

EXECUTIVE SUMMARY

1. Context and justification

Information and Communication Technologies has emerged as a tool for sustaining economic growth and delivering essential services to the populace in all spheres and sectors of the economy.

It is for these reasons, among others, that today there is a high demand for information and communication technologies and information society statistics to help lay foundation for the monitoring of progress in the aforementioned areas. However, there cannot be a jump into monitoring progress without having a benchmark and a common and standardized framework in place.

Having realized these, the United Nations Economic Commission for Africa (UNECA) closely working with Partners to prepare the ground and lead the process of setting up a mechanism for the establishment of benchmarks and monitoring systems in the area of Information and Communication Technologies (ICT).

This has led to an international consensus in developing and agreeing of indicators to benchmark and monitor of progress in the area of ICT development, access, usage and exploitation. Not also losing sight of the need for common and standardized methodologies for comparison purpose.

In the African region, ECA established a project that is helping spearhead the process in the region as a result of which countries like The Gambia benefited to conduct baseline studies in the area of ICT and, to also look into modalities to incorporate the continuous production of ICT statistics within the National Statistics System. The project helped African countries discussed and agreed on sixty-two indicators that all should endeavour to collect the necessary data for their production regularly.

The Scan-ICT Baseline Project is the resultant programme of activities in the African region, the second phase of which is being implemented in nine African countries – including Gambia, geared towards the realization of these objectives in the region.

The implementation of the project in The Gambia is being coordinated by a National Technical Committee under the Department of State for Finance and Economic Affairs (DoSFEA), Department of State for Communications and Information Technology (DOSCIT) and the Central Statistics Department, now Gambia Bureau of Statistics (GBoS). GBoS has taken the lead role in the technical implementation of the project which includes methodological design, coordination of the desk research, design of instruments and implementation, among others.

2. Methodology

After series of preparatory and consultative meetings, Gambia's Scan-ICT baseline study took off with the commencement of desk research in April 2006. This activity involved members of Scan-ICT technical committee who represent the various relevant sectors. The desk research went on for a period of about 3 to 4 weeks during which secondary data was also gathered and where not available the possible source was determined.

This activity then overlapped into the survey design stage when the necessary instruments for the subsequent data collection activities, intended to fill the gaps, were drafted. The survey approach was also proposed - which involved the methodological approach in conducting institutional and household surveys.

The survey was conducted throughout the national territory in institutions representing government and private services. The institutional survey covered those key institutions and employees that Scan-ICT focused on and, household survey targeted households and individuals access to and exploitation of ICT. Final sample of households obtained is 1504 households.

The data collection activity proceeded for a period of twenty-one days during the months of July and August 2006. Both institutions and households were covered during the twenty-one days survey period.

3. ICT Infrastructure

Telecommunication Links

Gambia Telecommunication Company (GAMTEL) has laid a fibre optic cable on the south bank of the river Gambia that run across the country. The country has a fixed line telephone penetration rate of 3.1%. The penetration rate of 6% in urban areas and about 1% in the rural areas. Combined with mobile phones there is a total penetration rate increased from 18.35% in 2005 to 21.6% in 2006.

Telecentres

A number of telecentres existed in both the urban and rural areas making the telephone services accessible to the general populace in almost all parts of the country.

Public Key Infrastructure

The development of a legislative and regulatory framework for the use of ICT in a secured environment is limited..

Communication Links

There is only one public television station and no private television station in the Gambia but satellite and cable viewing is possible. There are also one public radio, five private radio and three community radio stations.

Projects for ICT Development in the Gambia

A number of projects have being designed and implemented by government and public institutions to enhance access and use of ICT equipments and services in the Gambia.

Key among these projects are:

- ✓ AU-E-Network;

- ✓ Construction of Technology Park
- ✓ The Biometric project
- ✓ The e-government project
- ✓ ICT for Development (ICT4D) project
- ✓ NICI Policy and Plans Development
- ✓ Telecommunications Bill formulation
- ✓ Crash Programme
- ✓ Alcatel Stage 1 project
- ✓ Airspan project
- ✓ CDMA Pilot project
- ✓ Internet Resource Centres
- ✓ Internet MPLS Backbone
- ✓ Intelligent Network (IN) Platform
- ✓ Gambia Telecommunication and Multimedia Institute (GTMI)

3.3 Personal Equipment for the Use of ICT Services

Equipment for Use in ICT Services at Households

Households mainly access information through the use of radio, mobile telephone and television programme for increased productivity and growth. At national level about 90% of households have access to radio, 40% have access to television and 56% use mobile telephone to send and receive information.

Other ICT equipments and facilities like computers and internet facilities are found in both urban and rural households. The survey results showed that about 2% of individuals in households accessed computers in the last 12 months whilst only 1% of individuals in households have access to internet facilities in the same period.

Equipment for the Use of ICT in the Workplace

The rate of penetration of computers into workplaces is very high; 66.2% of institutions on the average owned/accessed more than one computer whilst 12.0% owned only one computer.

Photocopying machines are normally found and used in most workplaces, on average about 45.8% institutions used photocopying machines but some local government areas reported low usage of copying machines in the workplaces in Mansakonko (11.2%), Kerewan (17.1%) and Janjangbureh (12.5%).

Nationally, the overall availability and usage of other ICT equipments like fax machine and printers in offices is quite high at a rate of 38.5% and 58.7% respectively. The rate of penetration of digital projectors is very low in the offices.

Access to Internet

The internet services that are commonly used in the Gambia are email, web browsing, web hosting, discussion forum and file transfers. Four Internet Service Providers (ISP); Gamtel, QuantumNet, Netpage and Airtip are licensed to operate and to provide dial-up internet access to the public and the institutions. The services provided through dial-up access are cheaper in the Gambia than in many African countries. In fact, dial-up time for unlimited access costs about D200.00 (equivalent to US\$8.00) and less than 50 American cents for one hour of access.

With regard to internet connectivity, the survey results revealed that on the average 46.2% of institutions covered have had internet connectivity whilst 22.1% of the workplaces interviewed have their own websites

Fixed Telephony

There has been a significant increase in the number of fixed line subscribers over the three years period despite the fact that rates for fixed telephone local calls during non-busy and busy periods have doubled, i.e. have increased from D0.30 per minute to D0.60 per minute. The provision of fixed telephone in the different categories of the institutions is sufficient. Generally, the penetration rate on the availability of fixed telephone lines is at 42.0%.

With regard to the number of fixed telephone lines in workplaces, the study results shows that on

average only 4.0% of institutions do not have any fixed telephone set in the workplace. On the other hand, on the average, 31.2% and 33.7% of institutions respectively reported to have one and at least two fixed telephone lines in the workplaces.

Mobile Telephony

Two GSM operators are providing the mobile telephone services: GAMCEL and AFRICEL via GSM 800-900 networks with countrywide coverage. There was a rapid increase in the number of mobile subscribers in the Gambia since 2001. The mobile telephone penetration rate has increased from 7.3% in 2003 to 16.9% in 2006.

According to the study results, a higher proportion of households have owned mobile telephones (65.1%) than fixed telephones (20.6%). In the urban areas, 76.5% of households owned a mobile telephone as against 54.8% of households having owned a mobile telephone in the rural areas.

4. Training in the Use of ICT

Status of ICT in Education sector

The importance of information underscores the importance of adopting ICT in the education sector. The availability of computers in the education sector is still very low, on the average and at national level; student-to-computer ratio is 142 students per computer. The availability of computers to students increases with increase in the level of education. In fact, 256 students in Lower Basic School have to share one computer whereas 10 students in tertiary/higher education share a computer. In the urban areas, there are about 29 students per computer in the Senior Secondary schools whilst there are only 11 students per computer in the Vocational schools.

With regard to training received in the use of the ICT, there are disparities according to gender. Our survey results shows that there are only 18 percent of the female students enrolled in tertiary education who are in an ICT dominated field whiles there are about 60 percent of the male students in the same category who are in an ICT dominated field. However, the results concern with Vocational/Technical schools show a higher participation

of female in ICT field than the male students. There were 17 percent of female student in this school category who are in an ICT dominated field as against only 15 percent of male student in the same school category are in an ICT dominate field.

The proportion of students and teachers using internet services is very high. About 98.4% of students and 98.9% of teachers used internet services for email messaging.

5. Limitations to Access to ICT in the Gambia

Education-low literacy levels

To develop the economy and improve the lives of Gambians we therefore need a basic level of education underpinned by developing a learning culture. The ability to use new technology that is ever changing, acquire relevant knowledge and convey information in a manner that empowers individuals to maximize their natural potential perhaps stands out as the most basic prerequisite. In this regard, access to ICTS has to be precluded by training and learning.

Low Skilled Workforce

In The Gambia, the proliferation of ICT training will provide a future base but now it is important we recognize that the relevant knowledge base and therefore skills required to be competitive or have the competitive edge are lacking. Without an appropriately skilled workforce, we have limited access to use ICT services and facilities. Before we even get in to the IT fields or the lack of it in schools, what first comes to mind is the ongoing debate about the atrocious level of English proficiency in schools. Language forms a fundamental part of development and it is through this that the principle of skill acquisition is based on regardless of which skill one needs to acquire.

Awareness and Sensitization on ICTs

“Information is power” to empower and power to act. The completely learning process for us in Africa and The Gambia specifically, is challenged by how quickly we raise the level of awareness of ICTs. At present, the ICT industry in the Gambia is focusing more on selling computers, basic computer training, networking and a few other basic services. The

innovation to demonstrate to people what a simple computer program can do for them or their business that can translate to the need for computers is lacking.

Affordability of ICT Equipments and Services

Universal Access to and affordability of ICTs are inextricably linked. In the Gambia, the cost of computers and the price of accessing the Internet are one of the main issues that influence the spread of ICTs. Purchase of equipment is still far beyond the reach of the average citizen. The high price tags compared to other necessities in life act as a barrier to access to ICT equipments and services.

Gender

The high cost of computers and connectivity keep ICT services far beyond the reach of most women. ICT infrastructure is largely urban-centred. Internet content is overwhelmingly in English. Insufficient attention is given to content in local languages and the use of the Internet for women with low levels of literacy. Gender roles and other cultural factors translates to the fact that women have less time to make use of ICTs.

6. Suggestions and Recommendations

Recommendations are made for the use of the results in ICT development, access, usage and development of ICT database. Please refer to chapter 6 of this report.