

## WP2: DIAGNOSIS OF THE DIGITAL LANDSCAPE IN SOUTH AFRICA – SKILLS, INFRASTRUCTURE AND AVAILABLE TECHNOLOGIES

The brief for this study was to give an overview of the digital landscape within South Africa, to determine national and provincial trends pertaining to digital literacy and finally to gauge the South African public's response and attitude towards technology and technological devices.

South Africa has a total population of 56 million of which slightly more than half (53.8%) live below the poverty line; about a quarter (26,5%) is unemployed while a large proportion has very low educational levels. Basic services are inaccessible for a large portion of the population. The country is typically classified as a developing country but has the characteristics of both advanced and developing economies. South Africa has one of the most advanced and largest telecommunications markets on the African continent and has an approximate GDP of \$357 billion.

The South African Government has made a commitment in its National Development Plan 2030 to promote ICT readiness, to bridge the digital divide and to equip its youth for the impending technological revolution. It stated the ambitious goal to realise 100% broadband access by 2020 and to utilise ICTs as a key enabler of socio-economic development. This vision is supported by the South African Broadband Policy, the National Integrated ICT Policy and the White paper for post-school education and training. The country has furthermore been identified as one of the seven “top movers” (65th position amongst 139 world countries on the 2016 WEF e-Readiness index) largely the result of improvements in terms of infrastructure developments. However, despite these positive developments South Africa is still characterised by ineffective regulation and policy implementation.

Internet usage in South Africa has increased noticeably from 5.5% internet penetration of the total population in 2000 to 52% in 2016. The consumer demand for mobile phones is growing with 86% of adults owning one although only about a third of South Africans can afford to own a smartphone and use it to access the Internet. On average, SA citizens spend about a quarter of their income on cell phone usage.

Low income and affordability are typically identified as significant barriers to internet adoption and usage of ICTs. Other factors include the lack of relevant skills (educational in general and digital skills in particular), lack of incentives such as relevant local content, awareness of the benefits of the internet, socio-cultural acceptance and the general lack of infrastructure. Many digital skills development initiatives are happening in the country often linked with the Broadband rollout in the various Provinces and the ICT policy made provision for the establishment of a national body to assist in facilitating the national digital skills development process across sectors and institutions. However, a national assessment instrument or approach to measure the digital skills levels of citizens and/or to measure progress made in terms of digital skills interventions is yet to be developed.

Despite technological advances and ground breaking solutions (such as snap-scan, e-tax) comparable to developed economies, the majority of the population faces real access and adoption barriers. South Africa follows a mobile first technology trajectory creating opportunities for innovative approaches such as this project—with the aim to facilitate the sharing of digital stories for social innovation—provides.

