

# Digital Mapping & Analysis

## SRI LANKA

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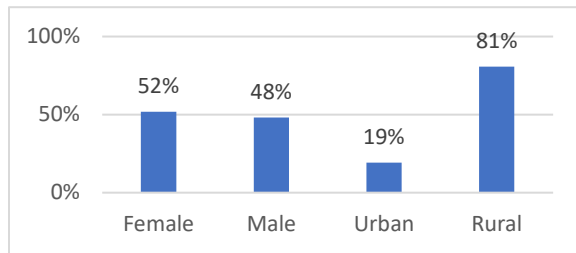
## Purpose of this Document

To support the UNICEF Regional Office for South Asia’s integration of digital tools, technologies, and best practices into Social and Behaviour Change (SBC) programming, this Digital Mapping outlines the existing digital interests, needs and challenges across Sri Lanka. This document outlines the country's context, media, digital habits and preferences, emerging trends and recommendations on leveraging the existing opportunities gathered through secondary research.

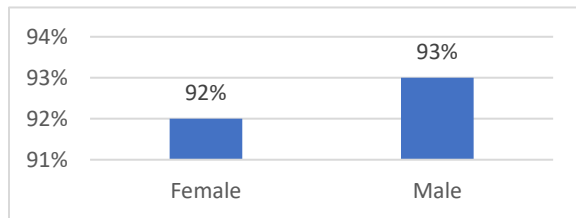
This document can inform digital SBC programme design, development, and implementation at the country level based on the available insights and data from recent years.

# Demographic Overview<sup>i</sup>

Total Population: 22M<sup>ii</sup>

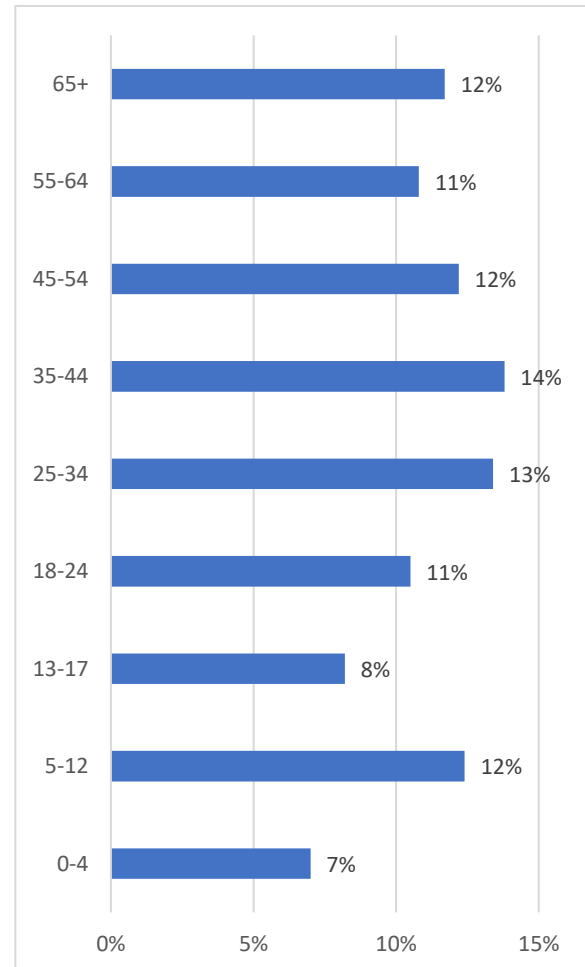


Literacy Rate: 92% of the population over 15<sup>iii</sup>



Languages Spoken: Sinhala and Tamil<sup>iv</sup>

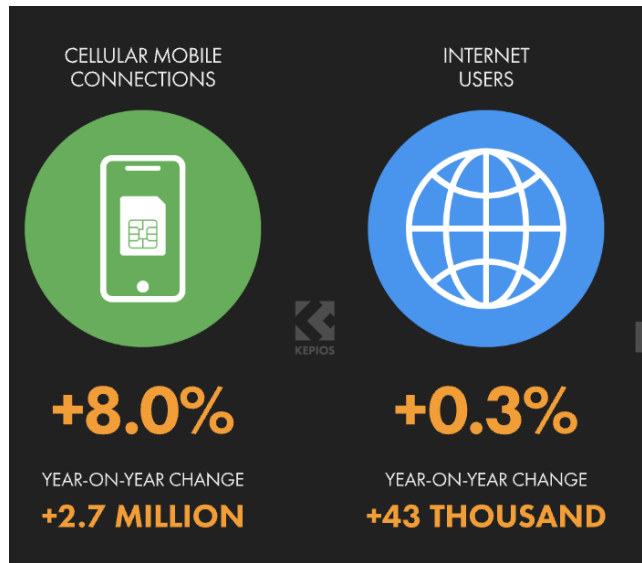
Age Demographics



## Digital Connectivity

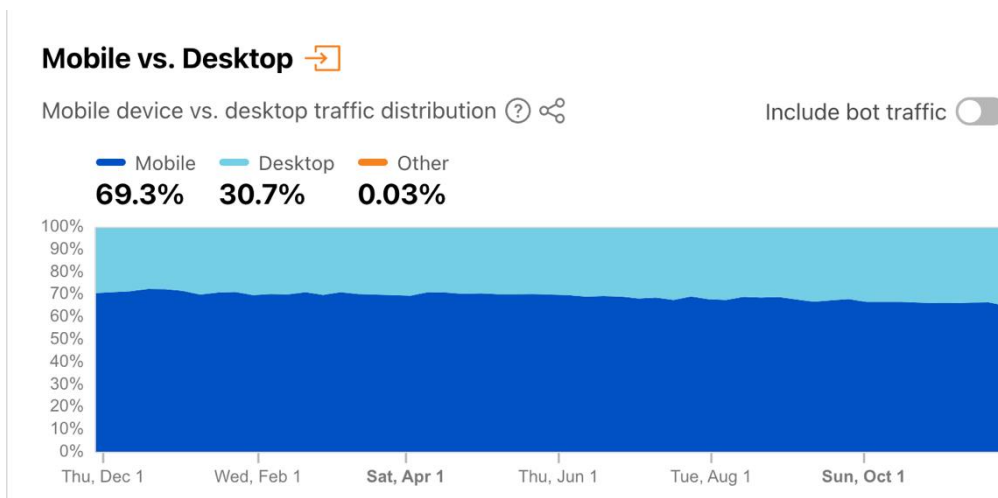
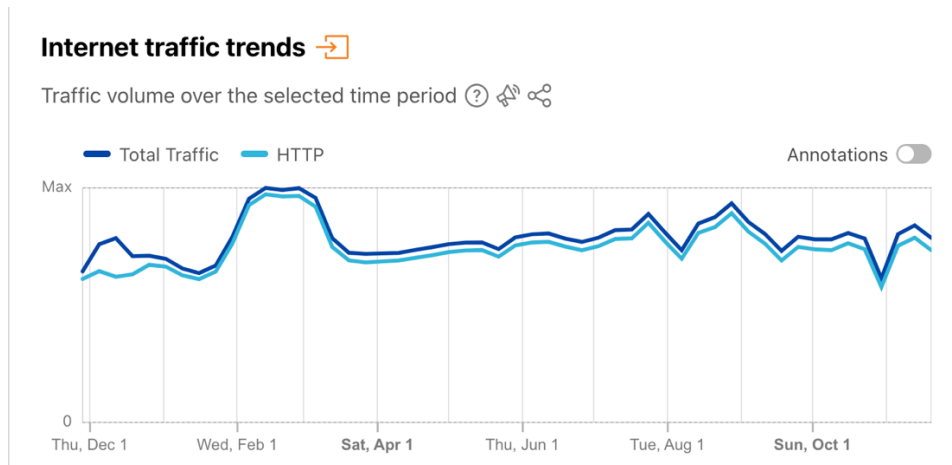
There were more than 29M Cellular Mobile Telephone Subscriptions in Q3 of 2023<sup>v</sup> and 14.58M internet users.<sup>vi</sup> The World Bank report also noted that 28% of the population has 4G mobile broadband connectivity and only a third of households have fixed broadband connections.<sup>vii</sup> Internet speeds in Sri Lanka are mostly fast enough to accommodate video streaming, with an average mobile internet connection speed of 14.29 Mbps and an average fixed internet connection speed of 20.09 Mbps.<sup>viii</sup> To note for comparison, the World Bank Report on South Asia’s Digital Opportunity noted that ‘with an average fixed broadband speed of 29 Mbps, only a small share of households would be able to access a mix of learning, telework, and public services online during this and future pandemics.’ It also stated that Sri Lanka ranked 121st (out of 141 countries) in mobile broadband speed and 107th out of 175 in fixed broadband speeds (in February 2021).<sup>ix</sup>

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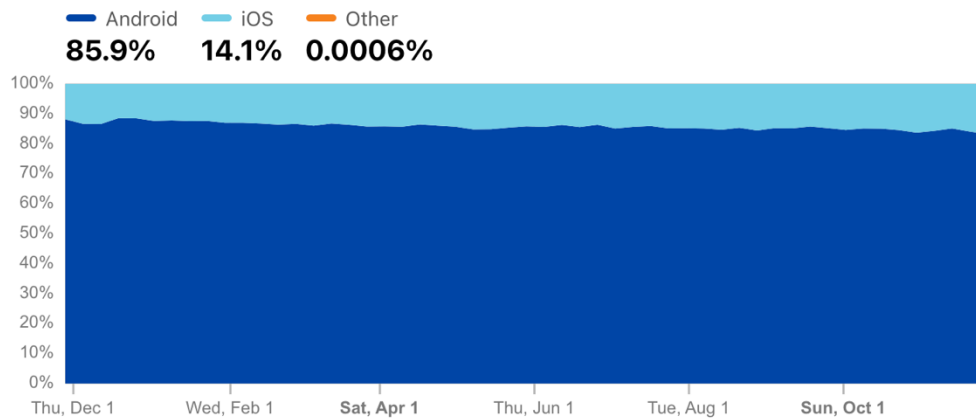
Digital Growth<sup>xi</sup> (compared to 2022)

Trends to Note (Nov 2022 to Nov 2023)<sup>xii</sup>



## Mobile Operating Systems

Distribution of mobile device requests to Cloudflare by operating system  



## Digital Divide



### Connectivity: rural vs urban

Not much robust data was available on the gaps between urban and rural connectivity. However, it was noted that the use of smartphones is still limited in remote rural areas where broadband internet facilities are still weak.<sup>xiii</sup> Though there is data available on initiatives to bridge the divide. Such as the Nenasala Project, implemented under the ‘e-Sri Lanka Initiative’ by the Information and Communication Technology Agency (ICTA), which established 1005 telecentres (which offer internet-based services) in rural areas to ‘help fight poverty, develop culture and commerce, and sustain peace and to improve digital literacy’.<sup>xiv</sup> Alongside that, Sri Lanka also introduced other plans, such as a least-cost subsidy scheme to build and operate a fibre backbone in rural areas.<sup>xv</sup> Furthermore, Sri Lanka tried to ‘increase the accessibility of foundational identification systems’ (such as the National ID system, which has over 93% coverage) for vulnerable populations to promote ‘broader inclusion for digital public platforms’.<sup>xvi</sup> As per Digital Quality of Life (DQL) Index 2023, Mobile speed ranked 102nd (up from 111th in 2022), but fixed speed declined (96<sup>th</sup> in 2023, down from 92<sup>nd</sup> in 2022).<sup>xvii</sup>



### Gender Divide

Important gender gaps still exist. World Economic Forum’s Global Gender Gap Report 2023 noted that parity has receded in Sri Lanka by 0.5% or more. Still, it has the highest parity scores in the region for Economic participation and Opportunity (0.555). It is the only one in the region that has ‘attained full parity in health life expectancy’ while also being close to achieving parity in secondary education enrolment. It is 3rd in the region on the Global Gender Gap Index ranking by region, 115 globally (out of 146 countries) and has a score of 0.663 (on a 0-1 scale), a -0.007 change from 2022.<sup>xviii</sup> For the sub-index of Education Attainment, Sri Lanka scored 0.988, 0.980 for health and survival, and 0.130 for political empowerment and opportunity.<sup>xix</sup>

Though not a lot of data is available on the gender digital divide, it was still noted that men were 34% more likely to be internet users than women<sup>xx</sup>, and it was noted in 2022 that computer literacy among males (37.3% (36.1% in 2021<sup>xxi</sup>)) was higher than that of females (34.8% (32.6% in 2021<sup>xxii</sup>)).<sup>xxiii</sup> A 2018 [UNICEF study](#) had also found that 67% of boys aged between 11 and 18 had access to the internet in Sri Lanka, while only 33% of girls used the internet. It also noted that about 75% of the late users of the internet are women due to limited accessibility to skill enhancement, opportunities to enter the innovation and tech spaces, fear of harassment and lack of online safety measures<sup>xxiv</sup>; the gender divide is also glaring in the workforce with women holding less than 35% of ICT jobs.<sup>xxv</sup>



### **Lack of Affordability: Cost of Data and Devices**

Despite Sri Lanka providing fixed broadband at, or below, the recommended threshold (2% of GNI per capita) and where the cost of a smartphone as a percentage of average GNI per capita is comparatively lower (11.33% of average income<sup>xxvi</sup>), the ongoing economic crisis, and the pandemic, contributed to the lack of affordability (average price of 1GB of mobile was \$0.27 in 2023<sup>xxvii</sup>, which is noted to be 0.09% of average income<sup>xxviii</sup>).<sup>xxix</sup> In urban areas, poverty increased from 5% to 15% between 2021 and 2022, with 80% of the poor living in rural areas and 50% of the estate population now living below poverty line.<sup>xxx</sup> Furthermore, the average mobile broadband service, and entry-level speed connectivity, remains unaffordable for the bottom 60% (coming to more than 2% of the GNI per capita). Also worth noting that in 2021, at least one computer was available in 22.9% of households overall (38.3% in urban sector and 20.7% in rural and estate sector).<sup>xxxii</sup>

As per the Digital Quality of Life Index (DQL) report 2023, Sri Lanka ranked 86<sup>th</sup> out of 121 countries and ranked 13<sup>th</sup> for internet affordability (up from 74<sup>th</sup> in 2022).



### **Low levels of digital literacy**

It was noted that the computer literacy in Sri Lanka increased by just 0.3% according to the Census and Statistics Department (CSD) 2022 data.<sup>xxxiii</sup> Other data on digital skills points to low levels of basic digital literacy amongst the population as indicated by the 2021 National Computer Literacy Survey, which indicated that the average level of digital literacy stands at 4%, higher amongst men (49%) than women (42%).<sup>xxxiv</sup> According to the Computer Literacy Statistics 2021 by the Department of Census and Statistics, 44.5% of 5 to 69-year-olds used the internet at least once in the past 12 months (and 17.8% used email). Furthermore, the young population showed higher internet usage.<sup>xxxv</sup>

Urban sector, which has more infrastructure and facilities, showed the highest digital literacy rate (72.7%) compared to the rural (58%) and estate sector (41%).<sup>xxxvi</sup> Digital literacy was also much higher among the professions, with 86% of managers, senior officials and legislators 'satisfying the requirements set out by the DCS'.<sup>xxxvii</sup> Meanwhile, agriculture and fishery workers averaged a literacy rate of 30% in 2021.<sup>xxxviii</sup> A 2017 school



census also noted that 45% of schools in the country had no access to computers and many 'instructors do not have the skills'.<sup>xxxix</sup>

### Lack of Relevance: content and language

The lack of relevant content in local languages and local/native apps is a barrier to digital adoption and inclusion and contributes to the digital divide.<sup>xi</sup>



#### Public trust in technology

Lack of trust is noted amongst the public due to the lack of regulations protecting users' data protection and privacy. Though Sri Lanka has data protection and privacy bills at various legislative stages and laws containing 'chapters' for cybercrime.<sup>xli</sup> However, the government is taking steps to merge the Sri Lanka Unique Digital Identity (SL-UDI) with the National Data Exchange (NDX), which could provide citizens with more control over their data.<sup>xlii</sup>

With the uptake of digital services, such as mobile banking, there is an increased risk of fraud, security breaches and data privacy violations. The 'Financial Consumer Relations Department of the Central Bank' and the expected 'Data Protection Bill should help address these issues'.<sup>xliii</sup>



#### Slow uptake: Digital financial services (DFS) and start-up culture

In recent years, Sri Lanka has made significant progress in developing digital financial services, such as The Central Bank of Sri Lanka (CBSL) actively promoting digital financial services and introducing several regulatory and policy measures to support this.<sup>xliv</sup> The CBSL also issued licenses to several non-bank digital financial service providers, enabling them to provide mobile banking and other digital financial services.<sup>xlv</sup> 43.5% made a digital payment in 2022 (37% female and 49% male).<sup>xlvi</sup> The government has also implemented several initiatives to promote digital financial inclusion, such as the "e-Grama Niladhari" program, which enables villagers to access government services and make payments through digital channels.<sup>xlvii</sup>

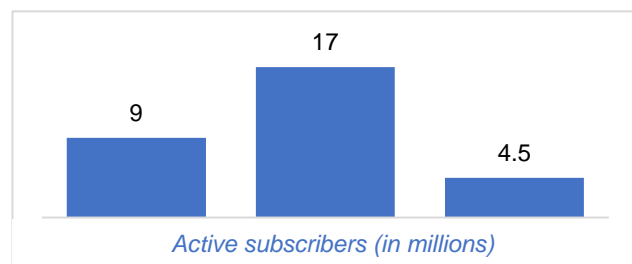
While the banks and financial institutions have started to digitalize, the public's participation in DFS is slow.<sup>xlviii</sup> FinTech start-ups are facing difficulties persuading people to use their DFSs and are having trouble with becoming established in the market. Start-ups in Sri Lanka lack support from the government compared to other South Asian countries. According to the existing regulations, FinTechs have to partner with financial institutions to offer products, services, and solutions. HatchX, Sri Lanka's first Fintech accelerator, recently supported seven fintech startups.<sup>xlix</sup>



## Digital Communications

### Telecommunications

The Telecommunications Regulatory Commission of Sri Lanka (TRCSL) is the nation's telecom regulating state agency.<sup>i</sup> A September 2023 report by TRCSL stated that there are 19.5 million mobile broadband subscriptions (3G, 4G) and 21 million



cellular mobile telephone subscriptions (Voice & Data), while total number of cellular mobile telephone subscriptions (90 days) was at 29 million.<sup>li</sup> The top three telecommunications companies are SLT Mobitel<sup>lii</sup>, Dialog<sup>liii</sup>, and Hutch<sup>liv</sup>.

Domain Insights (Nov 2022 to Nov 2023)<sup>lv</sup>

**Top 10 Domains** →

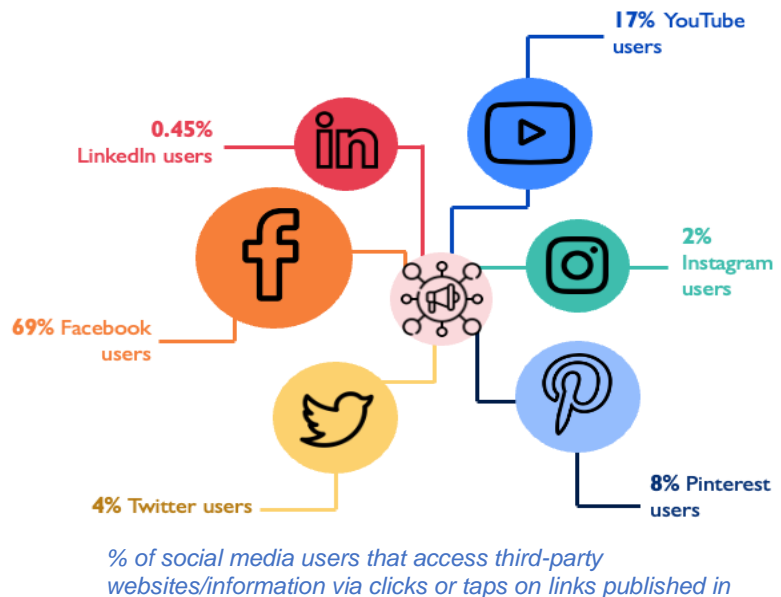
Daily insights into domain popularity derived from Cloudflare 1.1.1.1 data ? 🔗



**Social Media**

There were 7.20M social media users in early 2023 (6.85M were above 18). 37% of users were female and 63% were male.<sup>lvi</sup> In 2022, 98.8% of social media users accessed social media platforms through mobile devices.<sup>lvii</sup>

*\*Reference for the figure<sup>lviii</sup>*



**Social Media Platform Overview**

Platform	User Demographics	Usage
<b>Facebook</b>	<ul style="list-style-type: none"> <li>6.55M users<sup>lix</sup></li> <li>39% Female, 61% Male<sup>lx</sup></li> <li>Largest user group is 25-34</li> </ul>	To share information with friends and family, access news and information, particularly on current events and politics. Media organizations and journalists in Sri Lanka also use Facebook to reach their audience. Additionally, Facebook also



		played a silent but vital role in Sri Lanka's election campaigns. <sup>lxi</sup>
<b>Instagram</b>	<ul style="list-style-type: none"> <li>• 1.4M users<sup>lxii</sup></li> <li>• 40% Female, 60% Male<sup>lxiii</sup></li> <li>• Largest user group is 18-24</li> </ul>	Connecting with friends and family, sharing photos and videos, promoting businesses or personal brands, and following celebrities and influencers. <sup>lxiv</sup>
<b>Linked In</b>	<ul style="list-style-type: none"> <li>• 1.8M members<sup>lxv</sup></li> </ul>	LinkedIn is used by brands and employers to advertise, generate leads, increase sales, recruit potential employees, and by people for job hunting. <sup>lxvi</sup>
<b>YouTube</b>	<ul style="list-style-type: none"> <li>• 7.04 users<sup>lxvii</sup></li> <li>• 39% Female , 61% Male</li> </ul> <p><i>User group data not available</i></p>	Youtube is popular among all ages and it's the video consumption site with more views than television and other media. <sup>lxviii</sup> The most popular videos are comedy videos, blogging, and collaborations. <sup>lxix</sup>
<b>Twitter</b>	<ul style="list-style-type: none"> <li>• 373,100 users<sup>lxx</sup></li> </ul> <p><i>User group data not available</i></p>	Twitter is used by politicians and political parties to engage with followers. <sup>lxxi</sup> It is also used by people to disseminate information (factual, mis- and disinformation). <sup>lxxii</sup> Additionally, during the country's economic crisis, Twitter was used to help raise money for example. <sup>lxxiii</sup>
<b>TikTok</b>	<ul style="list-style-type: none"> <li>• 900,000 Users<sup>lxxiv</sup></li> </ul> <p><i>Recent data not available</i></p>	TikTok's is popular not only in urban areas but also in rural areas. Used for entertainment purposes, as well as sharing storytelling, to raise awareness etc. <sup>lxxv</sup>

### Social Messaging Applications

Facebook Messenger had 3.55 million users in Sri Lanka in early 2023.<sup>lxxvi</sup> WhatsApp, Snapchat and Telegram are also popular social messaging apps in Sri Lanka, but no data is available to ascertain this.<sup>lxxvii</sup>

### Social Media Key Influencers<sup>1</sup>

The top ten key influencers, as identified by the criteria indicated in [Annex 1](#), have been identified below. Local macro influencers, who are celebrities or key opinion leaders will be the priority criteria used for this digital mapping. As they have the most potential for meaningful partnerships with UNICEF, reaching target communities seems most likely with this cohort. However, depending on the Country Office priorities, as well as the evolving nature of social media influencers, key influencers may need to be re-identified.

<sup>1</sup> Social influencer statistics may have changed since they were last checked in January 2023.

Influencer	Social Media Platform	Number of Followers	Level of Influence	Type of Content
<b>Sachini Nipunsala</b>	Instagram YouTube TikTok	Instagram – 1.1M YouTube – 367K TikTok – 741K	Entertainment Celebrity	Social Posts Videos Blogs
<b>Dinakshie Priyasad</b>	Instagram YouTube TikTok	Instagram – 1.1M YouTube – 559K TikTok – 430.7K	Entertainment Celebrity	Social Posts Videos Blogs
<b>Oshadi Himashi Chavindi</b>	Instagram TikTok	Instagram – 754K TikTok – 479K	Entertainment Celebrity	Social Posts Videos Blogs
<b>Mashi Siriwardene</b>	Instagram TikTok	Instagram – 710K TikTok – 718	Entertainment Celebrity	Social Posts Videos Blogs
<b>Hashan Lawrence Pannilage</b>	Instagram TikTok	Instagram – 360K TikTok – 22.6K	Entertainment Key Opinion Leader	Social Posts Videos Blogs
<b>Otara Gunwardene</b>	Instagram Twitter	Instagram – 186K Twitter - 69.7K	Key Opinion Leader	Social Posts Videos
<b>Dedunu Akarshanie</b>	Instagram TikTok YouTube	Instagram – 210K TikTok – 332.8K YouTube – 78.5K	Entertainment Celebrity	Social Posts Videos Blogs
<b>Alanki Kishani Perera</b>	Instagram YouTube Twitter	Instagram – 157K YouTube – 15.6K Twitter - 6705	Entertainment Celebrity	Social Posts Videos
<b>Dinesh Gamage</b>	Instagram YouTube	Instagram – 154K YouTube – 341K	Entertainment Celebrity	Social Posts Videos

<b>Kanchana Anurabi</b>	Instagram YouTube TikTok	Instagram – 206K YouTube – 242K TikTok – 190.5	Entertainment Celebrity	Social Posts Videos
<b>Kumar Sangakkara</b>	Instagram Facebook Twitter	Instagram – 341K Facebook – 6M Twitter – 1.6M	Athlete	Social posts
<b>Yupun Abeykoon</b>	Instagram Facebook	Instagram – 32.6K Facebook – 189K	Athlete	Social posts
<b>Mahinda Rajapaksa</b>	Instagram Facebook YouTube	Instagram – 142K Facebook – 1.4M YouTube – 9.21K	Politician	Social posts Videos
<b>Garena Free Fire Sri Lanka</b>	Youtube	34K	Online Gaming	Videos

### Online Groups

Group Name	Social Media Platform	Number of Members	Level of Influence	Type of Content
<a href="#"><u>Bridge to Equality</u></a>	Facebook	14K	Human rights LGBTQ rights	Social posts
<a href="#"><u>Sri Lanka (r/SriLanka)</u></a>	Reddit	85.6K	Photography News/Announcements Questions	Discussion
<a href="#"><u>ElaKiri.com</u></a>	Ela Kiri	550K (as of 2016)	Knowledge Sharing	Collaborative Community Discussion
<a href="#"><u>Sri Gaming</u></a>	Facebook	17K	Online gaming	Social posts
<a href="#"><u>SL FREE FIRE AND GAMING COMMUNITY</u></a>	Facebook	46K	Online gaming	Social posts
<a href="#"><u>Mobile Legends Official Sri Lanka</u></a>	Facebook	5.6K	Online gaming	Social posts
<a href="#"><u>COD Mobile Sri Lanka Official</u></a>	Facebook	3K	Online gaming	Social posts
<a href="#"><u>Sri Lanka DOTA 2 Community</u></a>	Facebook	6.8K	Online gaming	Social posts

<a href="#"><u>Sri Lanka Valorant Community</u></a>	Facebook	12.1K	Online gaming	Social posts
<a href="#"><u>Gamer.LK (GLK)</u></a>	Discord	8.1K	Online gaming	Voice over Internet Protocol Instant messaging
<a href="#"><u>CS:GO Sri Lanka Community</u></a>	Facebook	2.2K	Online gaming	Social posts

## Gaming Platforms and Communities

Community/Group Name	Type of Content
<a href="#"><u>Gamer.LK</u></a>	<ul style="list-style-type: none"> <li>• A leading online gaming and esports platform in Sri Lanka</li> <li>• Hosts a range of events and activities for gamers of all levels and interests</li> <li>• Has an online forum which serves as a community hub for gamers to discuss games, share tips and strategies, and connect with other players</li> <li>• Has a physical gaming center located in Colombo, which provides a space for gamers to play and socialize with other members of the community</li> </ul>
<a href="#"><u>Steam Community</u></a>	<ul style="list-style-type: none"> <li>• A digital distribution platform that offers a wide range of video games, software, and other digital content</li> <li>• Allows members to discuss the latest developments in the gaming industry and to share their views on various gaming-related topics</li> </ul>
<a href="#"><u>Garena</u></a>	<ul style="list-style-type: none"> <li>• A digital entertainment platform that offers a wide range of online games (e.g., Free Fire, League of Legends, and Call of Duty Mobile) and social networking services</li> <li>• Provides a platform for gamers to connect with each other, join teams, and participate in esports tournaments.</li> <li>• Offers localized content and support for Sri Lankan gamers and provides access to exclusive in-game events and rewards</li> </ul>
<a href="#"><u>InGame Esports</u></a>	<ul style="list-style-type: none"> <li>• An esports organisation that has teams competing in various games, focuses on player development, and helps to train &amp; nurture talented players</li> </ul>

- Hosts tournaments and events both online and offline
- Provide opportunities for local players to showcase their skills and compete at a professional level.

### Traditional Media Platforms

Traditional media retains a heavy and influential presence in Sri Lanka. According to 2018 data from Verite Research, 68.9% of households had access to a radio, and 78.3% to a television set, with the numbers expected to be higher now.<sup>lxxviii</sup> There are 5 government-run TV channels and 19 government-run radio stations. Additionally, there are 25 private TV stations and 43 radio stations. A small proportion of these are run as non-profits.<sup>lxxix</sup>

- Sri Lanka Rupavahini Corporation (SLRC) is the national television network of Sri Lanka.<sup>lxxx</sup>
- Independent Television Network (ITN) is Sri Lankan state-governed television and radio broadcaster.<sup>lxxxi</sup>
- Derana TV is a Sri Lankan private entertainment terrestrial television channel (Sinhala).<sup>lxxxii</sup>
- Sirasa TV is a private channel broadcasting teledramas (Sinhala).<sup>lxxxiii</sup>
- Sri Lanka Broadcasting Corporation (SLBC) is the national radio broadcaster.<sup>lxxxiv</sup>

Additionally, several newspapers are widely read in the country, with the Daily News and Daily Mirror being some of the most widely circulated newspapers in Sri Lanka.<sup>lxxxv</sup>

### Streaming Services/OTT/VOD

- International services like Netflix, Amazon Prime, Apple TV, Hulu, etc are available in Sri Lanka (no data to ascertain the number of subscribers), but Telecoms do promote internet entertainment bundles to promote themselves and to provide users access to the platforms.<sup>lxxxvi</sup>
- Local OTT:
  - [PEOTV](#): provides access to television channels and videos through SLT telephone line.



## Digital Tools

### Education

Several examples of digital education tools that Sri Lanka has developed to support learning and access to educational resources include:

- E-thaksalawa: an e-learning platform developed by the Ministry of Education that provides access to educational resources such as e-textbooks and videos for students in grades 1-13.<sup>lxxxvii</sup>
- EduLanka: an online education platform that provides access to various educational resources such as e-books, past papers, and educational videos.<sup>lxxxviii</sup>
- Smart Learning: an online tutoring platform that connects students with certified teachers for one-on-one learning sessions.<sup>lxxxix</sup>
- Siyapath: an online platform that provides access to educational resources and tools such as e-textbooks, interactive quizzes, and educational videos for students and teachers.<sup>xc</sup>

## Health

Some examples of digital health tools developed to support healthcare service delivery and management include:

- E-Health: a government-led initiative to develop and implement an integrated electronic health system in Sri Lanka, which includes electronic health records, telemedicine, and digital health services.<sup>xc</sup>
- mHealth: a mobile-based health service that provides health-related information, appointment scheduling, and remote consultations through mobile phones.<sup>xcii</sup>
- e-Vikasitha: an electronic health record system developed by the Ministry of Health in Sri Lanka, allowing for storing and sharing patient information between healthcare providers.<sup>xciii</sup>
- HealthID: a digital health identification system allowing patients to securely store and share their health information with authorised healthcare providers.<sup>xciv</sup>
- E-channelling: an online platform allowing patients to order and pay for prescription drugs online and have them delivered to their homes.<sup>xcv</sup>

## Child Protection

Several organisations are working to ensure child safety online, and some data is available on some activities related to child protection. Some examples include:

- The Computer Emergency Readiness Team (CERT) Sri Lanka is an organisation responsible for responding to cyber incidents and providing information and guidance on cybersecurity best practices.<sup>xcvi</sup>
- National Child Protection Authority (NCPA) is a government body that protects children from abuse and exploitation, including online.<sup>xcvii</sup>
- Cybercrime Unit is under the Sri Lanka Police and is responsible for investigating and preventing cybercrime in the country.<sup>xcviii</sup>

- Childline Sri Lanka 1929 is a free emergency hotline service for children experiencing harm or need aid.<sup>xcix</sup>



## Digital Ecosystem and Infrastructure

The Information and Communications Technology Agency (ICTA), established in 2003 and ‘housed’ in the Ministry of Technology, plays a key role in coordinating activities in policy development and implementation, and it also develops software on behalf of line ministries. The ICTA has created some shared infrastructures, such as the Lanka Government Cloud and Lanka Government Network, which connects 800 government offices.<sup>c</sup> Sri Lanka tops the region on the UN E-Government Development Index (in 85th place) and is the only South Asian country in the top 100 globally.<sup>ci</sup> Despite the relatively widespread use of the internet, the use of online government services remains limited.

The [Digital Sri Lanka initiative](#), is a comprehensive plan to promote the use of digital technology across all sectors of the economy and society. The main objective of this strategy was to transform Sri Lanka into a digital nation by 2020. Some of the key elements of the Digital Sri Lanka initiative include<sup>cii</sup>:

- Investing in Digital Infrastructure, such as expanding broadband access and establishing data centres.
- Digitising public services and making them more accessible to citizens through online portals and mobile apps.
- Promoting the development of a digital economy, including the growth of e-commerce and the creation of digital jobs.
- Digital Skills: particularly in coding, data analysis, and digital design.
- Improving cybersecurity through initiatives such as establishing a Computer Emergency Readiness Team (CERT) and cybersecurity awareness campaigns.
- Digital inclusion: ensuring that digital technology is accessible to all citizens, including those living in rural areas and those with disabilities.

The initiative also includes several specific programs, such as creating a national digital identity system, establishing a national e-payment system, and developing a national cloud computing platform.

### Regulations promoting Digital Transformation

Vision 2024 is Sri Lanka’s robust digital transformation vision, but it is not a ‘whole-of-government (WOG) approach’.<sup>ciii</sup>

### Artificial Intelligence

The artificial intelligence (AI) landscape in Sri Lanka is still in its early stages. On the 2020 Government AI Readiness Index, Sri Lanka ranked 90, 3<sup>rd</sup> highest South Asia



country (after India and the Maldives). Furthermore, AI is the most dominant in Sri Lanka’s private sector and academia. The telecommunications industry uses AI-based voice assistants and AI-powered Facebook chatbots to answer customers’ questions and universities are starting to offer AI courses.<sup>civ</sup> Since April 2023, Sri Lank has 28 AI startups.<sup>cv</sup>

The Sri Lanka Association of Artificial Intelligence (SLAAI) is the country’s first organisation to represent AI researchers. The aim of the organisation is to promote research and AI usage in the country. Since it was established in 2000, the organisation has hosted AI programmes, short courses, promoted research, and conducted AI research. Additionally, in 2017 Sampath Bank launched the country’s first AI banking robot in the form of a humanoid teller banking robot.<sup>cvi</sup> Furthermore, similar to other countries in South Asia, Sri Lanka has not yet adopted any AI policies.<sup>cvii</sup>



## Challenges, Opportunities and Recommendations

Challenge/ Opportunity	Narrative	Recommendations
<b>Challenges</b>		
<b>Limited digital infrastructure in rural areas</b>	While much progress has been made in connecting underserved areas, Sri Lanka’s rural areas still lack meaningful levels of internet accessibility.	<ul style="list-style-type: none"> <li>• Advocate for investments in digital infrastructure, such as broadband networks, improved electricity supply and wider (and affordable) connectivity.</li> <li>• Support the ongoing national programs for digital transformation and inclusion. And partner with the government and private sector to improve access in rural areas (via/through SBC interventions, applying design thinking, utilizing low-data/mobile-based platforms to engage populations and raise awareness etc.).</li> <li>• Partner with relevant authorities to develop alternative solutions such as local access community networks, community-led networks and ‘internet cafés’ to provide device access and satellite-based internet solutions.</li> <li>• Implement initiatives that bridge the gap between online and offline communities. Do a service mapping to ensure that SBC digital interventions are linked to relevant support, and this also reduces the online and offline gaps (a community being reached online should be able to get support offline and vice-versa). The loop should be completed.</li> </ul>
<b>Low digital literacy and skills</b>	Despite the fact that internet penetration rates are on the rise, the uptake of essential digital services is low, due primarily to inadequate digital literacy. <sup>cviii</sup>	<ul style="list-style-type: none"> <li>• Advocate for recent and relevant data to ascertain the situation of digital literacy and skills in Maldives (segregated by gender). Support the relevant authorities/partners to carry out the research (nationwide).</li> </ul>



		<ul style="list-style-type: none"> <li>• Advocate for a balanced curriculum to improve both traditional and digital literacy skills.</li> <li>• Partner with the Ministry of Education (and any other relevant authority and UNICEF sectors) to develop digital literacy and online safety programs for schools and communities. Use gamification and interactive learning tools (AI and games) to make digital literacy programs engaging and fun.</li> <li>• Partner with local NGOs to provide digital skills and online safety training to marginalized communities.</li> <li>• Strengthen the capacity of teachers, educators (TOT) and parents on digital skills and online safety.</li> <li>• Partner with CBOs/CSOs, private sector or media to develop and implement educational, edutainment or gaming programmes to improve literacy and awareness of the online platforms/tec/tools etc.</li> <li>• Leverage social media platforms and communities to raise awareness and develop the community's digital literacy skills: promote the use of social media for educational purposes. For example, Facebook Groups can be used for collaboration, co-creation and discussions etc. or to create edutainment programmes.</li> <li>• Partner with AI and tech companies and organisations, to establish platforms and tools (such as online courses, games, training, hubs, labs, centres etc) that can digitally empower communities, or leverage the <a href="#">existing ones</a> (annex 3), that can be sustained. Apply design thinking when developing new or existing digital interventions, tools and platforms to improve literacy skills.</li> <li>• Partner with telcos to provide connectivity and data to ensure that digital tools and platforms are accessible to the community. This will also encourage digital adoption.</li> <li>• Partner with the gaming community as an entry point to build digital literacy and skills and promote online safety.</li> </ul>
<b>Data Unaffordability</b>		<ul style="list-style-type: none"> <li>• Develop alternative solutions such as community-led networks and satellite-based internet solutions or support the development of community-led solutions (engage the youth), such as shared community Wi-Fi networks/centres.</li> <li>• Advocate for policies that promote affordable internet and device access for all.</li> <li>• Work with telecommunication companies to expand coverage to underserved areas and reduce the digital divide.</li> <li>• Develop offline solutions, such as low-tech mobile applications (such as the <a href="#">existing UNICEF tools/platforms</a> (annex 3)) and text messaging services, to reach those without sustained or reliable access.</li> <li>• Partner with PTA/telcos/internet service providers to offer low-cost/free internet packages for low-income (rural) communities, as part of the SBC interventions and programmes.</li> <li>• Implement initiatives that bridge the gap between online and offline communities, such as all SBC interventions ensuring that communities can be guided/referred to online via offline means (or vice-versa).</li> </ul>
<b>Digital Gender Divide</b>		<ul style="list-style-type: none"> <li>• Assess the situation of girls and women in Sri Lanka: carry out formative research (identify KABP, barriers, challenges hindering the move to digital and opportunities and best practices that can be emulated to bring girls/women online) etc.</li> <li>• Collaborate with the gender focal points/section and develop a digital SBC strategy (based on the learnings from the research) as a foundation to bring girls and women online; address the negative gender norms (and the hindering social and cultural norms), educate the men/fathers/mothers/community and religious leaders/other decision makers on the positive outcomes of ensuring</li> </ul>

		<p>girls/women have access and devices, create STEM programs/tools/platforms for girls, advocate for/create women/girls only safe online spaces, ensure online safety is a core part of the interventions/discussions etc</p> <ul style="list-style-type: none"> <li>• Embed the discourse about girls' access to digital into the ongoing SBC programmes (or as part of any new intervention).</li> <li>• Utilise <a href="#">digital tools</a> and social listening on a continuous basis to gather insights (behaviour as well) for impactful community engagement and for M&amp;E as well.</li> <li>• Develop specific programs, in partnership with the relevant ministries, private sector organisations etc, to encourage and promote digital entrepreneurship culture among women (support with financing, establishing businesses and connecting to digital services to support the inception and promotion).</li> <li>• Partner with women entrepreneurs to reach and engage with girls/women in urban and rural areas and encourage the use of digital technology as a source of information and livelihood (offline to online movement).</li> <li>• Establish (in consultation with the women/girls) digital centres/hubs/labs/platforms, and partner with local private sector organizations to develop gender-sensitive digital platforms.</li> <li>• Mobilise influencers, religious leaders and activists to advocate for online, and device, access for girls/women.</li> <li>• Partner with tech companies to promote their safety measures/safeguarding tools to parents as a stepping stone to bringing girls online and to provide safeguarded devices to girls to ensure ongoing and sustained access.</li> <li>• Partner with telecoms to: <ul style="list-style-type: none"> <li>• Provide connectivity to girls/women: such as special data packages or zero-rated apps/content. Especially for women/girls in rural or remote areas.</li> <li>• Expand the reach of <a href="#">existing digital</a> and e-learning platforms (using AI technology and tools), specifically targeting girls/women in rural areas to develop their digital literacy and skills.</li> </ul> </li> </ul>
<b>Opportunities</b>		
<p><b>Reach of Telecoms/Mobile Network Operators (MNOs)</b></p>	<p>There were more than 29M Cellular Mobile Telephone Subscriptions in Q3 of 2023<sup>ci</sup> and 14.58M internet users.<sup>cx</sup></p>	<p>Partner with TRCSL and telecoms/mobile network operators to:</p> <ul style="list-style-type: none"> <li>○ Expand the reach of digital interventions and programmes, particularly in remote and underserved areas.</li> <li>○ Provide subsidised or free data for specific interventions/programmes/activities/community.</li> <li>○ Develop and implement data-driven interventions to bridge the digital divide.</li> <li>○ Use their micro-segmentation on high engagement channels to target communities and people for specific digital interventions.</li> </ul>
<p><b>Government's commitment and investment in digital</b></p>	<p>Government investment in digital initiatives is increasing, which is enabling investment into technological developments.<sup>ci</sup></p>	<ul style="list-style-type: none"> <li>• Collaborate with the government to develop and implement policies and regulations that promote digital development in the country, with a focus on the gender digital divide and the rural population.</li> <li>• Advocate for the inclusion of digital literacy programs in the national education curriculum.</li> <li>• Develop partnerships with government agencies to deliver digital services and solutions to the 'last mile'.</li> <li>• Establish programmes/activities (in collaboration with the relevant ministries and partners etc) that encourage and promote youth-led tech startups (hackathons, investment funds, innovation funds etc).</li> <li>• Develop partnerships with ICT companies to deliver digital services and solutions to communities.</li> </ul>

		<p>AI-focused:</p> <ul style="list-style-type: none"> <li>• Leverage the interest and focus of the government on AI and support its growth for SBC work: partner with relevant authorities to work together on ethical and protection issues and on leveraging the technology for children and other communities.</li> <li>• Introduce AI into SBC programming and interventions (internal and external capacity building).</li> <li>• Partner with AI start-ups and organisations to develop digital solutions (and elements) to enhance SBC work in Sri Lanka.</li> <li>• Leverage the existing AI-powered platforms and tools: partnerships, content support etc.</li> </ul>
<p><b>Growing e-commerce</b></p>	<p>A growing e-commerce market allows for increased desire and need to better improve digital financial services including e-payments, online transactions and web platforms. Advancements in these sectors can cascade down into other sectors.<sup>cxii</sup></p>	<ul style="list-style-type: none"> <li>• Partner with local and international fintech organisations and startups to promote digital skills and online safety.</li> <li>• Use their reach and engagement platform (communities) to expand the reach and depth of SBC work.</li> <li>• Partner with e-commerce platforms to provide digital literacy and skills training and promote online safety best practices and key messages.</li> </ul>

## Annex 1 – Key Influencer Criteria

For the purpose of this document, key influencers have been defined in three ways - by the number of followers, types of content, and level of influence.

Defining influencers by the **number of followers** can be categorised into four types.

- **Mega influencers** are people with a large number of followers, usually over 1M followers on at least one social media platform. Mega influencers tend to be celebrities who have gained their fame offline, however some will have gained their followers online and through social activities.
- **Macro influencers** usually have 40,000 to 1M followers on social media platforms. This group tends to have high profiles and can be great for raising awareness on issues. It may be easier to connect with macro influencers, as there tends to be more of them than mega-influencers.
- **Micro influencers** have between 1,000 to 4,000 followers and tend to be ordinary everyday people who have become well-known and popular for their knowledge about a specific topic. This means that their followers tend to be interested in that specific topic. These influencers tend to have smaller followings but higher engagement and influence with their followers.
- **Nano influencers** have less than 1,000 followers and tend to be experts in a highly specialized or technical field. Similar to the followers of micro influencers, they tend to have smaller followings but higher engagement and influence with their followers. However, they will not have as much influence as micro influencers as they have less followers.

Defining influencers by **types of content** which can be categorised into four types.

- **Bloggers** tend to have the most authentic, active, and engaging relationship with their followers.
- **Video makers** are popular types of content, and most tend to create and share videos on YouTube.
- **Podcasters** are the newest form of content to start generating followers and is growing increasingly popular.
- **Social posting only** is rare and tends to happen in parallel with other types of content creation.

Defining influencers by **level of influencer** which can be categorised into two types.

- **Celebrities** can sometimes lack credibility with specific target audiences, or around certain types of topics.

- **Key opinion leaders** are industry experts that can also be considered influencers who gain credibility among followers and people in general due to their technical expertise, qualifications, position, and experience. Key opinion leaders can include journalists, academics, industry experts, and/or professional advisors.

Macro and micro influencers, who are celebrities or key opinion leaders will be the priority criteria used for this digital mapping. As the potential for meaningful partnerships with UNICEF, to reach their target communities seems most likely with this cohort.

## Annex 2 – Digital Public Goods (DPGs) case studies

### *UNICEF Ghana*

UNICEF's Ghana office is a Pathfinder and runs the StartUp Lab, which assists sustainable entrepreneurs to develop their products and business models. The lab also serves as an incubator for open source startups and educates those considering it. The objective is to prepare DPGs from the StartUp Lab to apply for UNICEF's Venture Fund investment. The Country Office evaluates the StartUp Lab's solutions through its programmatic sections and collaborates with national institutional partners to incorporate open-source work into broader policy solutions.

UNICEF employs various tools, including the StartUp Lab, Venture Fund, and Innovation Hubs, to support innovation at different stages. In Ghana, the UNICEF Country Office used this system to uncover and advance two DPGs: [Bisa App](#) and [EduNOSS](#), as well as DPG nominee [Project Konko](#). For more information visit this [site](#).

### *UNICEF Philippines*

UNICEF Philippines started their DPGs Pathfinding Pilot in early 2021 with two objectives. Firstly, to discover how existing technical country capacity can be advantageous to DPGs and improving Technology for Development (T4D) that are relevant to UNICEF and the government's programmes. And secondly, developing a tool that would allow the sharing of knowledge and capacity among sectors. For more information visit this [site](#).

### *UNICEF Innovation Funds*

UNICEF Innovation funds exclusively invest in open-source technology solutions from new and emerging companies. Through its investments, UNICEF is strengthening communities, increasing the number of DPGs, and having an impact on children. For more information visit this [site](#).

### *Safe YOU: Virtual Safe Space for Women*

Safe YOU was launched in Northern Iraq (Kurdistan) in partnership with UNFPA Iraq and UNFPA Armenia in 2021. With the help of UNICEF Innovation, Safe YOU was recognised as a Digital Public Good (DPG), a digital tool aimed at achieving sustainable development goal number 5 (Gender Equality) as set by the United Nations Secretary General's 2020 Roadmap for Digital Cooperation. Safe YOU aims to be a key resource for evidence-based policy-making through our sophisticated AI data analysis system. This will lead to the prediction & prevention of Violence Against Women & Girls. For more information, visit the site [here](#).

## Annex 3 – UNICEF Digital Platforms

**U-Report** is a messaging tool that enables young people to interact with and raise their voices on issues that are important to them. It is operated by local government, organizations, and young people who record gather information, tips, and opinions from mobile device users on a range of issues. Based on the data and insights gathered by U-reporters, the results are shared with the relevant communities and stakeholders. For more information on U-Report, visit this [site](#). Access UReport South Asia here: <https://southasia.ureport.in/>

**RapidPro** collects data via short message service (SMS) and other communication channels (e.g. voice; social media channels, such as Facebook Messenger, Telegram, WhatsApp) to enable real-time data collection and mass-communication with target end-users, including beneficiaries and frontline workers. The technology allows users to design, pilot, and scale direct mobile outreach services without the help of a software developer in both normal development contexts and humanitarian emergencies. For more information on RapidPro, visit this [site](#).

**Internet of Good Things (IoGT)** aims to build people and communities' knowledge by closing the digital divide. For more information on IoGT, visit this [site](#). Access South Asia IoGT here: <https://sa.goodinternet.org/en/> or the Pakistan site here: <https://nanhayqadam.org/ur/>

**All Children Learning** is a regionally focused platform designed to strengthen assessment capacity and learning. The platform offers four different guidance's (government, emergencies, development, and teaching) to improve the users' assessment capacity and learning. For more information on All Children Learning, visit this [site](#).

**OKY app**: the world's first menstruation education and period tracker app co-created with girls, for girls. Access here: [Oky Nepal](#) and [Oky India](#)

**Bebbo app**, developed by the UNICEF Regional Office for Europe and Central Asia, is an application that supports responsive, positive parenting. It aims to provide comprehensive information about early childhood development and parental care in a parent-friendly format. Bebbbo also supports the dissemination of messages and information related to COVID-19 prevention and protection for children. For more information: <https://www.bebbo.app/about-us>

**USupportMe**: part of the Mental Health and Psychosocial Wellbeing Portfolio at UNICEF. It is an app for on-demand psychosocial support services. After successful pilots in East and Central Asia, we're scaling up this innovative solution to meet its full potential.

**UNilearn**: online national learning and knowledge-sharing platform which hosts dynamic education, skills, and other content from different states in India and from other countries.

**AGORA** is a platform that provides learning opportunities to UNICEF's staff, partners, and supporters. The learning opportunities range from specific thematic areas to strategies to languages to career support. For more information on AGORA, visit this [site](#).

**INFORM** provides UNICEF and partners with a turnkey solution for field-based data collection, management and visualization. Inform supports UNICEF's strategic outcomes and strengthens our position as the global leader in data for children. For more information: visit this [site](#).

### UNICEF SOCIAL MEDIA PLATFORMS

# Endnotes

## Definitions to Note:

### Definitions to Note:

- **Fixed Broadband Internet:** High-speed connectivity for public use of at least 256 Kbit/s or more in one or both directions (downloading and uploading). It includes cable modem Internet connections, DSL Internet connections of at least 256 Kbit/s or higher, fibre and other fixed broadband technology connections (such as satellite broadband Internet, Ethernet LANs, fixed-wireless access, Wireless Local Area Network, WiMAX, etc.).<sup>cxiii</sup>
- **Mobile Broadband:** Mobile broadband technology allows for a wireless wide area network (WWAN). In simple terms, it provides wireless high-speed Internet access to portable devices by way of radio towers.<sup>cxiv</sup>
- **Gross Domestic Product (GDP) per Capita:** is the sum of gross value added by all resident producers in the economy plus any product taxes (less subsidies) not included in the valuation of output, divided by mid-year population.<sup>cxv</sup>
- **Unbanked:** people with no bank account.<sup>cxvi</sup>
- **Underbanked:** people with insufficient access to banking.<sup>cxvii</sup>

<sup>i</sup> <https://datareportal.com/reports/digital-2023-sri-lanka>

<sup>ii</sup> <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=LK>

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<sup>iv</sup> <https://www.britannica.com/topic/Sinhalese-language>

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<sup>vi</sup> <https://datareportal.com/reports/digital-2023-sri-lanka>

<sup>vii</sup> <https://openknowledge.worldbank.org/server/api/core/bitstreams/4044c18e-d6ba-50aa-8e3f-efade3ca5ab1/content>

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<sup>xi</sup> <https://datareportal.com/reports/digital-2023-sri-lanka>

<sup>xii</sup> <https://radar.cloudflare.com/lk?dateRange=52w>

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<sup>xiv</sup> <https://www.icta.lk/projects/nenasala-project-national-telecenter-project>

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<sup>xxiii</sup> <https://ceylontoday.lk/2023/07/22/marginal-growth-in-digital-computer-literacy/>

<sup>xxiv</sup> <https://sri.lanka.un.org/en/222055-bridging-digital-gender-gap-sri-lanka-challenges-and-opportunities-women-stem>

<sup>xxv</sup> <https://www.ft.lk/columns/Let-s-make-women-and-girls-trail-behind-digital-We-need-to-achieve-digital-gender-equality/4-696997>

<sup>xxvi</sup> <https://datareportal.com/reports/digital-2023-sri-lanka>

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