Conducted interviews in five countries to better understand current and potential spend on mobile communication channels by NGOs and multilateral organizations.

Built a demand forecasting model to project demand across all 48 countries in sub-Saharan Africa (SSA) for the next five years.

**Market Value is Lower than Expected**

The market value for mobile communications channels is lower than expected due to fundamental knowledge, connection, and evidence gaps.

SSA Market Value = $15.7 million

We estimate the current aggregate market value across all of SSA to be $15.7 million, with projected growth by 2022 to be between $31.6 - $61.6 million.

**Quality of Service + General Awareness > Price**

Quality or reliability of service and general awareness are greater barriers to scale than price.

**Demand Aggregation … Not Now**

The effectiveness of demand aggregation for mobile channels may be limited especially given broader challenges to achieving scale and pooling demand across the aid and development sector.

**Increased Bargaining Power and Advocacy for Product Needs**

More broadly, organizations welcome ideas and mechanisms to increase bargaining power and the ability to advocate for product needs as many don’t have the time, capacity, or technical knowledge to negotiate well with providers.

**Connect supply and demand actors**

Make it easier for supply actors (MNOs, mobile aggregators, technology providers) and demand actors (implementers, NGOs) to locate each other and create opportunities.

**Gather and package evidence around the use of mobile channels**

Provide evidence of the pros and cons and where and when it might be appropriate to leverage each channel.

**Next Steps**

- DIAL will continue to explore how innovative models of pooling demand and financing can be leveraged to support other digital public goods more broadly.
- DIAL welcomes participation and partnership from the community as we further explore these themes.