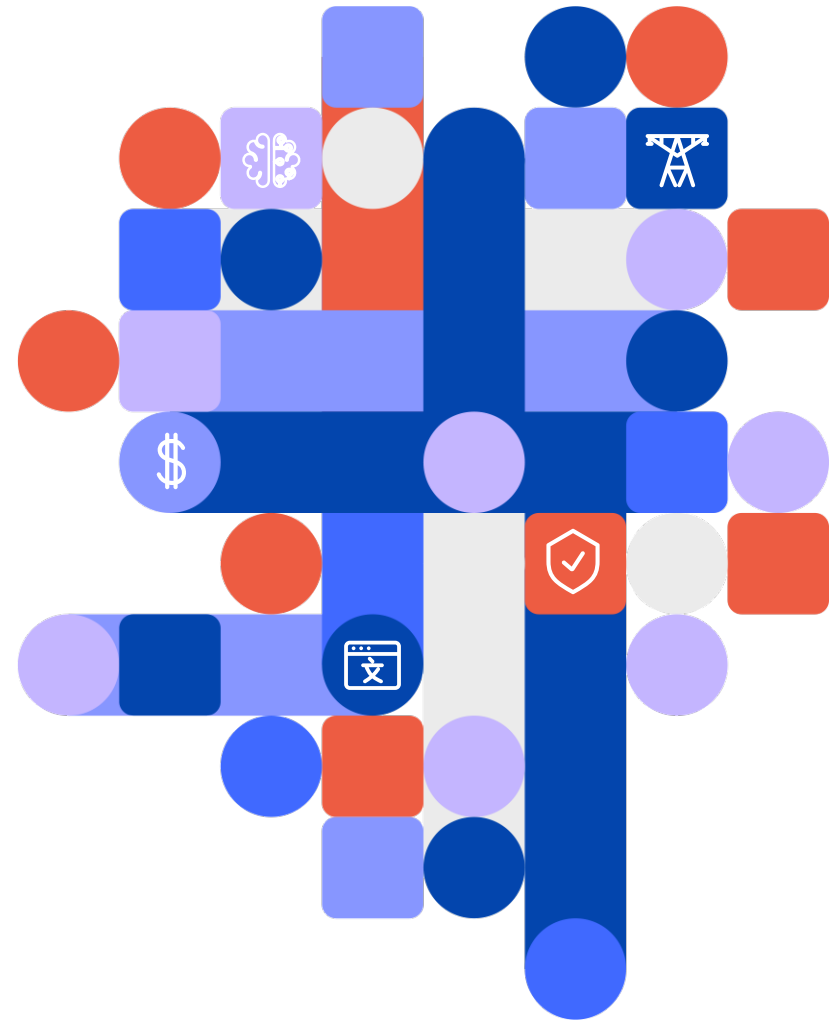


State of Digital Inequity: Civil Society Perspectives on Barriers to Progress in our Digitizing World

A Global Study



January 2023



Acknowledgements

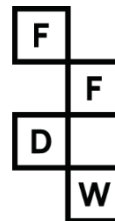
KNOWLEDGE PARTNER



DISSEMINATION PARTNERS



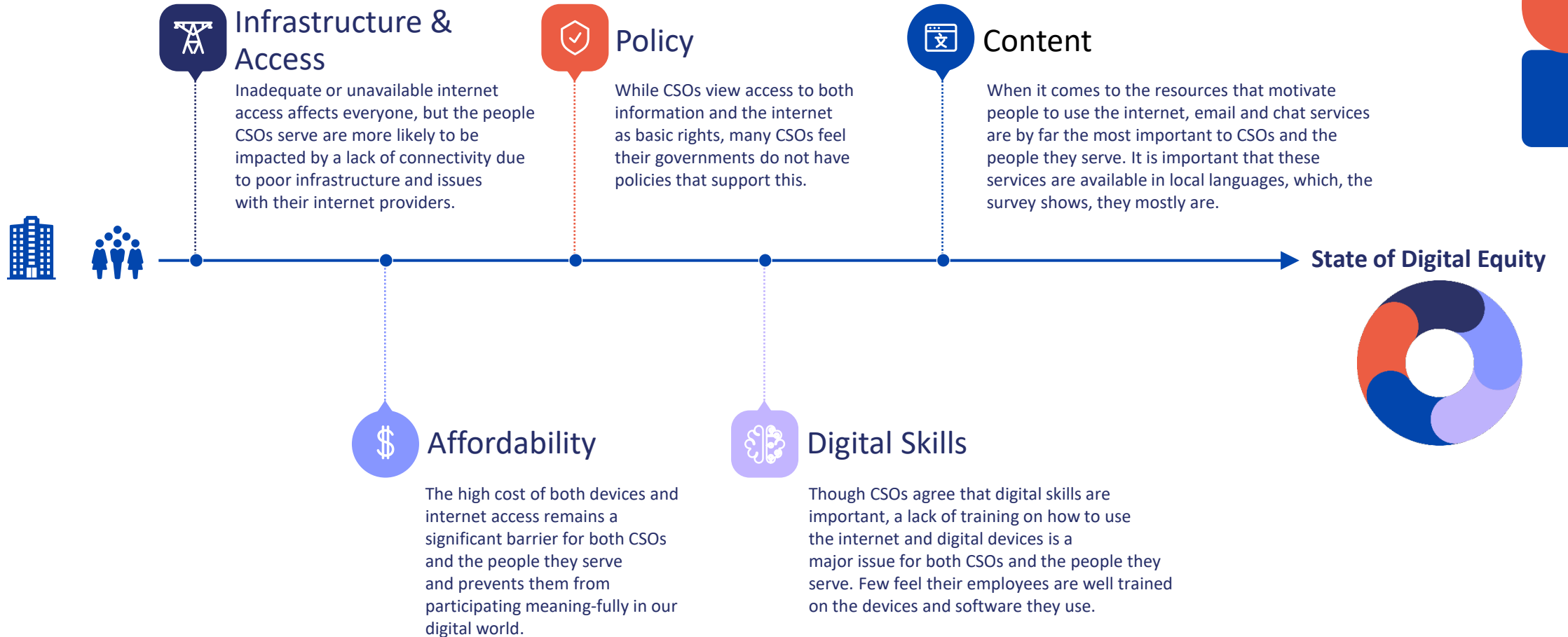
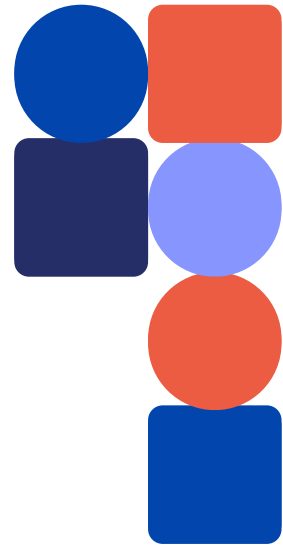
FUNDERS



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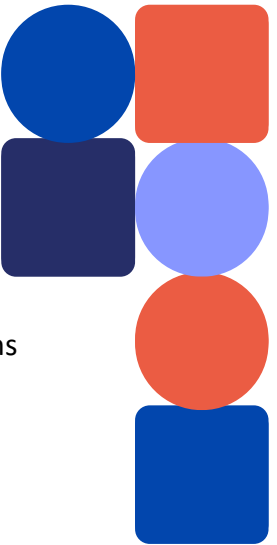
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For more information visit www.connecthumanity.fund or email press@connecthumanity.fund.*

Key Findings



Introduction

Access To Information Is A Right



One in two people do not have the internet. We are collectively failing to ensure their right to access the information they need to thrive in our increasingly digital world. As with all other rights-based struggles, civil society can and must play a leading role. To fulfill our role, we must better understand the conditions that ensure access to information. Namely, digital equity — the state in which all individuals have the digital access, tools, and skills they need to operate in our digitizing society. Further, we must understand where our communities are in relation to digital equity; how to articulate and fight for what our communities need.

To help organize the conversation, we developed a Digital Equity Framework with five broad elements: **Infrastructure, Affordability, Digital Skills, Policy, and Content**. The survey that led to the report is built around these themes and has been an effort to map gaps in digital equity: who has the resources they need to fully participate in our increasingly digitalized society — and who doesn't?

Completed by more than 7,500 civil society organizations, the survey represents the voices and reflections of a broad swath of civil society on the state of digital equity in their work and communities. Perhaps as important as the results, the survey gives us a common vocabulary, and increases our capacity to effectively discuss where we need to go from here.

The data is clear: across the world, many of the communities we serve do not have access to affordable and reliable internet nor the digital tools they need to fully participate in this digital age. The promising news is that the knowledge, capital, and solutions to advance digital equity are out there — we must mobilize, harness, and distribute them.

We hope that this report spurs discussions and debate, proves a useful step in building the Will for the Web, and encourages you to join us in work to ensure all those we seek to serve have their rights and are on a path to an equitable digital future for all.

A handwritten signature in blue ink, appearing to read "Chris Worman".

- Chris Worman, Co-Founder, Chief Partnership and Strategy Officer

Table Of Contents

6	<u>Overview</u>
15	<u>Detailed Findings</u>
21	<u>Infrastructure & Access</u>
28	<u>Affordability</u>
36	<u>Policy</u>
42	<u>Digital Skills</u>
48	<u>Content</u>
53	<u>Rural and Urban</u>
57	<u>Global North and Global South</u>
63	<u>Regional Snapshots</u>
72	<u>Issues Areas</u>
73	<u>Health</u>
74	<u>Education</u>
75	<u>Climate</u>
76	<u>Summary</u>



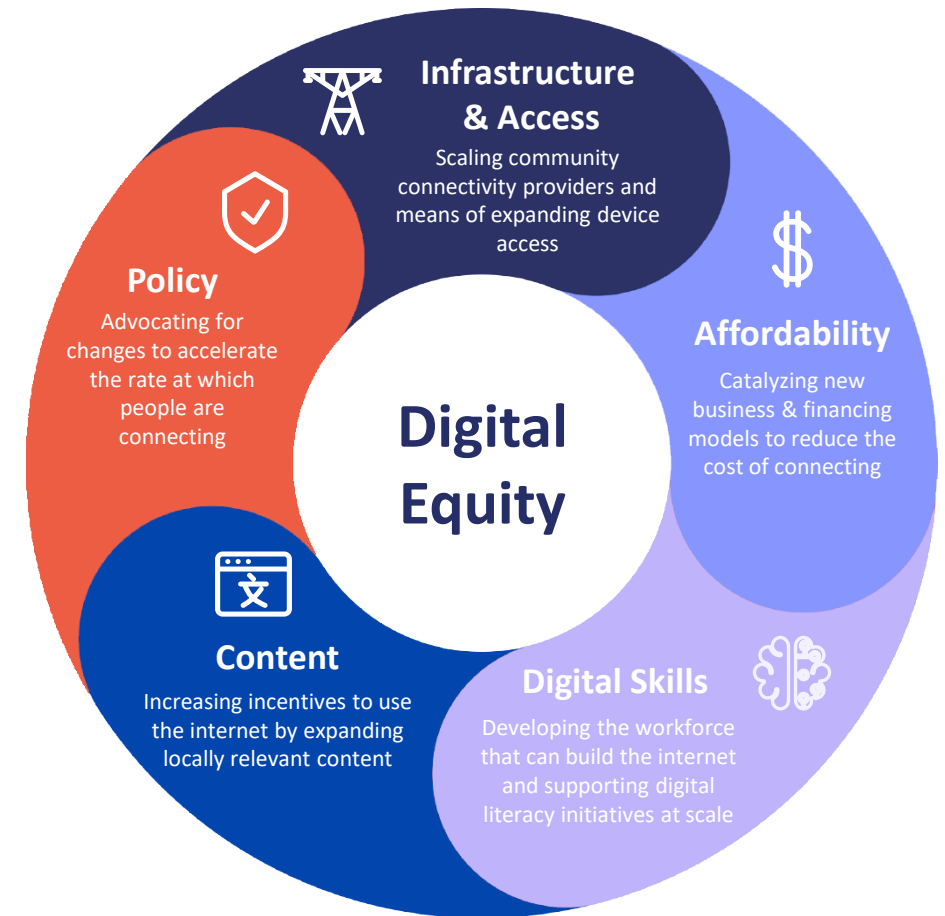
Overview

Digital Equity: An Introduction

Digital Equity is a state in which all individuals have the digital access, tools, and skills they need to operate in our digital society. Connect Humanity has developed a Digital Equity Framework with five broad elements: Infrastructure, Affordability, Digital Skills, Policy, and Content.

Each element is necessary to overcome the various digital divides that continue to prevent billions of people from being able to fully participate in our digital world. Only when people have the infrastructure that enables high-speed, affordable access, the tools and skills to take advantage of it, policies that ensure they are safe online, and content that is relevant to their needs, can we fully realize the power of the internet.

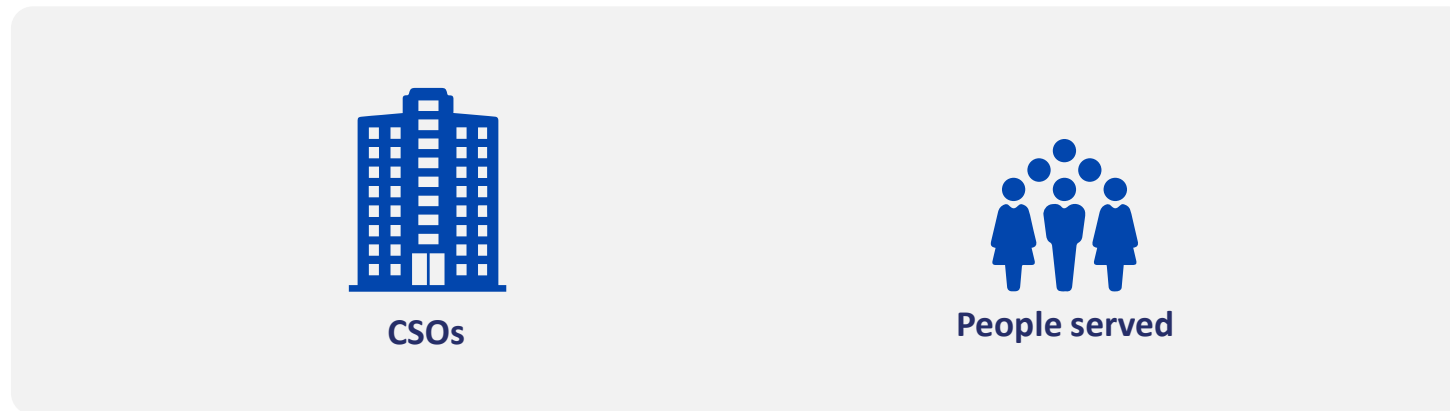
This report uses the Digital Equity Framework to structure the discussion, starting with a general section on digital equity and inclusion.



Before We Begin

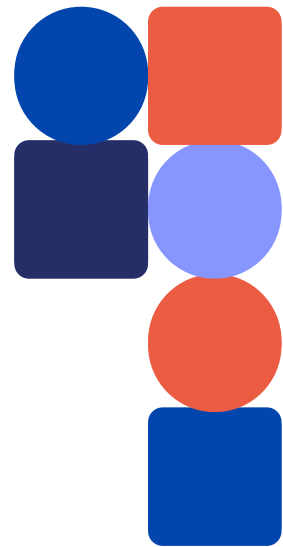
This report is based on the findings of a survey designed to address and map the digital needs of both civil society organizations (CSOs) and the people they serve. The survey was taken by over 7,500 CSO representatives, who were also asked to assess the needs of the people they serve.

Follow the data about these two groups by looking for their corresponding icons:

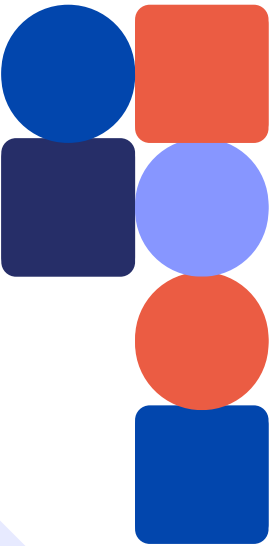


Interwoven throughout the data of this report are case studies, resources, and quotes sourced directly from civil society.

When comparing two or more groups, only statistically significant differences (at the 95 percentile) are highlighted in this report.



Why Civil Society's Perspective Matters



The more than 7,500 CSOs surveyed represent and serve over 190 million people.

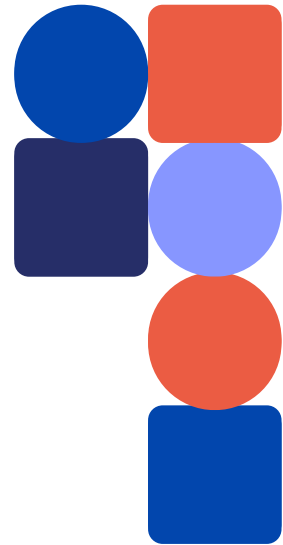
Nearly half of humanity does not have the internet access needed to participate in online education, health, business, or work. They are falling behind in our increasingly digital world.

Unconnected people and families are often served and advocated for by civil society. Civil society itself is often underconnected and lacking digital capabilities.

Until digital equity is achieved, governments, philanthropy, and other decisionmakers will continue to lack the breadth of data and information needed to make the best possible decisions.

Our collective right to information is compromised by solvable digital inequities, while we have collectively underinvested in the solutions needed to enable a more equitable digital future.

Why Civil Society Must Achieve Digital Equity



The digital divide affects CSOs and the people they serve across **all** issue areas.

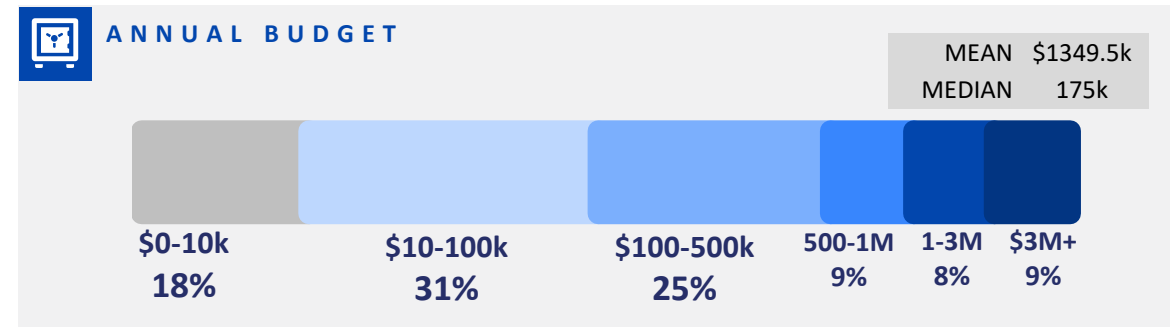
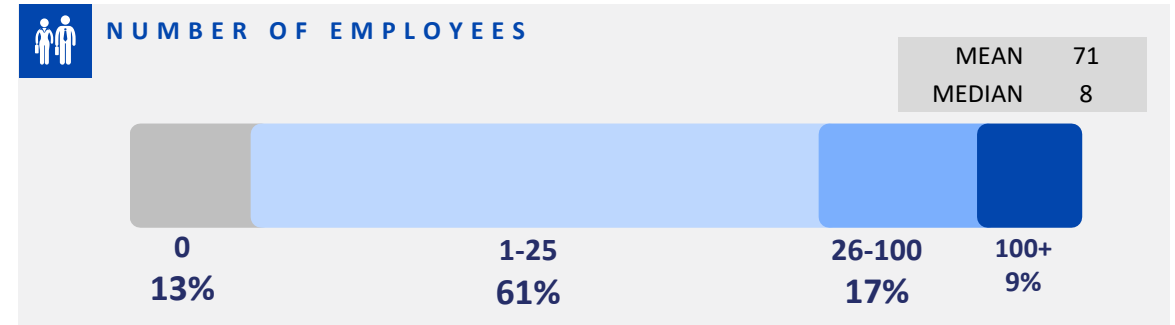
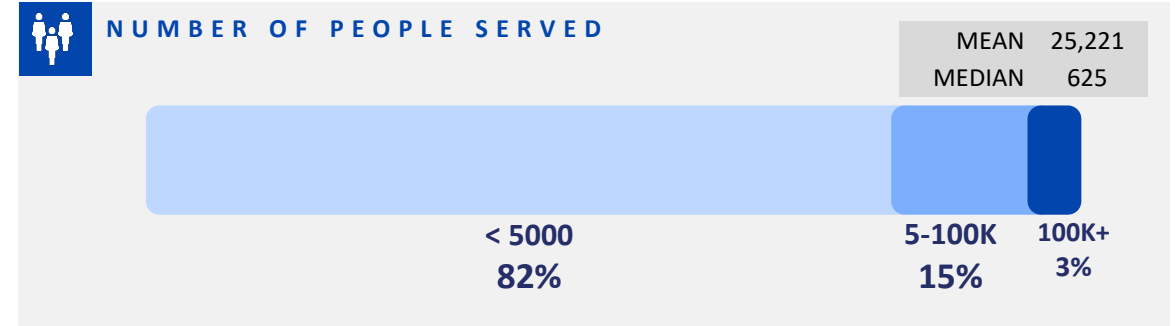
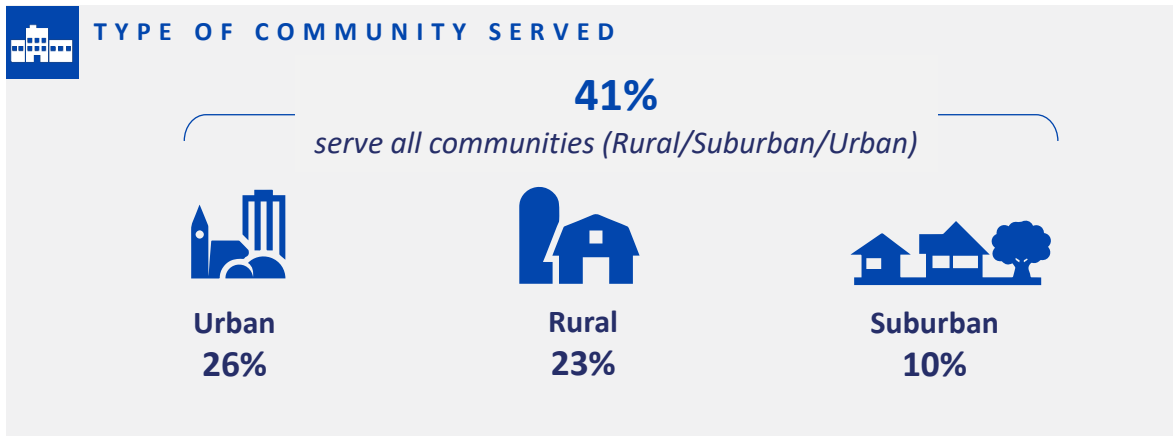
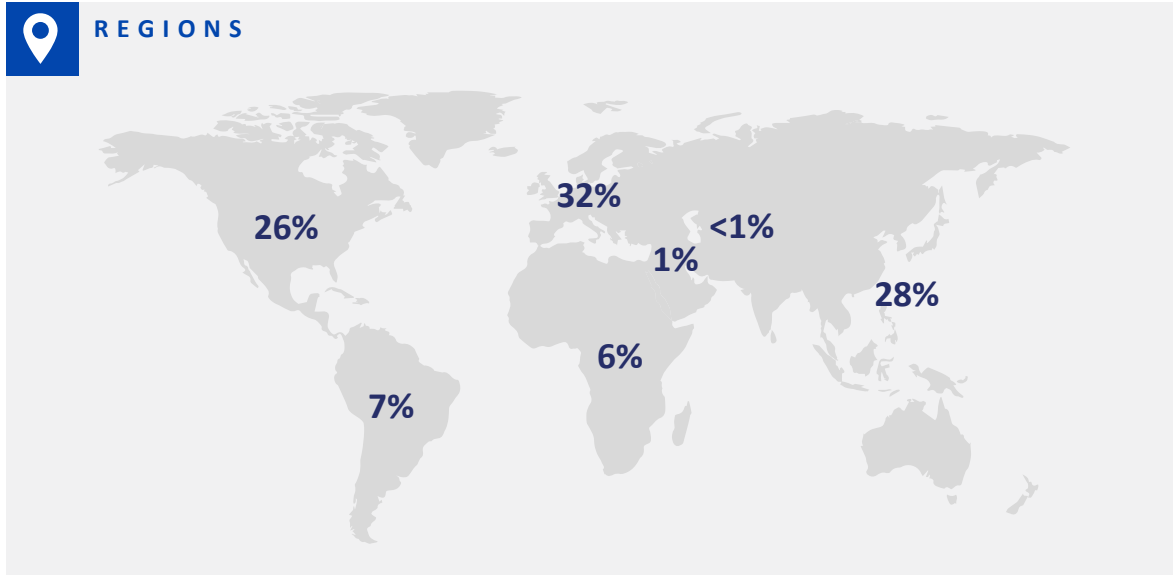
A lack of internet access, tools, or digital skills **limits the ability of CSOs to conduct their work.**

A lack of internet access, tools, or digital skills **limits the ability of the people they serve to participate fully in our digitalizing world.**



Digital equity intersects with every aspect of civil society in our digitalized age.

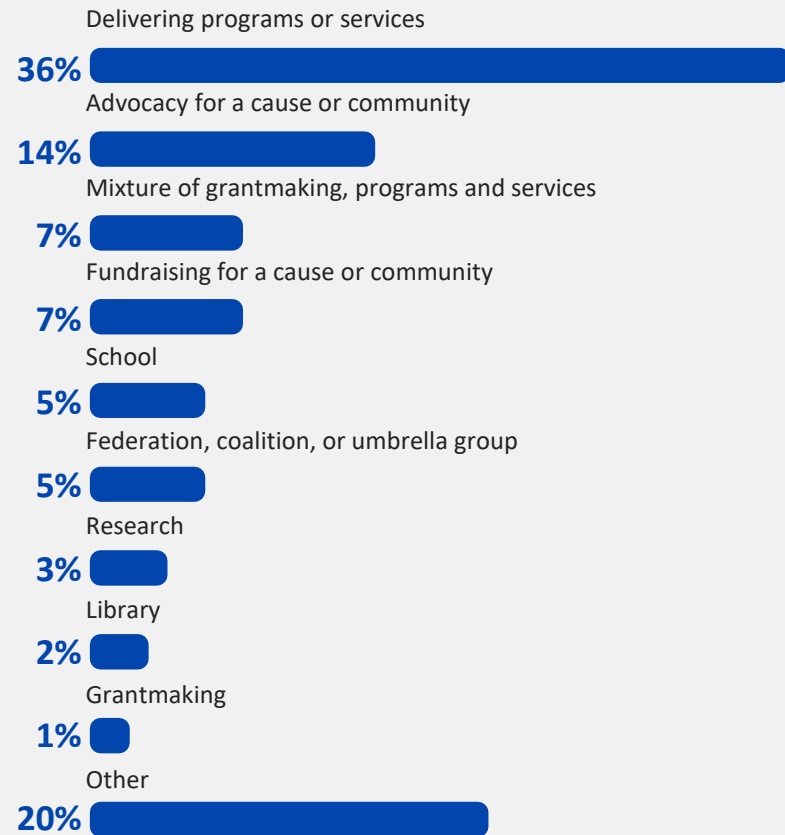
Overview of Participants



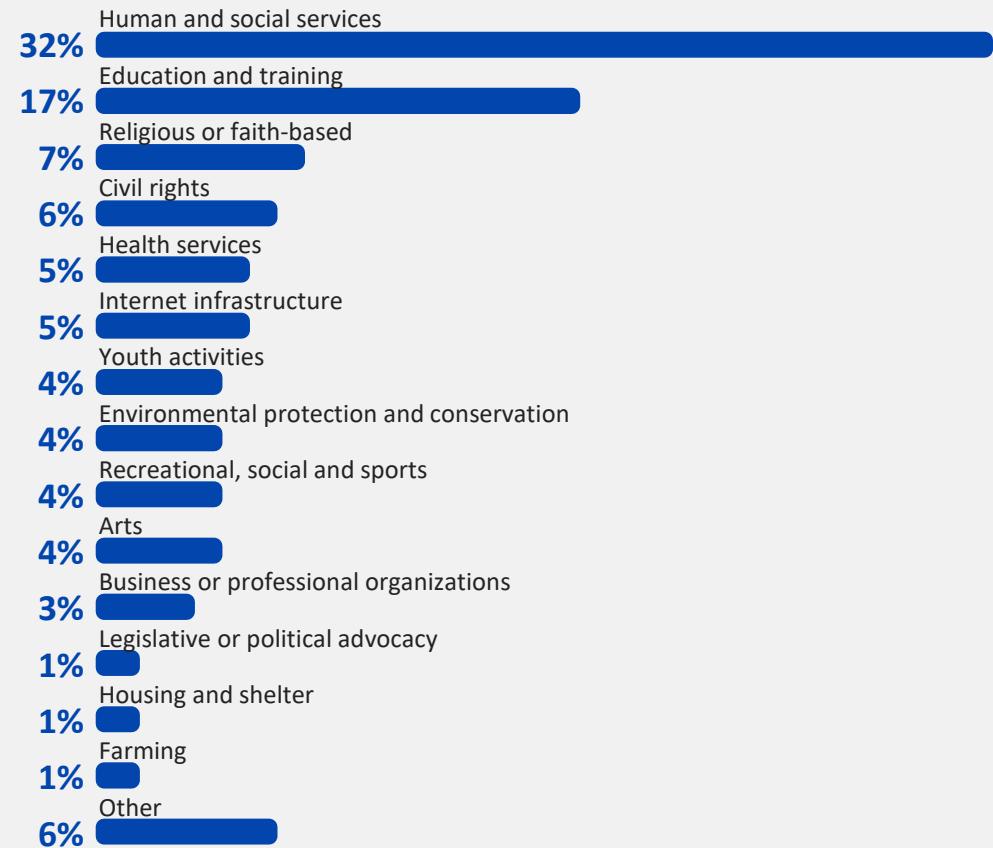
Organization Type



ORGANIZATION TYPE



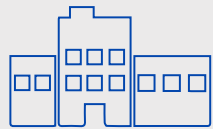
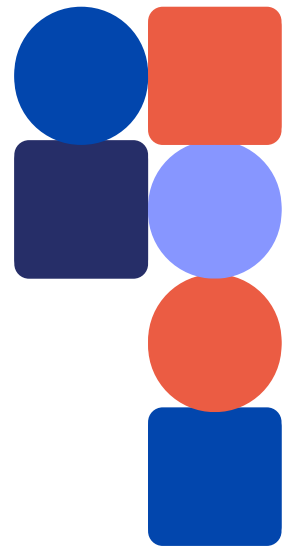
PRIMARY PROGRAM FOCUS



Research Approach

The survey was globally and anonymously distributed to CSOs in August and September 2022.

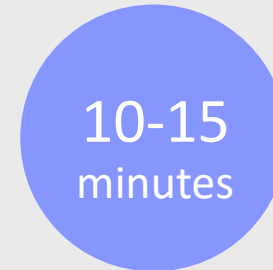
A total of 7,558 qualified responses from 136 countries and 26 languages were collected.



Representatives of civil society organizations



Languages

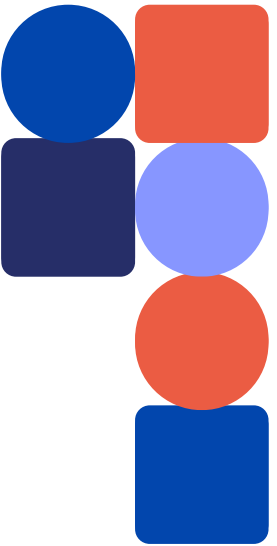


Average completion time



Spent mapping the state of digital equity

What's Next



All of us need to reflect on what having the internet — or not — means to our work and our communities in today's digital world.

The data in this report is unique because it presents the voices of people and communities who often have the most to gain from being connected, and the most to lose from being left behind. They are telling us that they — organizations providing invaluable services to people who need them — are hindered by a lack of connectivity. And they are telling us the nearly 200 million people they serve simply do not have what they need to participate in our digital society.

We have a choice: work with communities to meet their needs or watch them fall behind and fail.

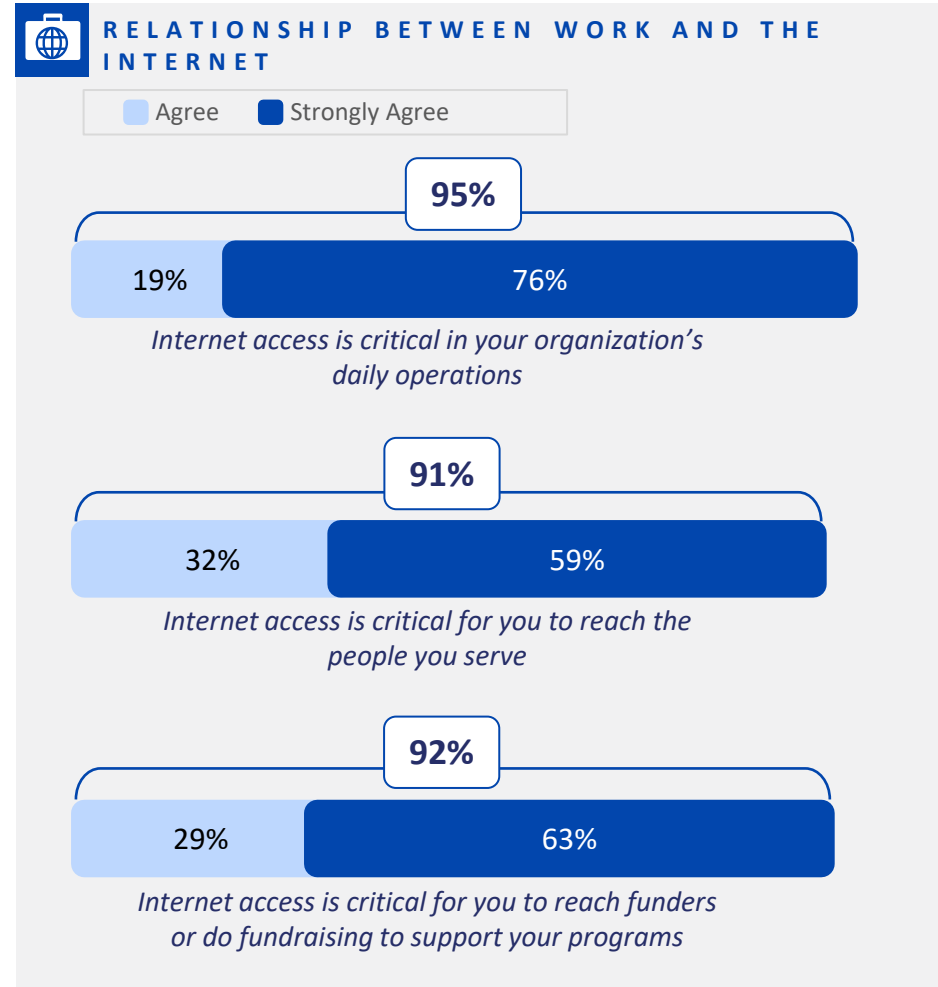
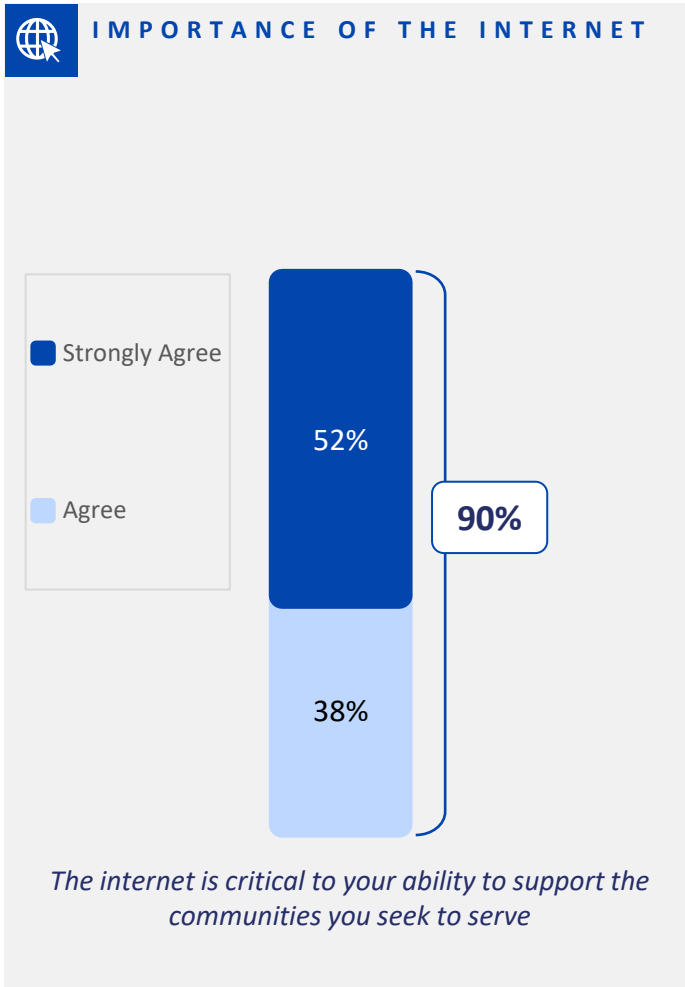
We must accept that the path to digital equity begins with civil society and that digital equity will not be achieved without civil society's engagement. To that end, we have already begun engaging civil society participants in a conversation about what they need and, collectively, we are developing a roadmap to advocate more effectively for digital equity.

We aim to continue this work for years to come, strengthening connections and feedback loops between communities, civil society, advocacy organizations, and their allies in government and business.

We hope you will join us and, in the spirit of "nothing about us, without us," help us to ensure that discussions determining our collective digital future do not leave half of humanity's voices unheard.

Detailed Findings

Almost all CSOs recognize the importance of the internet in their ability to conduct their work and support communities they want to serve

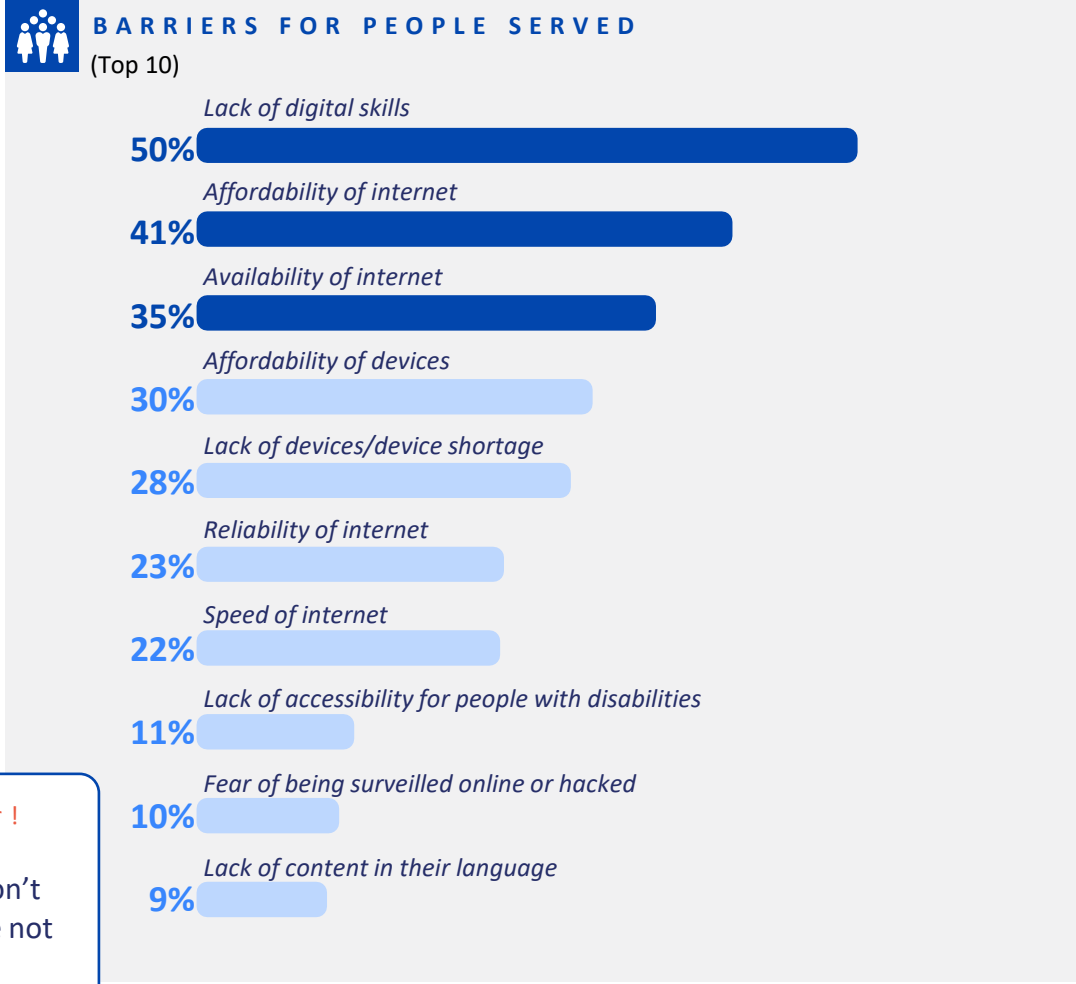
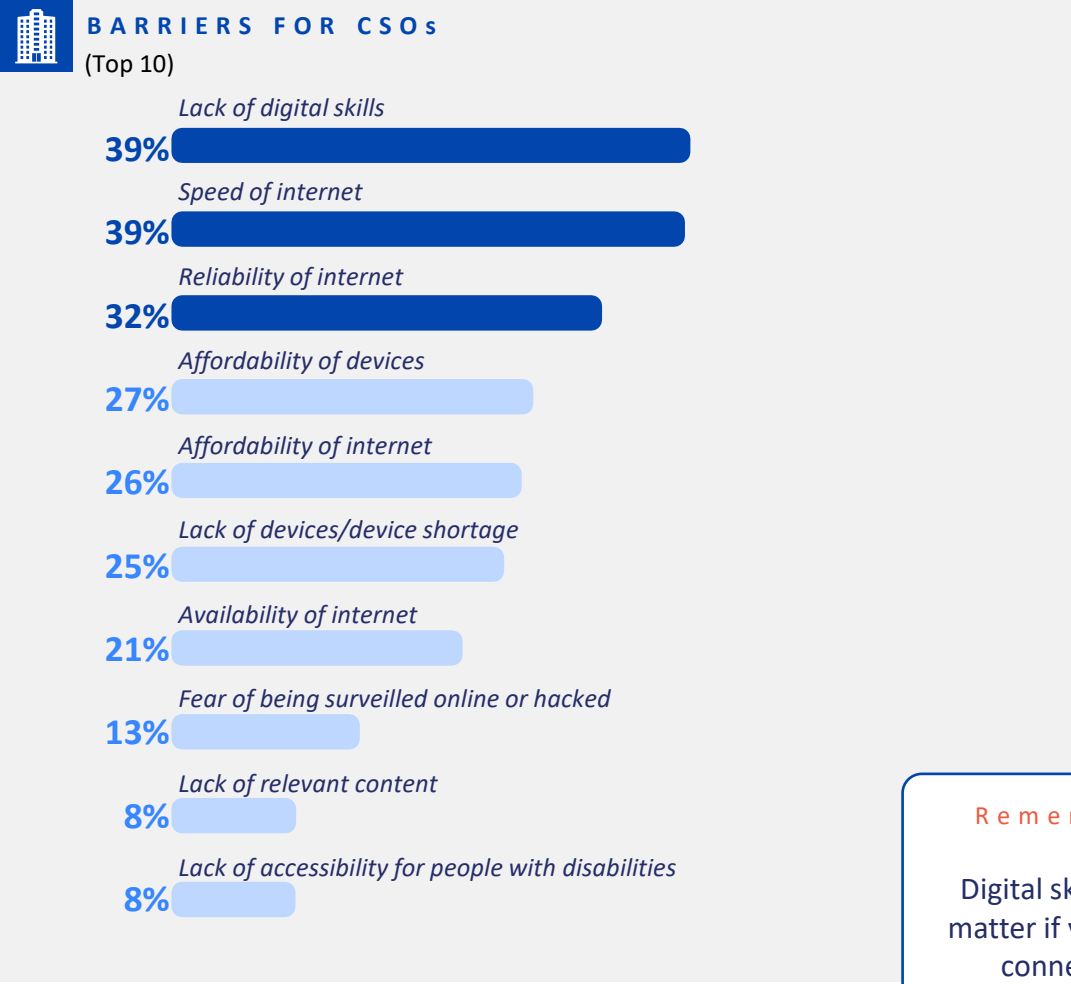


CSOs today see the internet as critical to their work

Everyone says the internet is important: when they don't have it, they can't work or serve their communities. Generous estimates say almost 3 billion people have no internet access. Billions more lack affordable, fast, and reliable internet connectivity.



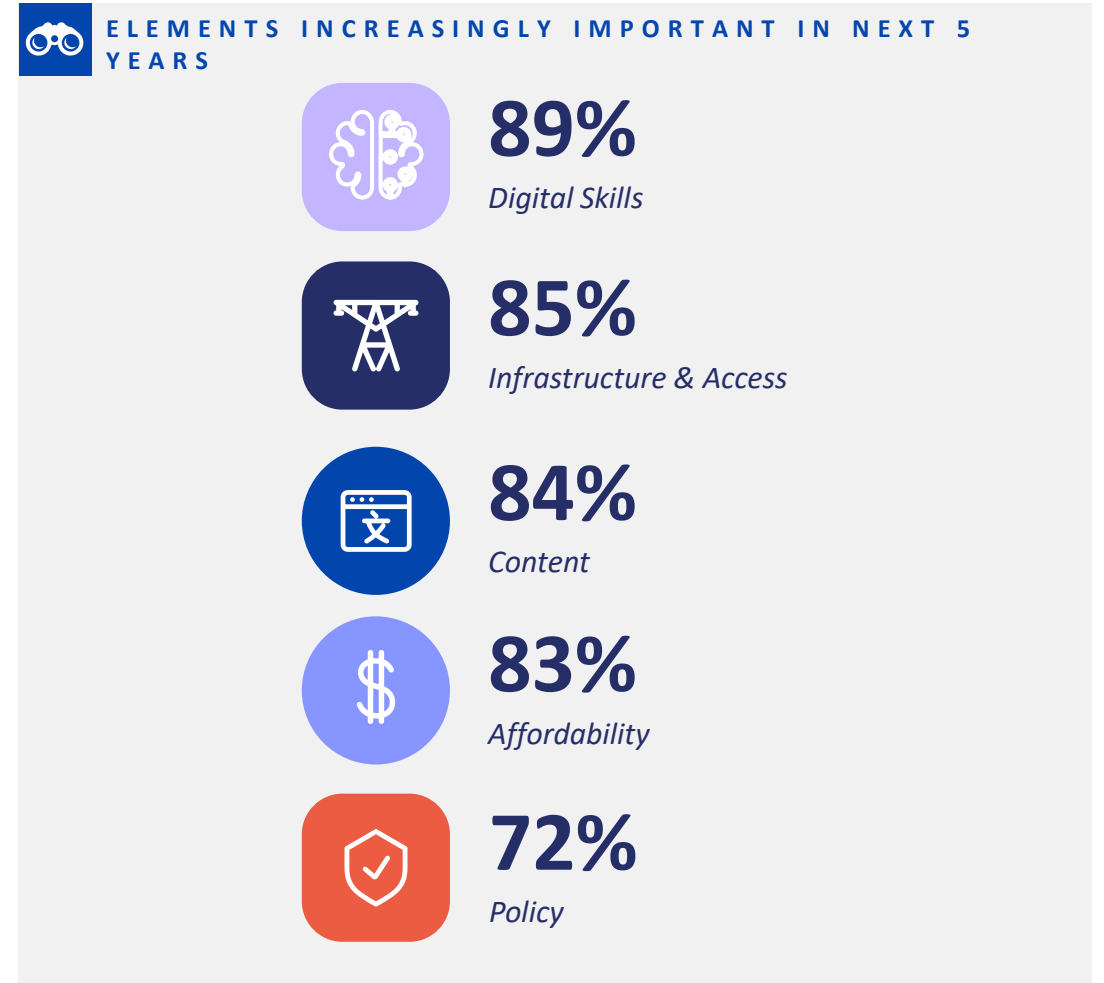
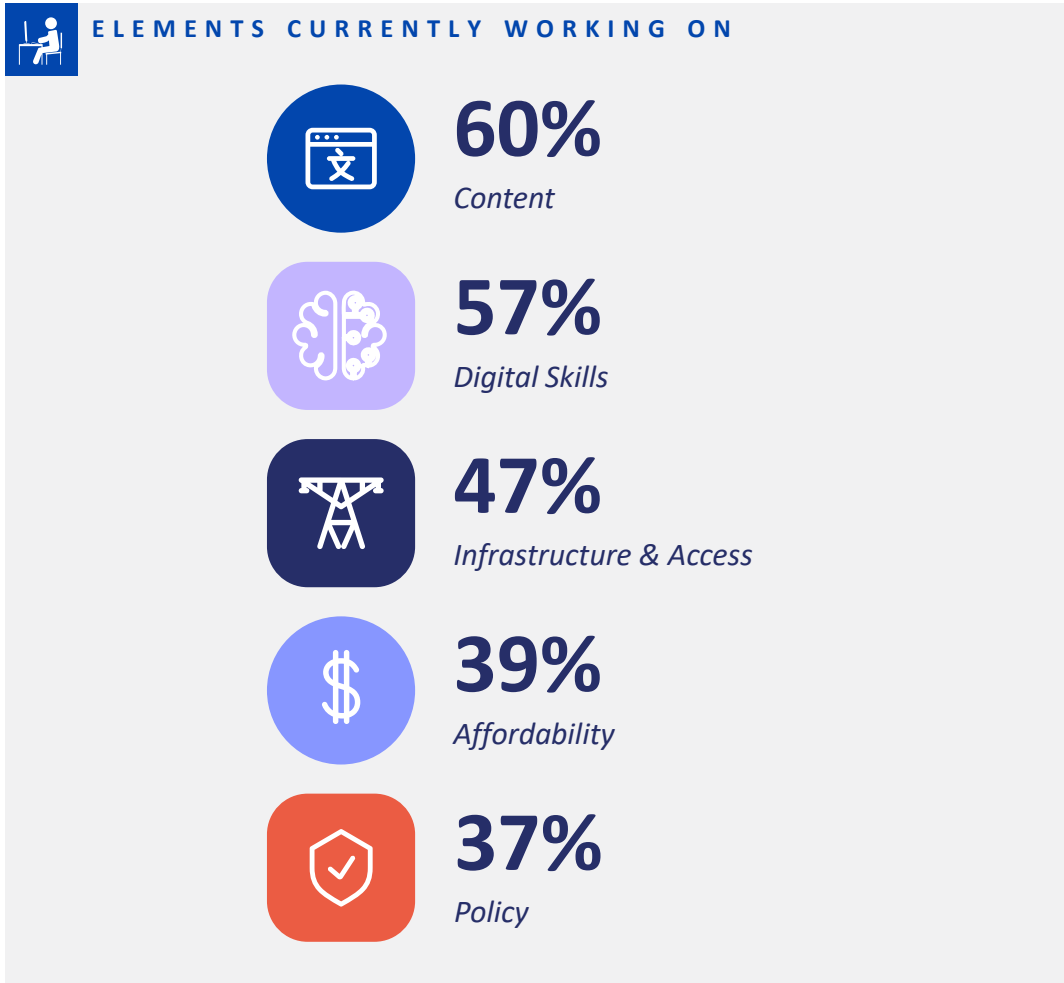
Access to affordable, fast, reliable internet are top concerns, after digital skills



Remember!
Digital skills don't matter if you're not connected!



CSOs are most focused on content, digital skills, and access — and increasingly on affordability issues

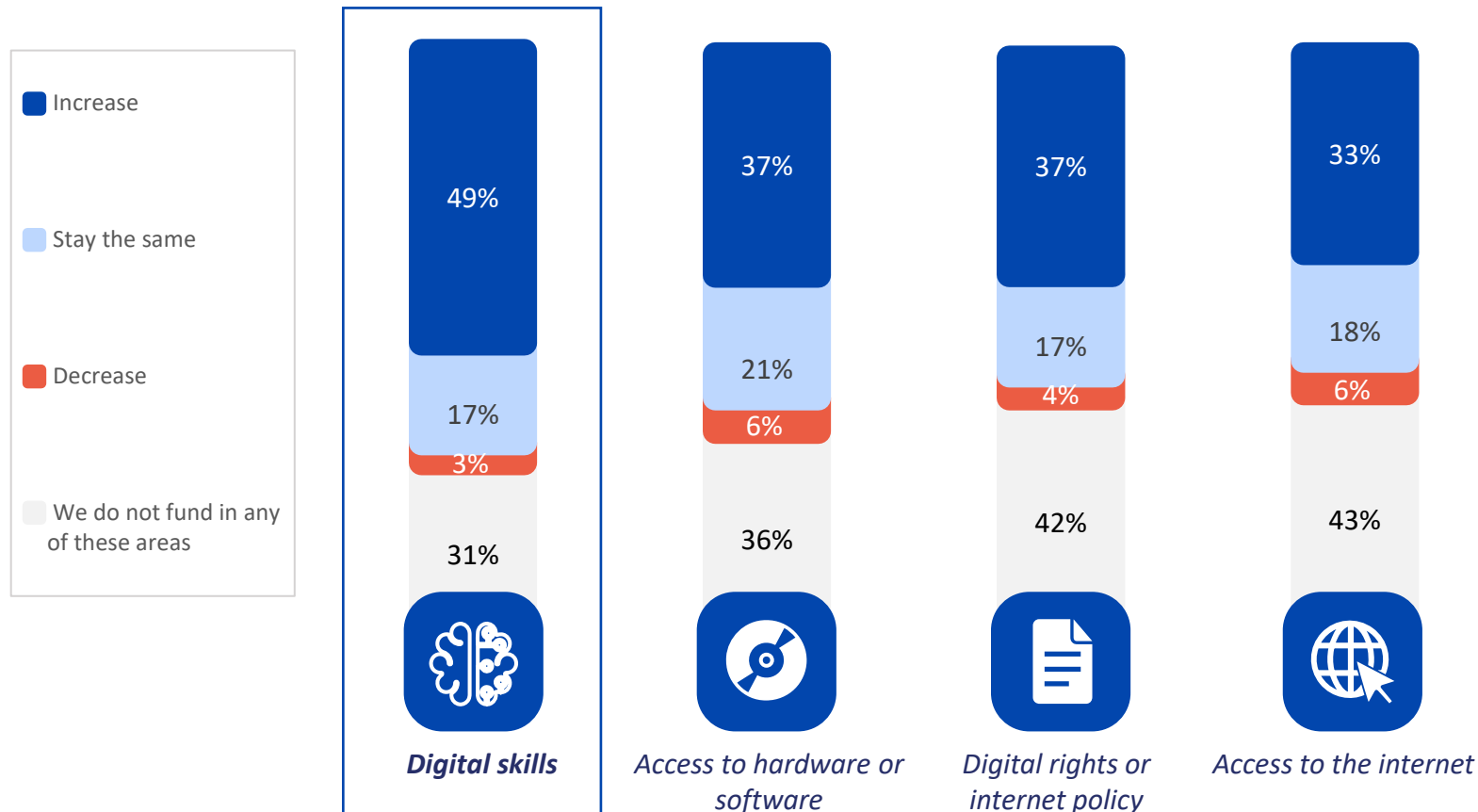


Q39. Are you actively working, either formally or informally, towards any of the 5 issue areas listed in this survey? (Base: Total = 7,558)

Q40. To what extent do you agree with the following: Over the next five years, the following will be increasingly important to you, your organization, and the work you do with your communities (Base: Total = 7,558)

Of the grantmakers who invest in digital equity, most expect to increase funding in the next 5 years; but many are still yet to invest

FUNDING CHANGE EXPECTATIONS FOR THE NEXT 5 YEARS (2023-2027)



No time to step back

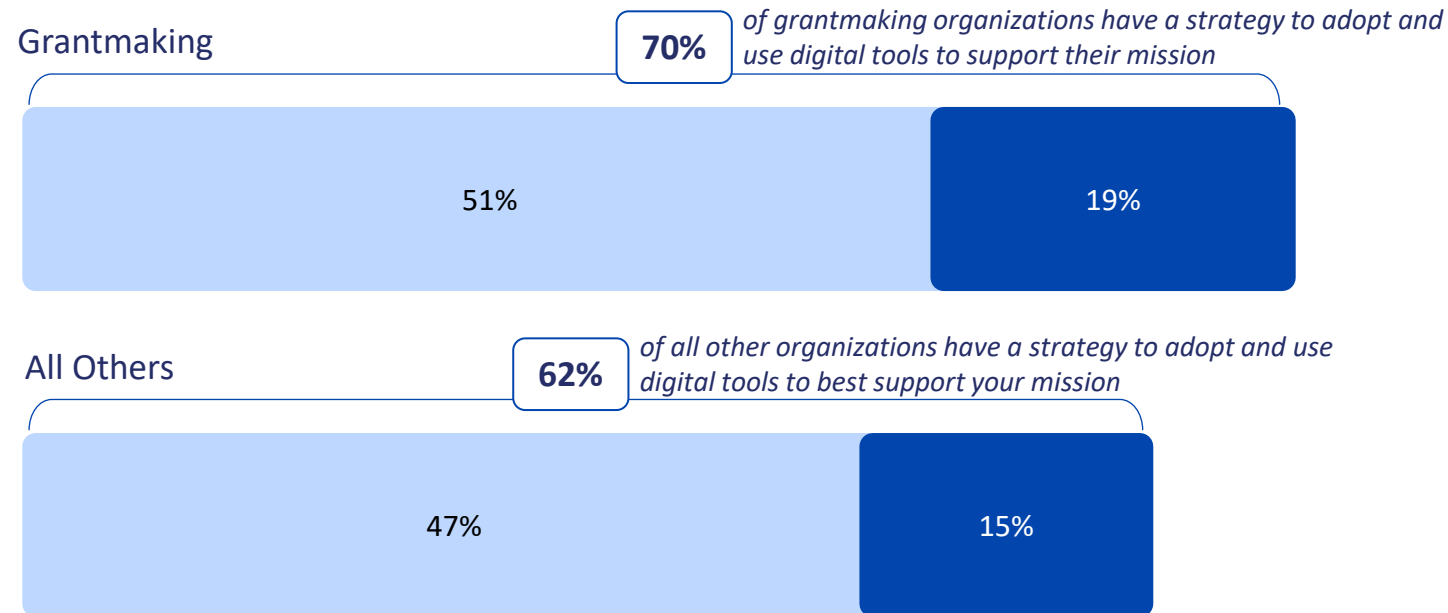
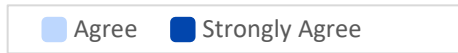
According to research done by Connect Humanity and Candid, only .05% of giving in the U.S. has gone toward ensuring digital equity. If funders decrease investments under the assumption that governments will step in with more funding, the digital divide will remain.

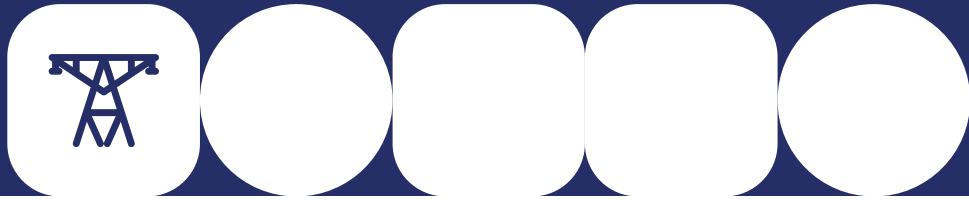
Funders to our programs refuse to properly recognize digital literacy as a sole educational need and push back when only digital literacy skills are being delivered. There is a refusal to give consistent and sustained funding to these programs and it forces programs like ours to spend time and energy looking for funding elsewhere — much of which is project based.

- Survey respondent from Canada

Grantmaking organizations are more likely to have a digital strategy than other CSOs

GRANTMAKING STRATEGY



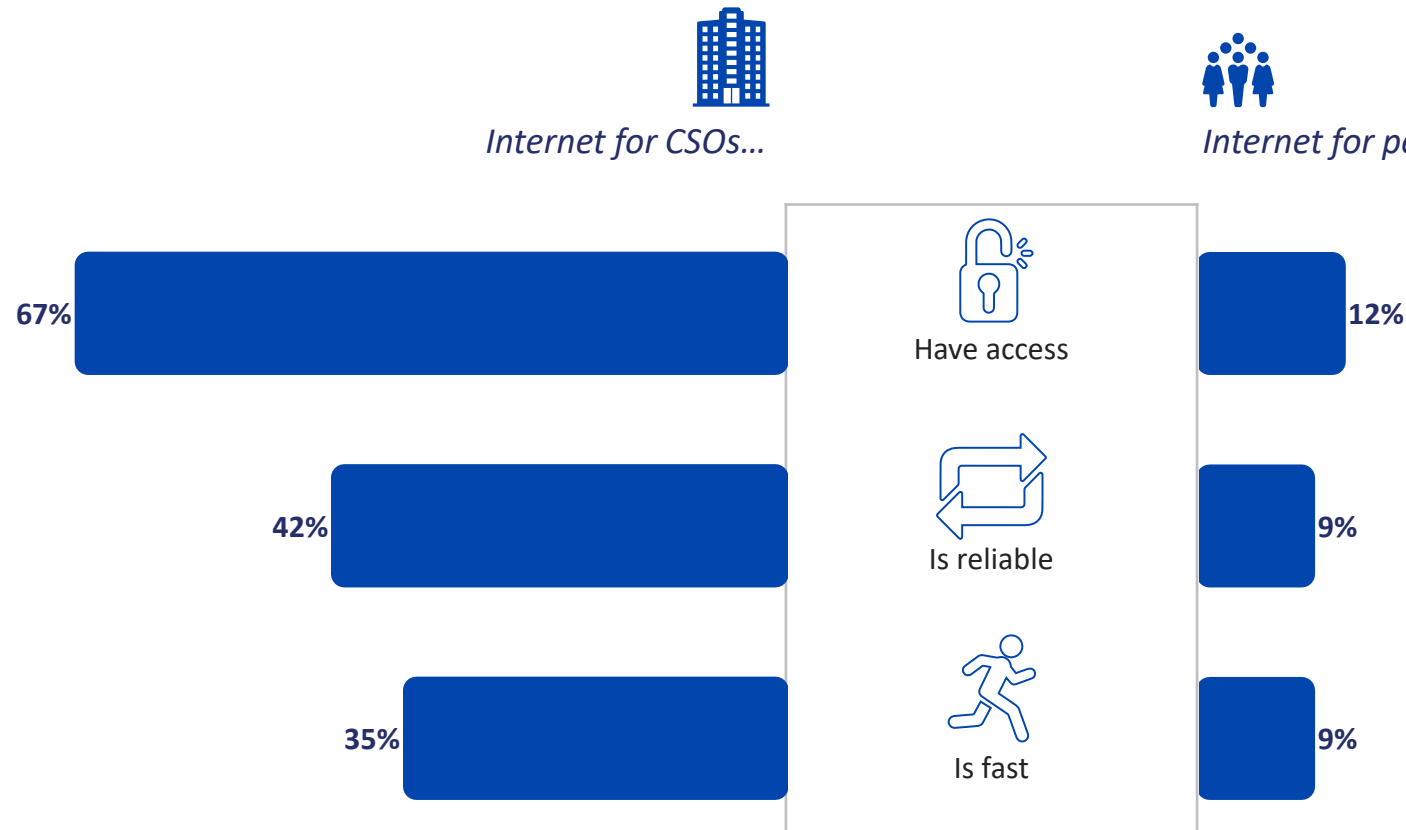


Infrastructure & Access

INFRASTRUCTURE refers to the technical components that enable computers and other devices to connect and **ACCESS** internet services

Most CSOs are without fast, reliable internet; the people they serve struggle far more

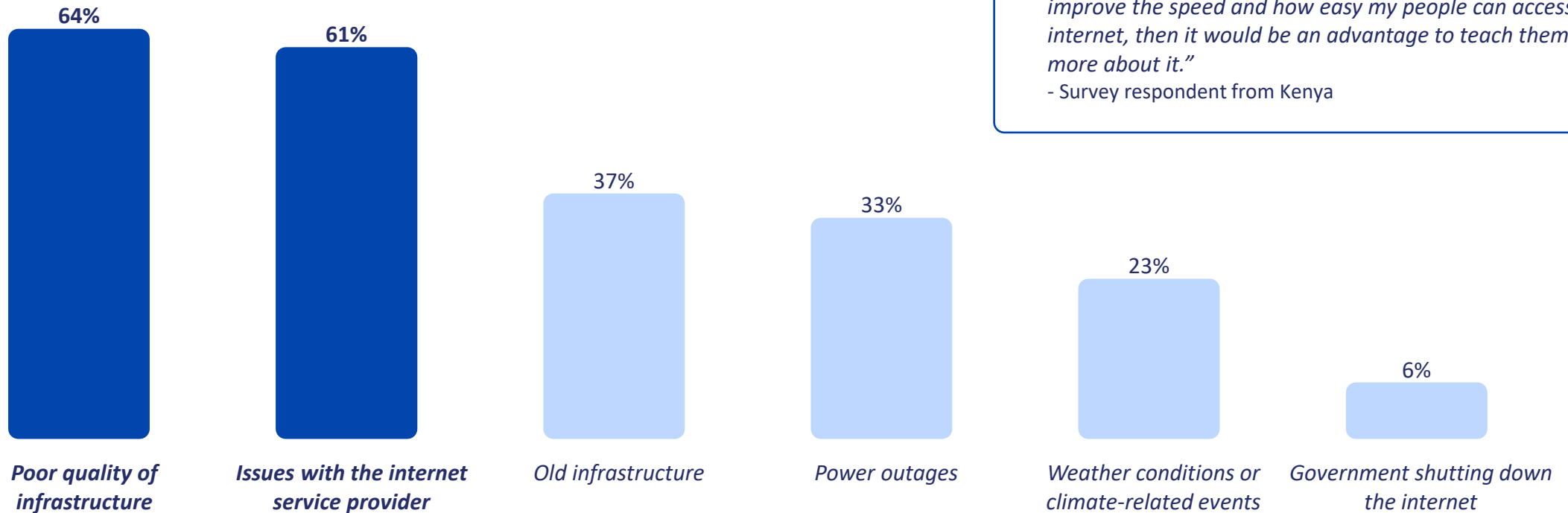
ACCESS TO THE INTERNET (STRONGLY AGREE)



We are in Oaxaca and the young people we serve had to use the internet to receive our services because of the pandemic. But most of them had no internet access, no devices... and could not pay for the service.”
 - Survey respondent from Mexico

Poor quality infrastructure and issues with internet providers are the main reasons internet is not reliable

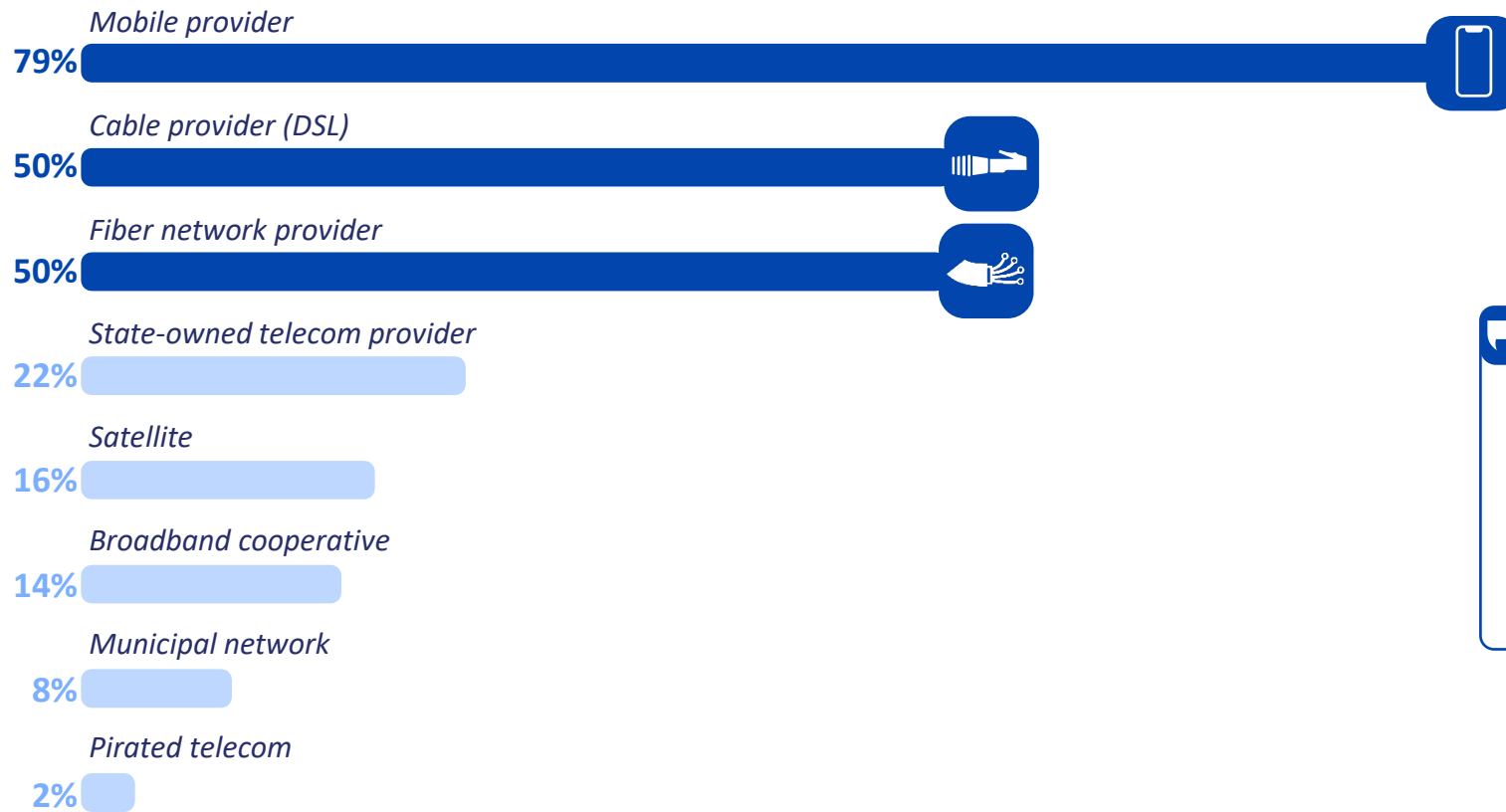
BARRIERS TO RELIABLE INTERNET



My challenge is always the reliability of internet access. Sometimes it is very poor such that you cannot do anything meaningful at work. If there is a way to improve the speed and how easy my people can access internet, then it would be an advantage to teach them more about it.”
- Survey respondent from Kenya

A large majority of CSOs and the people they serve use a mobile provider to access the internet; half also use a cable provider or a fiber network provider

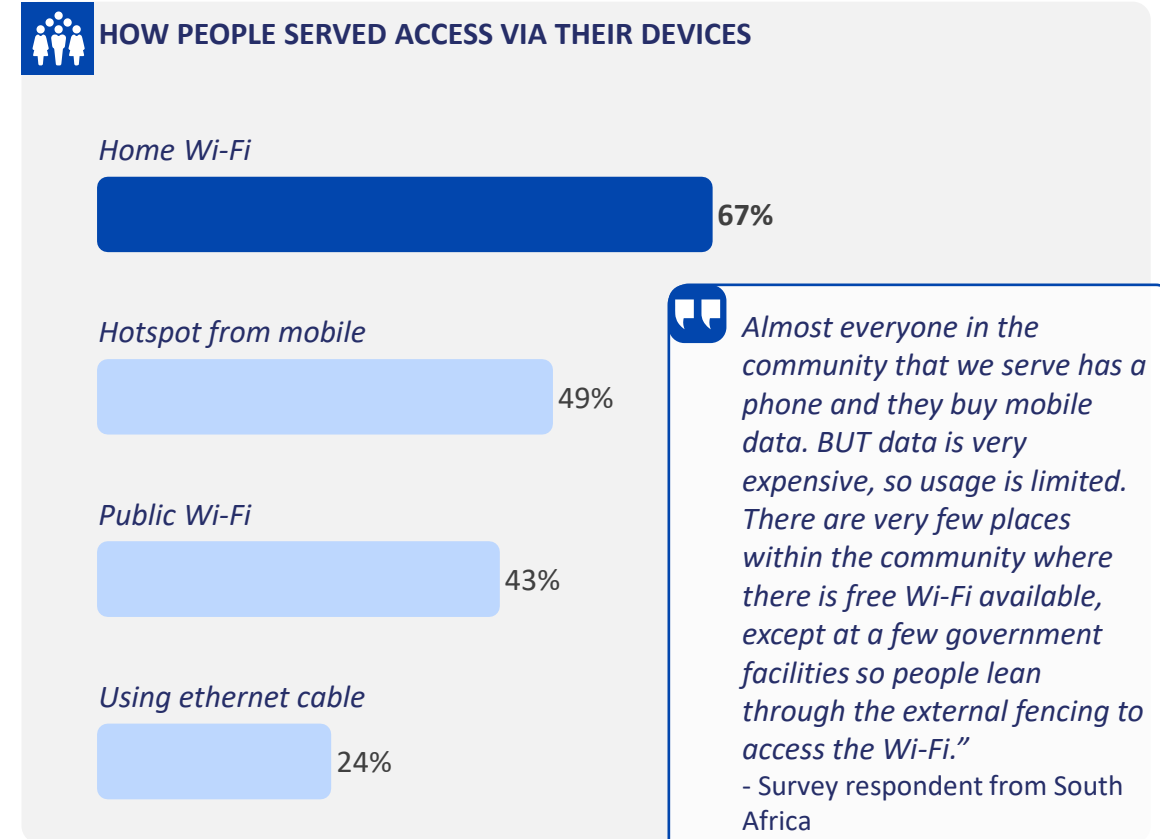
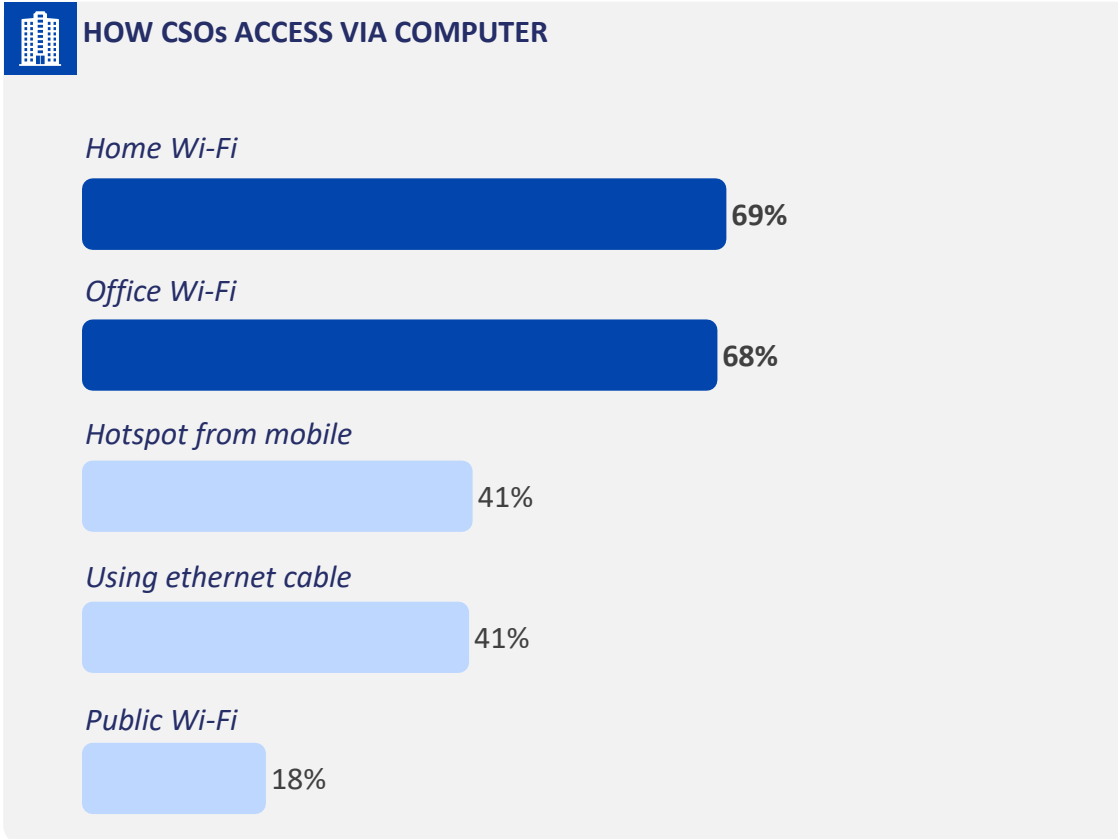
HOW THE INTERNET IS ACCESSED





 In our east Bali mountain village, where our 19 individual communities are scattered over the northeastern slopes of two mountains, most people must walk various distances from their home to find even a basic internet signal.”
 - Survey respondent from Indonesia

Most CSOs and the people they serve use Wi-Fi to access the internet

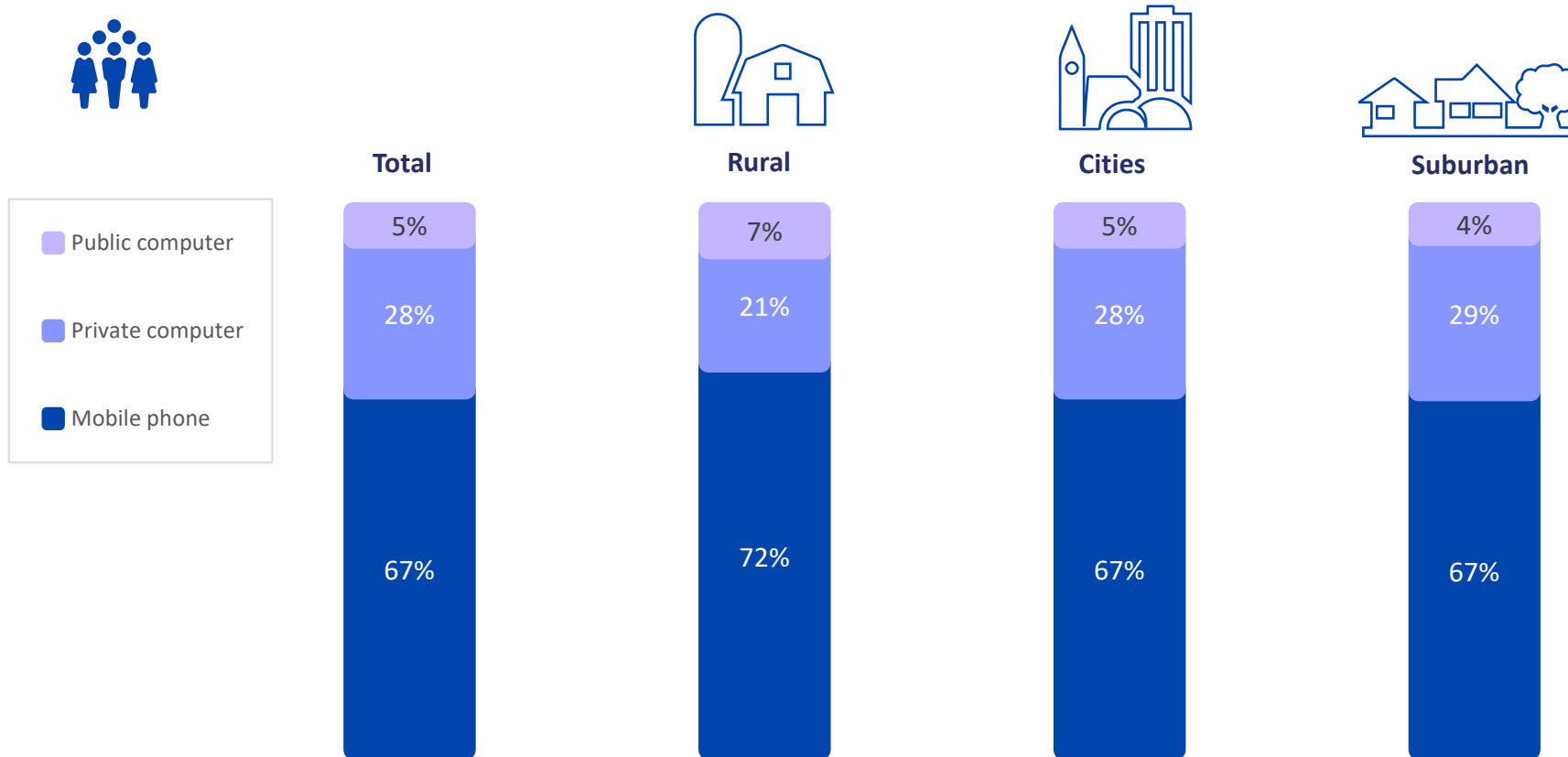
ACCESS TO THE INTERNET




 Almost everyone in the community that we serve has a phone and they buy mobile data. BUT data is very expensive, so usage is limited. There are very few places within the community where there is free Wi-Fi available, except at a few government facilities so people lean through the external fencing to access the Wi-Fi.”
 - Survey respondent from South Africa

Mobile phones are the most common devices people use to access internet; rural areas see an even higher usage

DEVICES USED BY PEOPLE SERVED



**Mobile Internet
≠ Full Access**

Have you tried doing your taxes on your phone? Mobile connectivity is certainly better than nothing, however, it is often far from sufficient for online education, work, or services designed for high-speed, data-rich, big screen experiences.



Copyright: Natalie Campbell, Internet Society



North End **Connect**

Expanding reliable, affordable internet in Canada's largest urban Indigenous community

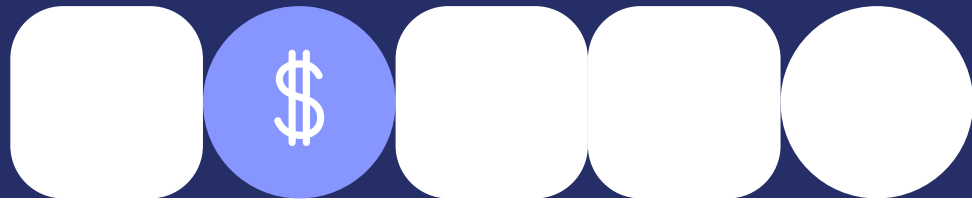
Context: While internet connectivity is fundamental for people and communities to thrive, Indigenous groups disproportionately lack access. In Canada, less than one-quarter of Indigenous people have access to broadband speeds. This is a challenge not only in remote and rural areas, but also for those living in towns and cities, including Winnipeg, Manitoba's North End neighborhood, which has the largest urban Indigenous population in North America.

Problem: There is a deep digital divide in the city, with neighborhoods like North End served by poor-quality internet infrastructure. This means residents living in here have fewer opportunities to benefit from digital technology. Facing a long history of under-investment and political disenfranchisement, the digital exclusion of this Indigenous-majority neighborhood exacerbates a cycle of economic and political neglect in the area.

Solution: A coalition of community-based organizations, including Indigenous Vision for the North End, the Internet Society Manitoba Chapter, Computers for Schools Manitoba, Broadband Communications North, and the Manitoba Research Alliance have formed "North End Connect" to build a fast, affordable internet network to serve the community. This project has engaged deeply with the community to fully understand their digital needs — building a solution with, and not for, residents.

Why it matters: The group plans to deploy a fixed wireless network in 2023. Once built, families in the North End will have the internet they need to work, learn, and play — just like the rest of the city. Beyond infrastructure, North End Connect is also working to remove other digital barriers — working to reduce costs, and increase device access, local tech support, and digital literacy — so that internet access really is for everyone. This is a community building solutions to digital equity on their terms.

Learn more about [financing mechanisms for locally owned internet infrastructure](#).



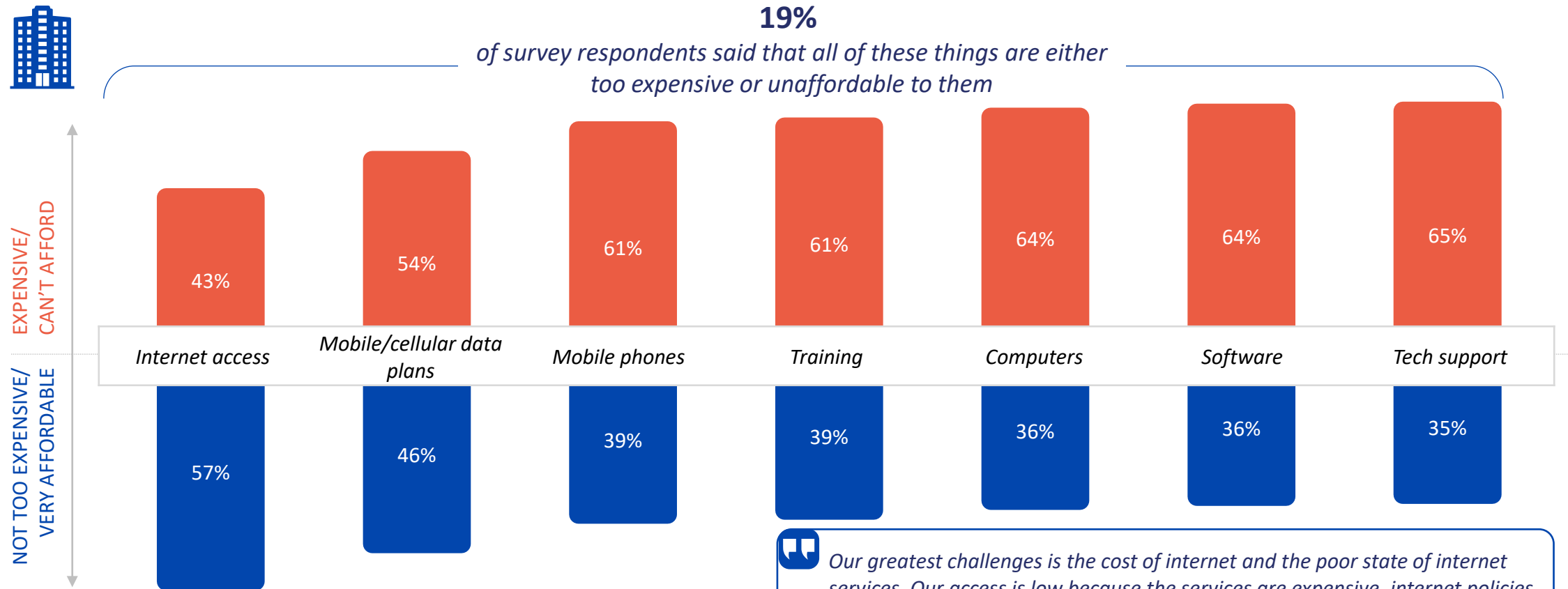
Affordability

AFFORDABILITY refers to whether or not access to the internet, digital tools, and devices exists at a reasonable price



CSOs struggle with the cost of the digital services and devices they need

AFFORDABILITY FOR CSOs



Our greatest challenges is the cost of internet and the poor state of internet services. Our access is low because the services are expensive, internet policies don't really protect the users, and at any time, the internet can go off or become slow to upload.
 - Survey respondent from Cameroon

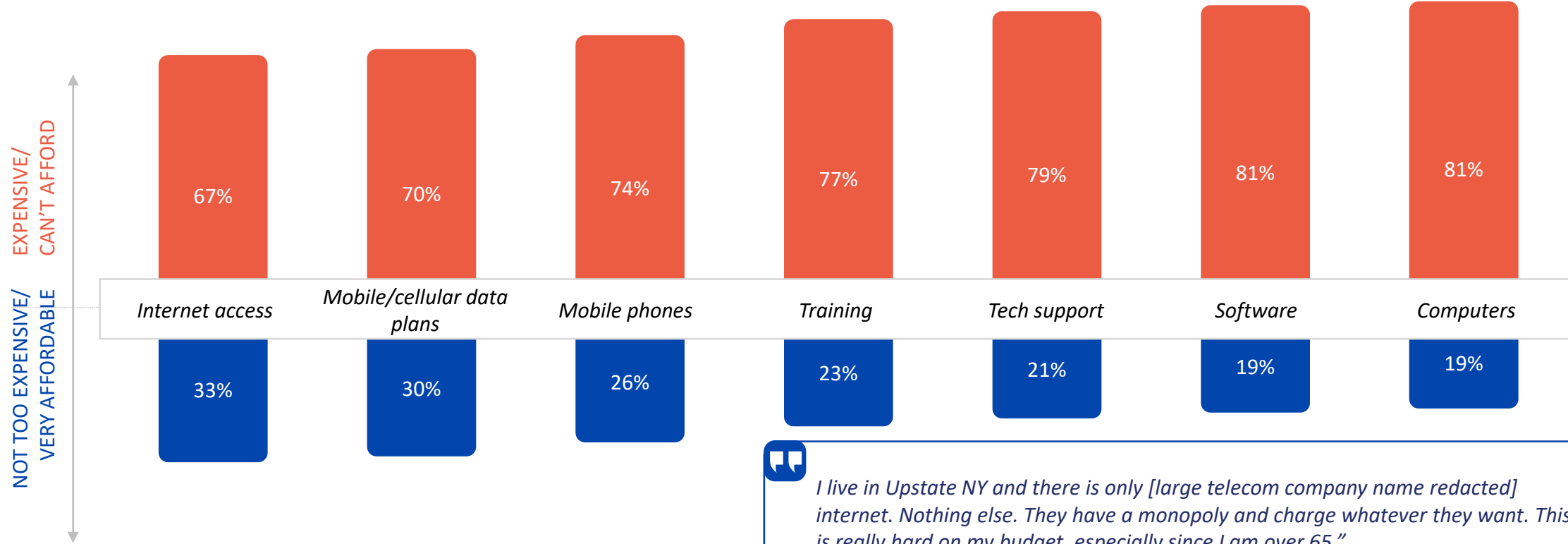


Most people CSOs serve cannot afford internet access nor the tools to participate in our digital world

AFFORDABILITY FOR PEOPLE SERVED



49%
of survey respondents said that all of these things are either too expensive or unaffordable for the people they serve



I live in Upstate NY and there is only [large telecom company name redacted] internet. Nothing else. They have a monopoly and charge whatever they want. This is really hard on my budget, especially since I am over 65.”
- Survey respondent from the U.S.

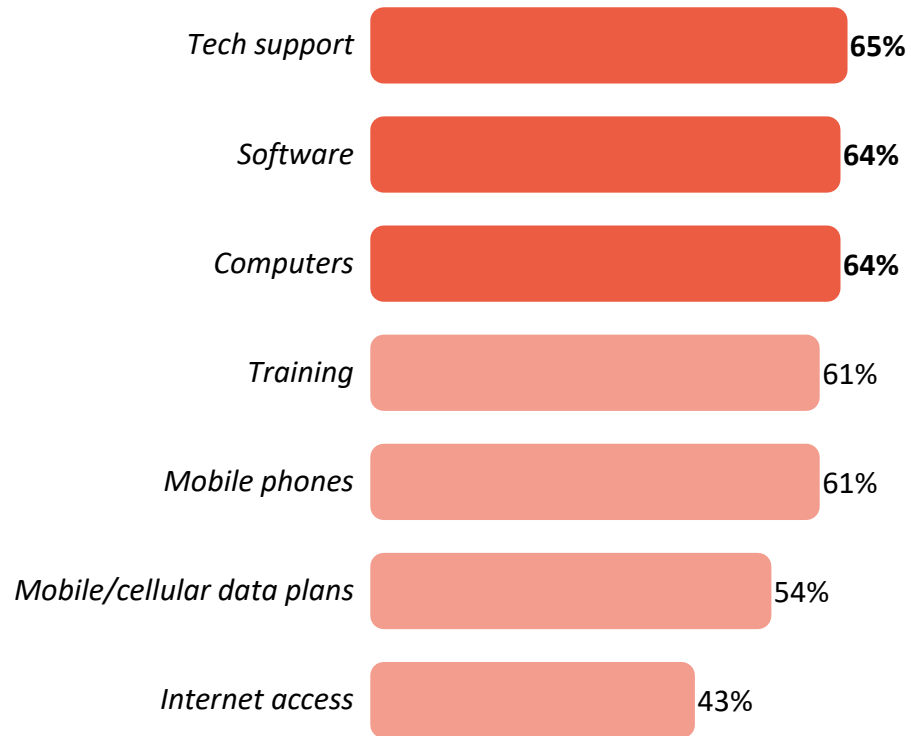


For CSOs and the people they serve, tech support, software, and training are least affordable

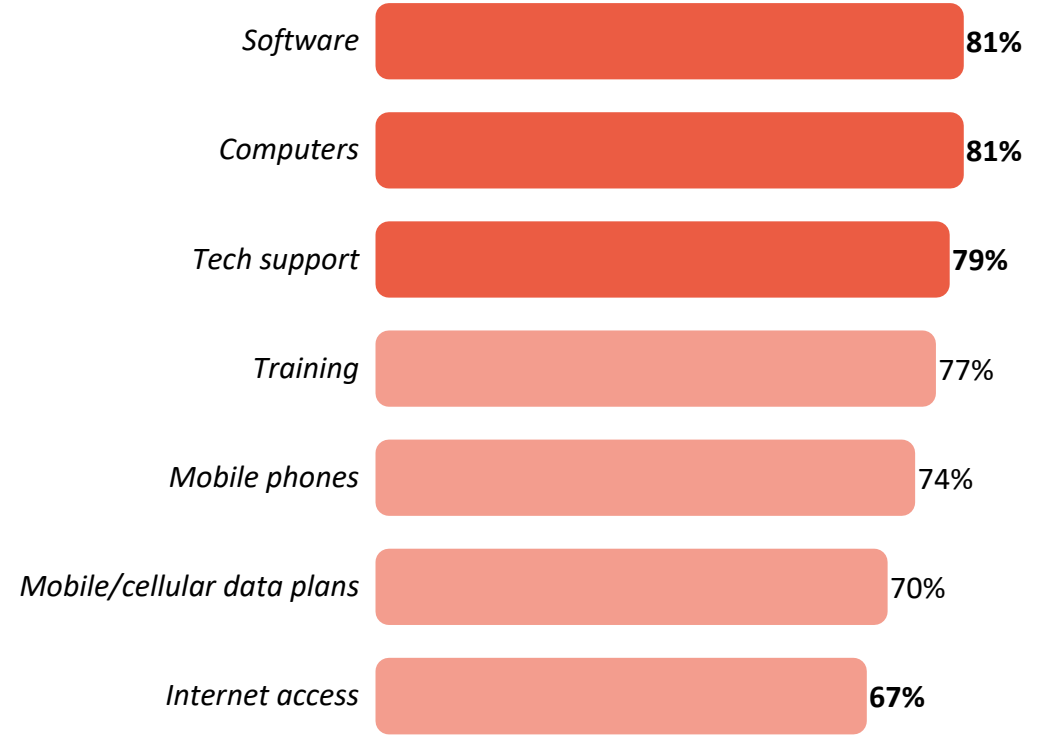
AFFORDABILITY
(EXPENSIVE/CANNOT AFFORD)



CSOs



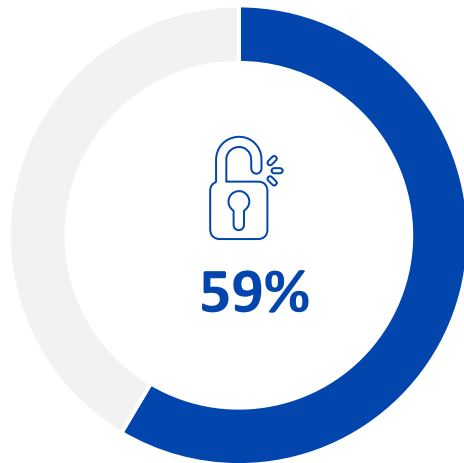
People they Serve



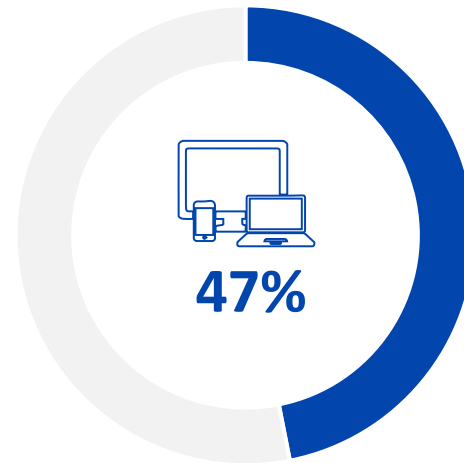


Over half of CSOs would prioritize paying for the internet over something else, closely followed by paying for devices

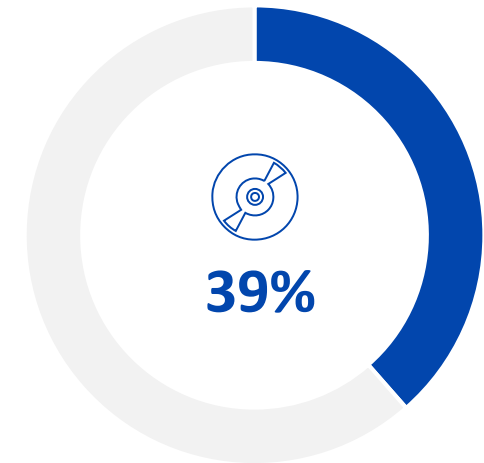
PRIORITIZATION (AGREE/STRONGLY AGREE)



*of CSOs would prioritize paying for **the internet** over something else that benefits their organization or the people they serve*



*of CSOs would prioritize paying for **devices** over something else that benefits their organization or the people they serve*

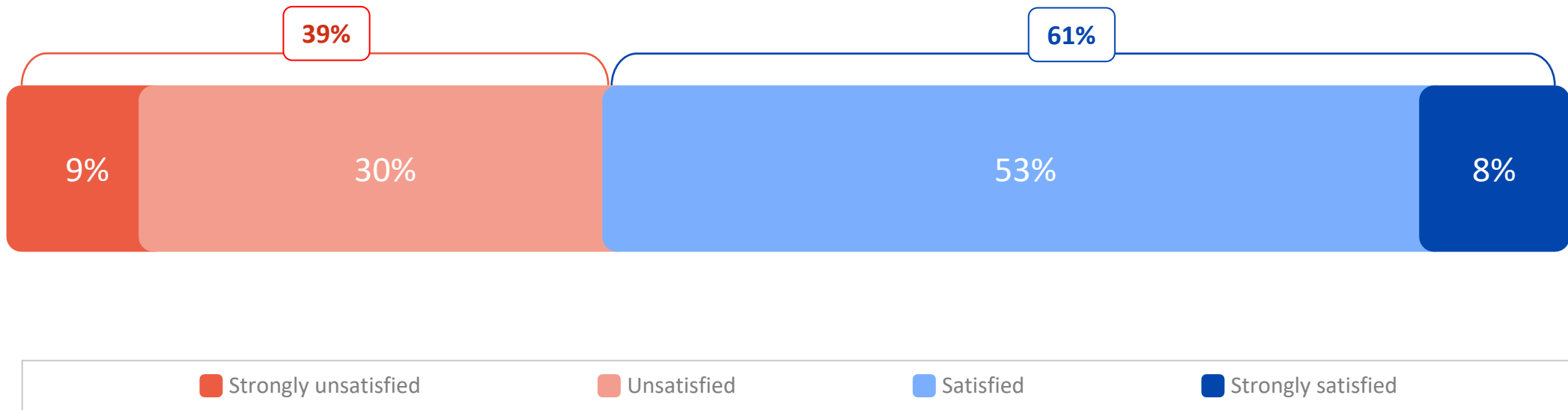


*of CSOs would prioritize paying for **software** over something else that benefits their organization or the people they serve*



Four in ten CSOs are not satisfied with the internet service they receive for the price paid

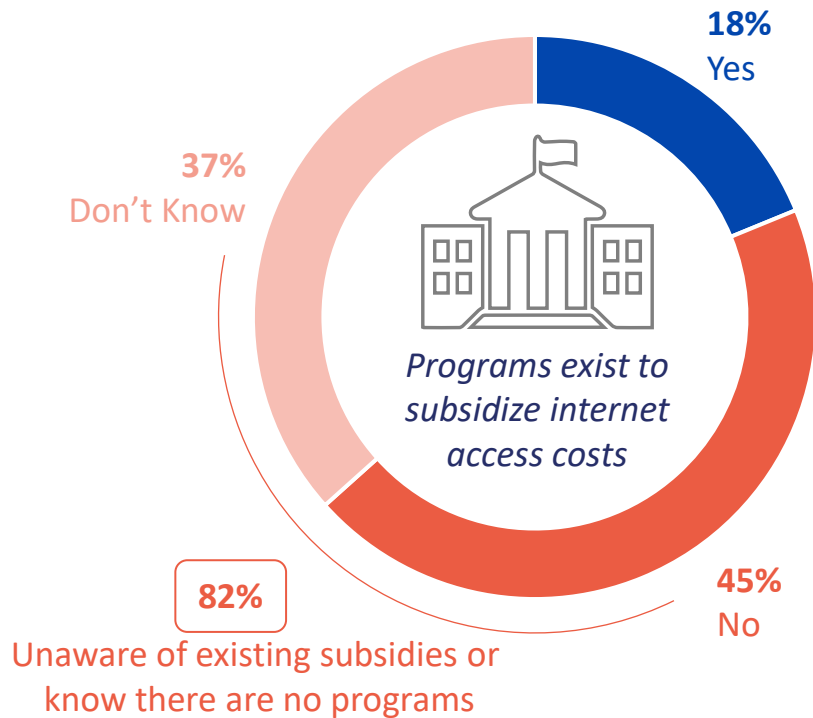
SATISFACTION WITH PRICE PAID FOR THE INTERNET





Most CSOs operate in communities where there are **no programs** to subsidize internet costs

SUBSIDY AVAILABILITY



Connect Locally

Community Connectivity Providers (CCPs) are local ISPs that provide internet access to their local communities. No two community networks are the same: they all have their own financial and governance models. In many cases, local providers or CCPs offer more affordable internet options than larger telecommunications companies. You can work with these five NGOs to build out the internet in your community: [Internet Society](#) (global), [Association for Progressive Communications](#) (global), [AFCHIX](#) (Africa), [Digital Empowerment Foundation](#) (India), and [Connect Humanity](#) (U.S. & Canada).



The regulatory environment for internet service providers in my country is weak and woefully inadequate, so providers take their clients for granted. This also results in exorbitant costs for internet access.
- Survey respondent from Ghana



Copyright: Wanda Manning



A low-income Louisiana community fights for more affordable internet access

Setting: Once labeled "[the poorest place in America](#)" by TIME Magazine, Louisiana's East Carroll Parish is a low-income, rural community with dismal internet service. With half of families living below the poverty line, internet access is unaffordable for most people, with packages commonly costing \$100+ a month, for slow, unreliable service.

Problem: These prices mean that 63% of families have no internet subscription and 60% lack a laptop or smartphone. Residents describe the area as being left behind, as young people leave to find work and go to college in bigger, more well-connected towns, and businesses struggle to survive without the connectivity they need. During the pandemic, many school children were unable to keep up with their education because they lacked the data and devices to connect to online learning.

Solution: In response, the community formed an internet taskforce, led by church-based coalition Delta Interfaith. With the support of external partners, the group produced a broadband plan to build a lightning-fast fiber network and partnered with rural ISP Conexon Connect to build it. This work helped Conexon secure a \$4 million state grant to help fund the network and, when deployed, residents will have access to 100Mbps service for \$50 a month.

Why it matters: This network will be a game-changer for East Carroll, finally giving families a quality, affordable internet option. As community organizer Wanda Manning said: "Soon children will have the connection they need to do their schoolwork from home. Local businesses will have broadband fit for the 21st century at a price they can afford. And we will no longer have to drive 70 miles for a doctor's visit when an online consultation will do. This network means a better future for folks living in East Carroll." Where incumbent internet providers are not delivering, it is possible to build community connectivity providers designed to meet the digital needs of residents.

Learn more about East Carroll's [fight for better broadband](#).



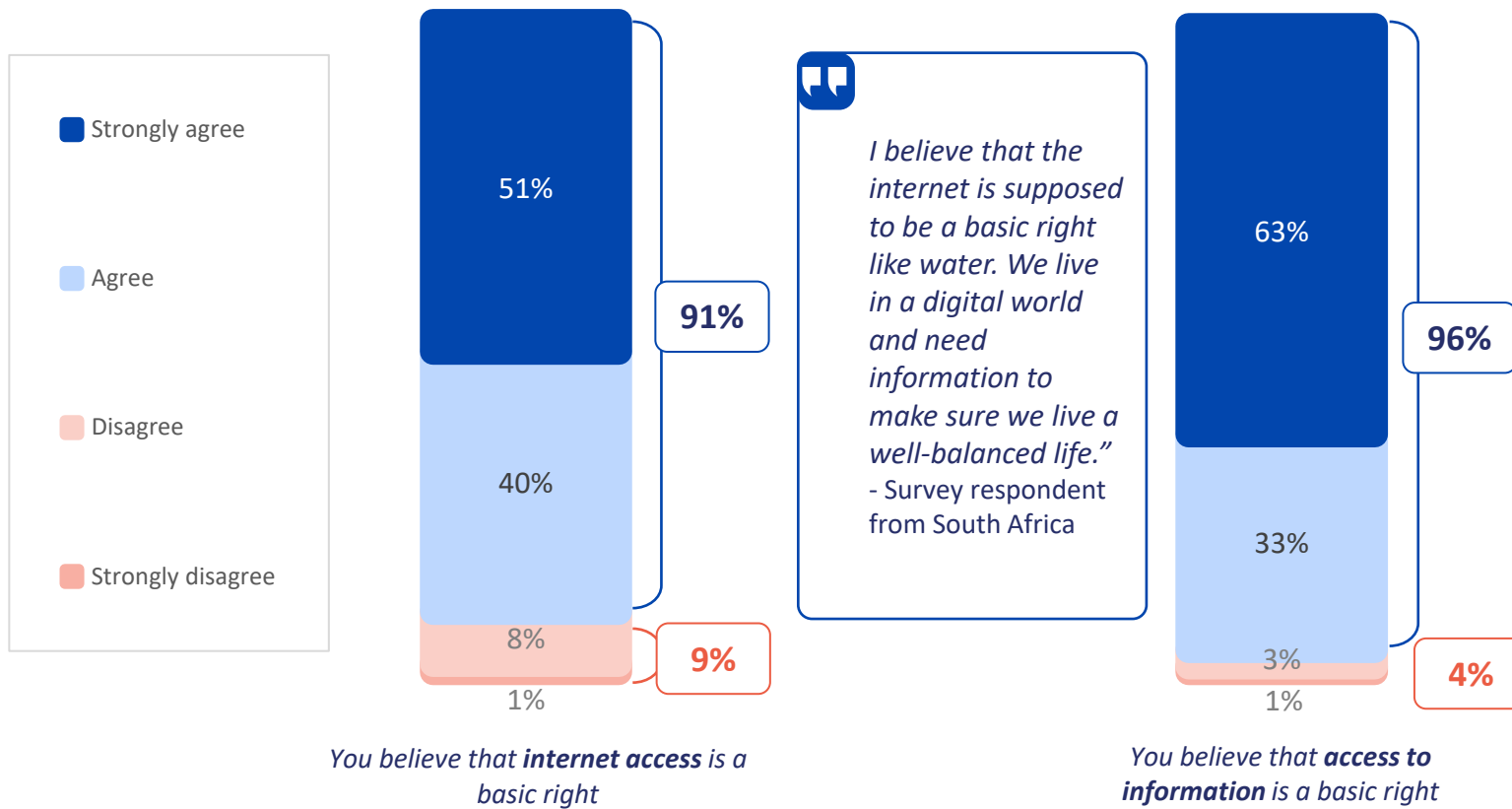
Policy

POLICY refers to the rules and regulations that govern how the internet is built and used



CSOs believe that access to both information and the internet are basic rights

BASIC RIGHTS



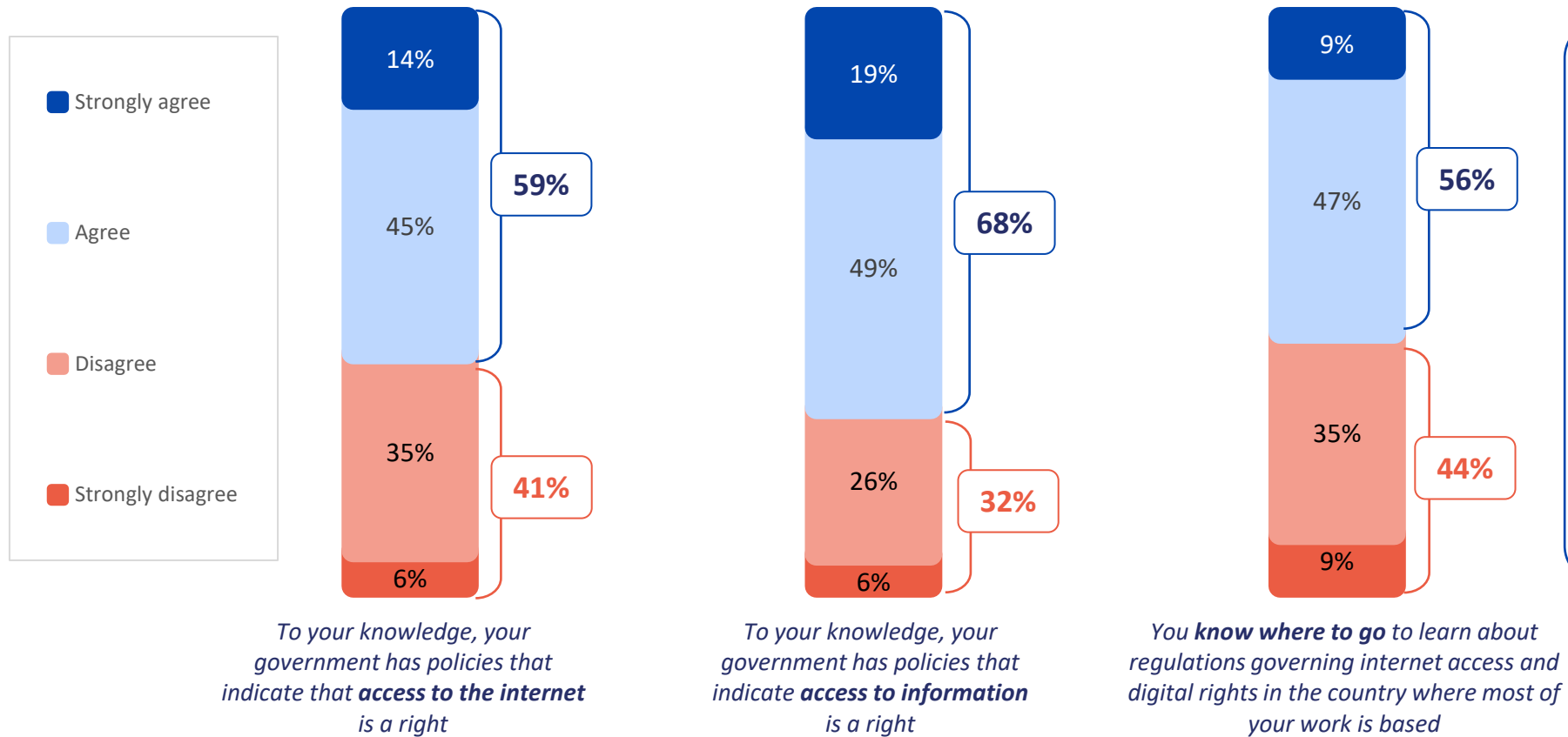
Right to the internet?

Article 19 of the UN Declaration of Human Rights, passed in 1948, declares that “Everyone has the right to freedom of opinion and expression; this right includes freedom to hold opinions without interference and to seek, receive and impart information and ideas through any media and regardless of frontiers.” In 2016, the UNHRC released a resolution that reaffirmed that “the same rights people have offline must also be protected online.” It calls for a “human rights-based approach when providing and expanding access to the internet.”



Fewer feel their government has policies stating that access to information and internet access are both basic rights

BASIC RIGHTS



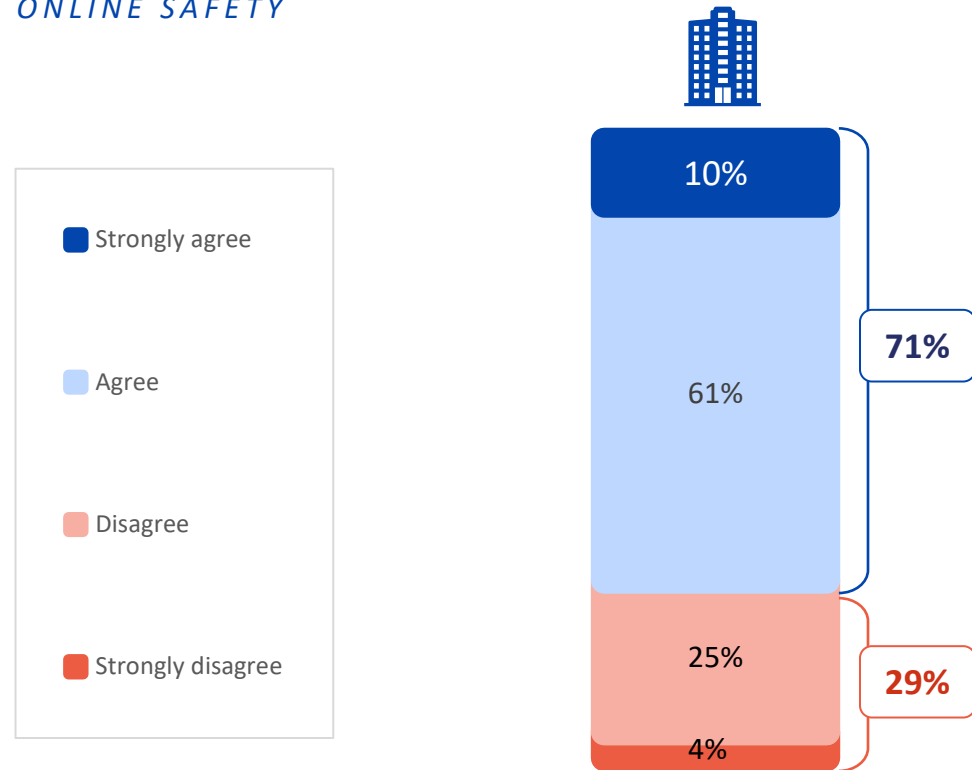
Internet shutdowns on the rise

More governments are increasingly demonstrating a willingness to undermine this right to internet access. According to [Access Now](#) and the [#KeptItOn](#) coalition, there were 182 documented internet shutdowns across 34 countries in 2021. This is a 14% increase from the year before.

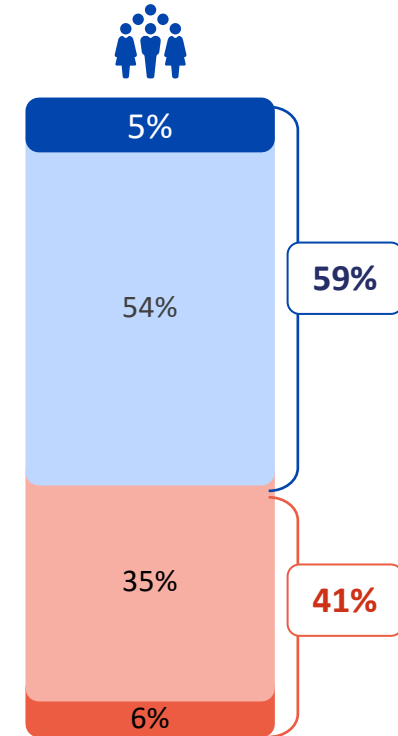


Many participants do not feel safe online and say that an even larger portion of those they serve do not feel safe online

ONLINE SAFETY



You generally feel safe online

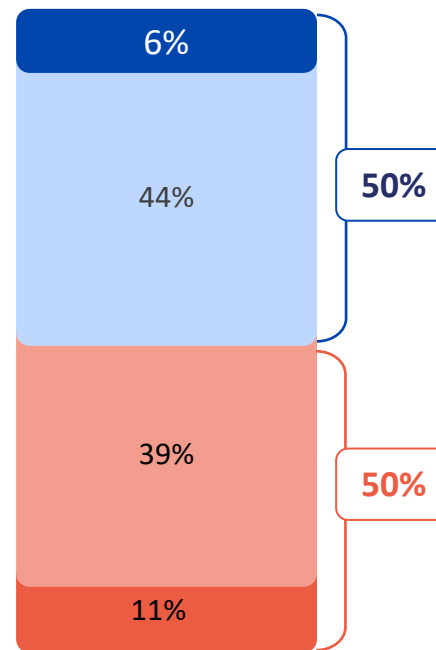


The people you serve generally feel safe online



Half of CSOs say the government where they work do not ensure people are safe online

ONLINE SAFETY



The government where you work ensures you and the people you serve are safe online

So what?

The data shows that civil society doesn't feel safe online. If they don't feel safe online, they may be less likely to use the internet, and therefore, more likely to be left behind to the detriment of the communities they serve.



Copyright: TooMuchWifi



Using Universal Service Funds to increase access in Kenya - when policy works

Setting: Universal service is the principle that all people should have access to communications services. Many countries have a Universal Service Fund (USF) paid for by mandated contributions from telecommunications providers, intended to provide financial support for initiatives to connect communities typically left out by large service providers. In practice, many countries do not spend these funds or use them on non-internet projects.

Problem: Kenya's spectrum licensing rules meant it was too expensive for communities to access and use spectrum to build internet solutions to connect unserved residents. As a result, they were left with no option but to wait for the large service providers to expand services to their area, often paying high fees to build the "last mile" connectivity needed to serve their communities.

Solution: The Communications Authority of Kenya worked with experts from local communities, APC and KICTANET, with support from the U.K. Digital Access Programme, to create a new affordable licensing category exclusively for community networks within Kenya's Unified Licensing Framework. This has allowed communities in Kenya to design, govern, and operate their own networks. Kenya's Universal Service Fund has also been made available for communities, with plans to facilitate the establishment of a 100 community networks in the unserved and the underserved communities, supporting people to take control of their digital future.

Why it matters: This is a successful example of the power of working with stakeholders to develop a new policy-regulatory approach that supports community-driven internet solutions. Smart policy can be used to enable a pathway to spend Universal Service Funds to achieve their purpose of expanding internet access and ensure funding for additional network builds.

Learn more about Universal Service and Access Funds (USAFs) across Africa.



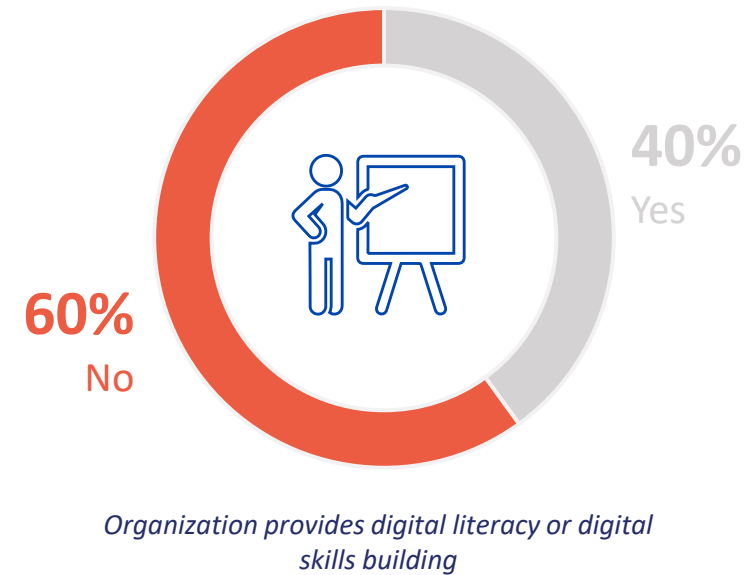
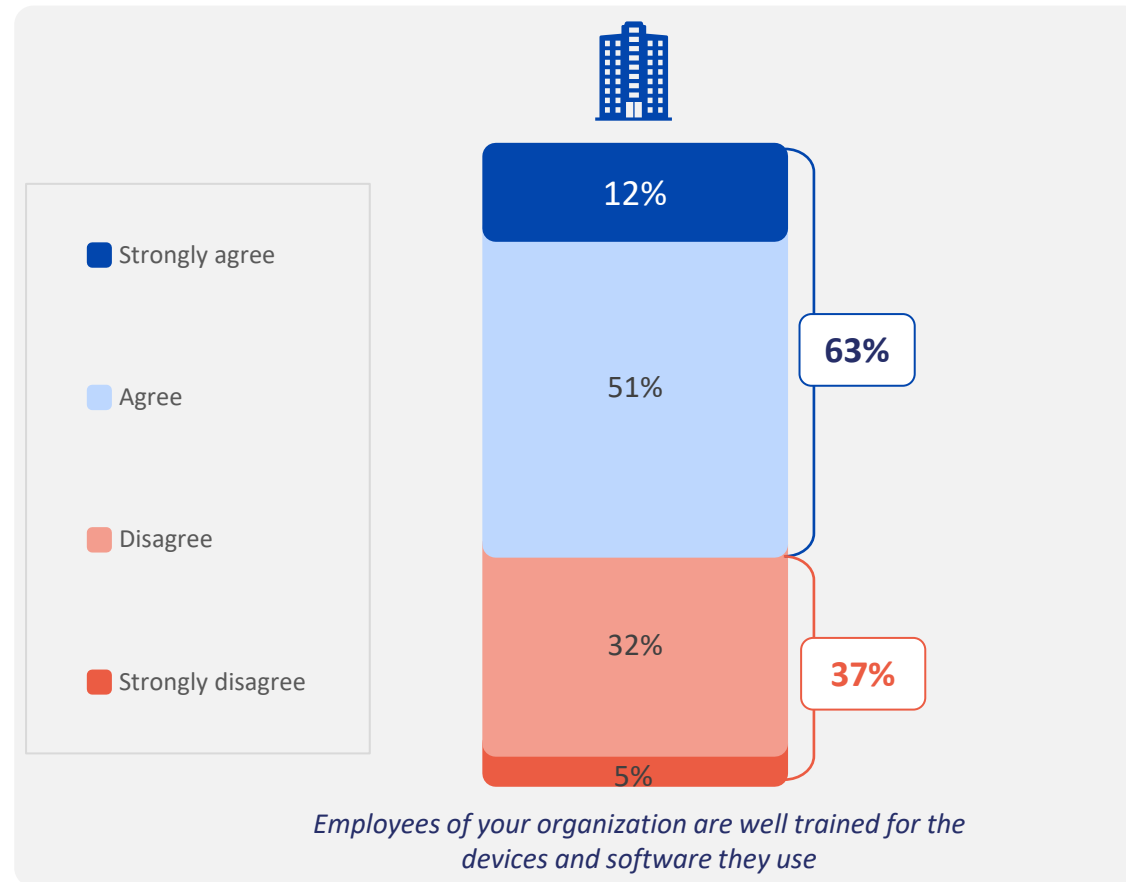
Digital Skills

DIGITAL SKILLS refers to the knowledge of and training on digital tools and devices that people need to participate in a digital society



Almost 40% of CSOs believe their staff are not well trained on digital tools; the majority of CSOs don't provide digital literacy or skills-building programs

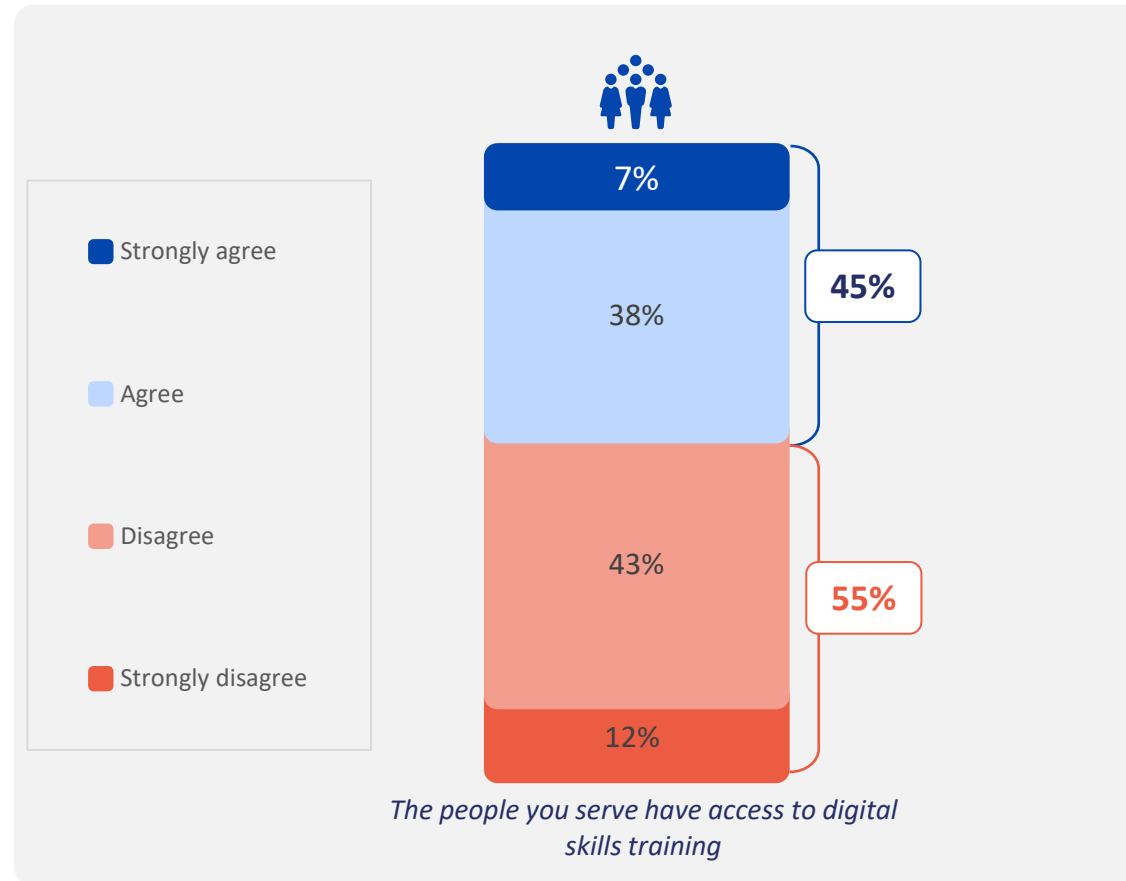
DIGITAL LITERACY/SKILLS BUILDING



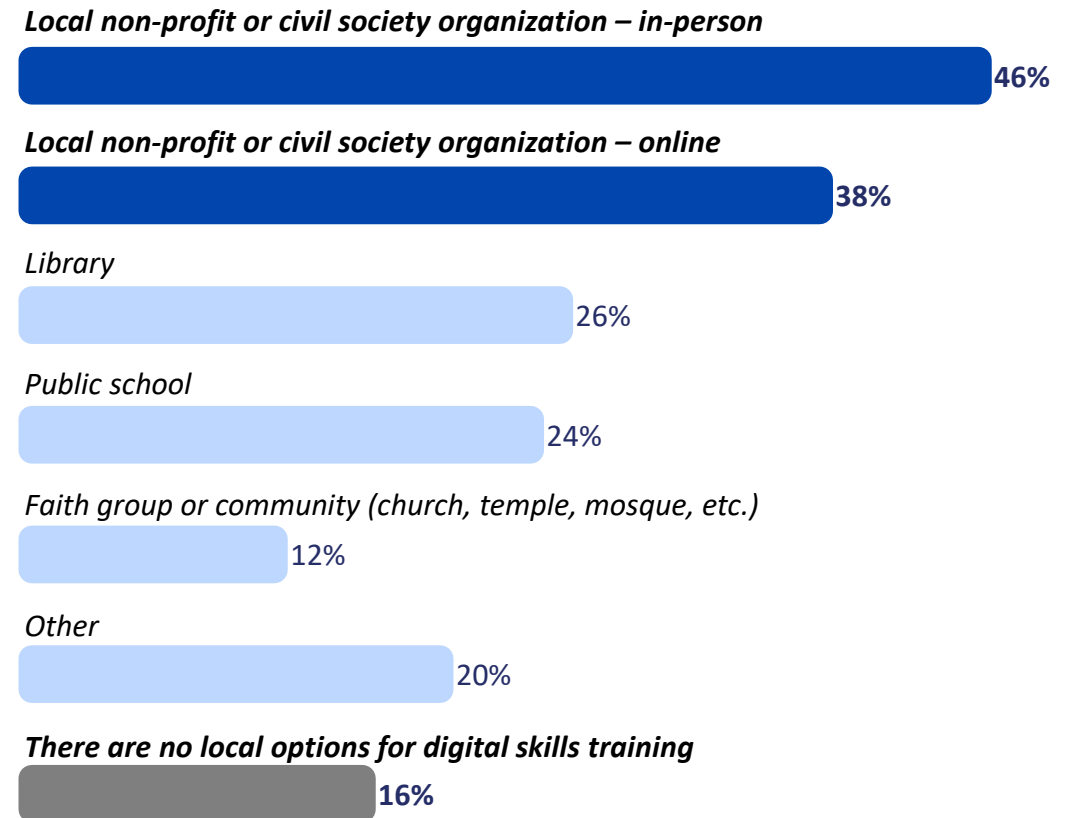


Over half say that the people they serve do not have access to digital training; those who do rely on local non-profits or CSOs for training

ACCESS TO DIGITAL TRAINING



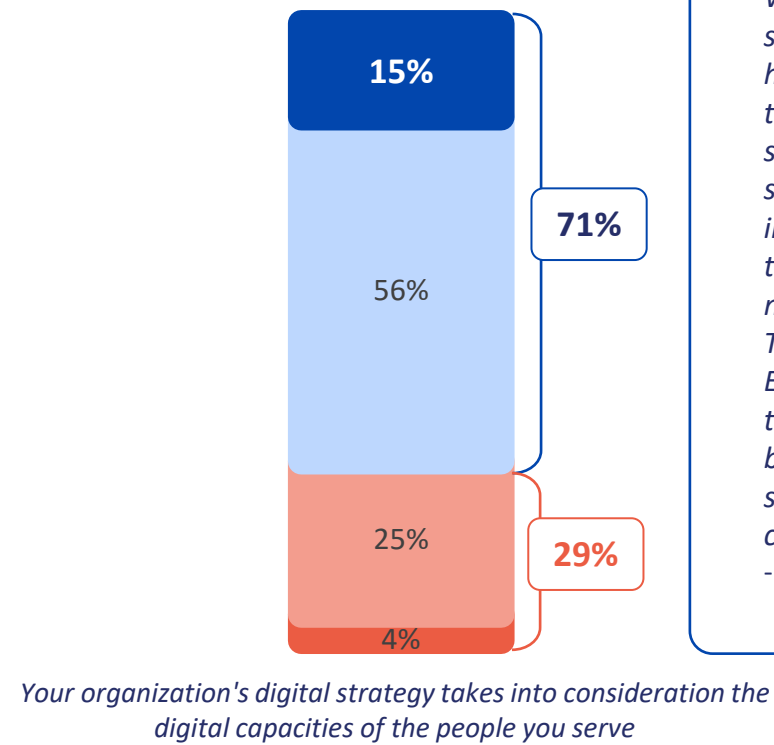
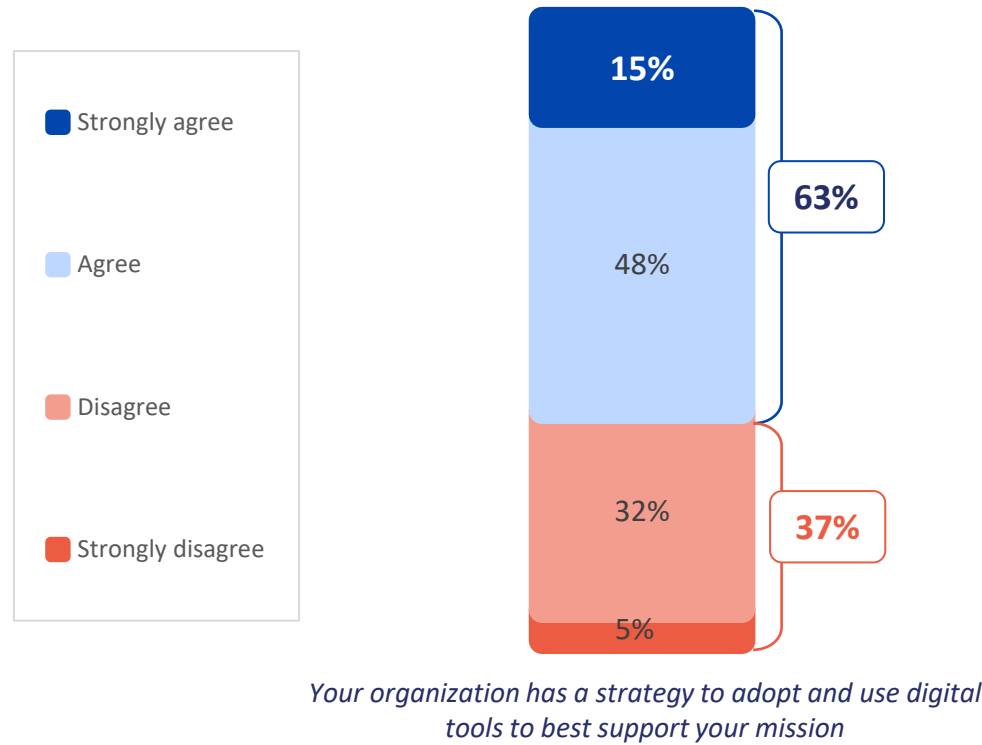
Source of Training





Few strongly agree that their organization has a strategy to use digital tools to support their mission and help the people they serve based on their digital capabilities

STRATEGY TO ADOPT DIGITAL TOOLS

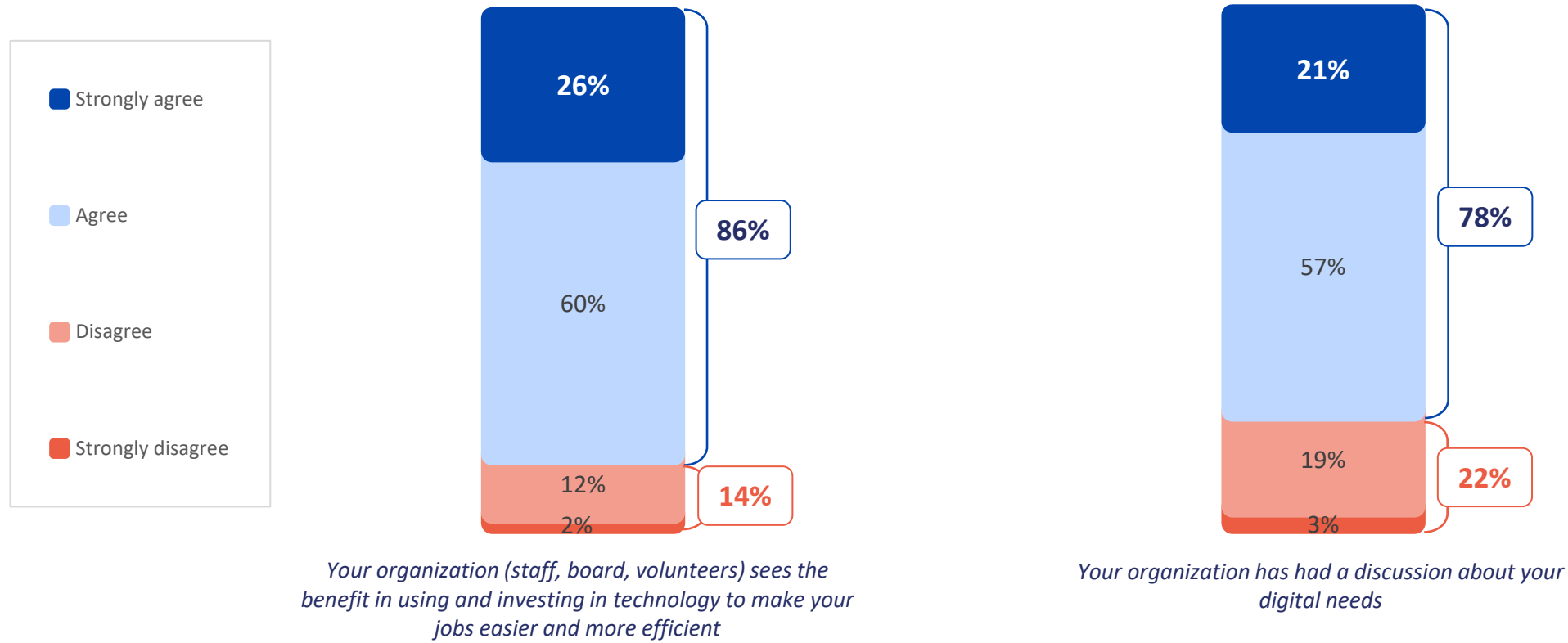


We work with schools and the rural students don't have access at most homes (our students regularly went to McDonald's to use the Wi-Fi to submit their work!) The city students don't have devices or internet nor the knowledge on how to use them. The teachers are given new technology WITHOUT TRAINING... over and over again!! Each year, we spend time teaching teachers how to make an electronic bookmark of a browser page. For some, copy/paste from a keyboard command is a new discovery."
 - Survey respondent from the U.S.



Most organizations see the benefit in investing in technology and have had discussions around their digital needs

DIGITAL BENEFITS AND NEEDS





Copyright: Yewin Fong of Pixel Photography



Digital skills help NGOs reach vulnerable people in Malaysia

Setting: Human trafficking is a serious problem in Malaysia; in 2018, it ranked on the Tier 3 Watchlist by the U.S. State Department's [Trafficking in Persons \(TIP\)](#) report. This designation results in serious economic repercussions, including economic sanctions; development agencies and local embassies might allocate funding according to how a country performs on the report. One of the largest contributing factors to Malaysia's Tier 3 ranking is the technology divide and the lack of digital skills for CSOs working to fight trafficking.

Problem: Digital communications offer a valuable means for these CSOs to combat and raise awareness of human trafficking, particularly as many find that conventional, non-digital outreach does not reach the people they are working to help. Victims and witnesses of trafficking are often not permitted, or are unsafe, in public spaces and so can be more easily reached online. However, organizations working to combat trafficking frequently lack the technology and digital skills they need to make digital communications an effective part of their strategy. To enable CSOs to reach the people they serve online in a safe and effective way, it is important that they are able to build their digital capacity and skills, including by gaining access to relevant networking platforms, insight into regionally appropriate best practices, and funding for their work.

Solution: To help CSOs strengthen their skills, TechSoup Global Network held a two-part workshop in Malaysia, which included training on digital outreach and capacity-building, digital storytelling and creating infographics to raise awareness, using Facebook Insights to inform strategy, and privacy and security tips. Because human trafficking victims are increasingly targeted online, training CSOs to trace victims and to keep everyone involved safe was critical.

Why it matters: These workshops equipped a range of organizations, from grassroots coalitions to regional NGOs, with the digital skills they need to more effectively combat human trafficking. No matter your mission, digital skills are increasingly important to being an effective CSO. It is vital that all organizations have the support and funding to acquire the tools and skills they need to improve the lives of the communities they serve.

Learn more about your organization's technology needs and digital capabilities with [this tool](#).



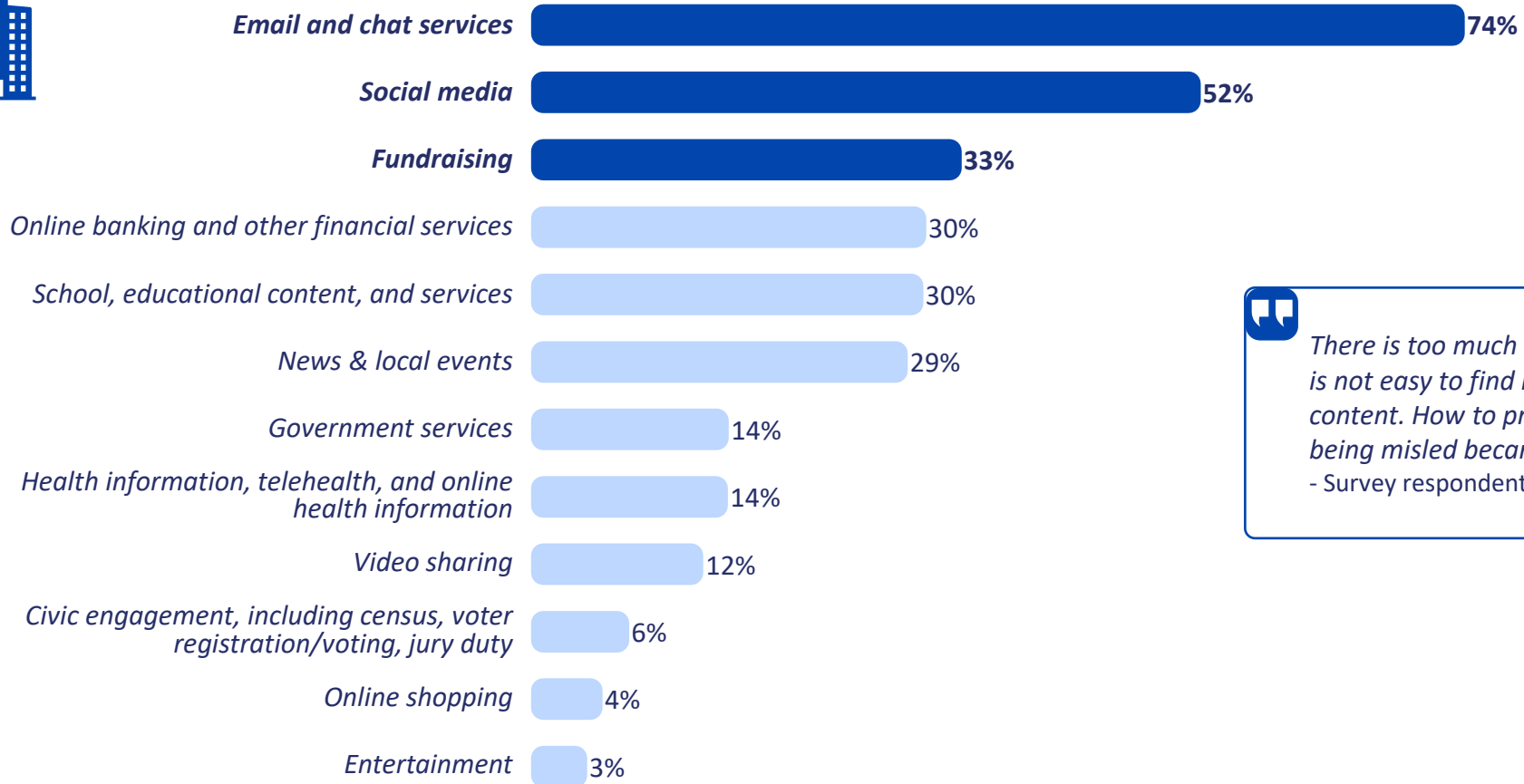
Content

CONTENT refers to whether there are relevant resources, media, tools, and articles on the internet that motivate people to use it



Email and chat tools are by far the most important services to CSOs, followed by social media and fundraising

MOST IMPORTANT INTERNET SERVICES FOR CSOs

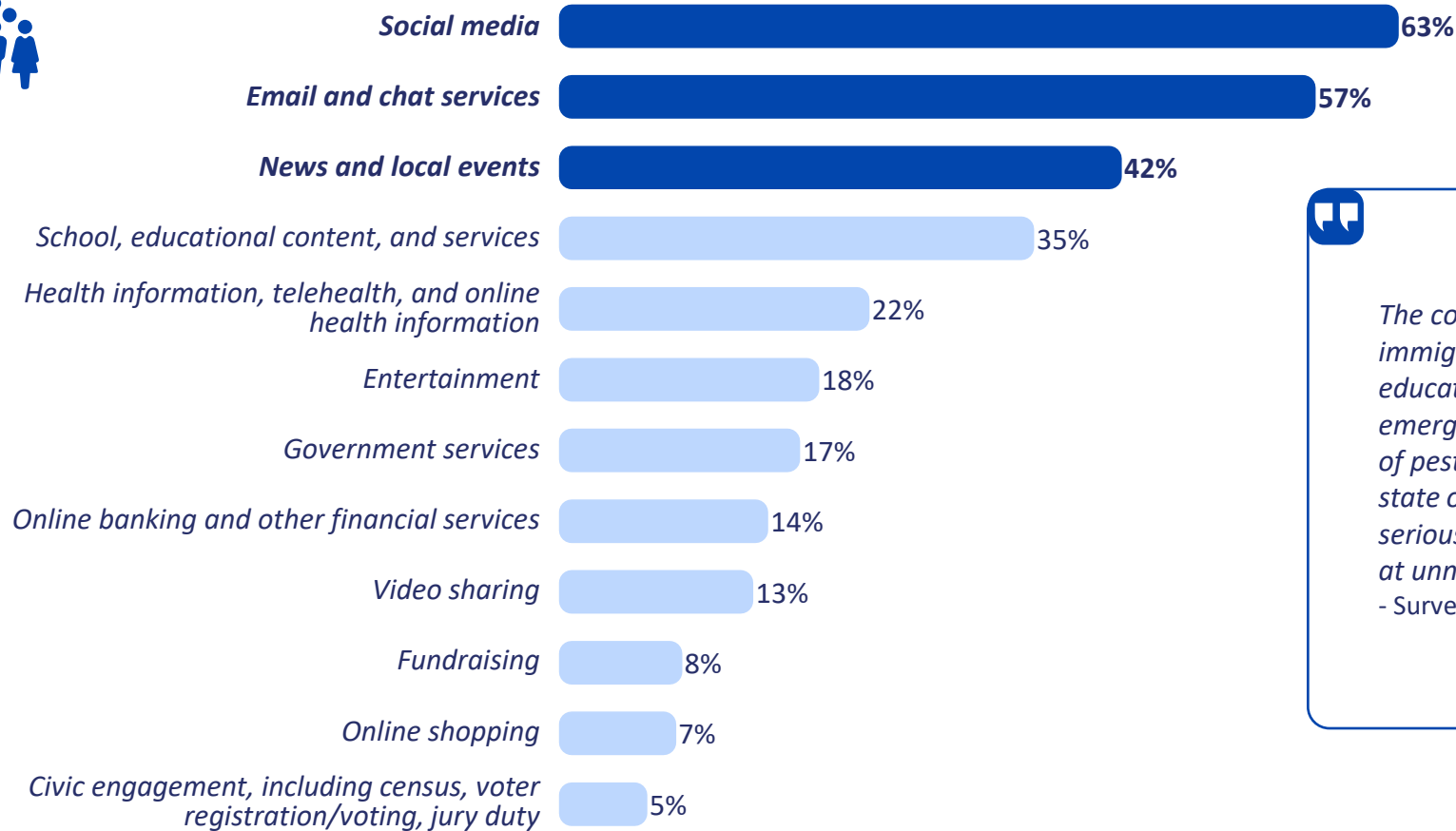


There is too much information on the internet, and it is not easy to find real, valuable knowledge and content. How to prevent our staff and clients from being misled became an issue.”
 - Survey respondent from the Taiwan



Social media is the most important tool for people CSOs serve

MOST IMPORTANT INTERNET SERVICES FOR PEOPLE SERVED

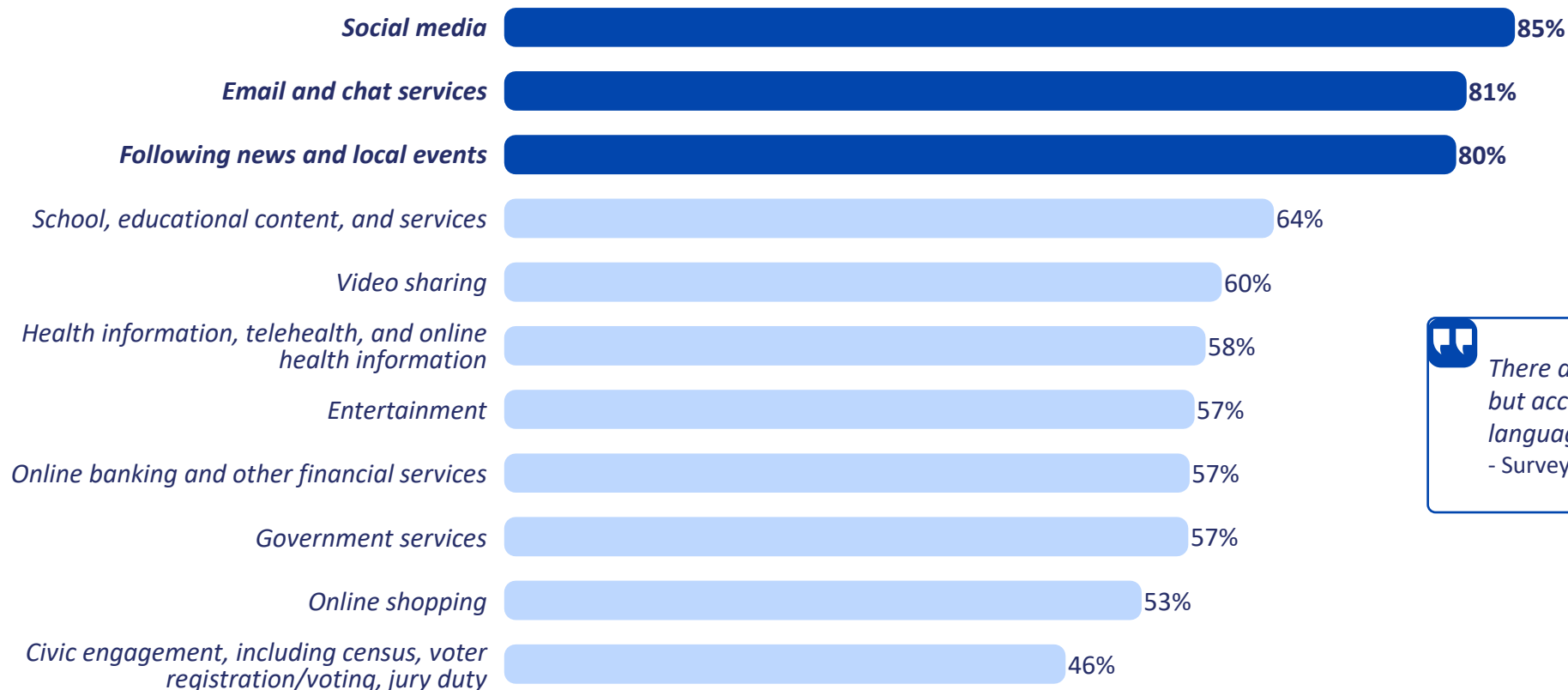


The community we serve is 20% Latinx and recent immigrants. While we mostly focus on environmental education, we also provide information about emergencies such as flooding, heatwaves or overuse of pesticides. Very little information on the local, state or federal level is available in Spanish...This is a serious equity issue and puts our whole community at unnecessary risk.”
 - Survey respondent from the U.S.



Social media, email and chat services, and news and local events are typically provided in local languages

AVAILABILITY IN LOCAL LANGUAGE



There are lots of resources available, but access is very severely limited by language, culture and income level.”
- Survey respondent from Ireland



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Social media shutdowns & economic implications

Setting: Brazil is the second largest WhatsApp market in the world, with 70% of its population using the messaging platform, including 98% of cell phone owners. The app has transformed the way Brazilians communicate and has also become deeply embedded in the economy, shaping how business works. Nine in ten doctors use WhatsApp to communicate with patients, 80% of the app's users use it to purchase products and communicate with companies, and many non-profits and grassroots organizations use the platform to organize. WhatsApp is an integral part of life in Brazil.

Problem: Between 2015 and 2016, the Brazilian government forced three nationwide WhatsApp shutdowns while trying to mandate the company to hand over data for a criminal investigation. In 2021, Facebook suffered a global outage forcing all its services, including WhatsApp and Instagram, offline for six hours. These outages resulted in major financial losses, particularly harming those in the informal economy (e.g., day laborers and housekeepers), who account for 33% of Brazil's total GDP. Many people are so reliant on WhatsApp and Facebook that if these services fail, they are functionally blocked from the internet. This creates a huge disruption for people's lives, the economy, and public safety.

Why it matters: While the internet was conceived as a decentralized, distributed platform, it has become increasingly centralized with a few dominant platforms. What does it mean for the communities we serve when so much of our digital world depends on a few platforms on which entire businesses and economies are built? And if this infrastructure goes down, whether from political action or technical failure, how will our lives and our economies suffer? Brazil's experience shows why we must think deeply about resiliency, governance, and choice in order to ensure our digital world serves us well. Ultimately, our internet is only as useful as the content, services, and data that flow across it.

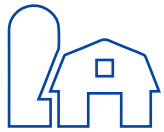
Learn more about [how governments restrict access to the internet.](#)

Rural and Urban: Looking at affordability



People in rural areas have less access to the internet and are less satisfied with the value of their internet service

ACCESS TO INTERNET (STRONGLY AGREE)



Rural



8% of CSOs strongly agree that the people they serve in rural areas have access to the internet



Urban

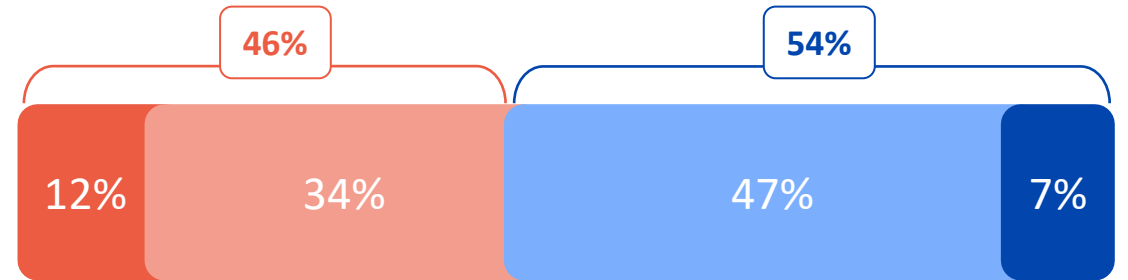


15% of CSOs strongly agree that the people they serve in urban areas have access to the internet

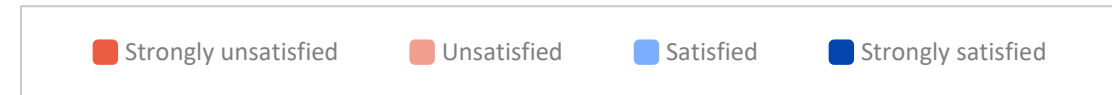
SATISFACTION WITH PRICE PAID FOR THE INTERNET



Rural

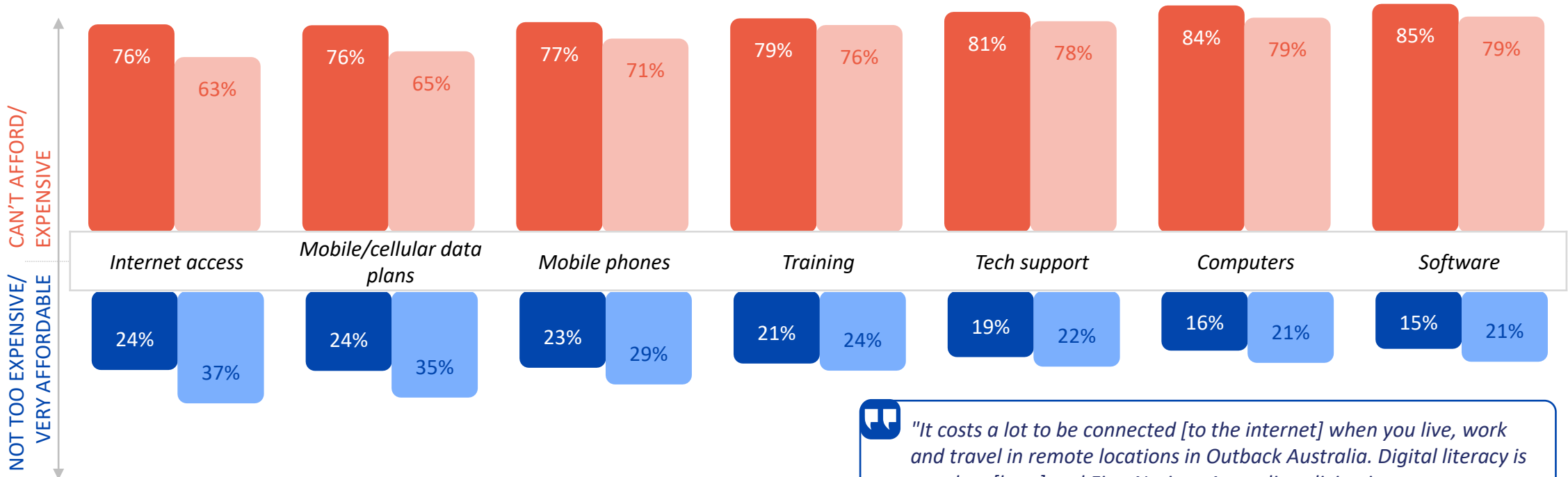


Urban



People in rural communities find digital services and tools more expensive than in urban areas

AFFORDABILITY FOR PEOPLE SERVED

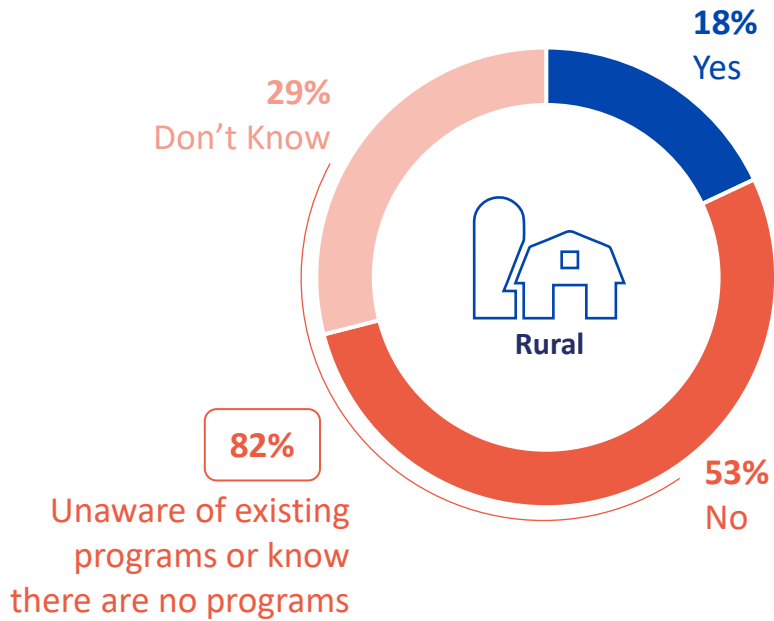


"It costs a lot to be connected [to the internet] when you live, work and travel in remote locations in Outback Australia. Digital literacy is very low [here] and First Nations Australians living in remote locations often cannot afford computers or internet."
 - Survey respondent from Australia

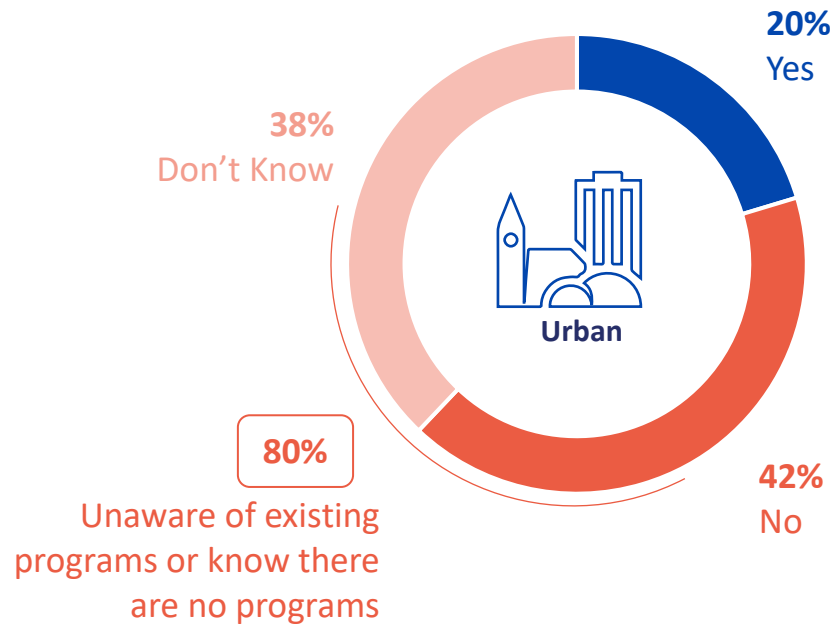


Rural communities have fewer programs helping with internet costs than urban communities

SUBSIDY AVAILABILITY



Programs exist to subsidize internet access costs



Programs exist to subsidize internet access costs

"Most of the Internet Service Providers are focusing their business area only in the urban communities whereas the rural population is totally ignored for a respectable Internet Connection (not a supersonic) due to commercial reasons."
 - Survey respondent from India

Global North and Global South: A look at digital differences



A Useful Lens

We appreciate the sensitivities of categorizing countries into Global North and Global South. Doing so does, however, offer a useful lens to help contextualize and analyze the digital divide data. If a lack of connectivity, digital tools, and digital opportunities affect millions in the Global North, it affects even higher numbers in the Global South, where there is less access to resources.

Broadband internet is the first key to solving for the global digital divide and a large component of development. While digital divides exist everywhere — within and between countries — countries in the Global South typically have access to fewer resources and far lower levels of broadband connectivity. Internet access is a conduit of opportunity that could help improve healthcare options, encourage engagement in civic life, promote financial independence, increase fundraising opportunities, and forge stronger connections between communities.

ITU data shows that internet penetration is 90% in high-income countries, compared to 54% in low- and middle-income countries. These numbers do not factor in speed, reliability, device access, or cost, which are all critical for individuals and civil society organizations to use the internet effectively to improve lives. Furthermore, people living in Global North countries are also much more likely to have internet at home compared to their Global South counterparts.

With internet increasingly important as a platform for health, wealth, education, and community building — closing the Global North-South digital divide must be one of the most important goals for the development community.



I fear digital inequality, where there is a two-stream economy — those with digital access and competency, and those without.”

- Survey respondent from Australia



Key Findings: North and South



CSOs in **Global South** have more employees than in Global North (Average 88 employees vs. 63) and have a lower budget (\$754K vs. \$1.6M)



More CSOs in **Global North** than in Global South agree that **internet access is critical to their daily operations** (96% vs. 92%) and to reach the people they serve (91% vs. 90%) while more in **Global South** agree that **internet access is critical to reach funders** than in Global North (93% vs. 92%)



A lack of internet access, tools or skills amongst staff or those served limited more organizations in **Global South** than in Global North to conduct their work (89% vs. 73%)



Internet speed is the biggest barrier for **Global South CSOs** while lack of digital skills is the largest one for **Global North CSOs**. For people served the biggest barrier in Global North is lack of digital skills while in Global South a lack of digital skills, affordability and availability are tied as top barrier



More CSOs in **Global South** than Global North are **unsatisfied with their internet access for the price they pay** (44% vs. 36%)










More people served in **Global North** feel **safe online** than in Global South (59% vs. 57%)

Snapshot Profile: Global



	STAFF & BUDGET	<p># of employees</p> <p>71 Mean</p> <p>8 Median</p>	<p>People served</p> <p>25,221 Mean</p> <p>625 Median</p>	<p>Annual Budget</p> <p>\$1,350k Mean</p> <p>\$175k Median</p>
	IMPORTANCE OF THE INTERNET	<p>% Agree: 95%</p> <p>Internet access is critical to organizations' daily operations</p>	<p>92%</p> <p>Internet access is critical for you to reach funders or do fundraising to support your programs</p>	<p>91%</p> <p>Internet access is critical to reach people served</p>
	INFRASTRUCTURE & ACCESS	<p>Lack of internet, tools or skills impacted work</p> <p>78%</p>	<p>% Strongly agree that the internet is:</p> <p>Accessible 67%</p> <p>Reliable 42%</p> <p>Fast 35%</p>	<p>CSOs</p> <p>People Served</p> <p>Accessible 12%</p> <p>Reliable 9%</p> <p>Fast 9%</p>
	AFFORDABILITY	<p>Unsatisfied with internet access for price paid</p> <p>39%</p>	<p>% Can't Afford/Expensive:</p> <p>Mobile phones 61%</p> <p>Mobile plan 54%</p> <p>Internet access 43%</p>	<p>Mobile phones 74%</p> <p>Mobile plan 70%</p> <p>Internet access 67%</p>
	POLICY	<p>% Agree: 97%</p> <p>Access to info is a right</p>	<p>91%</p> <p>Internet is a basic right</p>	<p>59%</p> <p>People served generally feel safe online</p>
	DIGITAL SKILLS	<p>% Strongly Agree: 12%</p> <p>Employees are well trained for devices and software used</p>	<p>7%</p> <p>People they serve have access to digital training skills</p>	
	CONTENT	<p>% Most Important</p>	<p>CSOs</p> <p>Emails & chat services 74%</p> <p>Social media 52%</p> <p>Fundraising 33%</p>	<p>People Served</p> <p>Social media 63%</p> <p>Emails & chat service 57%</p> <p>News & local events 42%</p>

Snapshot Profile: Global North

	STAFF AND BUDGET	# of employees 63 Mean 8 Median	People served 23,054 Mean 625 Median	Annual Budget \$1,624k Mean	\$175k Median
	IMPORTANCE OF THE INTERNET	% Agree: 96% Internet access is critical to organizations' daily operations	92% Internet access is critical for you to reach funders or do fundraising to support your programs	91% Internet access is critical to reach people served	
	INFRASTRUCTURE & ACCESS	Lack of internet, tools or skills impacted work 73%	% Strongly agree that the internet is: Accessible 74% Reliable 48% Fast 40%	CSOs Accessible 74% Reliable 48% Fast 40%	People Served Accessible 12% Reliable 9% Fast 9%
	AFFORDABILITY	Unsatisfied with internet access for price paid 36%	% Can't Afford/Expensive: Mobile phones 63% Mobile plan 55% Internet access 40%	Mobile phones 63% Mobile plan 55% Internet access 40%	Mobile phones 75% Mobile plan 72% Internet access 68%
	POLICY	% Agree: Access to info is a right 97%	Internet is a basic right 89%	People served generally feel safe online 59%	
	DIGITAL SKILLS	% Strongly Agree: Employees are well trained for devices and software used 11%	People they serve have access to digital training skills 5%		
	CONTENT	% Most Important	Emails & chat services 76% Social media 49% Fundraising 33%	CSOs Social media 62% Emails & chat service 61% News & local events 41%	People Served Social media 62% Emails & chat service 61% News & local events 41%

Snapshot Profile: Global South



STAFF AND BUDGET	# of employees		People served		Annual Budget	
	Mean	Median	Mean	Median	Mean	Median
	88	18	29,897	625	\$754k	\$30k



IMPORTANCE OF THE INTERNET	% Agree:	93%	93%	92%
		Internet access is critical for you to reach funders or do fundraising to support your programs	The internet is your most powerful communication tool	Internet access is critical in your organization's daily operations



INFRASTRUCTURE & ACCESS	Lack of internet, tools or skills impacted work 89%	% Strongly agree that the internet is:	CSOs		People Served			
			Accessible	Reliable	Fast	Accessible	Reliable	Fast
			50%	29%	23%	12%	11%	11%



AFFORDABILITY	Unsatisfied with internet access for price paid 44%	% Can't Afford/Expensive:	Mobile phones		Mobile plan		Internet access	
			57%	50%	48%	71%	66%	66%



POLICY	% Agree:	Access to info is a right	Internet is a basic right	People served generally feel safe online
		96%	94%	57%



DIGITAL SKILLS	% Strongly Agree:	Employees are well trained for devices and software used	People they serve have access to digital training skills
		14%	10%



CONTENT	% Most Important	CSOs		People Served			
		Emails & chat services	Social media	Fundraising	Social media	Emails & chat service	News & local events
		69%	60%	33%	65%	47%	44%

Regional Snapshots: Mapping similarities and differences

Key Findings: Regions



A lack of internet access, tools or skills was a challenge for more organizations in **Africa and Latin America & Caribbean** than in other regions.



The biggest digital barriers for CSOs are:

Africa:
Internet affordability

Latin America & Caribbean, Middle East, and North America:
Speed

Asia-Pacific and Europe:
Digital skills



The biggest barrier for people served is:

Africa, Middle East, North America:
Internet affordability

Latin America & Caribbean:
Internet availability

Asia-Pacific and Europe:
Digital skills










Africa and Latin America & Caribbean have the highest percentage of CSOs who are unsatisfied with their internet access for the price they pay, while **Europe** has the highest percentage of those satisfied.



More people served in **Asia-Pacific, Europe, the Middle East** and **North America** feel safe online than in **Africa** or **Latin America & Caribbean**.

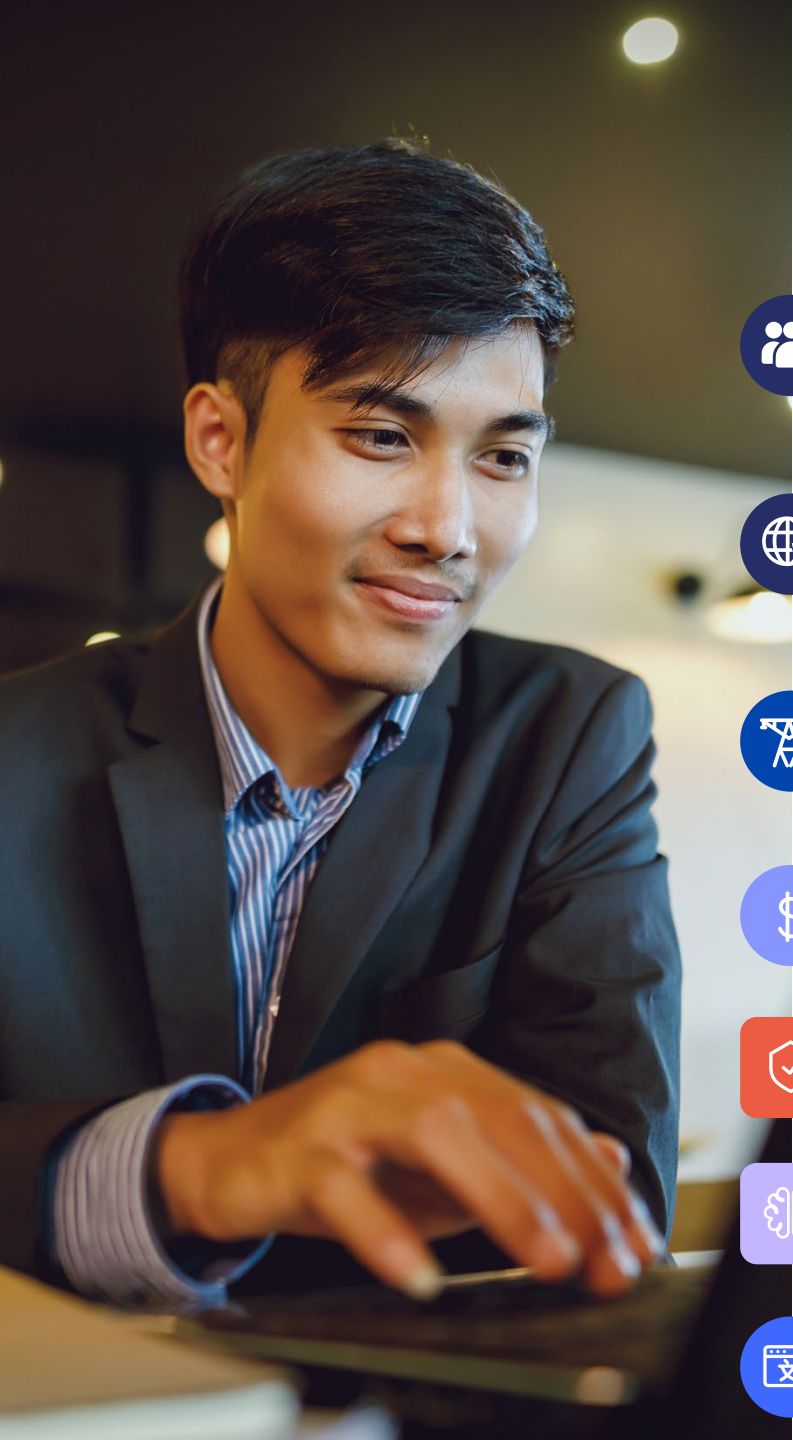
Snapshot Profile: Africa

	STAFF AND BUDGET	# of employees 58 Mean	18 Median	People served 38,930 Mean	625 Median	Annual Budget \$574k Mean	\$75k Median
	IMPORTANCE OF THE INTERNET	93% % Agree: Internet access is critical for you to reach funders or do fundraising to support your programs	92% Internet access is critical in your organization's daily operations	92% The internet is your most powerful communication tool			
	INFRASTRUCTURE & ACCESS	Lack of internet, tools or skills impacted work 93%	% Strongly agree that the internet is: Accessible 34% Reliable 14% Fast 11%	CSOs Accessible 3% Reliable 3% Fast 2%	People Served Accessible 3% Reliable 3% Fast 2%		
	AFFORDABILITY	Unsatisfied with internet access for price paid 69%	% Can't Afford/Expensive: Mobile phones 73% Mobile plan 77% Internet access 78%	Mobile phones 88% Mobile plan 88% Internet access 91%			
	POLICY	96% % Agree: Access to info is a right	93% Internet is a basic right	44% People served generally feel safe online			
	DIGITAL SKILLS	9% % Strongly Agree: Employees are well trained for devices and software used	5% People they serve have access to digital training skills				
	CONTENT	% Most Important Emails & chat services 68% Social media 56% Fundraising 43%	CSOs Social media 49% News & local events 47%	People Served Social media 62% School, educational content 49% News & local events 47%			

Snapshot Profile: Latin America & Caribbean

	STAFF AND BUDGET	# of employees 66 Mean 8 Median	People served 15,408 625 Mean Median	Annual Budget \$916k \$75k Mean Median
	IMPORTANCE OF THE INTERNET	% Agree: 97% Internet access is critical for you to reach funders or do fundraising to support your programs	94% The internet is your most powerful communication tool	93% The internet is critical to your ability to support the communities you seek to serve
	INFRASTRUCTURE & ACCESS	Lack of internet, tools or skills impacted work 83%	% Strongly agree that the internet is: Accessible 59% Reliable 28% Fast 21%	CSOs People Served Accessible 6% Reliable 3% Fast 4%
	AFFORDABILITY	Unsatisfied with internet access for price paid 52%	% Can't Afford/Expensive: Mobile phones 75% Mobile plan 62% Internet access 56%	Mobile phones 87% Mobile plan 84% Internet access 84%
	POLICY	% Agree: Access to info is a right 98%	Internet is a basic right 97%	People served generally feel safe online 48%
	DIGITAL SKILLS	% Strongly Agree: Employees are well trained for devices and software used 12%	People they serve have access to digital training skills 6%	
	CONTENT	% Most Important	Emails & chat services 69% Social media 58% Fundraising 48%	CSOs People Served Social media 72% Emails & chat service 47% School, educational content 47%

Snapshot Profile: Central Asia*



	STAFF AND BUDGET	# of employees 18 Mean 6 Median	People served 79,102 Mean 625 Median	Annual Budget \$1,278k Mean \$30k Median
	IMPORTANCE OF THE INTERNET	% Agree: 100% (tie) Internet access is critical for you to reach funders or do fundraising to support your programs / The internet is critical to your ability to support the communities you seek to serve		94% (tie) Internet access is critical in your organization's daily operations / The internet is your most powerful communication tool
	INFRASTRUCTURE & ACCESS	Lack of internet, tools or skills impacted work 100%	% Strongly agree that the internet is: Accessible 13% Reliable 13% Fast 13%	CSOs People Served Accessible 6% Reliable 0% Fast 0%
	AFFORDABILITY	Unsatisfied with internet access for price paid 81%	% Can't Afford/Expensive: Mobile phones 63% Mobile plan 63% Internet access 56%	Mobile phones 94% Mobile plan 94% Internet access 81%
	POLICY	% Agree: Access to info is a right 100%	Internet is a basic right 100%	People served generally feel safe online 19%
	DIGITAL SKILLS	% Strongly Agree: Employees are well trained for devices and software used 13%	People they serve have access to digital training skills 6%	
	CONTENT	% Most Important	Emails & chat services 69% School, educational content 56% Social Media/News & local events 50%	CSOs People Served Social media 88% News & local events 56% Emails & chat service 44%

*Interpret with caution, extremely small base (less than 25)

Snapshot Profile: Asia-Pacific



	STAFF AND BUDGET	# of employees 67 Mean 8 Median	People served 22,082 Mean 625 Median	Annual Budget \$1,303k Mean \$75k Median
	IMPORTANCE OF THE INTERNET	% Agree: 96% Internet access is critical in your organization's daily operations	94% Internet access is critical for you to reach funders or do fundraising to support your programs	93% Internet access is critical for you to reach the people you serve
	INFRASTRUCTURE & ACCESS	Lack of internet, tools or skills impacted work 79%	% Strongly agree that the internet is: Accessible 63% Reliable 47% Fast 38%	CSOs People Served Accessible 17% Reliable 16% Fast 15%
	AFFORDABILITY	Unsatisfied with internet access for price paid 37%	% Can't Afford/Expensive: Mobile phones 54% Mobile plan 46% Internet access 36%	Mobile phones 65% Mobile plan 60% Internet access 56%
	POLICY	% Agree: Access to info is a right 96%	Internet is a basic right 93%	People served generally feel safe online 67%
	DIGITAL SKILLS	% Strongly Agree: Employees are well trained for devices and software used 11%		People they serve have access to digital training skills 10%
	CONTENT	% Most Important	Emails & chat services 69% Social media 54% News & local events 32%	CSOs People Served Social media 59% Emails & chat service 56% News & local events 40%



Snapshot Profile: Europe

	STAFF AND BUDGET	# of employees 82 Mean 8 Median	People served 22,441 Mean 625 Median	Annual Budget \$992k Mean \$75k Median
	IMPORTANCE OF THE INTERNET	% Agree: 94% Internet access is critical in your organization's daily operations	89% Internet access is critical for you to reach funders or do fundraising to support your programs	87% The internet is your most powerful communication tool
	INFRASTRUCTURE & ACCESS	Lack of internet, tools or skills impacted work 80%	% Strongly agree that the internet is: Accessible 73% Reliable 47% Fast 38%	CSOs Accessible 12% Reliable 9% Fast 9%
	AFFORDABILITY	Unsatisfied with internet access for price paid 27%	% Can't Afford/Expensive: Mobile phones 57% Mobile plan 45% Internet access 30%	People Served Mobile phones 71% Mobile plan 63% Internet access 58%
	POLICY	% Agree: Access to info is a right 98%	Internet is a basic right 92%	People served generally feel safe online 55%
	DIGITAL SKILLS	% Strongly Agree: Employees are well trained for devices and software used 13%		People they serve have access to digital training skills 6%
	CONTENT	% Most Important	Emails & chat services 78% Social media 52% Online banking and other FS 35%	CSOs Social media 67% Emails & chat service 59% News & local events 49%

Snapshot Profile: Middle East



STAFF AND BUDGET	# of employees		People served		Annual Budget	
	165	38	90,857	3,000	\$2,183k	\$175k
	Mean	Median	Mean	Median	Mean	Median



IMPORTANCE OF THE INTERNET	% Agree:	93%	92%	89%
		Internet access is critical in your organization's daily operations	Internet access is critical for you to reach the people you serve	The internet is your most powerful communication tool



INFRASTRUCTURE & ACCESS	Lack of internet, tools or skills impacted work 79%	% Strongly agree that the internet is:	CSOs		People Served	
			Accessible	61%	Accessible	23%
		Reliable	48%	Reliable	18%	
		Fast	28%	Fast	12%	



AFFORDABILITY	Unsatisfied with internet access for price paid 44%	% Can't Afford/Expensive:	Mobile phones		Mobile plan		Internet access	
			59%	67%	61%	72%	49%	67%



POLICY	% Agree:	Access to info is a right	Internet is a basic right	People served generally feel safe online
			90%	90%



DIGITAL SKILLS	% Strongly Agree:	Employees are well trained for devices and software used	People they serve have access to digital training skills
			21%



CONTENT	% Most Important	CSOs		People Served	
		Emails & chat services	66%	Social media	70%
		Social media	57%	School, educational content	40%
		Fundraising	38%	Emails & chat service	37%

*Interpret with caution small base (less than 100)

Snapshot Profile: North America



	# of employees		People served		Annual Budget	
STAFF AND BUDGET	64	4	28,731	625	\$2,092k	\$175k
	Mean	Median	Mean	Median	Mean	Median



	% Agree:	Internet access is critical in your organization's daily operations	94%	The internet is critical to your ability to support the communities you seek to serve	93%	Internet access is critical for you to reach the people you serve
IMPORTANCE OF THE INTERNET						



	Lack of internet, tools or skills impacted work	% Strongly agree that the internet is:	CSOs	People Served
INFRASTRUCTURE & ACCESS	70%	Accessible	72%	Accessible 10%
		Reliable	42%	Reliable 6%
		Fast	37%	Fast 7%



	Unsatisfied with internet access for price paid	% Can't Afford/Expensive:	Mobile phones	Mobile plan	Internet access
AFFORDABILITY	43%		67%	80%	81%
			64%		
			53%		



	% Agree:	Access to info is a right	Internet is a basic right	People served generally feel safe online
POLICY		95%	84%	60%



	% Strongly Agree:	Employees are well trained for devices and software used	5%	People they serve have access to digital training skills
DIGITAL SKILLS		12%		



	% Most Important	Emails & chat services	CSOs	Social media	People Served
CONTENT			77%		61%
		Social media	48%	Emails & chat service	61%
		Fundraising	44%	School, educational content	36%

Issue Areas



CSOs that focus on health have the following characteristics:

- They represent about 10% of all CSOs who completed our survey
- Almost three quarters (74%) are headquartered in the Global North region
- An average of 34,000 people participate in the CSOs' programs that run with an average annual budget of \$1.8M
- The internet is critical to their daily operations (95%), to reach funders or do fundraising (92%) and to support the communities they serve (91%)
- A lack of internet access, tools, or skills has limited the ability to conduct work of three quarters of CSOs (75%)
 - The top barriers for CSOs are lack of digital skills (46%), internet speed (38%) and internet reliability (31%)
 - The top barriers for people they serve are lack of digital skills (51%), internet availability (36%) and affordability of internet (35%)
 - The internet is not reliable due to poor quality of infrastructure (65%), issues with internet provider (63%) or old infrastructure (38%)
- Seven in ten of people they serve (71%) access the internet via their mobile phone
- Six in ten people they serve (60%) do not have access to digital skills training and only three in ten (30%) CSOs provide digital skill building
- Only 3% of CSOs strongly agree that the people they serve generally feel safe online
- Over one third (34%) of CSOs say that health information, telehealth, and online health information is most important to their work, most of which is provided in local language (66%)



Education

CSOs that focus on education have the following characteristics:

- They represent about 22% of all CSOs who completed our survey
- Over six in ten (63%) are headquartered in the Global North region
- An average of 18,500 people participate each in the CSOs' programs that run with an average annual budget of \$1.2M
- The internet is critical to their daily operations (95%), to reach funders or do fundraising (92%) and to support the communities they serve (91%)
- A lack of internet access, tools, or skills has limited the ability to conduct work of eight in ten CSOs (80%)
 - The top barriers for CSOs are lack of digital skills (38%), internet speed (37%) and internet reliability (34%); lack of devices is higher than among other industries (28%)
 - The top barriers for people they serve are lack of digital skills (48%), affordability of internet (43%) and internet availability (36%); lack of devices is higher than among other industries (33%)
 - The internet is not reliable due to poor quality of infrastructure (67%), issues with internet provider (59%) or power outages (36%)
- Almost seven in ten of people they serve (69%) access the internet via their mobile phone
- Over half of people they serve (51%) do not have access to digital skills training and over half of CSOs (53%) provide digital skill building
- Only 4% of CSOs strongly agree that the people they serve generally feel safe online
- Over half of CSOs (53%) say that school, educational content, and services is most important to their work, most of which is provided in local language (69%)



CSOs that focus on climate have the following characteristics:

- They represent about 2% of all CSOs who completed our survey
- Almost two thirds (65%) are headquartered in the Global North region
- An average of 30,000 people participate each in the CSOs' programs that run with an average annual budget of \$1.5M
- The internet is critical to their daily operations (96%), to reach funders or do fundraising (96%) and to support the communities they serve (96%)
- A lack of internet access, tools, or skills has limited the ability to conduct work of three quarters of CSOs (75%)
 - The top barriers for CSOs are lack of digital skills (40%), internet speed (34%) and internet reliability (32%)
 - The top barriers for people they serve are lack of digital skills (44%), internet availability (43%) and internet affordability (33%)
 - The internet is not reliable due to issues with internet provider (68%), poor quality of infrastructure (62%), or power outages (36%)
- Two thirds of people they serve (66%) access the internet via their mobile phone
- Over six in ten people they serve (62%) do not have access to digital skills training and only two in ten CSOs (22%) provide digital skill building
- Only 3% of CSOs strongly agree that the people they serve generally feel safe online

Summary



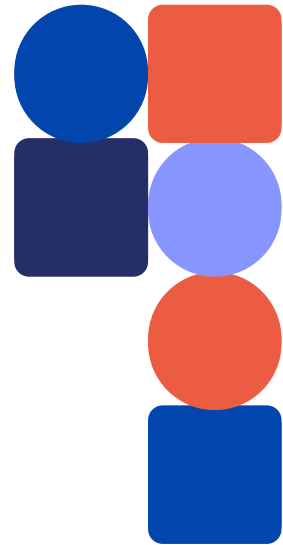
Both the people civil society serves and civil society itself are far from achieving digital equity.



The internet is critical to the work of civil society – to fundraise, to communicate with the people they serve, and to work and live, but many don't have reliable, affordable, and accessible internet.



We know how to close the connectivity and digital equity gaps that exist in our civil society ecosystem, but there are too few efforts to close the digital divide. There is too little funding, too few policy interventions (like affordable connectivity programs and government subsidies), and not enough data to map the global state of digital equity... until now.



Thank you!



We hope you use this report at a tool to help build the Will for the Web until we are all connected.



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