



# Building Digital Resilience

Barcelona presentation

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THE BOSTON CONSULTING GROUP

# Internet access creates vast economic benefits ...

**A 10% increase in Internet penetration...**



**... increases new business creation by 1%**



**... increases GDP by more than 1%**

# ... benefits priority social issues ...



# ... and offers crucial learning opportunities

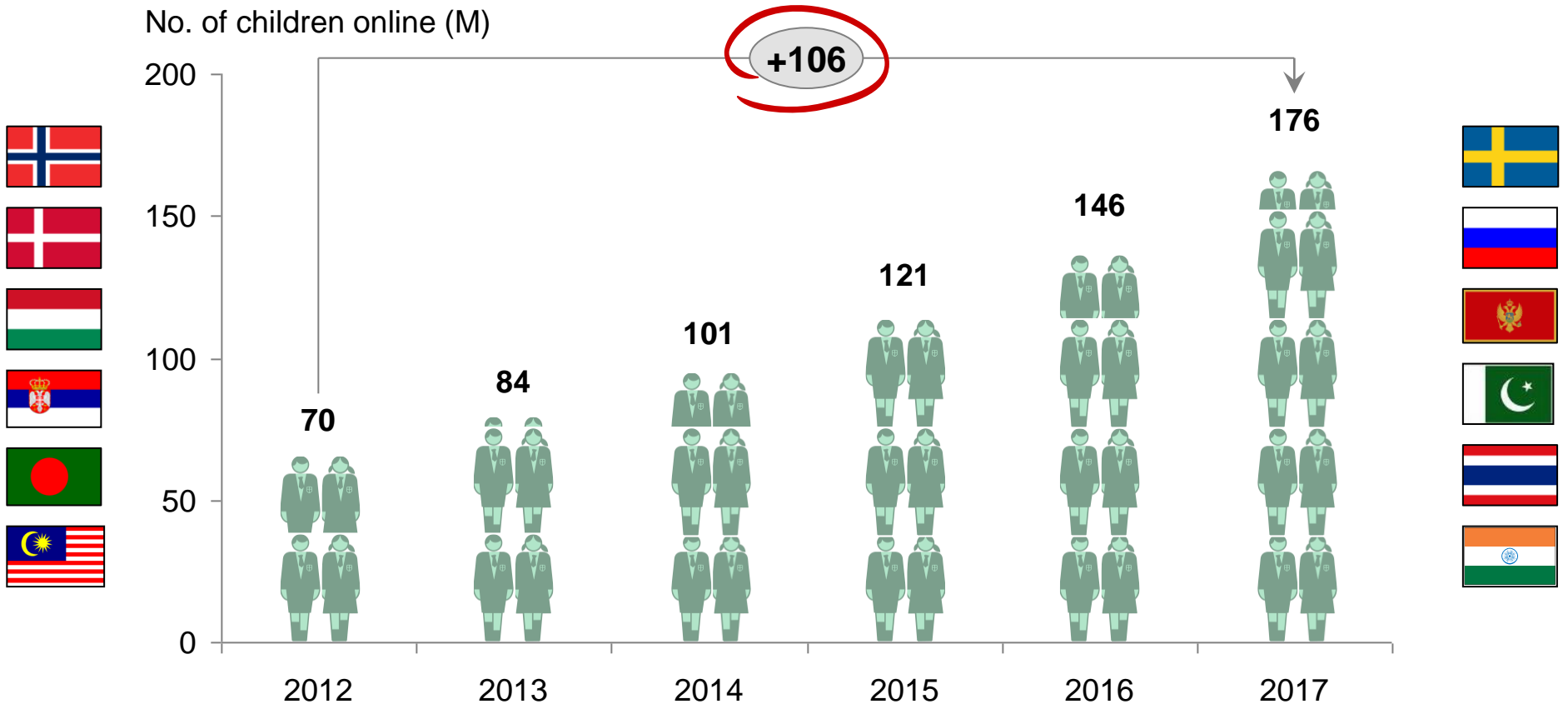
## A digital world needs digital skills

<b>Work-life</b>	<b>ICT skills growing requirement across all occupations</b>	
<b>Education</b>	<b>Research, data, lectures, debates... all moving online</b>	
<b>Public services</b>	<b>Access to and ability to benefit from online public services</b>	
<b>Health care</b>	<b>Managing one's own / family's health via e-health solutions</b>	
<b>Social life</b>	<b>Being able to take part in social networks and online communication</b>	


**"Digital literacy is as relevant as reading and writing, mathematics, or the management of social behavior" - UNESCO**

# 100 million new children will come online by 2017

Expected to reach 176 million online children in 2017 in 12 study markets









**85 million of these children will use a mobile device when going online for their first time**

 = 40M children

# Children face a wide range of risks online

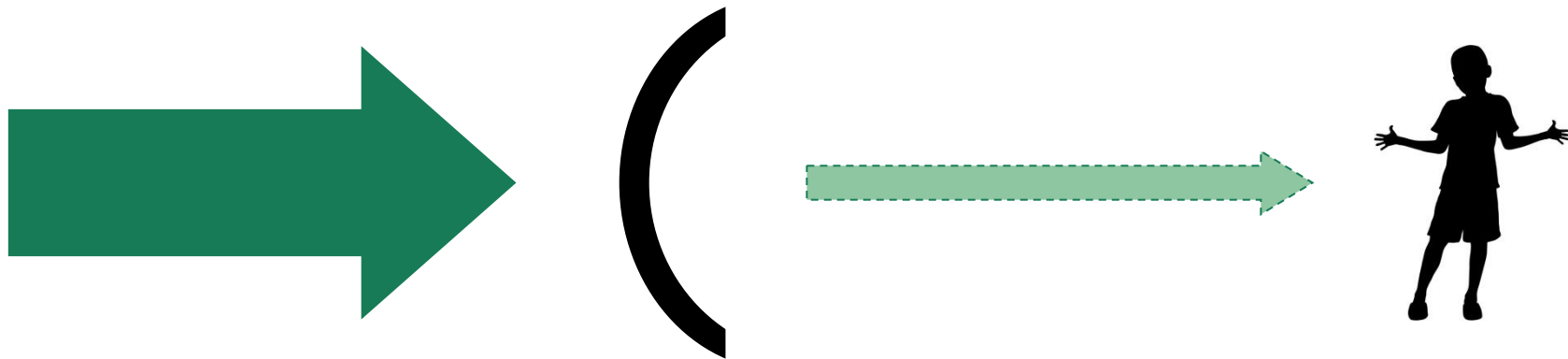
Significant numbers of children already encountering risks

Child's role Type of risk	 Passive	 Active
 Content	• <b>20% (~14M) potentially exposed to harmful user-generated content</b>	
 Contact	• <b>Up to 50% (35M) may have experienced cyber bullying</b>	
 Commerce	• <b>8% (5M) may have unknowingly subscribed to commercial services</b>	
 Security	• <b>10% (~6M) have potentially been subject to personal data misuse</b>	

# Risk does not equal harm

Assessing potential harm requires considering both risks and resilience

## Resilience reduces translation of online risks to harm



### Risk

- Represents the potential for harm
- Online services expose children to a range of risks

### Resilience

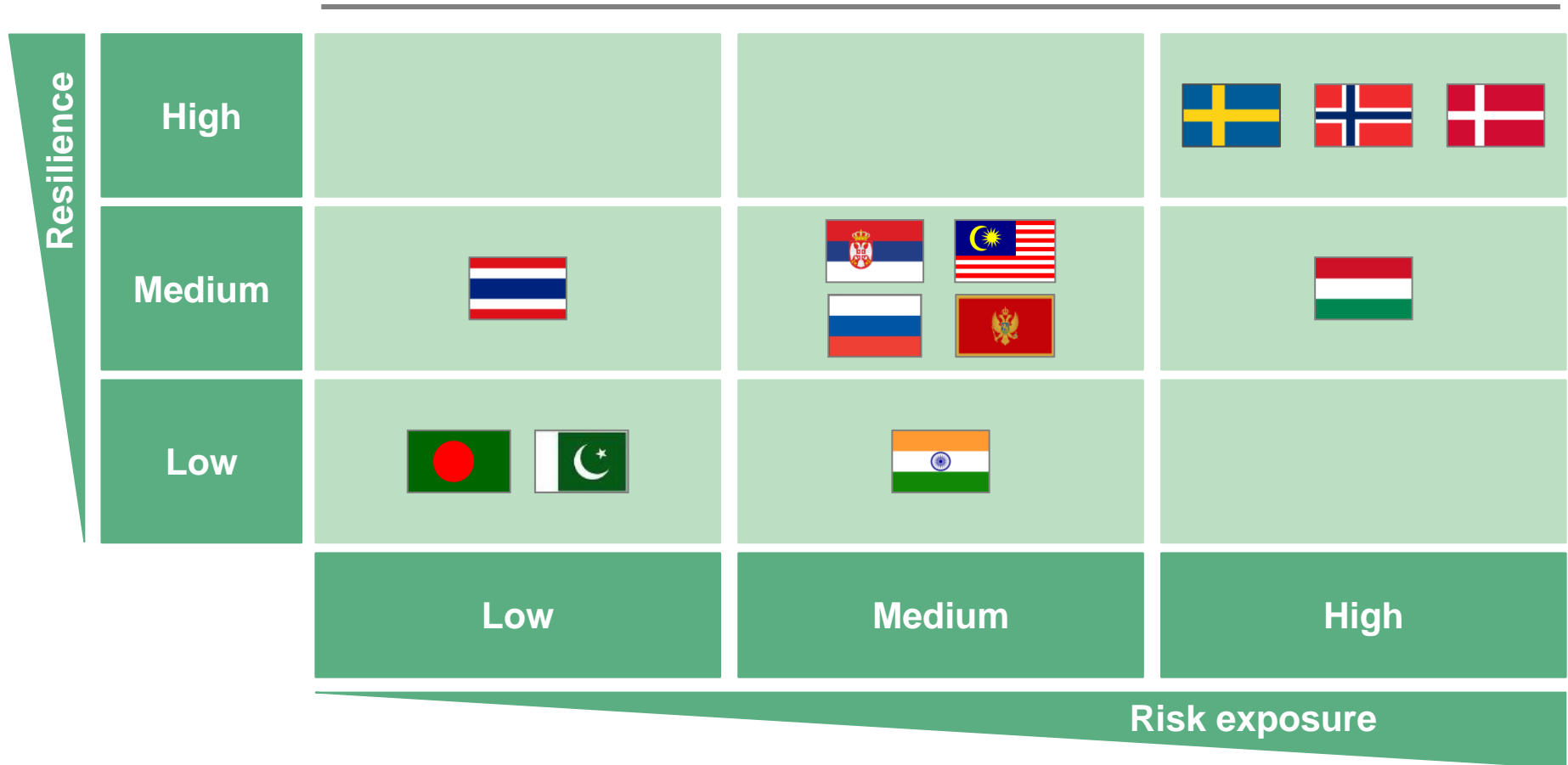
- Child's ability to be exposed to risks without harm...
- ... and to cope and recover faster if harm occurs

### Harm

- Injury, loss or damage
- Various types of harm can be inflicted: social, financial, legal, physical, psychological

# Risk exposure partially mitigated by resilience

Risk exposure and resilience, 2012





# The threat of harm is real

## Example: Websites advocating eating disorders as active lifestyle choice

### Risk category & potential harm

#### Content



#### Passive



**Wide range of online content with potentially harmful effects on children<sup>1</sup>**

#### Potential sources of harm

- Psychological harm
  - Normalization of socially deviant behavior
  - Contracting / reinforcing self-destructive behavior
  - Unwanted persuasion

### Pro-ana and pro-mia websites



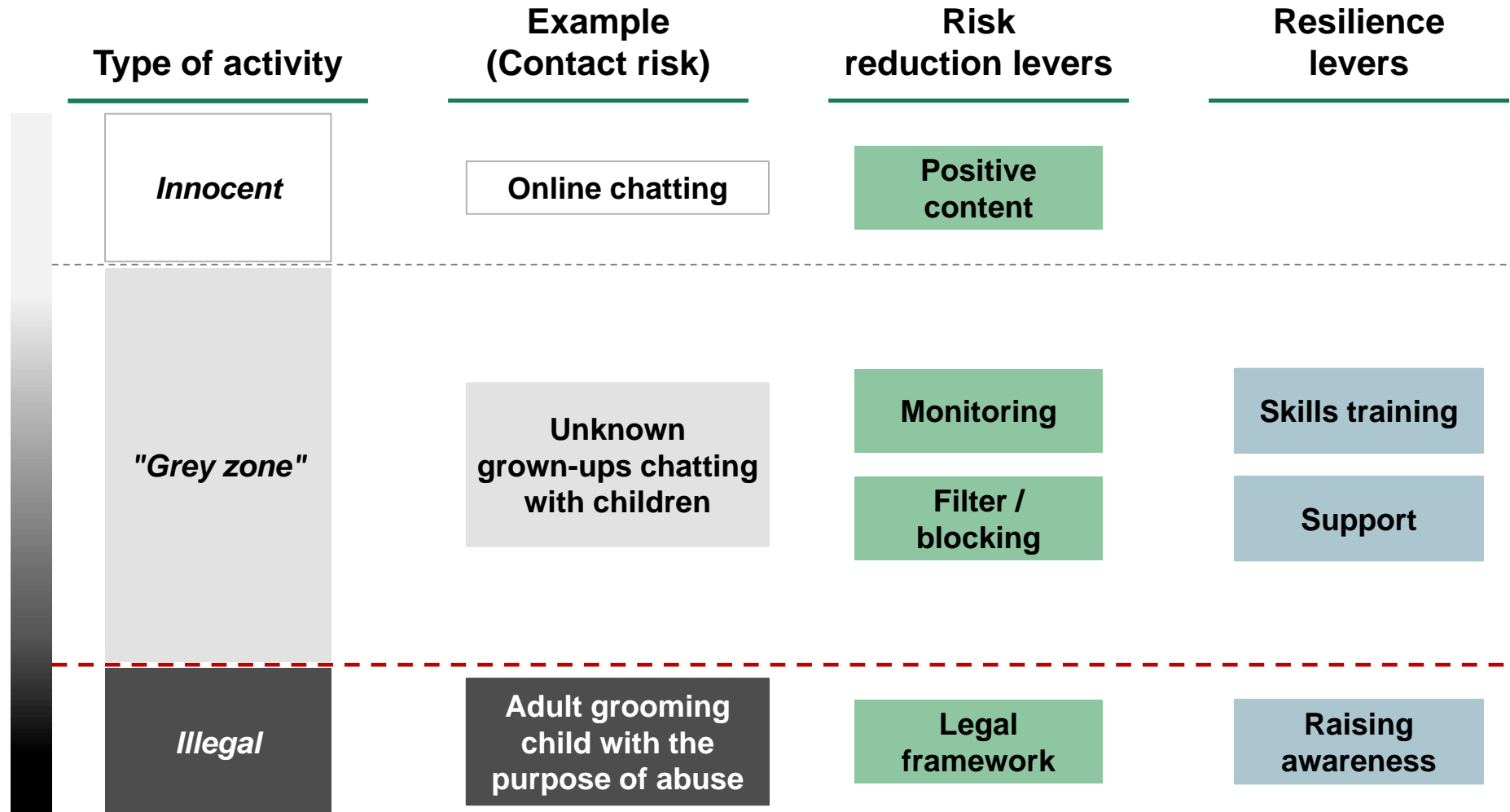
1. Whether or not actual harm is inflicted on children by viewing various types of online content is disputed – included here to allow broad view of potential risks to children online

2. Children between the age of 9 to 16

Source: EU Kids Online; The Economist; Kids and Media; Borzekowski et al. (2010); press search; BCG analysis

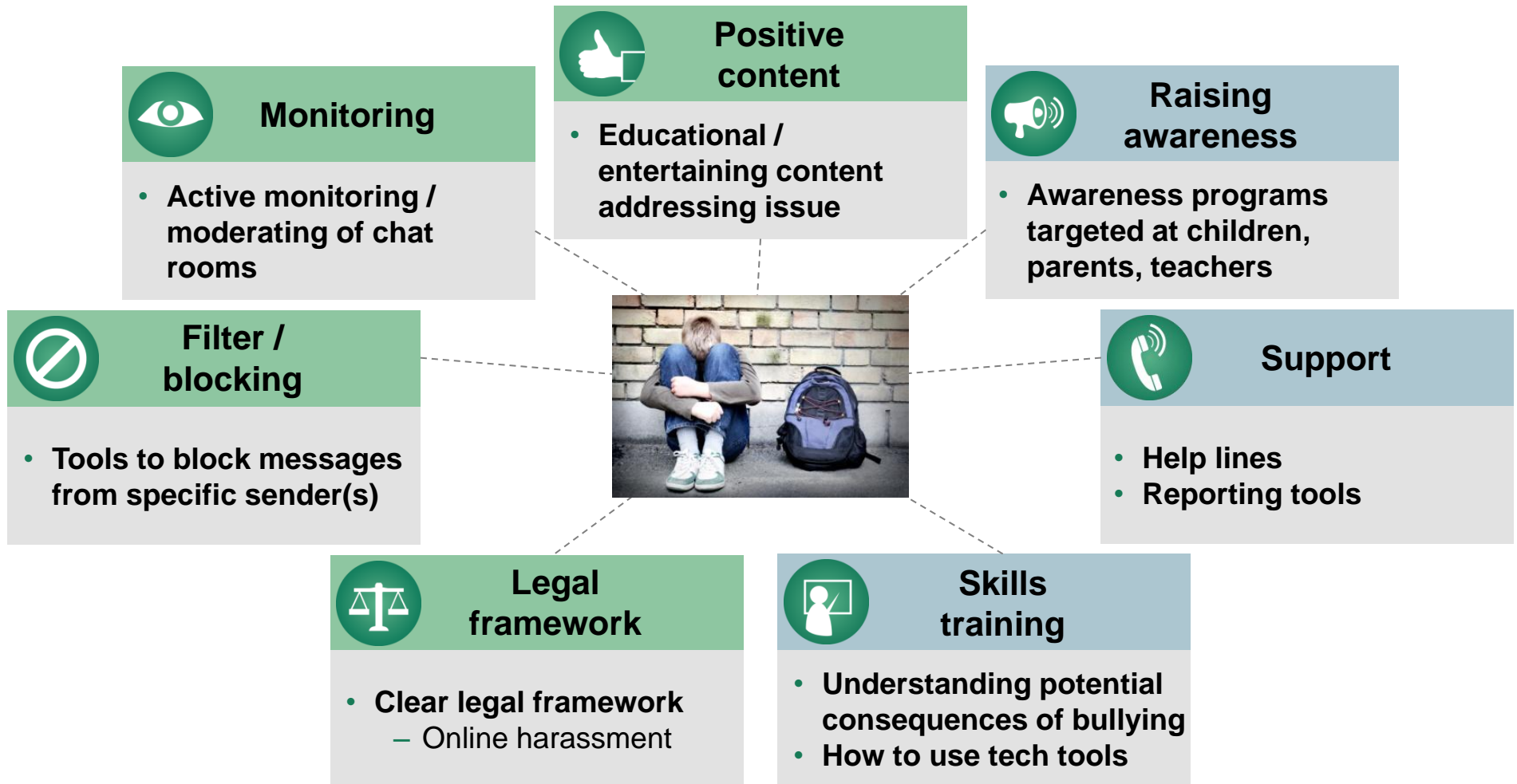
# Legal framework will never be sufficient

Other levers required to reduce risk and increase resilience



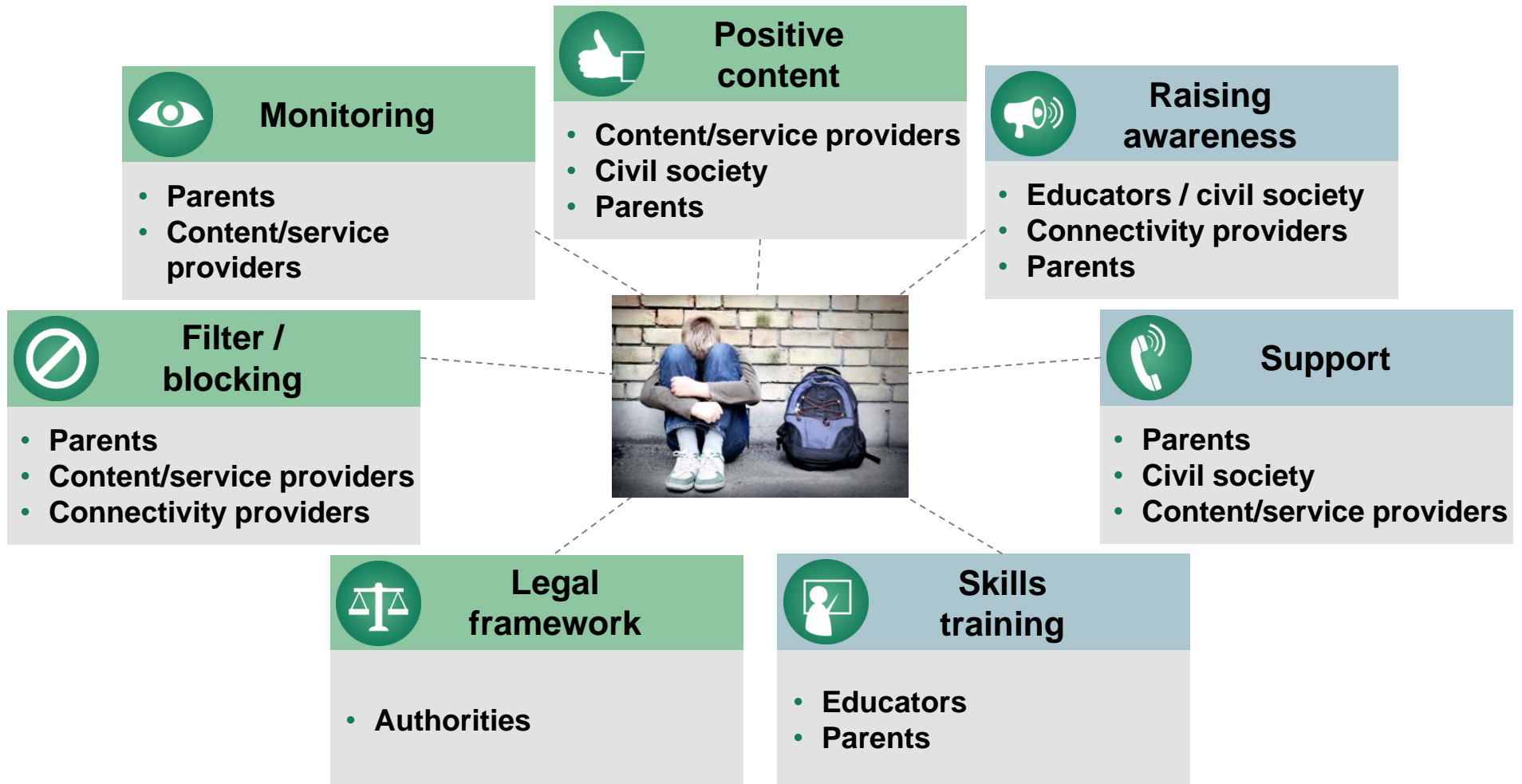
# Diverse stakeholders must collaborate

Example: Addressing cyber bullying requires multi-stakeholder action



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# Telcos will play a key role in reducing harm



## Access

Direct access to those potentially at risk through delivery of service



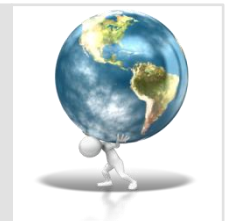
## Ability

The competence and tools to contribute to the solution

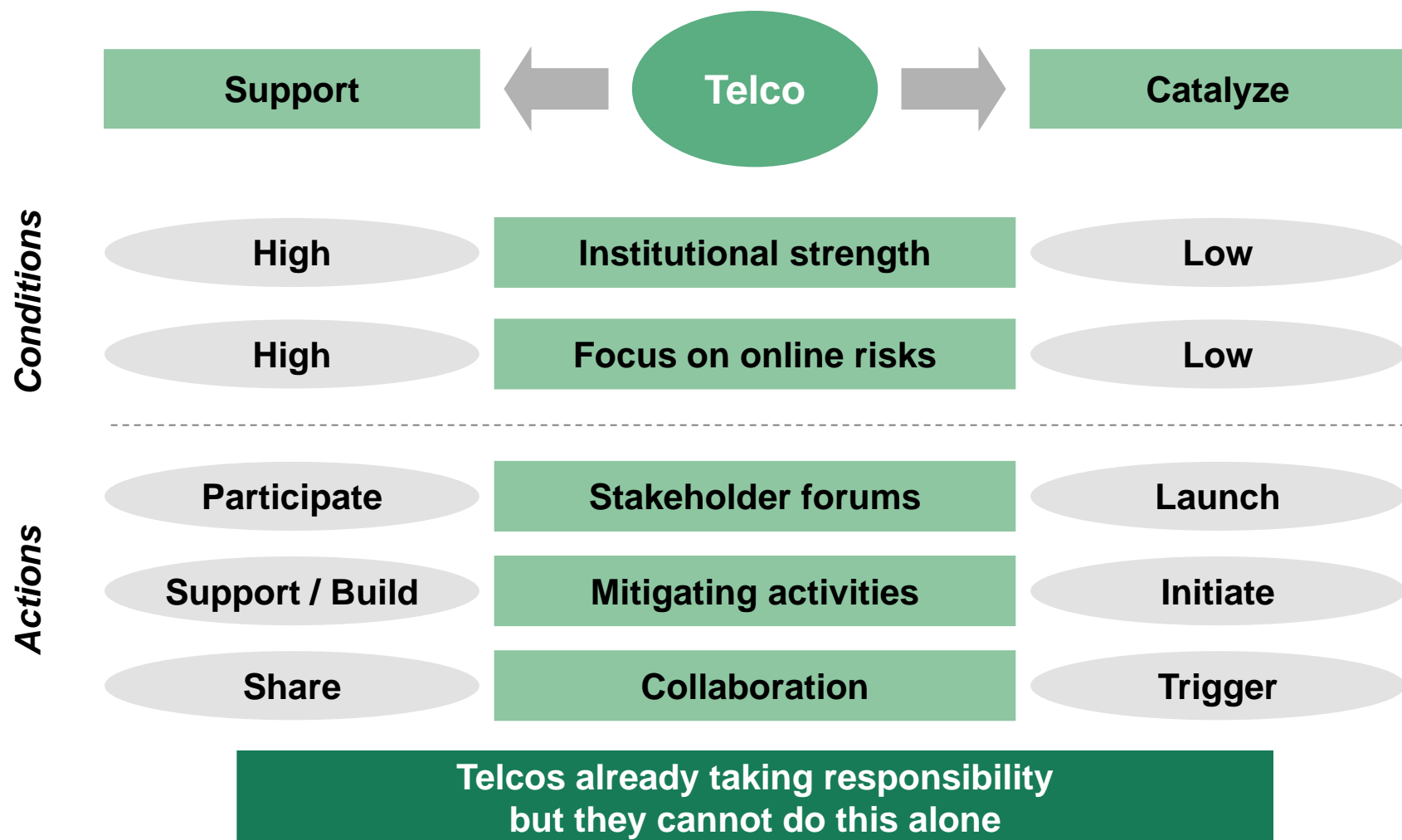


## Responsibility

Share the responsibility as provider of online access



# Nature of role varies with market characteristics



# Call to action: Reduce harm in all markets

**Study experiences and best practices in other markets**



**Family**



**Educators**



**Civil society**



**Connectivity providers**



**Service/content providers**



**Authorities**

**Generate independent, research based evidence**



**Family**



**Educators**



**Civil society**



**Connectivity providers**



**Service/content providers**



**Authorities**

**Remain vigilant towards current and emerging risks**



**Family**



**Educators**



**Civil society**



**Connectivity providers**



**Service/content providers**



**Authorities**

# Call to action: Reduce harm in all markets



**Together we can build digital resilience  
to secure the future of our children**

