IDFI | **Institute for Development of Freedom of Information**

Internet Usage and Accessibility Tendencies in Georgia

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Introduction

In 2016, the United Nations Human Rights Council declared that it considers access to the Internet a human right, which guarantees that "everyone has the right to freedom of thought and speech". The Internet is one of the most powerful instruments of the 21st century for increasing transparency, access to information, and for facilitating active citizen participation in building democratic societies." – declares the report. In 2018, a similar statement was added to article 17 of the Constitution of Georgia - "Everyone has the right to access and freely use the internet", thus the State bares a positive obligation to make the Internet widely available and accessible.

The Internet and digital technologies are vital tools for many people. This phrase has taken on a more literal meaning during the pandemic and the state of emergency. Due to the limitations of movement, education and work have shifted online for a large part of the population. Consequently, the demand for online access to private and public services has increased. Furthermore, the Internet is an important tool in terms of keeping people informed. During the pandemic, citizens are provided with vital and constantly updated information on a daily basis, in the form of official announcements, statistics, and recommendations.

Consequently, the lack of Internet access can cause serious impediments and inconveniences for individuals, especially during such a period. Despite this, based on the data as of 2018, two-fifths of Georgia's population does not have Internet access.

Statistical Overview

According to the National Statistics Office of Georgia (Geostat), 79% of households had Internet access in 2019. In cities, This figure stood at 86% for cities. However, the situation was different in rural areas, where only 69.9% of households had Internet access.
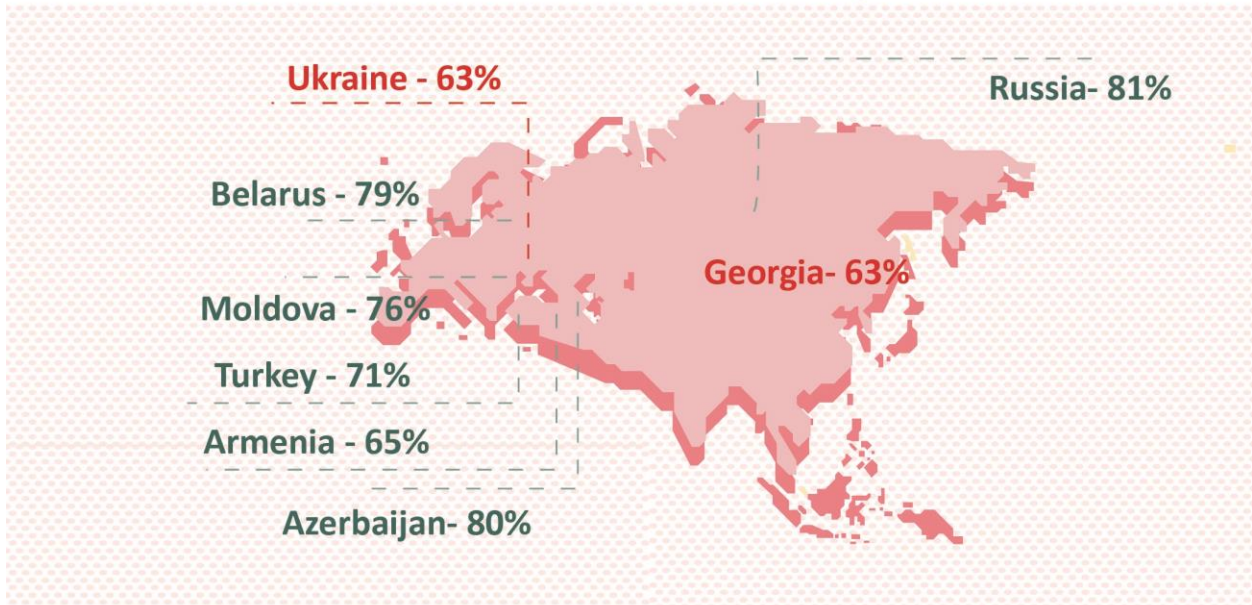

Percentage of Households with Internet Access
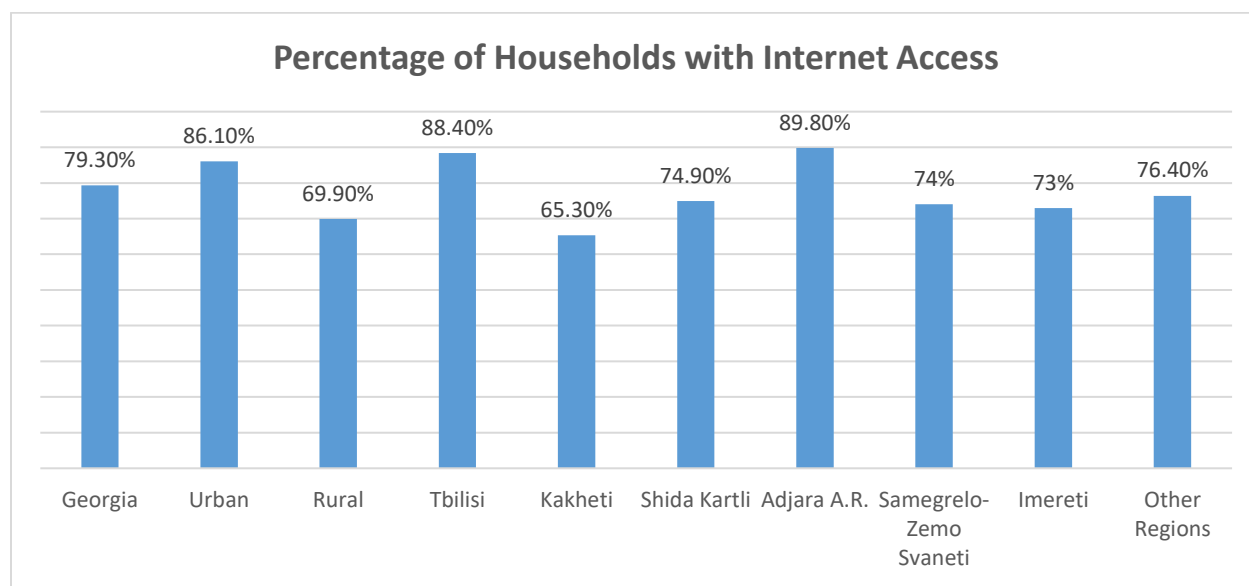
As of January 2020, the number of broadband subscribers across the country is 919,905. However, there is a clear disparity between regions in terms of penetration rate. Racha-Lechkhumi and Kvemo Svaneti region is by far the most underdeveloped in this regard, with a 15% penetration rate and only 2,175 subscribers throughout the entire region. In Tbilisi (125,7%) and Adjara (124%) the penetration rates exceed 100%, which means that the number of subscribers is higher than the number of households.
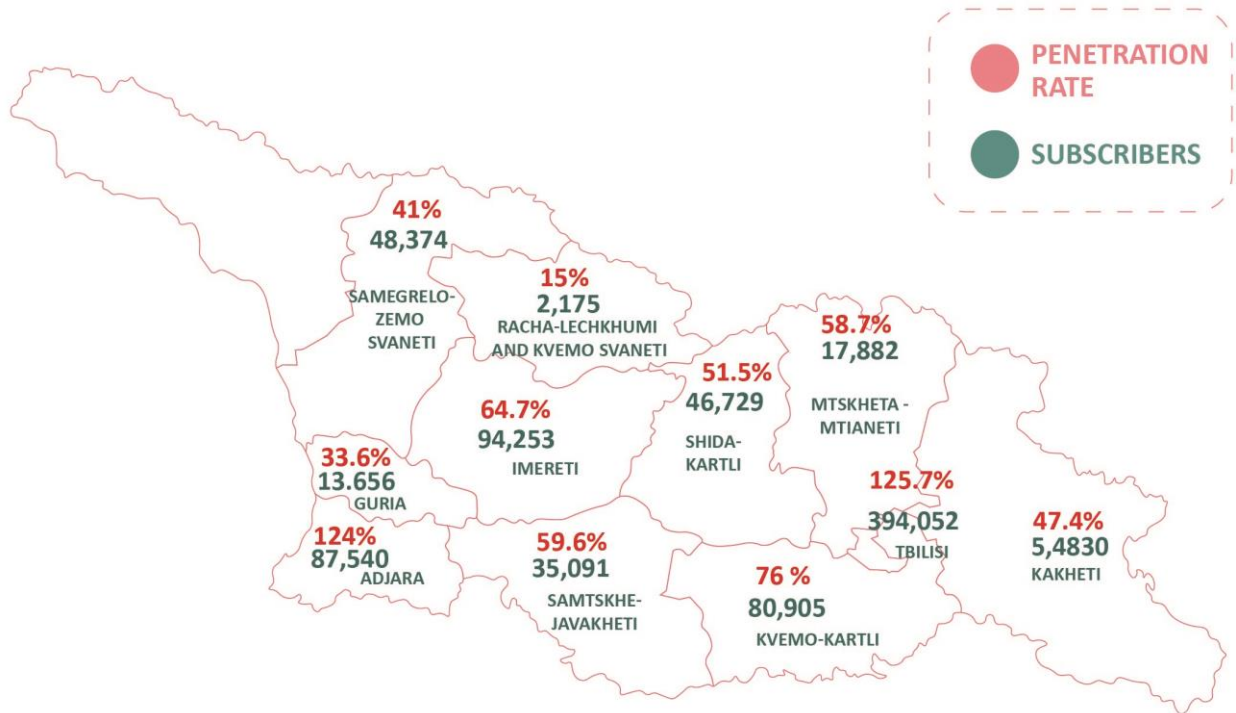
* Penetration Rate – The number of subscribers divided by the number of households in the region.
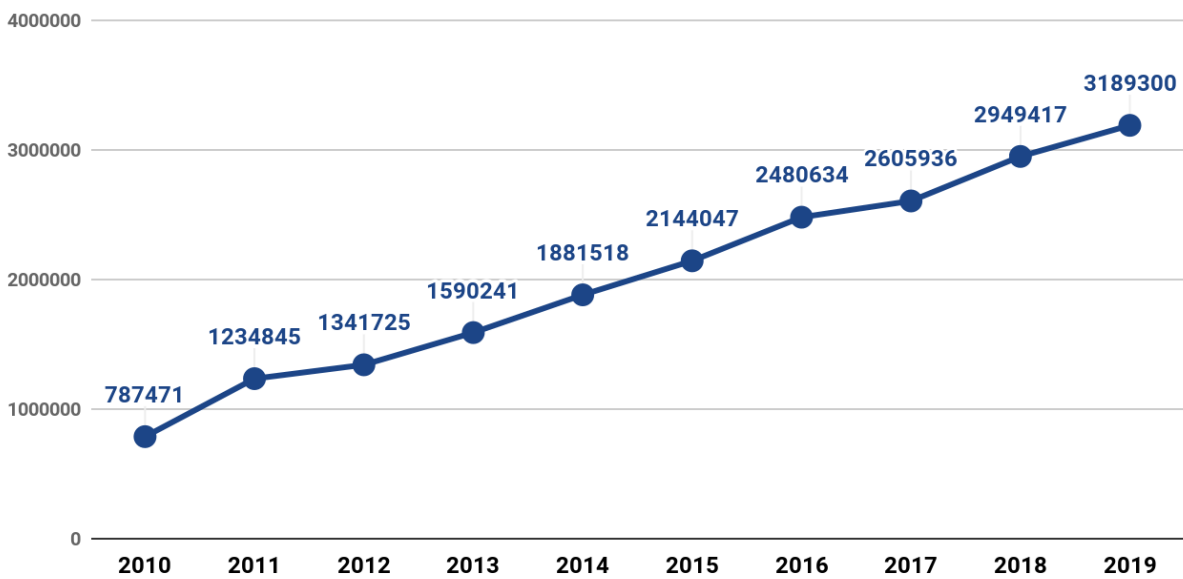
According to the International Telecommunications Union's (ITU) data as of 2018, Georgia and Ukraine have the lowest rate of Internet accessibility among neighboring and Eastern Partnership countries.

Among neighboring and Eastern Partnership countries the citizens of Ukraine and Georgia have the lowest rate of Internet accessibility.

Ukraine - 63%

Russia- 81%

Belarus - 79%

Georgia- 63%

Moldova - 76%

Turkey - 71%

Armenia - 65%

Azerbaijan- 80%

According to the Georgian National Communications Commission (GNCC), more than 3 million subscribers used mobile internet in 2019, and this number is growing quite rapidly, considering the current trend.

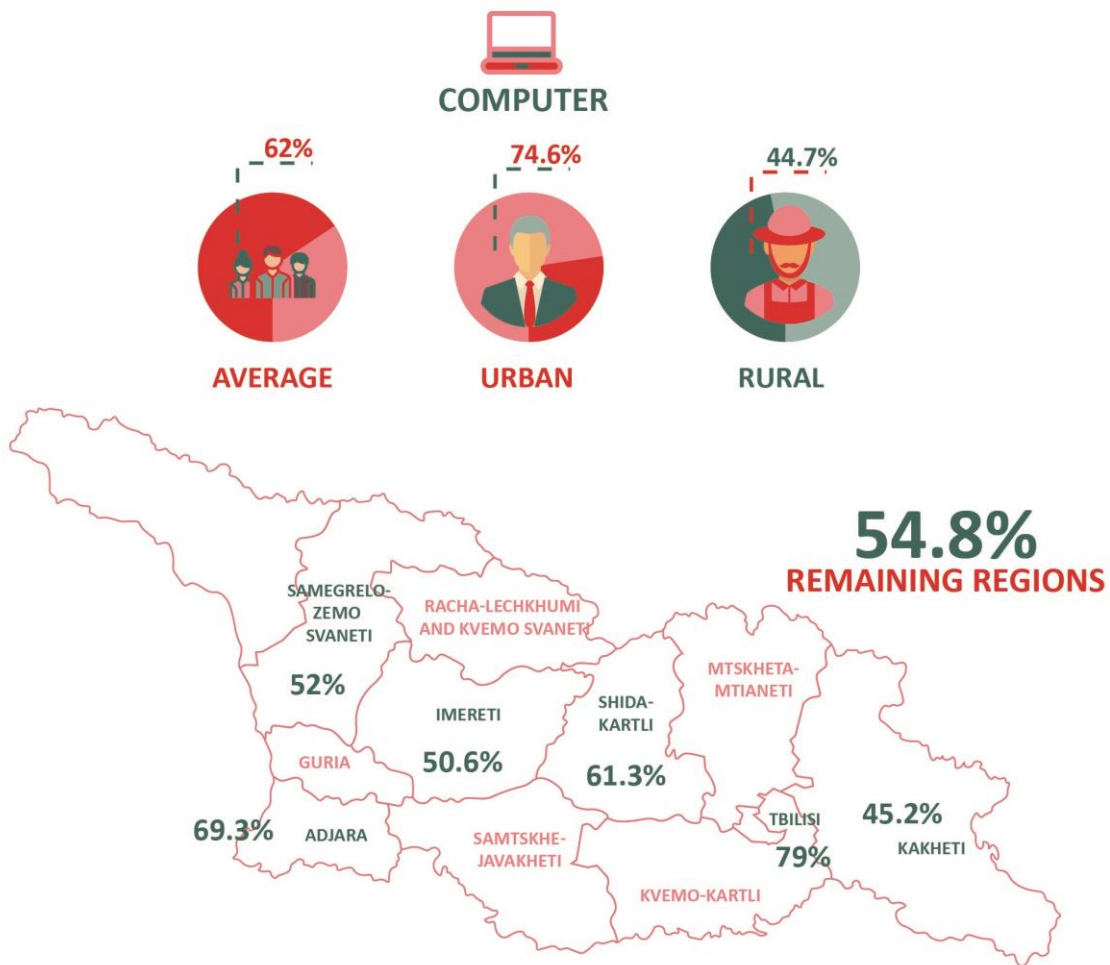## Number of Mobile Internet Users 2010-2019

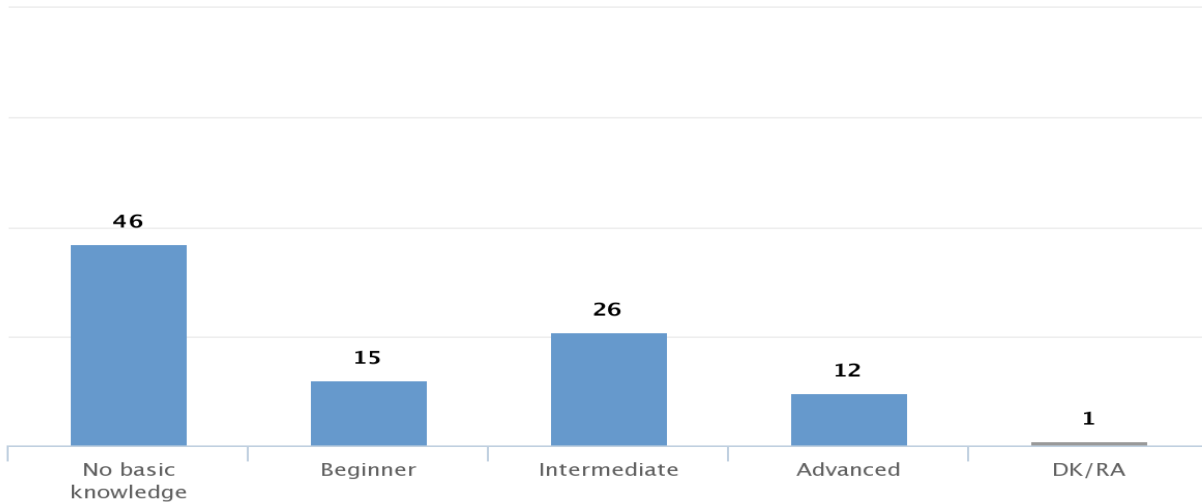| Year	Users
2010	787471
2011	1234845
2012	1341725
2013	1590241
2014	1881518
2015	2144047
2016	2480634
2017	2605936
2018	2949417
2019	3189300

A [2018 report](#) by the Georgian National Communications Commission found that despite the annual growth of mobile Internet users, up to 45% of subscribers do not / cannot use mobile Internet due to lack of skills, financial ability, or coverage in their geographical zone.

Having access to Internet infrastructure is not the only prerequisite for Internet usage. Statistics regarding [access to computers](#) and [digital literacy](#) are of equal importance, according to which only 62% of households in Georgia own a computer, and 46% believe that they do not have the basic knowledge to use them.

OWNERSHIP OF DEVICES TO CONNECT TO THE INTERNET IN HOUSEHOLDS

COMPUTER

62%	74.6%	44.7%
AVERAGE	URBAN	RURAL

54.8%
REMAINING REGIONS

SAMEGRELO-ZEMO SVANETI
RACHA-LECHKHUMI AND KVEMO SVANETI
MTSKHETA-MTIANETI

52%

IMERETI
SHIDA-KARTLI

GURIA
50.6%
61.3%

69.3% ADJARA
SAMTSKHE-JAVAKHETI
TBILISI
45.2% KAKHETI

79%
KVEMO-KARTLI

COMPABL: Knowledge of computer (%)

No basic knowledge	Beginner	Intermediate	Advanced	DK/RA
46	15	26	12	1

According to Geostat's data as of 2019, 86% of Georgia's Internet users use it for online audio/video communication, 55% for news, and 52% for health-related queries. In the face of a state of emergency, an increase in these figures is quite expected, and it will be interesting to observe new trends revealed by a similar survey in 2020.

WHAT IS THE INTERNET MAINLY USED FOR IN GEORGIA?

Social Media	Internet Audio/Video Communication	Online news
96%	86%	55%

E-mail communication	Health related Queries	Product and Services related Queries
54%	52%	38%

Internet Banking	Software Download	Job searching/online applications
30%	20%	17%
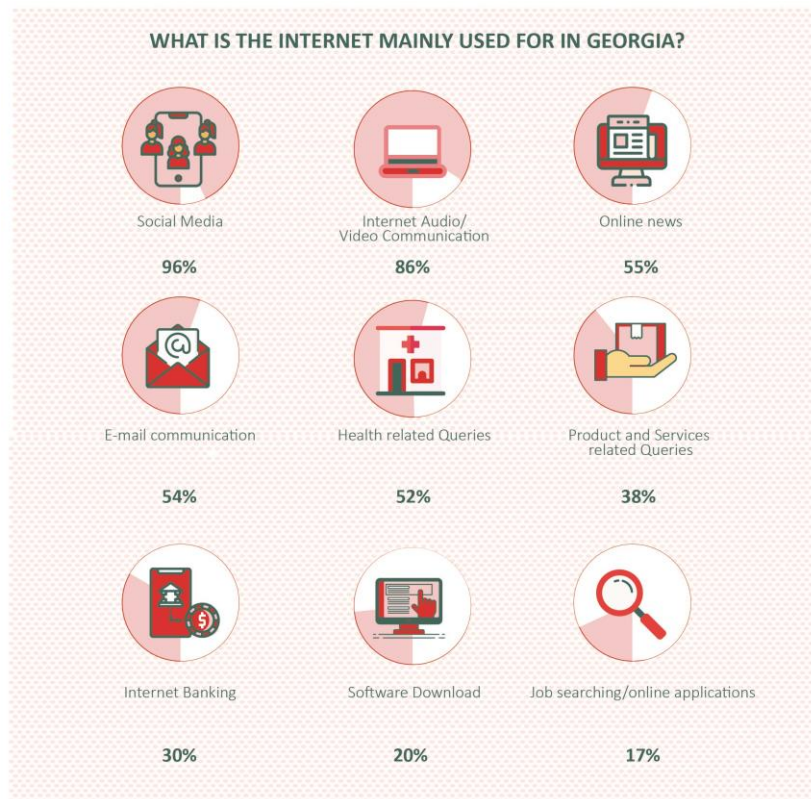
Internet and Education

The educational process has been suspended due to COVID-19. The Ministry of Education, Science, Culture, and Sports is considering various remote learning solutions in order to safely resume the learning process in the current situation. A Microsoft Office 365 user profile has been set up for Georgian public schools (up to 600,000 students and up to 55,000 teachers). According to the latest data, 213,919 users are already using the "Teams" program.

The remote learning process is facilitated by state-distributed netbooks, which have been issued to all first-graders from 2011 onwards. If we take into account that on average, 45,000 first-graders are enrolled in Georgian public schools every year, we can assume, that currently about 405,000 students (73.6% of public school students) own a government-issued netbook. This estimate is supported by the OECD research on education response to the COVID-19 Pandemic of 2020, according to which, approximately only 78% of students have access to a computer they can use for schoolwork. As for Internet accessibility, currently up to 78,000 socially vulnerable students do not have Internet access. Even though 95% of them live in areas, where Internet infrastructure exists, they lack financial resources.

The efforts of the Ministry of Education are commendable, but it is also important to note that one-fifth of Georgian students are unable to effectively participate in the learning process due to the lack of Internet or computers.

Universal Internetization Project

Bidzina Ivanishvili, the former Prime Minister and leader of the ruling Georgian Dream party, was the first to voice the idea of universal internetization. In 2015, NNLE "Open Net" was established under the Ministry of Economy and Sustainable Development and was tasked with developing broadband infrastructure in Georgia. The $ 150 million project's goal was to construct an 8,000-kilometer fiber-optic network by 2020 and provide high-speed Internet access to up to 2,000 settlements. Open Net was to implement infrastructure in places, where private Internet providers did not plan to invest due to high costs or low customer demand. The list of 473 villages to be covered in the first phase of the project was also announced, but the construction has not yet started. The Procurement Agency has authorized "Open Net" to start building fiber-optic infrastructure through a simplified procurement process, but the announced tender worth GEL 20 million failed.

According to the statements, made by the Minister of Economy and Sustainable Development, Dimitri Kumsishvili, and other officials, the project was to be financed by the "Cartu Fund". According to initial estimates, the project would require up to $ 125-150 million investment. However, this figure does not match the current figures. IDFI requested information from "Open Net" about the funding received in 2015-2017. According to the provided data, "Open Net" only received a total of GEL 3,178,252 over these three years. According to a study, conducted by "Transparency International Georgia", "Cartu" funded

Open Net only in 2015-2017, for a total of GEL 2.9 million, and since then the organization has been operating through other private donations.

The Government scrapped the project in 2019, and instead of it, [adopted the 2019-2025 Georgia's National Strategy and Action Plan for the Development of Broadband Networks](). According to Natia Turnava, current Minister of Economy and Sustainable Development, the strategy envisages the establishment of Georgia as a digital and informational hub in the region, and its implementation will be supported by the World Bank. The construction of the network will be carried out by the Municipal Development Fund under the supervision of the Ministry of Regional Development and Infrastructure. The general objectives of the strategy include stimulating competition, attracting investments, and increasing digital skills and demand throughout Georgia. Thus, the target outcomes for 2025 are:

- Ensure 99% 4G coverage throughout Georgia; Piloting 5G Service in at least 3 municipalities;
- 1GB/s access for all legal entities;
- High speed (100 MB/s+) broadband network access for all households.

The Georgian National Communications Commission, municipalities, the private sector, various sectoral regulatory bodies, and civic and international organizations will take part in the implementation of the strategy. The strategy and action plan will be implemented within the framework of the allocations of the responsible agencies envisaged by the state budget of Georgia and within the budgets of the Georgian National Communications Commission and other sectoral regulatory bodies.

According to the World Bank estimates, up to $ 600 million (about GEL 1.6 billion) will be required to reach the target. The project expects most of the investment from the private sector.

The Role of the Government and Internet Service Providers

Due to the pandemic, many Internet providers around the world have offered a variety of benefits to the public. In Uruguay, for example, a public telecommunications company [has provided 50,000 gigabytes of Internet to 120,000 families for free.]() Most providers in the United States have introduced [free/low-cost packages](). Authorities in [Argentina](), [Peru](), [El Salvador](), and [several U.S. states]() have declared the Internet as an essential service, and have banned providers from cutting off customers due to non-payment during the state of emergency.

At the moment, [the state subsidies for utility bills]() are already in force in Georgia. In particular, electricity and gas are provided free of charge to households, whose monthly consumption does not exceed 200 kilowatts and 200 m^3. The benefits also apply to cleaning fees and water supply, though not to the Internet, which probably indicates underestimation of its importance by the state. However, it should be noted that Kakha Bekauri, Chairman of the Georgian National Communications Commission, addressed telecommunications companies with the following [statement](): "In this situation, critical services and critical infrastructure, such as telecommunications services, must work in a completely different capacity in order to assist and support our population. We all need to work together for the next few months to determine what we need to do in this area so that the population does not face problems and receive telecommunication services without interruptions". The Commission also issued a separate [statement]() urging telecommunications companies to operate at full capacity during the state of emergency.

As of January 2020, 80% of broadband Internet subscribers in Georgia are consumers of two major providers, MagtiCom (446,378 subscribers) and Silknet (287,346 subscribers).

Distribution of Subscribers Among Companies
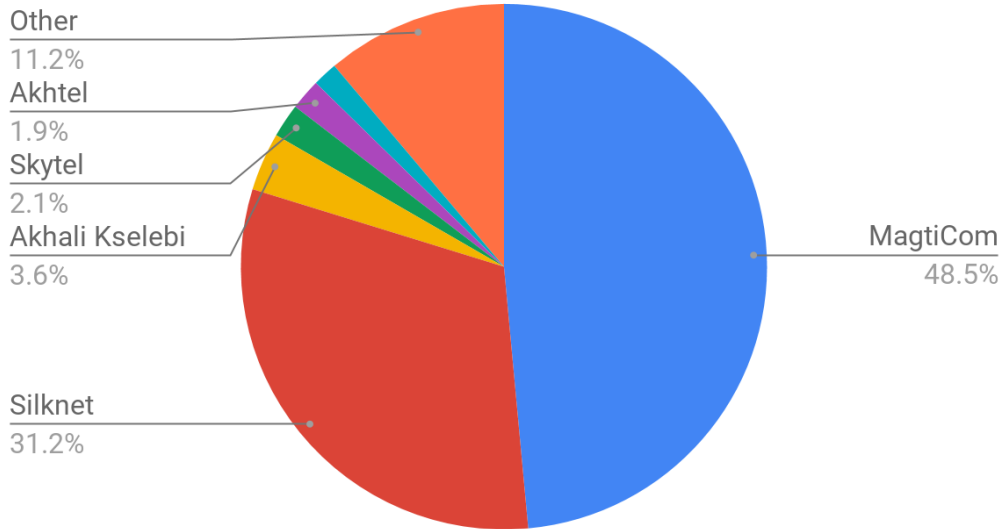
As of January 2020, 3,189,300 subscribers are using mobile internet. This market is even less diverse and is divided between three providers, Magticom, Silknet (formerly Geocell), and Veon Georgia (so-called Beeline).
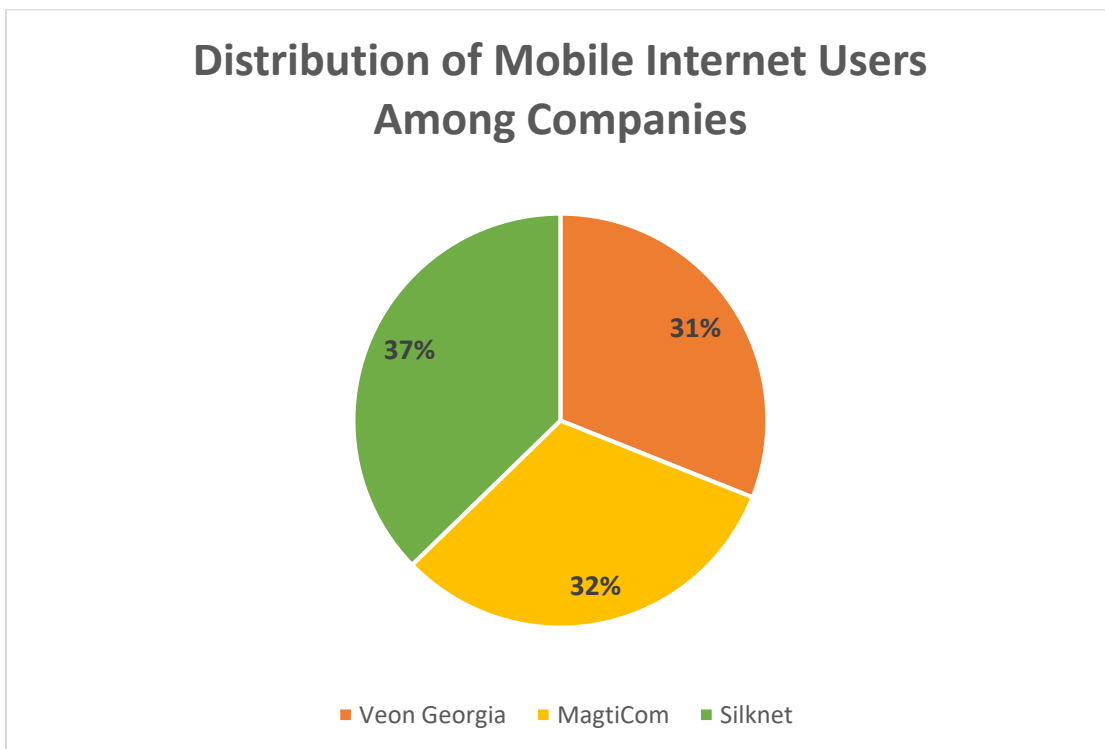
Silknet and MagtiCom also offered customers various benefits, [two-month free internet for new customers](#), low-cost unlimited mobile internet packages, free installation, and more.

Apart from state intervention and charity from large corporations, there are other solutions to this problem. The Georgian nonprofit platform, [„giveinternet.org"](#) allows regular individuals to finance socially vulnerable students by paying off their monthly internet fees or purchasing a computer. Up to 700 families have been connected thanks to this project so far.

Conclusion

Broadband Internet is an important foundation for socio-economic development in today's global and growing digital economy. Currently, there is a sharp digital inequality in Georgia, which is mainly due to geographical and economic factors.

Amid the ongoing coronavirus pandemic, the problems related to Internet access have become even more evident. In a state of emergency, the Internet is the only source of education, a means of employment, and a tool to access public services. It is unfortunate that more than one-fifth of the population is deprived of these opportunities due to their financial situation, insufficient skills, or geographical location. It is important for the government to ensure timely and efficient internetization throughout Georgia, both in terms of infrastructure development and media literacy.

IDFI once again calls on the government to take all necessary measures towards eliminating digital inequality, fulfill its positive obligations under the Constitution and provide the population of Georgia with Internet infrastructure in the shortest possible time.