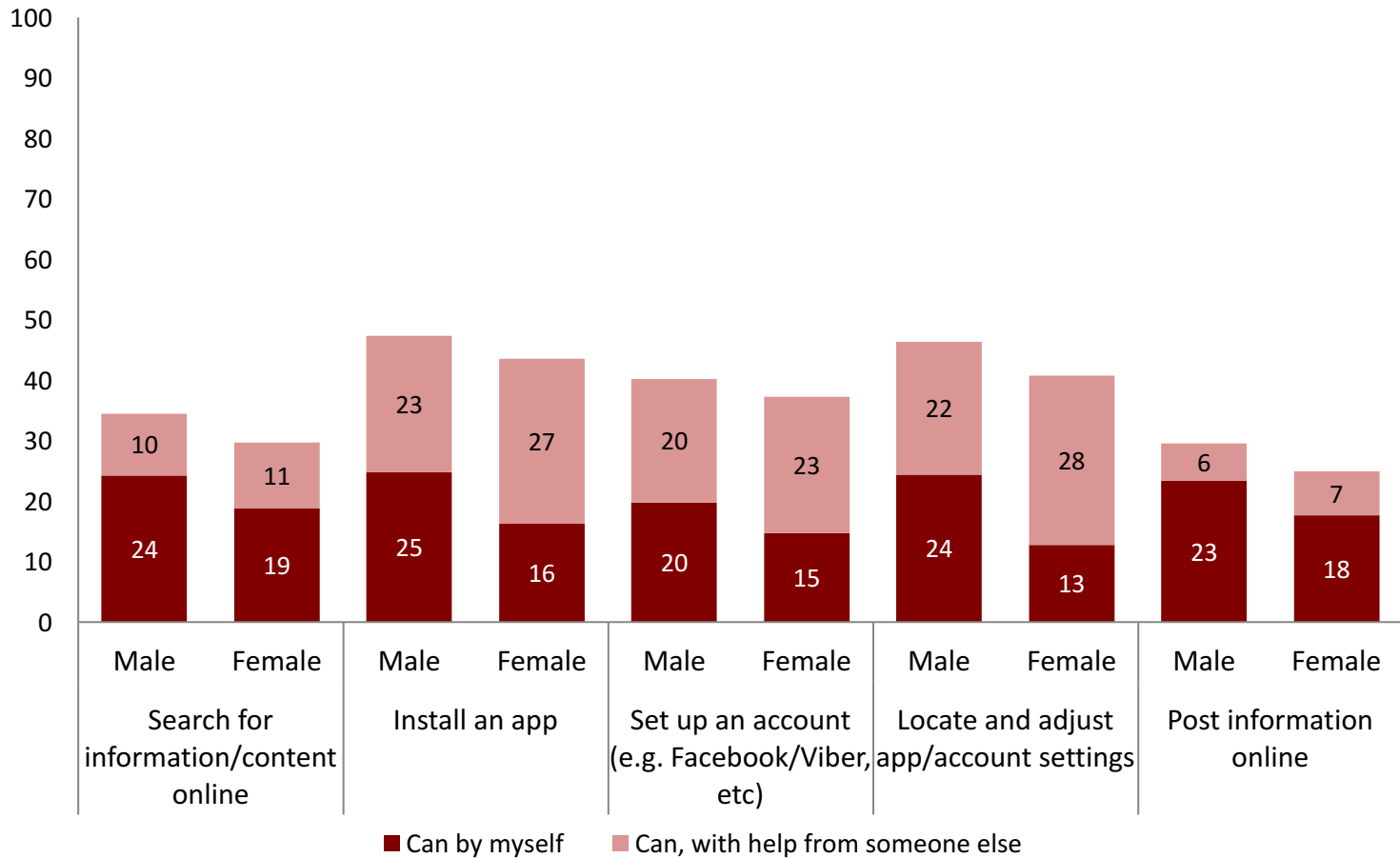


Q: Can you please tell me, which of the following activities you have ever done on your mobile or on the Internet/online, and for each one, whether you have done it by your self, or with someone else's help.

Base: Mobile handset owners

Digital literacy is even lower amongst women (compared to men)

Digital skills (% of mobile handset owners who can perform the tasks by themselves or with the help of others)



Q: Can you please tell me, which of the following activities you have ever done on your mobile or on the Internet/online, and for each one, whether you have done it by your self, or with someone else's help.

Base: Mobile handset owners

Being online in the context of low skills is problematic: hacking is experienced; self-regulation is seen as a solution

- Interviews with 93 Internet users in Myanmar interviewed (Aug- Sep 2017).
- Social media accounts (e.g. Facebook) opened by mobile phone shop owner/worker
 - Password known to shop owner
 - User at time not knowing there is a password for some apps
- Frequent hacking of passwords, payments made to hacker to recover password
 - *“Therefore, I tried to talk with the hacker through chatting. It looks as if I am talking to myself. I asked him to stop but he asked me to pay 5000 bill for his phone and when I did that, I got my account back again”. [Male respondent, Yangon]*
 - Online survey: 12% of 302 Internet users had been hacked; only 4% had experienced a financial scam online
- Significant “self-regulation” specially by women on content they post online due to fear of hacking, shaming, reputational damage
 - *“I have heard that it is easier to make a Photoshop out of the full body images. That’s why I also upload pictures that don’t reveal my full body”. [Female respondent , Yangon]*

Justice systems don't help: not accessible to all, unable/unwilling to help or doesn't know how to help

- Justice through the police limited to those with connections, power, resources
 - *“..They posted that photoshopped picture of mine on a different page... I tried to report it to the police... but their parents were government workers who have an authority. Thus, the policemen stood up for them and encouraged me to just forgive them. What else I could do? I decided to let it go.” [Female respondent, Yangon]*
 - *“They haven't posted it yet...they just threatened me.. I have lawyer friends therefore I don't need to worry about anything. At last they apologized me. Police asked me to leave it as it is...but I never gave up. I gave money to the police. At last I won.” [Male respondent, LGBTQ, Yangon,]*
 - *“I wouldn't want to [report it] because I'm scared of going to jail. And people would look at me and know about me... I wouldn't like going to the court either and I wouldn't want to meet with police and the judge. I would feel suffocated to meet them.” [Male respondent, LGBTQ, Yangon]*

It's not all about lack of skill. Policies that regulate online behavior are problematic too

- E.g. Section 66d of the Telecom Law: a criminal law provision that permits penalties of up to three years in prison for “extorting, coercing, restraining wrongfully, defaming, disturbing, causing undue influence or threatening any person using a telecommunications network.”
 - Over 50 people jailed as at mid 2017 under this provision
 - Third party complaints permitted
 - Duplicative of other (existing) laws that can deal with similar offenses
- *“I don't usually share posts on my wall. It is also because of the law like 66D. I am afraid that I might get into trouble by sharing some content. Since I do charity work, I need to be careful. The most I would do is to joke around with my friends by commenting about politics using the secret names we gave.” [Social media influencer, Yangon]*
- Not just Myanmar – India's Section 66A of IT Act provided punishment for offensive messages, insults etc.
 - Struck down by the Supreme Court as being unconstitutional

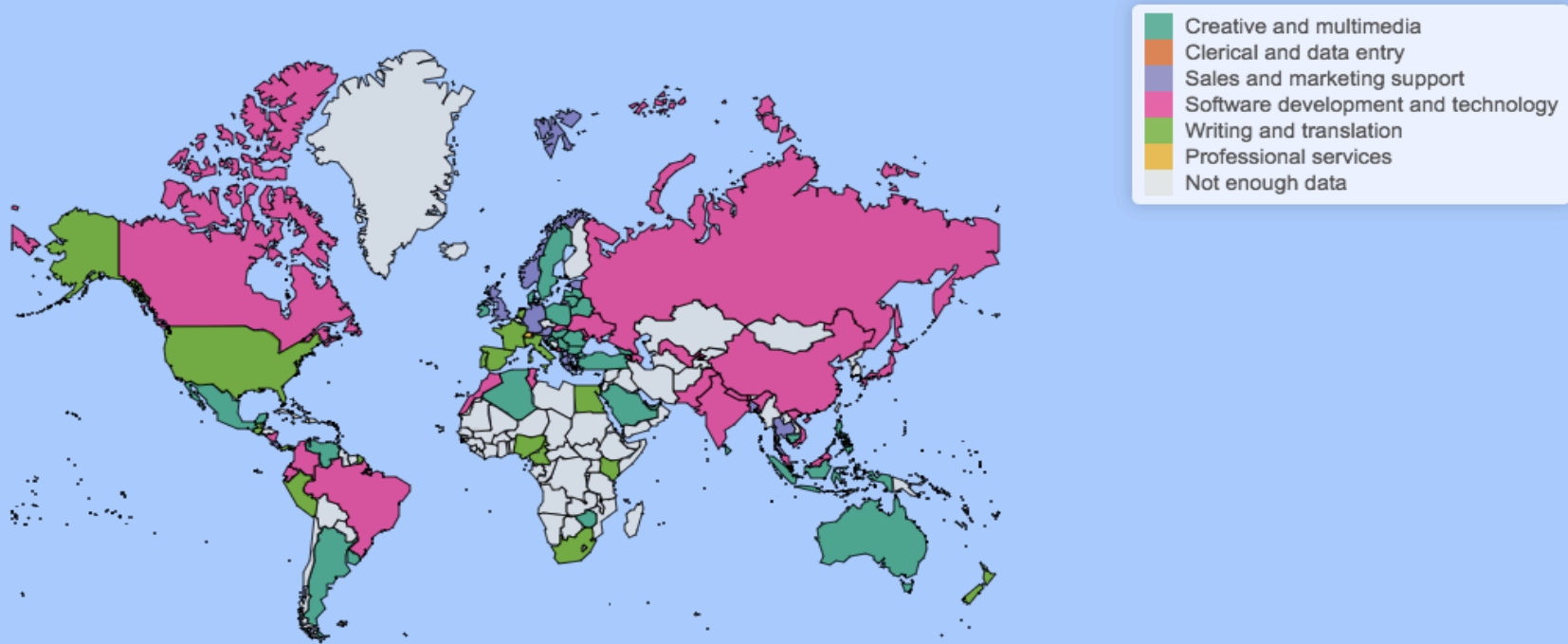
More broadly, many policies related to online life are non-existent or badly formulated. Internet Governance needs to be a priority for emerging Asian countries

- Telecom sector de-regulation successful – market forces connected many
 - Driven by technical assistance by multi-lateral banks
- Internet Governance issues rarely addressed in the liberalization process
 - But now they need to be addressed. Urgently
- No “focal point” in government to take the lead
 - Unlike the Ministry of Telecom/ICT/Digital Economy which has traditionally addressed ICT infrastructure issues
- Lack of multi—stakeholder mechanisms
 - Even when national level IGFs exists, IG policy often made elsewhere
- Resulting in adoption developed-country solutions/policies even when they are clearly unsuitable.

**MANY ARE ONLINE AND EARNING
MONEY**

Emerging Asian countries are major suppliers of labor on digital platforms that enable them to deliver work remotely

Online Labour Index top occupation by country, 1-6 July 2017



Source: Kässi, O. & Lehdonvirta, V. (2016) Online Labour Index: Measuring the Online Gig Economy for Policy and Research. Paper presented at Internet, Politics & Policy 2016, 22-23 September, Oxford, UK. <http://ilabour.oii.ox.ac.uk/online-labour-index/>

Type of work	Examples of type of work	Average earnings per month	Earning per job	Platforms used
Professional services	Project management Accounting Social media consultant	USD 15- 230	-	Facebook Frapp
Clerical and data entry	Translation Transcription Formatting documents Audio transcription	USD 15- 90	USD 0.1- 0.77 per word USD 6 per 1 hour audio	Translators café, Guru, Fiverr, Upwork, Freelancer
Creative and multimedia	Photography Video production Video editing	USD 107-184	USD 8- 77 per logo	Behance 99design
Sales and marketing support	SEO Ad posting Event promotion	USD 77- 230	-	Frapp Facebook groups WhatsApp
Software development and technology	Mobile development Software development Web development App development	USD 77- 230	USD 46- 122 per website	Upwork Freelancer Fiverr
Writing and translation	Copywriting ➤ Source: Focus groups and in-depth interviews with 301 current and potential online micro-workers and online freelancers in India, May – Aug 2017. Translation	USD 15- 90	USD 0.03 per word	Guru, Fiverr, Freelancer

Sri Lanka: 17,000 – 22,000 people engaged in online freelancing/microwork. Selling their skills on platforms

- National Survey (in 2016) and calculations show **17,000 – 22,000 people in Sri Lanka do online freelancing**
- Many work part time (e.g. 2-3 hours per week) to supplement income
- Most have 3 – 6 months of education (diplomas in computer science) after completing high school
 - Computer literacy and internet connections as basic needs
- **Average income per person nationally: Around USD 80 per month (Dept. of Census and Statistics)**
- **Average earnings from online free-lancing USD 140 per month**
- Most not willing to do full-time
 - Inability to prove income when asking for a loan
 - *“I need to into an office”*
 - *“I can’t explain what [I] do to my parents”*

A range of work is seen, with hugely varying income and skill. But only a few reach the high ends

Low earning,
low skill

Higher earning,
higher skill

Micro-tasks: low skill, low earning

- Ad-clicking (E.g. Clickworker, Amazon Mechanical Turk), image transcription, etc.
Can't get cheaper
- Low earning (USD\$ 0.1 per job)
- Buyer specifies price (worker is price taker)
- Low skill needed
- No payment if buyer not satisfied

Task based, but higher earning and higher skill

- Logo design; content writing; data entry; etc.
- **Facing competition from even cheaper labor markets**
- Average earnings (USD\$ 10-20 per hour)
- Range of skills needed
- Potential to develop repeat relationship w/ buyer

Project-based, high skill, higher earning

- E.g. Software/website development; consulting; etc.
- **Some tasks facing competition from cheaper labor. Others not**
- Direct client relationships
- Ability to charge premium prices
- Up to \$100,000 per month
- "Right place to use our skills"
- No issues getting paid

Need for constant re-skilling: learning how to learn

- Price-based competitive advantage of labor-erodes quickly
- Many jobs that were rule-based being automated
 - E.g. software testing. Result: Indian IT firms laying off in large numbers
- Solutions:
 - A) develop niche competencies (providing slightly longer term ability to capture a share of the labor market).
 - B) constantly re-skill and stay ahead of skills that are being commoditized

THANK YOU. SHOWN SURVEY DATA AVAILABLE AFTER DECEMBER 2017 AT:

- www.lirneasia.net and helani[at]lirneasia.net (for Asia survey data)
- www.researchictafrica.net (for Africa survey data)
- www.dirsi.net (for Latin America survey data)