This summary report presents key findings from a research report produced by the Commonwealth Telecommunications Organisation (CTO) with Gamos being the research engine. Funded by Ericsson, the project called on the CTO to describe and analyse the current and future mobile content (m-content) requirements of end-users in India and Uganda. Although some research in this area has recently been undertaken in India it is by no means comprehensive. In Uganda there has been little analysis of the situation despite the fact that an m-content industry has existed for more than ten years. As such, the CTO and Ericsson hope this report will contribute towards improving m-content development in both countries, as well as further a field.

Today, policy makers, mobile operators, donors and users see the mobile phone as more than a tool for talking. This can partly be attributed to the growing popularity of Value Added Services (VAS) delivered through mobile phones. VAS has become a key way for operators to develop new revenue streams, differentiate themselves from competitors, attract new customers and retain existing ones. Strong growth in the use of VAS such as ringtones, games and wall papers, has seen it contribute between 5%‐10% of operators' revenues and many are aiming for 100% growth during 2008. This trend has coincided with a growing number of initiatives that have used mobiles to provide content that has positively impacted on socio-economic development outcomes. As a result, many stakeholders are now focused on the development of m-content.

Stakeholders in the Indian and Ugandan m-content sector are working towards increasing the range and quality of m-content available in order to meet users' requirements. Following analysis of survey results from 602 end-users in Uganda and 909 in India, as well as consultations with key stakeholders from government, regulatory authorities, mobile operators, content producers and civil society, this report concludes that the future of m-content in both countries is bright.

When asked about their intention to use m-content services in general, end-users were overwhelmingly positive, with 96% of respondents in both countries expressing a positive intention to use services. However, this positive intention will only feed into the development of m-content if there are services that meet users' requirements. There are few m-content services that could effectively contribute to meeting the most important information requirements concerning users' livelihoods which relate to reducing vulnerability by being able to contact

people in emergencies and increasing human capital through education and training. This is not surprising since much of the m-content available in both countries is entertainment based.

Despite the lack of socially orientated content, most users are aware of the various forms of m-content that are available and do use them to different degrees. In India the most commonly used types of content are games, downloaded ringtones and music. In Uganda the situation is different with airtime transfer ranking number one followed by games, news and sports. Interestingly, users from each country show a great deal of satisfaction with the services they use most and believe they represent good value for money.

Evidence of user satisfaction is important for those intent on the development of m-content in both countries as it suggest that users will continue using the services. However, it is only one piece of the jigsaw. It is imperative that content producers and operators push the envelope and develop new services in order to increase demand. There is little consistency in the innovative services that respondents from India and Uganda intend to use in the future. In India the top ranked service was listening and downloading music, with obtaining exam results at number two. In Uganda, an advice line on healthcare and health products was ranked number one while services that enable people to find jobs was second. Watching television was the only m-content service that appeared in both countries' top five list of services. The report also suggests that Internet over mobile, remittances and m-banking may be highly demanded in future.

Currently, most content is demanded and delivered through SMS. However, key stakeholders suggest that the future will be characterised by a change in the way content is demanded and delivered. The increased use of technologies such as interactive voice recognition (IVR), which will remove barriers to m-content use such as illiteracy, as well as 3G and Unstructured Supplementary Service Data (USSD), which will give users a more interactive experience, will prove to be significant.

Despite the positive future for m-content development in India and Uganda there is a note of caution. Users in both countries identify the lack of m-content in their local language as the main barrier to using services. In turn, key stakeholders highlight numerous obstacles. Examples of policy and regulatory regimes that neglect m-content, poor collaboration between stakeholders, limited ownership of higher specification mobiles as well as the continued and unwarranted focus on entertainment based content are arguably the biggest obstacles.

Although overcoming the obstacles appears to be a daunting task, there is cause to be positive as there are a number of opportunities to increase the required types of m-content. Indeed, scope for increased collaboration, the falling price of entry-level handsets and strong examples of best practice from other countries, are all encouraging factors which will aid in meeting users' current and future m-content requirements in both countries.

The full report is available to read here - Assessment of M-Content Requirements

in India and Uganda