



IGF 2014 – GSMA Workshop Background Report

IGF Sub-theme: “Enhancing Digital Trust”

(Workshop proposal #2, May 2014)

“Mobile, trust and privacy”

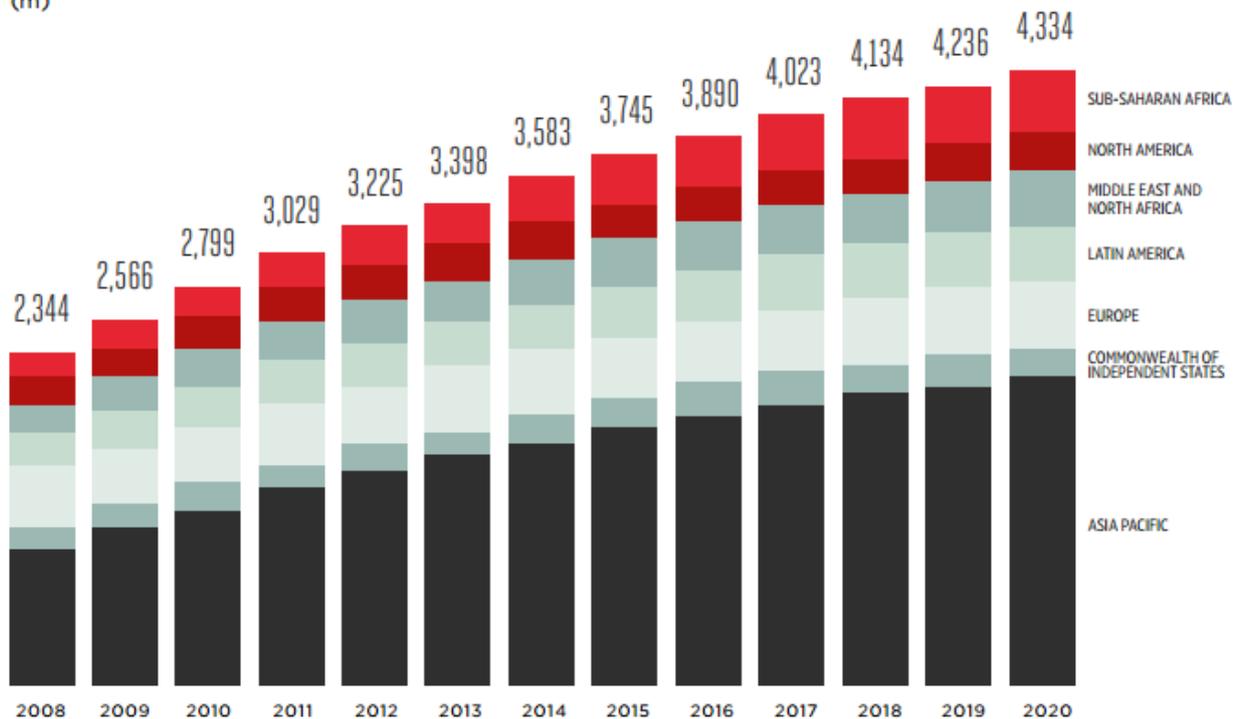
Mobile has become the primary platform for billions of people to connect online. At the end of 2003, there were over one billion unique subscribers, with this figure increasing to 3.4 billion by the end of 2013. The number of mobile broadband connections also grew tenfold from just over 200 million in 2008, to more than two billion by 2013. By 2020, the majority of the world’s population (56%) is expected to have their own mobile subscription.

The growth in mobile internet connections has been fuelled by higher speed networks and more advanced technologies.

Source: GSMA Intelligence

Unique Mobile Subscribers

(m)



7.7%

CAGR 2008-2013

3.5%

CAGR 2013-2020

It is no surprise that mobile has become a cornerstone of the global economy, both as an industry in its own right and as an enabler of opportunities in other sectors. The mobile industry (both directly and indirectly) contributed around 3.6% of global gross domestic product (GDP) in 2013, equivalent to over US\$ 2.4 trillion. This figure is expected to increase to 5.1% of global GDP by 2020. In addition, there are 10.5 million jobs supported directly by the mobile ecosystem across the world, while the mobile ecosystem contributed over US\$ 336 billion in public funding in 2013, even before considering regulatory and spectrum fees.

Mobile connectivity has already transformed daily life across the globe, and mobile is playing a particularly strong role in socio-economic development in many developing regions of the world. Mobile has brought voice services and Internet access to the previously unconnected, bridging the digital divide and empowering communities. Mobile has also benefited some of the most disadvantaged communities through the provision of mobile money services. This brings financial services within the reach of previously unbanked and underbanked populations, driving economic growth and promoting financial inclusion. Empowering women through mobile Internet access also has more wide reaching benefits to broader societies.

Through internet-enabled or 'Connected devices' the mobile industry can offer huge potential for enhancing people's lives in exciting new ways, for example helping them monitor their health, improve their education, pay for things with their mobile and improve the productivity of enterprises

Although the ability to connect with apps and services is bringing huge benefits to consumers and societies, this new ecosystem involves dynamic connections between people and things generating and sharing data in real time. Concerns arise as devices and smartphones access and collect information about consumers and their activities, which may then be shared with multiple parties or used in ways that might impact users' privacy or security often without them knowing.

Most internet-enabled devices are now designed and built to broadcast and facilitate the acquisition of consumers' data by default. Very often, consumers are not aware that their information is being broadcast to and shared with 3rd parties, either because the service or app did not notify them about this, or simply because they failed to read the long "terms and conditions" or privacy policies. Users may not be able to control these default settings and secondary uses of data about them and their devices.

While many companies use anonymised mobile data to realise economic opportunities but also to achieve social good objectives, consumers' privacy is still governed by a patchwork of national and local laws where they exist. Inconsistent legal frameworks lead to consumer loss of trust and create legal uncertainties, costs and barriers to innovation not only for multinational companies but for governments too.

There is also a growing public awareness of online risks and the need to protect identity. Governments and enterprises are seeking stronger authentication to reduce risk and

deliver efficiency through the mobile channel. Consumers want to know their identities are created and used in safe and secure, trustworthy ways.

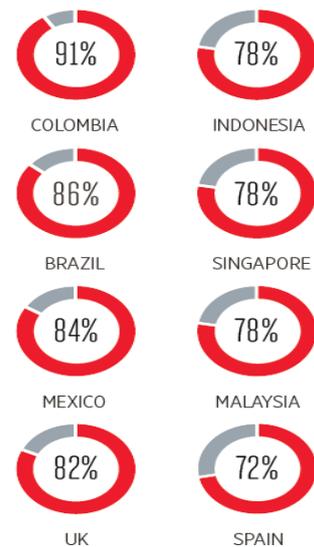
This workshop aims to bring together leading representatives from a broad spectrum of stakeholder groups to discuss privacy-related issues and ways to enhance mobile users' trust. Questions to address include:

- What are the key emerging challenges of a mobile-connected world?
- How can we ensure secure and trusted identities online?
- What needs to be done to ensure consumers are able to access services in private, trusted and secure ways?
- What are the respective roles of law and industry self-regulation in enhancing trust?
- How can we encourage multi-stakeholder cooperation in this space?

Insights from GSMA's Global research on mobile users' privacy attitudes

SEE OUR LATEST RESEARCH [REPORT](#) AND [VIDEO](#) ON HOW MOBILE USERS FEEL ABOUT THEIR PRIVACY

82%
of all mobile users want to know when, and what type of personal information is being collected from their mobile devices



80%

of mobile internet users who "agree" to privacy policies without reading them said it is because they are "too long"

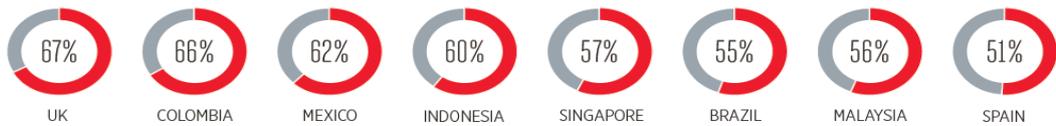




60%



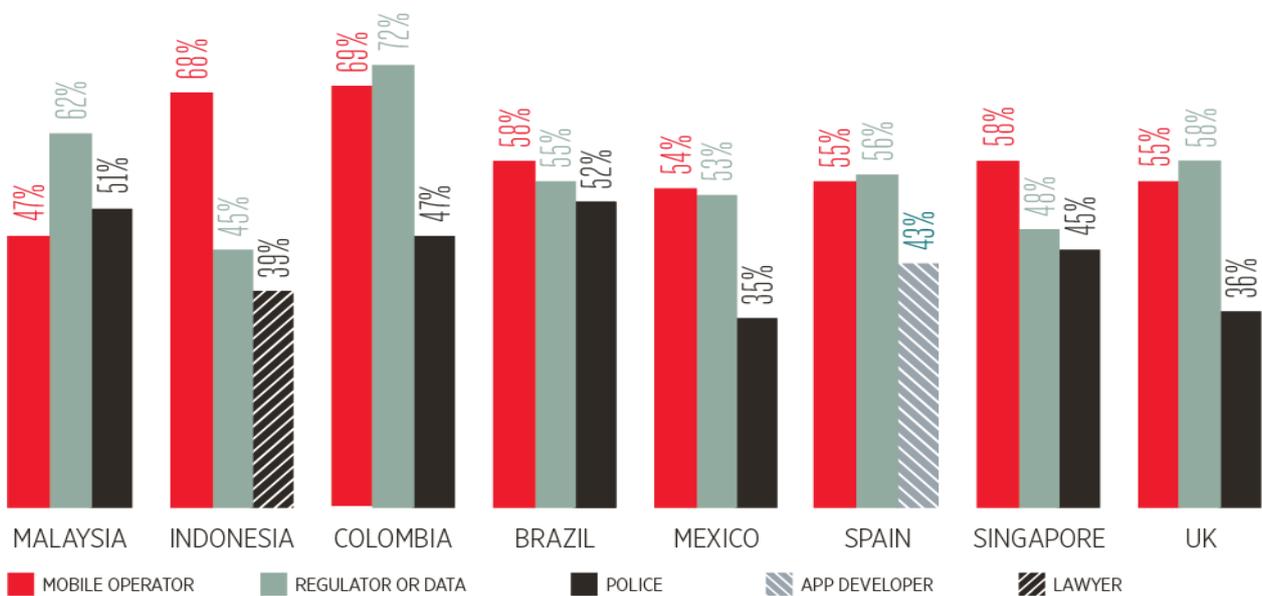
of mobile users want a consistent set of rules to apply to any company accessing their location, regardless of how they obtain this information



Base: All Audience 'A' mobile users

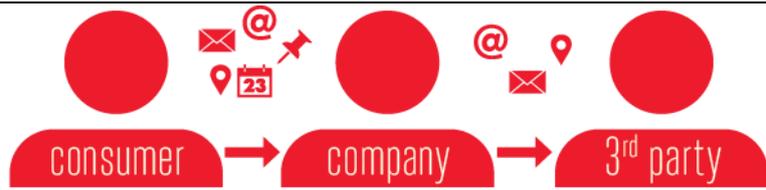


Globally, mobile users primarily look to their mobile operators (58%) for help when their privacy is invaded, followed by their national regulator/data protection authority (57%)



Base: All mobile users

81%



of mobile users think it is important to have the option of giving permission before 3rd parties use their personal information



UK



SINGAPORE



SPAIN



BRAZIL



MALAYSIA



MEXICO



COLOMBIA



INDONESIA

Base: All mobile internet users
