

DIGITAL SRI LANKA 2030

NATIONAL DIGITAL ECONOMY STRATEGY 2030

Ministry of Technology



Digital Sri Lanka 2030

A National Digital Strategy for Sri Lanka

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I. The Context for a National Digital Strategy

A dynamic Sri Lankan digital economy can drive economic competitiveness and growth, employment creation, sustainable development, and service delivery.

Sri Lanka has made significant strides in its digital capabilities between the 1980s and early 2000s but has lagged regional peers in the last decade. As part of an inclusive and resilient recovery, Sri Lanka will need to shift gears towards a new economic model including digital transformation and relevant strategic measures to help the country navigate ongoing economic challenges and take advantage of the wide-reaching benefits of digital and emerging technologies.

The focus moving forward is on developing the Sri Lankan digital ecosystem as a core component of a more-vibrant, socially inclusive, export-oriented, and green economy. The present national digital strategy will be an integral part of the country's economic recovery and growth between now and 2030 and will be implemented in phases. In the first phase, over the next two years (until end of 2025), the emphasis will be on setting the stage through reforms and selected investments to position the country for recovery. This will require strengthening institutions to rebuild the business climate, attracting private investment, and driving service exports, whilst ensuring that inclusive and improved digital services support improved governance and accountability. Beyond 2026, the focus will shift to strategically positioning the country as a digital innovation and entrepreneurship hub in the Asia-Pacific, investing in the future of technology and jobs, and fully integrating digital technology across all of society and the economy.

We recognize the importance of building a robust, export-oriented economy, and the need to create strong economic and technological partnerships with partners around the world. For the country to be successful in its journey towards digital transformation while minimizing the reliance on public financing, a vibrant private sector will be a key partner. In addition, measures to enhance regulatory capacity, efficient use of public investments and assets, and greater social inclusion will be critical for sustainable development.

The national digital strategy, with its associated implementation plan, should be seen as a living document that will keep pace with the constantly evolving global digital economy and achieve the country's vision of becoming a high-income economy by 2048. Desired outcomes include sustainable economic growth and competitiveness, greater social inclusion, a stronger skills base, good and well-paying jobs with dignity, and trusted and inclusive services. The focus is to reconstruct, rebuild and set the stage for the future of Sri Lanka's digital landscape. This will also require constant monitoring and evaluation to ensure that the country invests wisely in its digital foundations.

Sri Lanka has begun its digital journey with some of the key elements in place (see the *Background Paper* contained in Annex C), but with room to improve and expand access, innovation, and capabilities of people, businesses, and the government. This includes widespread basic connectivity, a growing base of IT businesses and increasing use of digital tools by traditional businesses, initial development of a digital connected government, a trust ecosystem, an entrepreneurship ecosystem,

Sri Lanka in Global Rankings		
	2020	2022/23
Global Services Location Index	25 out of 50 (2019)	44 out of 78 (2023)
ITU Global Cybersecurity Index	83 out of 194 (2020)	n/a
UN E-government (EGDI Index)	85 out of 193 (2020)	95 out of 193 (2022)
Network readiness index	83 out of 134 (2020)	81 out of 131 (2022)

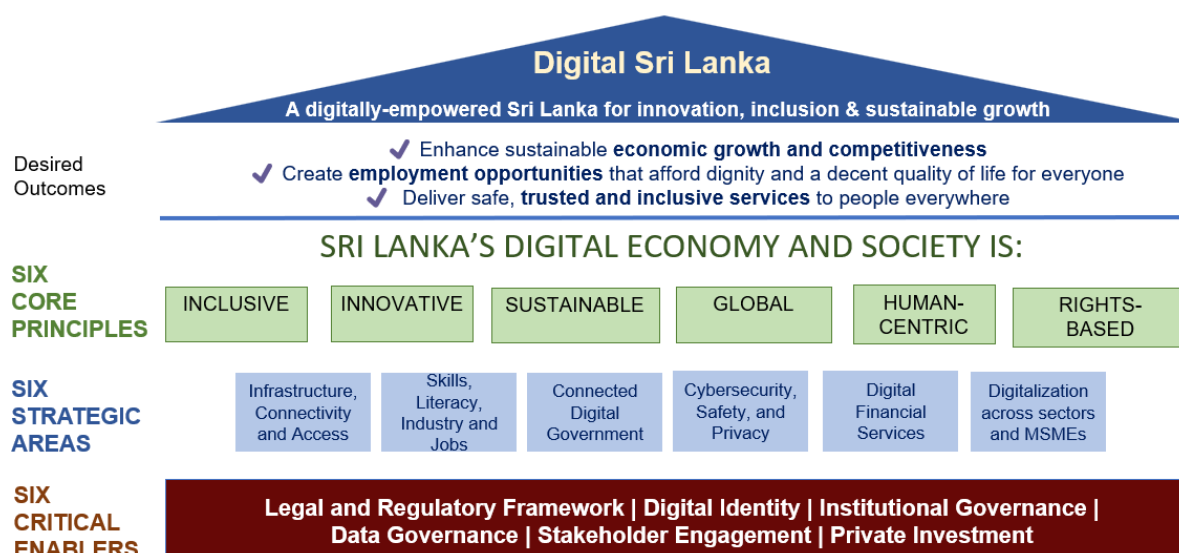
and functional elements of a digital financial system. This strategy also builds on, and learns from, earlier efforts—including policies, strategies, and frameworks—to grow the digital economy and integrate digital elements in trade and economic growth, governance, and social services, as proposed and promoted by the government, industry associations, and public agencies.

II. The 2030 Vision for a Digital Sri Lanka

The vision for 2030 is to have:

A digitally empowered Sri Lanka for innovation, inclusion and sustainable growth

To achieve the desired outcomes mentioned above, the national digital strategy for Sri Lanka includes actions across six strategic areas. Underpinning these areas are six core principles and six critical enablers, as set out in the figure below.



The digital strategy vision is based on a coherent and cohesive approach. All desired outcomes are achieved by actions under each of the six strategic areas, which reflect the core principles and are supported by key critical enablers. The following illustrates how the strategic areas identified contribute to achieving the outcomes:

- Sustainable economic growth and competitiveness will depend on infrastructure connectivity and access, and the digitalization of sectors and MSMEs.
- Employment opportunities that afford dignity will be enabled by actions under the areas of connected government, skills, literacy, industry, and jobs.
- Safe, trusted, and inclusive services will rely on a connected digital government, the adoption of digital financial services, and actions related to cybersecurity, safety, and privacy.

III. Core Principles

In developing and implementing our national digital strategy, we will be guided by our mission to improve the overall wellbeing of citizens, society, and the planet. Sri Lanka's safe and equitable digital transformation will be based on the six core principles set out below.

1. We Are Inclusive

We will build an inclusive digital economy and society where every Sri Lankan will benefit from the nation's digital transformation.

Digital technology is a powerful tool for progress and economic development. It empowers citizens, communities and businesses and can improve access to education, government services and support networks.

To realize this vision, it is essential that everyone has access to the myriad opportunities that digital development offers, irrespective of their location or circumstances.

This requires necessary investments in digital infrastructure, with priority being given to underserved areas and populations. The development of digital skills and knowledge should always be guided by the inclusiveness principle, as we promote digital and media literacy across age, gender, and socio-economic status, and provide tailored programs for disadvantaged populations (such as the elderly, women, marginalized and estate communities).

To stimulate innovation and entrepreneurship, across all sectors, we will facilitate the implementation of mechanisms that seeks to promote and support rural development and women-led businesses and start-ups, through educational and mentorship programs and opportunities for access to finance.

Our objective is to establish a robust and inclusive digital framework within Sri Lanka that fosters widespread access to digital dividends.

2. We Are Innovative

We will adopt an innovative approach to the digital economy, promoting an entrepreneurial mindset across business, government, and society.

Digital technology is the cornerstone of modern life, constantly evolving the way we work, play, live and conduct business. It has become embedded in social and economic structure, providing a strong basis for individual empowerment, social development, and economic growth.

For businesses, digital technologies provide the potential to significantly enhance efficiency, elevate customer service, and diminish operational costs. They unlock avenues for small businesses that were once exclusive to larger enterprises, thereby expanding opportunities across the business landscape.

New tools, powered by emerging technologies such as Machine Learning (ML) and Artificial Intelligence (AI), can facilitate informed decision-making, generate new revenue streams, while delivering personalized services and unlocking new markets and opportunities. To drive this opportunity into fruition, the government has allocated LKR 1 billion (USD 3.3 million) towards the development of Artificial Intelligence (AI) in 2024, with an emphasis on green energy and renewable technologies. Concurrently, the Ministry of Education has committed to incorporating Information Technology (IT) and AI into school curricula starting from 2024.

The pace of change today is rapid and unpredictable, with disruptive technologies presenting vital opportunities and along with it a series of new challenges. In order to adopt to this new landscape,

businesses must evolve to become agile, innovative and responsible in their approaches to integrating technology into their operations.

To stimulate growth and exports, it is vital to promote innovation as a core value. Public and private sectors will be encouraged to collaborate to facilitate creative and unconventional solutions. These will encompass solutions including but not limited to evidence-based sandbox environments, including regulatory sandboxes, and innovation test beds. These initiatives will span diverse sectors, encompassing government services, cybersecurity, and industry-specific applications like FinTech.

We will also put into place measures to create a holistic Research and Development (R&D) ecosystem while supporting entrepreneurs through start-up accelerators, incubators, and tech parks.

A comprehensive skills development strategy will be embraced across the population, with a particular emphasis on digital proficiency, as well as fostering creative and entrepreneurial skills.

3. We Are Sustainable

We will approach digital development in a sustainable manner, both with respect to the environment and the economy, while utilizing digital solutions to achieve critical climate goals.

Our strategy is designed to incorporate measures that are not only effective but also efficient, ensuring the economic and financial sustainability of digital development. Additionally, we are committed to accelerating climate action through secure and sustainable digital initiatives.

The widespread impact of climate change, affecting populations globally and posing a threat to millions by pushing them into poverty, underscores the urgency of our commitment to addressing this critical issue. Sri Lanka's Climate Prosperity Plan 2022 commits that "clean technologies are leveraged to digitize or provide new digital support to 50% of the economy across all sectors by 2025 (75% by 2030 and 100% by 2035)."

Digital technologies play a crucial role in mitigating greenhouse gas (GHG) emissions, particularly in high-emitting sectors such as energy, transportation, and manufacturing. These technologies are instrumental in improving disaster management, enhancing climate resilience of communities, and boosting agricultural production.

While digital technologies offer substantial benefits, it is essential to recognize their potential contribution to environmental degradation. Millions of metric tons of e-waste are generated from obsolete and discarded digital devices, while smartphone production requires large scale mining of rare earth minerals. And the environmental impact of large data farms is still being evaluated.

To align with our climate action goals as a nation, strategies such as greening digital products and services, creating green jobs, enhancing resilience and energy efficiency in networks, data centers, and critical information infrastructure, managing e-waste in accordance with international standards and transitioning to renewable sources of energy are necessary.

For economic and environmental sustainability, a requisite talent pool and strong partnerships between the government and the private sector will be critical, as will awareness and education among businesses and the public. Given the potential benefits of emerging and disruptive technologies, such as Distributed Ledger Technologies (DLTs), AI and the Internet of things (IoT), we will explore their adoption and use with a view to identify and promoting efficiency gains and green technology solutions.

4. We Are Global

We understand that digital transformation is a global phenomenon and will open wide our country to the world to boost innovation and investment, drive exports, and attract talent.

Concerted action must be taken to position Sri Lanka as hotspot international destination for investment, entrepreneurship, and talent. Initiatives such as digital nomad and entrepreneurship residency programs will be pursued in order to attract individuals with skills and capacities to contribute to the dynamism of the nation's business landscape.

To increase and sustain foreign trade and investment, our commitment lies in establishing a regulatory and legal framework, aligned with international best practices that can support innovation while simultaneously creating a safe and trustworthy environment for consumers and businesses.

Additionally, we will broaden the nation's visibility and engagement within the global context through bilateral and multilateral trade negotiations, collaborations with chambers of commerce, and strategic partnerships with development agencies.

Positioning Sri Lanka within the global stage will unlock new possibilities for small- and large-scale businesses, through potential for increased export revenues, access to a diverse talent pool and entry onto new markets.

Businesses will be supported in their adoption of digital standards and practices, and in an evolving gig economy, we will actively recognize, facilitate, and reward digital freelancers and entrepreneurs. Furthermore, measures will be implemented to foster cross-border digital payments, support trade, remittances, and tourism flows.

5. We Are Human-Centric

We believe that a digital economy and society should be human-centric, with the needs and interests of people placed at the heart of a safe and trusted digital environment.

Digital technologies are intertwined with and reshaping our daily lives, revolutionizing the way we approach education, consume entertainment, communicate with one another and access financial services. It is empowering the populace, by affording them the possibility to increase their quality of life, through convenience, wider support systems, quick access to government services, tailored products and flexible employment.

However, unregulated, rapid technology adoption can lead to the exposure of critical vulnerabilities from privacy violations, fraud and misinformation.

Our approach to digital development prioritizes being human centric and ethical, emphasizing the importance of serving concrete social and societal needs instead of being built solely on technological or business considerations.

Achieving this requires embracing multi- disciplinary thinking, involving stakeholders across diverse domains while employing data driven and evidence-based policy approaches.

6. We Are Rights-Based

We consider that digital access is not only an essential human need but also a fundamental human right, and we will adopt a rights-based approach to digital development.

Economic and technological development should act as a catalyst for social transformation, rather than exacerbating existing inequities. In pursuit of digital development that is both ethical and rights-based, we are guided by principles of non-discrimination, accountability, and equality.

Accountable and transparent decision making, upholding principles of fairness and non-discrimination, will be a guiding force in our digital transformation journey. Adoption of a rights-based approach will serve to protect individuals and build trust in online spaces while encouraging widespread adoption and stimulating innovation that aligns with interest of both business and society.

IV. Critical Enablers

To achieve the digital strategy's ambitious goals, critical cross-cutting enablers will be needed to sustain policy interventions, tackle important national and global challenges, and manage possible risks.

The recent crisis has also eroded development gains made over the last decade, diminished trust between citizens and government, and weakened the overall investment climate.

To address this, a collaborative approach to governance across government agencies is a critical factor together with a strong enabling legal and regulatory framework, which could improve regulatory predictability and transparency, increase competition, stabilize markets, and protect consumers. A foundational identity system that is secure and interoperable would help widen access to public services whilst creating a trusted digital ecosystem, through digital public infrastructure, for citizens and businesses. Challenging economic conditions and a weak investment climate can be partially addressed through an effective strategy for targeted public-private investment, greater stakeholder engagement and buy-in, and better access to capital. Finally, in a rapidly changing technological landscape that relies increasingly on big data (e.g., for services based on artificial intelligence, data analytics, distributed ledger technologies, and connected objects), a comprehensive and transparent data governance framework is crucial to stimulating innovation while ensuring that user rights are safeguarded.

We have identified six critical enablers for the national digital strategy which will frame the policy actions and initiatives included therein. These are set out below.

1. A Forward-Looking Legal and Regulatory Framework

To build a sustainable and dynamic digital economy, our **legal and regulatory framework** should keep up with the pace of technological development and create the right environment for business growth, infrastructure roll-out, socio-economic development, human safety, and inclusion. The implementation of a robust enabling legal and regulatory framework will foster trust and confidence in the digital economy and ensure that digital technologies are successfully adopted and utilized, benefiting everyone, from small and large businesses to entrepreneurs and individual users.

The regulatory framework should support innovation and growth, and at the same time protect businesses from predatory practices and individuals from harm. In this context, legislation will be enacted to regulate competition in the digital market and facilitate intellectual property rights.

We will enact rules and regulations to safeguard personal data, protect privacy, ensure secure digital transactions, and enhance online safety for users, whilst reinforcing the security of our critical information infrastructure.

These measures will serve to boost the adoption of digital technology across sectors and contexts.

Moreover, as the processing of data becomes increasingly pervasive, we will also make sure that it is handled ethically, transparently, securely and in line with the rule of law. By establishing robust institutions and effective enforcement mechanisms.

To expand connectivity and enhance digital access and opportunities to all Sri Lankans, we will advocate for pro innovation policies while developing regulations and frameworks that facilitate infrastructure sharing, optimize spectrum use, and connect underserved areas.

2. Foundational and Secure Digital Identity Systems

To unlock the benefits of a digital economy for all, a **foundational and secure digital identity system** should be a core element of the national digital public infrastructure to facilitate online authentication, exchange, and transaction.

By taking the lead in developing a multi-purpose and universal digital identity, we will not only create a more convenient, efficient, and secure system for accessing important government services, but will also build the foundation for broader digital transformation across the country, which will boost innovation, stimulate economic growth, and create jobs.

In the development of identity systems, security must be made priority with the implementation of measures such as encryption becoming crucial to safeguard sensitive data and ensure the integrity of the identity system. The identity system will integrate with existing government infrastructure to facilitate adoption and use, prioritizing interoperability and common application interfaces.

Multi-stakeholder dialogue will be critical to develop shared principles, standards and practices that are in the best interest of organizations and people alike.

3. A Comprehensive and Transparent Data Governance Framework

In our growing reliance on data-driven services, spanning healthcare, education, financial services, and retail, it is crucial to view data as a tool for positive impact rather than an end. In this context, a comprehensive and transparent **data governance framework** will help inform meaningful decision-making, promote trust, and prevent misuse, and is particularly critical for government organizations as stewards of social welfare and well-being.

The data governance framework should consist of publicly available guidelines, protocols, and standards that manage how data is handled, accessed, stored, shared, distributed, and discarded when necessary. These include data sharing policies, data classification and management policies, data quality control, data privacy and information security policies.

By setting the right tone for data governance, the government can encourage private sector actors and civil society organizations to put in place their own data governance policies to boost growth and stimulate innovation in the public interest.

It will be critical to facilitate better use of data within entities and across entities, and to open certain datasets for use by innovators and businesses, resulting in better investments and innovation. The Government has convened a committee to formulate a strategy for AI in Sri Lanka, and this effort will

complement and link with the present strategy, building on the wider and consent-based availability of data under an appropriate data governance framework.

4. Consistent and Proactive Stakeholder Engagement

To implement a comprehensive approach to the digital economy at the national level, we will actively solicit input from a diverse range of stakeholders spanning various sectors and geographical regions. Consistent **stakeholder engagement** will help us better grasp national and global trends, understand the requirements and challenges of all segments of society, manage risk, inform policy interventions, and prioritize program rollout. Collaboration and co-creation through, *inter alia*, technical and regulatory sandboxes, stakeholder consultations and public consultations, will result in better outcomes for both business and society.

The private sector is poised to play an increasingly important role in fostering the growth of the digital economy and creating a business environment that is conducive to innovation and entrepreneurship. As the landscape of work evolves, the private sector can influence and support skills development, literacy, and educational programs.

Educational institutes and academia, too, have much to contribute to making Sri Lanka a dynamic hub for research, innovation, and creativity. We also plan to engage user groups and civil society to make sure we are actively listening to the needs and concerns of society at large. Only through collaborative efforts can the full potential of the digital economy be unlocked to drive equitable and sustainable economic growth.

5. Collaborative and Effective Institutional Governance

For the successful implementation of the national digital strategy, transparent, effective, and **collaborative institutional governance** is needed to instill trust among stakeholders, ensure accountability and provide stability. Government entities, private sector organizations, and civil society must work together harmoniously to ensure a successful and holistic digital transformation across society and across sectors.

Collaborative institutional arrangements will make more efficient use of resources, reduce waste, simplify budgeting processes, maximize return on investment, and allocate funding to digital projects of the highest priority. This approach to governance will also help us develop a shared vision and a set of common values, as well as promote coordination and knowledge sharing among stakeholders (from government departments to industry associations and user groups).

We will nurture platforms for dialogue and coordination on the best way to implement, and benefit from, digital transformation. With holistic and collaborative governance, a linchpin of our national digital strategy, we will build trust among citizens, investors, and international allies, and create a conducive environment for digital investments and partnerships.

6. Targeted Private Investment

The public sector and its investments alone will not be adequate to drive a sustainable digital transformation. Private investment will play a significant role in driving innovation and stimulating economic growth.

With this in mind, we intend to create a regulatory framework that encourages private capital, streamlines administrative procedures, reduces bureaucratic hurdles, and provides tax incentives for greater private sector participation.

Private investors bring substantial financial resources, which complements government investments, helping accelerate digital infrastructure development and technology adoption. In addition to capital investments, the private sector can also help attract and build talent and disseminate knowledge.

Both startups and established technology firms, supported by private capital, can develop solutions specifically tailored to Sri Lanka's unique challenges, in areas such as healthcare, agriculture, and e-commerce. Additionally, Public-Private Partnerships (PPPs) can be used to strategically combine government and private sector resources and know-how to spearhead large-scale digital projects like smart city initiatives and e-governance platforms.

V. Strategic Areas for Action

In realizing the 2030 objectives, the government will have an 'online and digital first' policy across all sectors. The multi-strategy approach based on six thematic pillars will be monitored with proper milestones and a KPI driven culture.

Infrastructure, Connectivity and Access

The government plays a crucial role in establishing a favorable investment climate and simplifying processes for broadband infrastructure development. It should also promote competitive markets, encourage sharing of infrastructure, and develop policies for optimizing wireless broadband usage. It is estimated that over US\$1 billion will be needed by 2030 to achieve universal high-speed broadband access.

Regulatory frameworks should be fair, non-discriminatory, and competitive, with an emphasis on maintaining high-quality service and ethical business practices. Monopolistic and anti-competitive practices must be curbed to encourage innovation, reduce prices, foster inclusion, promote adoption, and attract investment. Regulatory entities should be proactive and flexible, adapting to new technological developments and market dynamics.

Collaboration with private sector entities, educational institutions, and civil society is crucial. Public-private partnerships can help mobilize resources and address market failures to ensure that no one is left unconnected in the digital economy. It is important to establish a comprehensive national broadband plan, invest in digital skills development, and enhance collaboration across stakeholders.

Monitoring progress is essential to identify gaps and challenges and take corrective measures. Continuous efforts are required to improve broadband accessibility and affordability in Sri Lanka, as it is a fundamental element for the development of a thriving digital economy.

The core strategic actions under this strategic area are as follows:

1) **Reform the authorization regime to promote investment and innovation.**

We intend to revise the current authorization regime to better keep pace with rapid technological developments, address inefficiencies, and seize opportunities for growth. Rules and regulations should stimulate investment and foster innovation while lowering barriers to entry and protecting consumers.

Target for 2025:

- ✓ *Nationwide access to broadband with speeds of at least 20 Mbps and all institutions equipped with speeds of at least 100 Mbps.*
- ✓ *>99% broadband coverage across both urban rural areas*
- ✓ *US\$250 million private investment in advanced and high-speed broadband mobilized*

Complex licensing processes, excessive taxation, and inflexible compliance regulations can discourage potential participants from entering the market, restrict the growth of established service providers, and impede innovation. To address this, we will streamline authorization procedures and introduce a unified licensing scheme. We will also facilitate licensing for companies providing passive infrastructure like telecommunications towers and cables.

By reducing bureaucratic red tape and creating a conducive investment environment, we can attract more local and international investors. Adaptable regulatory frameworks will allow established enterprises to explore new services and technologies, playing a crucial role in fostering innovation. This can lead to more economically efficient services, enhanced coverage, and the emergence of new communication technologies.

These measures will contribute to the development of a robust and dynamic broadband industry, enabling the growth of a digital economy in Sri Lanka.

2) Establish rules to increase competition and reduce the cost of infrastructure roll-out.

Implementing regulations to promote competition and assess Significant Market Power (SMP) will create a level playing field and lead to better services and lower prices for consumers. Competition encourages companies to invest in research, service diversification, and customer service improvements, resulting in better network speeds, quality, and subscription options. Increasing competition also attracts investors and supports business growth and market expansion.

To lower infrastructure costs, we will implement measures such as shared infrastructure, expedited approval processes, and subsidies. Clear guidelines on active and passive infrastructure sharing will reduce duplication of resources and enable faster deployment, particularly in underserved regions. This will promote digital inclusion and social equity.

3) Improve spectrum assignment and management procedures.

Optimized spectrum assignment and management procedures are crucial for implementing wireless broadband technologies like 5G. They support the development of sectors such as healthcare, education, and transportation, where reliable and fast connections are essential. Enhancing spectrum management will reduce inefficiencies, improve user experience, and ensure readiness for future technological advancements. Well-structured spectrum policies and periodic assessments will promote competition, innovation, equitable access, quality of service, and affordability.

4) Define rules and create initiatives to sustainably expand access to affordable broadband.

Ensuring affordable and widespread access to high-speed broadband is vital for a digital economy. Access disparities can deepen existing socioeconomic and geographical inequalities. Broadband has become an essential human need, facilitating access to education, healthcare, markets, knowledge, and public engagement.

To achieve sustainable expansion, policies like "dig once" can lower infrastructure deployment costs by integrating broadband in new public works projects. Operator incentives and efficient allocation of funding programs will expand infrastructure in rural and underserved areas, ensuring equal access for all. Specialized and cost-effective plans for educational institutions will provide students with equal opportunities for digital learning and participation in the digital economy.

These strategic actions will support the development of a robust and inclusive broadband industry, enabling the digital transformation of Sri Lanka.

7. Skills, Literacy, Industry and Jobs

The digital revolution and the impact of technologies like AI and IoT are transforming industries and the workforce globally. Sri Lanka, like many countries, faces a demand for digital skills that outstrips supply. To address this, we will develop a National Digital Skills and Inclusion Strategy. This strategy aims to accelerate digital transformation across sectors, ensuring a diverse and adaptable workforce while leaving no one behind. Collaboration with the private sector in curriculum development and investment in teacher training will bridge skill gaps and keep education aligned with rapid technological advancements.

Supporting businesses to scale, attract global investment, and foster entrepreneurship is also crucial. We will create an innovation and entrepreneurship-oriented ecosystem through collaborative cross-sector initiatives, forward-looking talent acquisition, and retention strategies. Government recruitment and capacity-building programs will lead by example, emphasizing dynamic skills-based hiring.

To position Sri Lanka as a hub of innovation and entrepreneurship, we will leverage our strengths in business process management (BPM) and integrate into digitalized global value chains. We aim to provide strong support for entrepreneurs, ensuring access to finance and building robust networks and infrastructure. Special attention will be given to supporting female entrepreneurs and women-led businesses.

The core strategic actions under this strategic area are as follows:

1) Integrate the development of digital capabilities in the educational system.

Expanding digital literacy and skills is crucial for an inclusive digital economy. We will develop a national skills and inclusion strategy, including a digital skills framework and industry-recognized credentials. We prioritize connectivity for educational purposes, ensuring equal access and sustainable inclusion.

2) Facilitate investment, entrepreneurship, and digital business growth.

Policies and mechanisms will be established to simplify bureaucratic practices, promote new work models, and prevent anti-competitive practices. Public-private partnerships will improve access to capital for diverse players. Digitalization efforts for smaller firms will drive integration into global value chains and investment in green technologies. Female entrepreneurs will receive dedicated support.

3) Promote innovation and market access for the digital industry.

We aim to increase Sri Lanka's visibility as an innovation hub, facilitating business expansion, market access, and attracting investment, R&D, and specialized talent. We will implement policies to open access to cross-border marketplaces and support local start-ups in public procurement.

4) Develop digital skills and talent for government and industry.

Targets for 2025:

- ✓ *75% of the population is digitally literate and 50% of all women are digitally (basic literacy as per new definition)*
- ✓ *Digital (ICT-BPM) export earnings of USD \$3bn*
- ✓ *1,200 digital startups*
- ✓ *200,000 strong ICT workforce*

Government recruitment and capacity-building efforts will prioritize skills-based hiring and the retention of digital talent. Across all sectors, reskilling and upskilling programs will be promoted, particularly for underrepresented groups. Collaboration with the private sector, academia, and stakeholders is critical for strengthening the skills base.

These strategic actions will drive Sri Lanka's digital transformation, develop a skilled workforce, and foster entrepreneurship and innovation.

8. Connected Digital Government

Digital technologies have the potential to transform public service delivery by improving ease of use, security, and personalization. Our vision is to create a citizen-centric 'Connected Digital Government' that collaborates, shares information, and leverages the government's digital and data infrastructure to serve the public effectively. We will develop digital services based on citizen and business needs, using a life-events approach to address specific requirements at each stage. User-friendly services will be designed with human-centric design principles in mind.

To ensure integrated and seamless online government services, we will establish a single access point for all services. This eliminates system duplication, increases adoption, and reduces costs. A common digital public infrastructure will be developed to be accessible to all government agencies. This infrastructure will include scalable, reusable, and interoperable digital tools. We will also leverage commercial cloud offerings, including updating the Lanka Government cloud. Additionally, we will utilize AI, data analytics, and other tools to enhance decision-making, resource allocation, and service delivery. Collaboration with the private sector will be crucial for innovation, and regular monitoring and evaluation will be conducted to ensure continuous improvement.

To meet the evolving needs of a connected government, we will prioritize internal capacity and human resources. This includes considering the appointment and flexibility in assigning technically qualified individuals within the government.

The core strategic actions under this strategic area are as follows:

1) Build an inclusive and resilient common digital public infrastructure

To promote seamless integration and efficiency, a common digital public infrastructure (DPI) will be developed. This DPI will include a digital ID, payment gateway, and data exchange platform, ensuring scalability and interoperability across government agencies. By eliminating the need for individual systems, costs will be reduced, IT silos will be removed, and user convenience and engagement will improve.

2) Enhance use of the public and private cloud for a connected government

To optimize hosting infrastructure, a cloud-first policy will be implemented. Government applications will be hosted on data centers and cloud platforms, with sensitive applications remaining on-premises and non-sensitive applications migrating to the commercial cloud. This approach will lead to cost savings, increased efficiency, and improved responsiveness to changing demands. The Lanka Government Cloud will also undergo upgrades to become a hybrid cloud with disaster-recovery capabilities.

Targets for 2025:

- ✓ *Implementation of a citizen authentication platform*
- ✓ *Implementation of a government-wide digital payment system*
- ✓ *Implementation of a data-sharing platform for the government (NDZ)*
- ✓ *Increase Sri Lanka's ranking in the Government AI Readiness Index from 105th to 95th*

3) Roll out integrated and responsive citizen-centric services

A citizen and human-centric approach will guide the delivery of government services. By adopting a life event-based strategy, tailored services will be designed to address specific needs during key life events. Legal frameworks, policies, and guidelines will support departments in developing services aligned with their mandates. Integrated service delivery through a single point of contact, along with an integrated payment gateway, will streamline citizen access. Multi-channel communication and access options will also be provided, ensuring inclusivity and user satisfaction.

4) Use data and disruptive technologies for innovative service delivery

The utilization of AI, data, and disruptive technologies will enhance government processes, enable data-driven decisions, and promote transparency and accountability. Embracing AI-powered solutions will automate tasks, enhance service quality, and personalize delivery. Open data portals and APIs will be expanded, allowing private sector firms, academics, and researchers to innovate based on available data. An AI Strategy Playbook for the Public Sector will establish guidelines for ethical and responsible AI use while identifying opportunities for shared resources and knowledge.

In conclusion, through the creation of an inclusive and resilient common digital public infrastructure, the enhancement of cloud utilization, the roll-out of citizen-centered services, and the utilization of data and disruptive technologies, Sri Lanka aims to establish a connected digital government. This vision focuses on improving service delivery, building public trust, and driving innovation for the benefit of citizens, businesses, and government agencies.

9. Cybersecurity, Safety, and Privacy

Risks to Sri Lanka's digital infrastructure and services must be effectively managed to support the growth of the digital economy and regain stability in the wake of recent crises. Cyber-attacks, cybercrime, and data breaches pose a threat to citizen safety, undermine public trust in digital services, and hinder the development of online commerce and digital businesses. It is crucial to establish robust digital safeguards, including a foundational digital identity system, to protect vital information infrastructure and sensitive data in the face of emerging technologies.

While Sri Lanka has passed comprehensive legislation for data protection, implementation is still in the early stages. Strengthening the cybersecurity ecosystem requires collaboration between the government, private sector, civil society, academia, and citizens. Efforts should prioritize the protection of all stakeholders, particularly vulnerable groups such as women, children, senior citizens, people with disabilities, minority communities with language barriers, rural areas, and low-income communities.

To create an enabling environment for cybersecurity, comprehensive legislation should be enacted and implemented. This should be accompanied by widespread public awareness of user rights and obligations, as well as the promotion of online safety skills and practices. Partnerships and collaboration at national and international

Targets for 2025:

- ✓ *Improve Sri Lanka ranking in the Global Cybersecurity Index (ITU) ranking from 83rd to 60th*
- ✓ *Data Protection Authority fully staffed and operational*
- ✓ *Implementation of 30 community focused cyber security awareness raising programs available in all three languages, with at least 30% female participation*

levels will facilitate knowledge sharing and collective action to enhance resilience in the digital economy.

In summary, effective cybersecurity measures are essential for supporting digital services, ensuring inclusive and sustainable growth, and protecting the privacy and safety of citizens in Sri Lanka.

The core strategic actions under this strategic area are as follows:

1) Establish a policy and regulatory framework that promotes trust.

Establishing a policy and regulatory framework that promotes trust is crucial for addressing cybersecurity and safety risks. This includes passing stand-alone cybersecurity legislation, establishing a cyber security regulatory authority, and setting up a separate Data Protection Authority. Sector-specific guidelines will be developed, and efforts will be made to ensure compliance with rules and regulations. The regulatory framework will be regularly updated to keep up with technological advances.

2) Create local and global partnerships for an effective whole-of-nation cybersecurity ecosystem.

Partnerships, both locally and globally, are essential for effective cybersecurity management. Collaborative opportunities will be created to exchange threat intelligence, develop expertise and training programs, and adopt common approaches to building cyber resilience. Consideration will be given to joining regional and global frameworks to enforce cross-border data breaches and improve data protection and privacy policies. Public-private partnerships, as well as partnerships with academia and civil society, will be strengthened to enhance the country's ability to handle specific cyber incidents.

3) Promote awareness, build capacities, strengthen digital safeguards, and mitigate cyberthreats.

Promoting awareness, building capacities, strengthening digital safeguards, and mitigating cyber threats are key actions to enhance trust in online spaces. Educational programs will be designed to empower all stakeholders, including individuals, small businesses, government workers, and corporations, with knowledge of their rights, obligations, and potential risks. Priority will be given to smaller enterprises and vulnerable groups. Efforts will be made to develop a future-proof cybersecurity talent pool and ensure appropriate training for data protection officers. Integration of cybersecurity into core curricula in schools and educational institutions will be pursued to foster digital skills development and child online protection.

In summary, Sri Lanka aims to establish a robust policy and regulatory framework, foster partnerships for an effective cybersecurity ecosystem, and promote awareness while building capacities to mitigate cyber threats.

10. Digital Financial Services

Digital financial inclusion is crucial for a robust and equitable digital economy. Access to affordable, secure, efficient, and inclusive financial transactions enables active participation and benefits from a growing economy. DFS allows users to store and transfer funds, make payments, borrow, and save, and invest and insure. It benefits individuals, businesses, and governments by providing faster, more efficient, and affordable transactions with reduced fraud risk. A conducive legal and regulatory framework, along with an enabling financial and digital infrastructure, is necessary for the development of DFS. Government support systems, such as secure digital identity, are also vital to create trustworthy markets and attract investment.

The government plays an important role in boosting financial inclusion and promoting the use of DFS. Secure online transactions with businesses and the government, along with reliable payment infrastructures, promote service adoption and enhance efficiency in government assistance. Integration of digital payment systems across all government services, including welfare payments and unemployment benefits, improves financial literacy among poorer populations. The government will collaborate with private sector entities, such as banks, fintech businesses, and telecommunication companies, to promote DFS in rural and underserved regions. National strategies may include the implementation of digital kiosks, measures to improve smartphone affordability, and subsidized data subscriptions. By prioritizing DFS, opportunities for financial empowerment are created for individuals of all socio-economic backgrounds, improving social equity and inclusion.

In summary, Sri Lanka aims to promote digital financial inclusion through the development of an enabling regulatory framework, financial and digital infrastructure, and government support systems. The government will integrate digital payment systems across services, collaborate with private sector entities, and implement strategies to facilitate DFS adoption in underserved regions, fostering opportunities for financial empowerment and social equity.

The core strategic actions under this strategic area are as follows:

1) **Boost digital financial literacy, awareness, and adoption among individuals.**

Efforts to increase digital financial literacy will raise awareness and knowledge of DFS products & services and promote their adoption. It is crucial to educate individuals about the benefits of DFS, such as opening bank accounts, saving money, and using online banking and e-commerce services. Financial literacy initiatives should also inform users about potential risks, such as online fraud, and provide guidance on managing these risks and understanding consumer rights and redress procedures. By improving financial literacy, people will gain confidence in making financial decisions, trust the digital ecosystem, and incentivize service providers to enhance security and diversify offerings.

2) **Create a secure and interoperable environment for Digital Financial Services.**

Ensuring a secure environment for DFS is essential to build trust and protect user data and transactions. Robust security measures, including encryption, authentication, and real-time monitoring, are necessary. Interoperability enables users on different platforms or with different

Targets for 2025:

- ✓ *Expansion of Financial Services into Remote Areas to Foster Financial Inclusion*
- ✓ *Increase the volume of digital transactions by 50%*
- ✓ *Digital payment mechanisms on public transport (by the end of 2024)*

financial institutions to transact seamlessly. Open API standards, a national QR code standard for e-payment acceptance, and open banking initiatives contribute to greater interoperability. Competition between service providers is encouraged to drive adoption, innovation, efficiency, and service quality-

3) Promote innovative, easy, and affordable digital financial services.

DFS can facilitate financial inclusion for disadvantaged and rural populations by providing safe, accessible, and low-cost transactions. Digital wallets and mobile money services are particularly beneficial in these communities. Innovative digital financial services also have the potential to enhance small business growth and attract large corporate investments. Cost-effective and user-friendly services reduce transaction costs, improve efficiency, and competitiveness. Collaboration with fintech companies and banks can develop low-cost service models tailored for underserved and low-income populations. Technical and regulatory sandboxes can encourage co-creation and innovation, and regulatory incentives can reward DFS providers who meet affordability benchmarks.

4) Create use-cases in the public sector to promote digital financial services.

Embedding DFS and digital payments in the public sector sets an example and encourages adoption across the economy. Implementing DFS in areas like transport, utility bill payments, tax payments, and public sector salaries and assistance demonstrates the benefits and efficiency of digital transactions. Collaboration with the Central Bank ensures efficient delivery and addresses challenges. A comprehensive legal framework, including payment services regulations, data protection laws, and cybersecurity regulations, promotes DFS innovation while protecting consumer interests. Policies that promote service provider compatibility and data exchange contribute to interoperability. Public-private partnerships (PPPs) can expedite DFS deployment through collaboration between the public sector and private fintech companies.

11. Digitalization across Sectors and MSMEs

The rapid adoption of digital technologies is transforming industries worldwide, including Sri Lanka. Digitalization promotes innovation and competitiveness, enabling businesses to create new products, reach broader markets, and respond to changing consumer demands. It also improves access to essential services like healthcare and education, fostering inclusive economic development. Advancements in technology, such as AI, cloud computing, and IoT, have made digital solutions cost-effective and efficient.

Prioritizing digitalization in key sectors like health, education, agriculture, transport, tourism, retail, and manufacturing is essential for Sri Lanka's economic resurgence. In agriculture, digital tools optimize crop management for higher yields. Telemedicine services in healthcare provide remote access to medical professionals, improving timely care. Citizen-centric health record apps enable individuals to manage their health data. AR tourism apps enhance travel experiences by overlaying digital information on real-world locations. Real-time public transit tracking improves journey planning in the transport sector.

MSMEs face challenges in adopting digital transformation due to limited resources and knowledge gaps. Effective awareness and adoption programs will support MSMEs, along with access to financing options for adopting digital technologies. Collaboration between the public and private sectors is crucial for a coordinated approach to digitalization.

Target for 2025:

100,000 MSMEs embrace digital solutions

30% MSMEs completed Digital Maturity Assessment

Digitalization Roadmaps for selected key sectors developed and adopted (Agriculture, Tourism, Retail, Health)

5 strategic PPP Digital initiatives for key sectors initiated

In conclusion, prioritizing digitalization across sectors and supporting MSMEs is essential for Sri Lanka's economic revival. Embracing digital technologies, fostering innovation, and promoting collaboration will unlock the full potential of digitalization and drive economic growth.

The core strategic actions under this strategic area are as follows:

1) Increase awareness and adoption of digital technologies among MSMEs.

To support the growth and innovation of MSMEs, we will launch strategic initiatives that address common challenges in digital adoption. These initiatives will include awareness programs, digital maturity assessments, and dedicated digital solution centers. By promoting a supportive business environment for digital adoption, we can empower MSMEs, enhance competitiveness, and strengthen Sri Lanka's resilience in the global landscape.

2) Partner with industry to promote digitalization in strategic sectors.

To overcome fragmentation and inefficiencies, we will partner with industry to develop Digitalization Roadmaps for key sectors. Industry Interest Groups will play a crucial role in championing sectoral digital initiatives and fostering collaboration. Public-Private Partnerships will be leveraged to drive innovation and efficiency in large-scale digital projects.

3) Facilitate and enable digital innovation in business.

Creating an ecosystem that supports digital transformation, investment, and innovation is essential for maintaining competitiveness. We will invest in robust infrastructure, provide access to finance for startups and MSMEs, establish Centers of Excellence as innovation hubs, and develop regulatory frameworks that promote resilient and secure business growth. Our government will lead by example through the adoption of digital technologies in service delivery and process streamlining.

VI. Implementation Arrangements

For the successful implementation of Sri Lanka's digital strategy, a solid institutional framework with clear structures and enabling policy frameworks is crucial. Efficient coordination, resource allocation, and transparent accountability mechanisms will be established. Coordinated efforts between government agencies, the private sector, and other stakeholders will be encouraged.

Overall, these measures will drive digital adoption, foster innovation, and promote economic growth and competitiveness in Sri Lanka.

Institutional arrangements for the implementation of Sri Lanka's digital strategy will be based on the following principles,

a) High-level ownership by the President and Cabinet committee, with parliamentary committee oversight.

Having high-level ownership from the President and Cabinet committee ensures alignment with national goals and enables critical decision-making. Parliamentary committee oversight provides transparency and accountability.

b) A single empowered body, under the office of the President and with a clearly defined mandate, responsible for overseeing and guiding the implementation of the digital strategy.

A single body will provide clear leadership, coordination, and accountability for the successful implementation of the strategy, while monitoring and evaluation mechanisms will ensure adaptability and evidence-based decision making.

c) Implementing partners that will include many of the existing agencies, suitably staffed and capacitated, such as TRCSL, DPA, CSA, CBSL, Ministries, and private sector partners.

Collaboration with existing government agencies, academic institutions, civil society organizations, private sector partners and other stakeholders will leverage their expertise and resources, promoting inclusive growth and needs-based innovation.

d) A suitably empowered digital government agency with a mandate focused on the technical aspects of the connected digital government.

This agency would be responsible for the technical elements of a connected digital government that would play a critical role in enabling efficient, secure, and integrated digital services. A new Digital Government Agency (DigiGov) should be a highly competent technical agency, with the following functions:

- Develop the Digital Government Blueprint and implement digital strategies
- Build, Manage, and Operate Whole-of-Government (WOG) Digital Infrastructure and Products in collaboration with public and private sector agencies
- Build, Manage, and Operate Government-wide Shared Applications and Services in collaboration with public and private sector agencies
- Establish, oversee, and support compliance to Digital Policies and Standards
- Provide Technical Expertise, Advice, and Support across the Government to support digital transformation, including to work across the public sector to develop and support strategic sectoral digital products
- Increase Digital Capabilities within the public sector

e) Arrangements to support the digital economy's private sector development.

The government will also need to consider how it can continue private sector development in the digital economy, including startups, digitalization of traditional businesses, and innovation. These could be within a new digital innovation agency, an agency to support the implementation of the upcoming artificial intelligence (AI) policy, or within the Ministry of Technology. This arrangement needs to be defined, and additional details are in Annex 2.

f) Sufficient and appropriate competencies and capabilities

Having the right people with the necessary competencies is crucial for leading and driving implementation. Technical expertise, strategic planning, leadership, and stakeholder engagement skills will be necessary for sustainable impact.

Technical expertise, together with competencies in areas such as strategic planning, leadership, policy development and stakeholder engagement, are critical in crafting a clear roadmap, managing implementation, and navigating any challenges that arise. These individuals should be both empowered to drive the transformation with appropriate guidance from Government leadership and be empowered to make changes for sustainable impact.

g) Clear and concise performance monitoring framework

A performance monitoring framework will offer insights into progress, identify areas for improvement, and foster transparency and trust by communicating progress to stakeholders.

The implementation plan (Annex A) provide guidance for the successful implementation of the national digital strategy. These documents will be periodically reviewed to ensure alignment with changing circumstances. Legal reforms will also be necessary to provide cross-cutting and enabling legal backing to the strategy's implementation.

Implementation of these measures will position Sri Lanka for a digital and vibrant future, advancing economic growth and societal development.

Annex A: Indicative Implementation Plan

Note: Responsibilities throughout this Annex refer to existing agencies and organizations as listed, or their successors and assigns.

This section provides a list of action items identified for the six strategic pillars. While most of the action items are proposed to be initiated within the next 24 months, it is important to note that some of these action items will continue beyond 2025. This Implementation Plan is a live document and will be reviewed periodically to assess its effectiveness and outcome in driving Sri Lanka's social economy development. Improvement will be made to ensure that we derive optimum value from the digital transformation initiative

1. INFRASTRUCTURE, CONNECTIVITY AND ACCESS				
Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
1.1. Reform the authorization regime to promote investment and innovation	1.1.1. Revise and streamline present licensing regime to introduce a unified licensing scheme.	MoT, TRCSL	ST	Coverage and capacity of high-speed broadband increases to at least 20 Mbps
	1.1.2. Simplify and expedite licensing for companies providing passive telecommunications infrastructure such as towers and cables.	MoT, TRCSL	I	
1.2. Establish rules to increase competition and to reduce the cost of infrastructure roll-out	1.2.1. Establish guidelines and protocols for both active and passive telecom infrastructure sharing, including rights of way, to reduce entry barriers, promote efficiency, and reduce duplication of investment,	MoT, TRCSL, RDA, CEB	ST	Adoption of infrastructure sharing
	1.2.2. Develop a comprehensive legal framework that allows issuance of licenses to passive infrastructure service providers, comprehensive infrastructure sharing framework and enables telecom providers to share government utility infrastructure and rights of way, expediting approval processes and reducing the time needed to deploy new telecom infrastructure.	MoT, TRCSL	ST	
	1.2.3. Establish streamlined approvals to facilitate quicker site deployments in areas lacking building approval	MoT, TRCSL, RDA, CEB	I	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	plans, thereby improving coverage and quality of service.			
	1.2.4. Formulate and enforce regulations to prevent anti-competitive practices and foster a level-playing field, leading to wider consumer choices, lower prices, and enhanced service quality in the broadband sector.	MoT, TRCSL, Consumer Affairs Authority		
	1.2.5. Strengthening the human and technical resources of the regulatory agency.	MoT, TRCSL	IST (ongoing)	
1.3. Improve spectrum assignment and management procedures	1.3.1. Introduction of spectrum assignment mechanism for broadband services including 5G in efficient, equitable & transparent process balancing revenue generation with digital inclusion objectives.	MoT, TRCSL	I	>99% wireless broadband coverage across both urban rural areas
	1.3.2. Develop a forward-looking roadmap for Wireless Broadband, that anticipates future technologies, ensuring that citizens and businesses have access to the latest wireless broadband advancements.	MoT, TRCSL	I	
	1.3.3. Periodically assess and optimize the distribution of spectrum assigned for broadband networks to ensure equitable access, thereby improving the Quality of Service (QoS) and throughput rates.	TRCSL	ST	
	1.3.4. Develop a framework for the assignment of spectrum and licensing for wireless broadband.	MoT, TRCSL	I	
1.4. Define rules and create initiatives to sustainably expand access to affordable broadband	1.4.1. Create tailored, affordable broadband access plans for educational institutions and students to support digital learning.	MoT, TRCSL, Operators	ST	Increased rate of adoption and use of internet nationwide
	1.4.2. Expand broadband connectivity in underserved areas, through incentives for operators or use of universal service funds.	MoT, TRCSL	Ongoing	
	1.4.3. Reform the Universal Service Program to serve vulnerable and marginalized groups and rural areas with a focus on financial sustainability and cost-efficient allocation.	MoT, TRCSL	ST	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	1.4.4. Designate the telecom industry as an Essential Service, making it eligible for special benefits such as reduced electricity tariffs.	Office of the President TRCSL MoT	I	

2. CONNECTED DIGITAL GOVERNMENT				
Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
2.1. Build an Inclusive and Resilient Digital Public Infrastructure	2.1.1. Adopt a policy on Digital Public Infrastructure (DPI) and service delivery, which will require all government agencies to utilize the common digital public infrastructure for their operations, including Digital ID for authentication, e-payment gateway, and a data exchange platform.	MOT	ST	Adoption of Policy on DPI and data sharing
	2.1.2. Adopt a data sharing policy for government (including a data exchange platform and API gateway), which covers data governance, management and sharing, in line with the Lanka Interoperability framework (LIFe) and personal data protection laws and regulations, and including the implementation of the “Ask Once” principle whereby user data can be pre-populated on user sign-in.	MOT	ST	
	2.1.3. Integrate the Digital ID system across government agencies to enable users to authenticate themselves to access public services and transact with the government conveniently and securely.	MOT, other departments	MT	
	2.1.4. Enhance the digital payment gateway connecting multiple payment options (credit cards, debit cards, internet banking, QR payments, mobile payment wallets etc.), removing the need to make separate payments for different government services from social protection and pension to taxes.	MOT and MOF	MT	
	2.1.5. Develop a data exchange platform with API gateway so that agencies can access and exchange trusted user information for purposes of delivering digital services to citizens and businesses.	MOT	MT	
	2.1.6. Strengthen cybersecurity safeguards and enablers, including standards, guidelines, and information	MOT, CERT	ST	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	security audits, as well as raise awareness among public agencies of the importance of cybersecurity			
2.2. Enhance competence to leverage Cloud Computing for a Connected Digital Government	2.2.1. Upgrade and expand data hosting, cloud, and data center facilities, with a view to implementing energy-efficient and green standards and practices.	MOT	MT	Cloud first policy and data classification policy is in place
	2.2.2. Leverage commercial cloud platforms for a hybrid Lanka Government Cloud, including with disaster-recovery capabilities.	MOT	ST	
	2.2.3. Adopt a cloud-first policy for government, which will require government agencies to consider cloud-based solutions for all new IT projects, and a data classification policy that ensures that less sensitive data can be hosted on the commercial cloud.	MOT, government agencies	ST	
2.3. Roll out integrated citizen-centric services	2.3.1. Adopt a policy on citizen-centric service delivery that requires all government agencies to design and deliver government services prioritizing the needs and requirements of citizens.	MOT	ST	Number of services developed based on life-events for citizens and businesses
	2.3.2. Design and integrate citizen services and business services based on a life-events approach.	Ministries/ agencies, MOT	ST and ongoing	
	2.3.3. Strengthen citizen engagement through the implementation of integrated service delivery whereby citizens can access multiple services through a single point of contact. and providing multi-channel communication access to government services (e.g., web portals, mobile applications, social media, kiosks/physical service centers and telephone helplines) including services to address complaints.	MOT	ST	
	2.3.4. Develop implementation standards on best practices for the design of citizen-centric digital services, such as use of local languages, intuitive design and useability, accessibility, and inclusivity.	MOT	ST	
2.4. Harness Data and disruptive technologies	2.4.1. Develop an Artificial Intelligence (AI) and disruptive technology Strategy Playbook for the Public Sector, to drive the adoption of AI and other disruptive	MOT, industry representatives (SLASSCOM)	ST	Number and type of data sets published on

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
for innovative service delivery	technologies in the government, and leverage data analytics for data-driven decision making.			Data.gov.lk, per agency
	2.4.2. Establish an inter-agency working group to coordinate and oversee the use of AI and disruptive technologies across government, including the establishment of a set of standards and guidelines governing the ethical and responsible use of AI.	MOT / PMO	MT	
	2.4.3. Enhance the data.gov.lk open data portal and accelerate the release of open datasets, to boost service and product innovation across sectors, create services and spur innovation by providing firms, entrepreneurs, researchers, and other stakeholders with access to valuable data that can be used to develop new products, services, and insights.	MOT	ST	

3. CYBERSECURITY, SAFETY AND PRIVACY				
Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
3.1. Establish a policy and regulatory framework, and strong institutions to promote trust	3.1.1. Adopt cybersecurity legislation, including provisions related to the establishment of a robust institutional framework.	MoT, SL-CERT	ST	Cyber security law enacted and the Cyber Security Regulatory Authority (CSRA) established
	3.1.2. Implement the Cyber Security Policy for Government Institutions, which establishes strong commitments for implementation, related to Critical National Information Infrastructure Service Providers (CNIIs).	MoT, SL-CERT, CNIIs	MT - Ongoing	
	3.1.3. Adopt an updated national cyber security strategy that considers the latest institutional framework (subject to enactment of legislation) and future proofing the cyber environment against evolving cyber threats, and new and emerging technologies	MoT, SL-CERT	ST- Ongoing	
	3.1.4. Strengthen and capacitate the data protection authority, institutional framework, and enforcement mechanisms, including the development of industry guidelines in key sectoral areas, such as health, finance, and technology, as well as MSMEs.	DPA	MT - Ongoing	
	3.1.5. Strengthen regulations, policies, institutional frameworks, and standards for online safety. A strong focus should be placed in protecting vulnerable groups, such as children, women, people with disabilities, poor and rural communities.	Ministry of Public Security	ST	
3.2. Set up local and global partnerships to foster knowledge exchange, and create a robust cybersecurity	3.2.1. Build partnerships and foster collaboration with regional and global entities, to create a robust cybersecurity ecosystem and facilitate exchange of threat intelligence	MoT, SL-CERT	MT	Increase in number of regional and international cooperation bodies/forums/agreements on data protection/privacy
	3.2.2. Join regional and international frameworks/cooperation bodies to enforce	MoT, SL-CERT	MT	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
and data protection ecosystem	cross-border breaches, develop and improve policies, awareness, assistance			in which Sri Lanka participates
	3.2.3. Partner with industry and education sector to provide cyber security, data privacy certifications and knowledge development. This could also be done in collaboration with the private sector, academia, and civil society.	MoT, SL-CERT, DPA	MT	
3.3. Build skills and capacities, and promote awareness, to strengthen digital safeguards and mitigate cyberthreats and compromised use of data. 3.4.	3.4.1. Accelerate cyber security, awareness, education, and skills. Implement measures to educate, and build capabilities of citizens, government agencies on cyber security risks and safeguards, and develop a competent cyber security workforce to build Sri Lanka’s muscle to respond to cyber threats, including a focus on emerging technologies (AI, blockchain, quantum computing, IoT, and cloud services). This could be a part of core curriculum in schools and universities with the idea of enhancing cyber literacy and safeguards. Establishing collaboration with international certifying bodies/associations for certifications, and education of privacy professionals and conducting training programs would produce enough privacy professionals in the country (e.g., accounting, financial, economists)	MoT, SL-CERT	MT	Improve rankings in the ITU Global Cybersecurity index from 83 to 60 by 2025
	3.4.2. Implement public outreach and awareness building programs on data privacy and protection. Carry out outreach programs to educate and empower all citizens including vulnerable communities, businesses, and public entities with awareness and	DPA	MT	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	<p>knowledge of the PDPA, individual rights, and available safeguards. This will be done, at the minimum, in three common languages of Sri Lanka (Sinhala, Tamil, and English) with the idea of fostering cyber hygiene as a life skill</p>			
	<p>3.4.3. Accelerate capacity building of all businesses and public entities to comply with PDPA. Ensure Data Protection Officers (DPO) designated in entities as per the PDPA are trained to carry out their tasks, including a standardized approach for data protection management and data protection impact assessments.</p>	DPA	ST	
	<p>3.4.4. Include digital literacy, security, and safety as a core curricular program in formal education, with an aim to develop digitally competent, responsible, and empowered individuals who can navigate the digital landscape with confidence, contribute positively to society, and thrive in the digital age.</p>	Ministry of Education, MoT, SL-CERT, DPA	LT	

4. DIGITAL FINANCIAL SERVICES				
Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
4.1. Boost digital financial literacy, awareness, and adoption among individuals	4.1.1. Run financial literacy and inclusion campaigns to raise awareness about, and promote the adoption of, Digital Financial Services (DFS), with special attention given to women, youth, elderly, and vulnerable groups.	CBSL	I	Increase of digital payments made domestically as a proportion of total payments
	4.1.2. Create initiatives to incentivize individuals to opt for digital payments for goods and services and ensure that merchants and service providers have access to affordable digital payment platforms.	Government CBSL Fintechs and Banks	I	
	4.1.3. Promote the use of digital and mobile banking for the unbanked and underbanked, including access to loans and financial planning, through collaboration with financial institutions and fintech companies.	Government CBSL Fintechs and Banks	I	
	4.1.4. Promote simplified digital customer onboarding policies.	CBSL FIs	I	
4.2. Create a secure and interoperable environment for digital financial services	4.2.1. Establish a comprehensive regulatory framework for DFS that mitigates cybersecurity risks, strengthens authentication measures, and prevents fraud.	CBSL LankaPay FIs	I	Regulatory Framework for DFS published
	4.2.2. Standardize digital transaction protocols and APIs across sectors, to ensure safety, interoperability, and availability of DFS.	CBSL FIs	MT	
	4.2.3. Publish technical guidelines on interoperability between different digital payment systems, APIs, and platforms, and the implementation of relevant standards.	Government Central Bank Fis	MT	
	4.3.1. Drive the broader adoption of digital payment systems by reducing transaction	Government CBSL	ST	Increase in number of mobile money

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
4.3. Promote innovative, easy, and affordable digital financial services	fees to a level that is lower than traditional banking and payment options.			providers, including non-bank organizations
	4.3.2. Stimulate competition in the finance domain to reduce costs and spur innovation, while optimizing current payment systems for greater efficiency and cost-effectiveness.	CBSL LankaPay FIs Fintechs	ST	
	4.3.3. Create opportunities for partnerships between financial institutions, fintech firms and banking regulators to craft affordable and user-friendly digital transaction channels, including fintech sandboxes.	CBSL LankaPay FIs	ST	
	4.3.4. Enhance the fund transfer experience by simplifying user requirements, e.g., allow funds to be transferred effortlessly using unique identifiers like mobile numbers or nicknames, while being backed by rigorous account number and mobile number validation processes.	LankaPay FIs	I	
4.4. Create use-cases in the public sector to promote digital financial services.	4.4.1. Introduce digital payments for the transportation system, making it easy and efficient for bus/train commuters to pay digitally via contactless payment cards, NFC-enabled mobile apps, and other payment apps.	Ministry of Transport CBSL LankaPay FIs	ST	Pilot Roll out of digital payments platform in transport sector
	4.4.2. Create a centralized verified database of eligible welfare beneficiaries and promote the take-up of digital accounts to facilitate the disbursements of welfare benefits, especially in remote areas.	Welfare Benefits Board	ST- Ongoing	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	4.4.3. Improve digital payment facilities available at post offices and extend the use of trained agents for banking in remote areas, to encourage adoption of digital banking and payments across the country.	Sri Lanka Post FIs	ST	

5. DIGITALIZATION ACROSS SECTORS AND MSMES				
Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
5.1. Increase awareness and adoption of digital technologies among MSMEs	5.1.1. Develop and launch a digitalization awareness campaign on the benefits of digitalization for business communities, including workshops, training programs, and Proof of Concept programs for selected sectors.	Ministry of Industry (MoI), CCC	IST	100,000 MSMEs have embraced digital solutions
	5.1.2. Develop a SME digitalization Playbook, containing best practices and guidance, to help SMEs effectively integrate and utilize digital technologies in their operations. to optimize their efficiency, productivity, and competitiveness.	MoI, CCC	ST	
	5.1.3. Conduct Digital Maturity Assessments of SMEs to identify existing digital gaps, to develop targeted policies that could support their digital transformation.	MoI, CCC	ST, MT	
	5.1.4. Establish Digital Solution Centers for SMEs to assist them in navigating the complexities of digital transformation, including advisory services, and sharing of best practice.	MoT, MoI, CCC, FITIS	ST, MT	
	5.1.5. Undertake a study to assess and forecast the impact of digital transformation on the overall economy and society of Sri Lanka	MoT, MoI, CCC, FITIS	ST	
5.2. Partner with industry to promote digitalization in strategic sectors	5.2.1. Develop Digitalization Roadmaps for key sectors, with priority given to sectors that contribute significantly to GDP, job creation and export potential.	MoI, MOT, CCC, and Ministries responsible for specific sectors		Digitalization Roadmaps for selected key sectors developed and adopted (Agriculture, Tourism, Retail, Health)
	5.2.2. Establish Industry Interest Groups to promote collaboration and coordination among businesses within the same industry, and encourage larger, more tech-savvy companies to mentor or partner with smaller enterprises	MoI, CCC		
	5.2.3. Foster Public-Private Partnerships to encourage digitalization and promote joint	MoT, CCC	ST, MT	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	projects between government and industry to develop and implement digital solutions that address sector-specific challenges.			
	5.2.4. Launch an eCommerce Adoption Initiative to empower businesses in establishing an online presence, broadening their customer base, simplifying transactions, and boosting competitiveness.	MoI, CCC, FITIS	IST, ST	
5.3. Facilitate and enable digital innovation in business	5.3.1. Facilitate access to financing options for businesses, especially SMEs and MSMEs, looking to invest in digital technologies and solutions, including technology-specific loans or venture capital support.	CBSL, CCC	ST	30% SMEs possess digital skills by 2025
	5.3.2. Establish industry-specific Centers of Excellence (CoEs) that bring together technology startups, entrepreneurs, and investors to foster innovation and collaboration and develop industry ready digital solutions, through best practice sharing. These CoEs are intended to knowledge, research, and skills development hubs.	MoI, CCC, FITIS	ST, MT	
	5.3.3. Promote the use e-government services by businesses (for services ranging from online permits and licensing to procurement), to encourage digital transformation.	MoT, CCC	IST, ST	
	5.3.4. Build affordable and reliable data centers, equipped with high-speed connectivity, to respond to the storage and processing needs of businesses in all sectors of the economy.	MoT	ST	

6. SKILLS, LITERACY, INDUSTRY AND JOBS				
Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
6.1. Integrate the development of digital capabilities in the educational system	6.1.1. Adopt a structured National Digital Skills and Inclusion Strategy, that measures and responds to skills gaps, considering regional/rural/gender disparities, specifically targeting skills development among youth, elderly, women, unemployed and marginalized communities, thereby meeting industry demand as well as the country's evolving social fabric.	MoT, Ministry of Education	IST and ST	75% of the population by 2025 is digitally literate, of which 50% are women (basic literacy as per new definition)
	6.1.2. Develop, as part of the National Digital Skills and Inclusion Strategy, a Common Digital Skills Framework, which establishes a new formal definition of "digital literacy" that can be embedded in inclusion, education, and workforce policies, identifies and characterizes different levels of digital skills (from foundational to advanced, including for new and disruptive technologies such as AI), sets up a skills monitoring and evaluation framework that measures skill levels for targeted interventions, and creates standardized, industry-recognized credentials.	MoT Ministry of Education SLASSCOM	IST and ST	
	6.1.3. Integrate and prioritize the teaching of digital skills, soft skills (e.g., communication, critical thinking, creativity, collaboration) and entrepreneurial skills essential to digital transformation, across K-12, higher education, and vocational training, including strengthening teaching capacity for such skills, providing opportunities for distance and blended learning, internships, and assessing progress through periodic monitoring and evaluation.	MoT Ministry of Education	IST and ST	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	6.1.4. Reform, strengthen and scale the ICT and STEAM education ecosystem (for both vocational and higher education, across regions) to meet demand, through prioritized government investments, incentives for private education, public-private partnerships, and greater collaboration among stakeholders (government, industry, academia, and civil society).	Ministry of Education, FITIS, in collaboration with SLASSCOM	ST	
6.2. Facilitate investment, entrepreneurship, and digital business growth	6.2.1. Foster an enabling environment for the growth and proliferation of digital businesses, such as the introduction of relevant regulatory provisions to prevent anti-competitive practices, support for businesses in meeting international standards, and the equivalence of paper-based and electronic forms of exchange.	Ministry Of Industries	IST and ST	Digital (ICT-BPM) export earnings of USD \$3bn by 2025
	6.2.2. Integrate and simplify investment and transit requirements across multiple government agencies.	Ministry of Investment Promotion Ministry of Finance	ST and MT	
	6.2.3. Review (modernize) labor and immigration legislation to spur new models of work (e.g., hybrid, part-time and remote), attract talent and encourage innovation (e.g., through digital nomad/entrepreneurship visa and tax incentive programs), and adapt to a rapidly evolving technological landscape.	Ministry of Labour Ministry of Defense Ministry of Foreign Affairs	ST and MT	
	6.2.4. Establish and foster a consistent, inclusive and resilient entrepreneurship ecosystem for supporting digital startups through a coherent national entrepreneurship strategy, which includes better access to finance and venture	Ministry of Technology Ministry of Finance	ST	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	<p>capital (including micro-financing), community-driven innovation, startup incubators and accelerators, hubs and technology parks, an enabling IPR framework, collaboration with academia and industry, and supportive enablers for sole trader and self-employed/freelancer businesses in a gig economy (e.g., registration and recognition)</p>	<p>Ministry of Industries</p> <p>Ministry of Investment Promotion</p> <p>Department of Commerce</p>		
	<p>6.2.5. Provide specific support and financial incentives to women entrepreneurs, e.g., facilitated lending, mentorship networks and dedicated incubator and accelerator programs.</p>	<p>Ministry of Technology</p> <p>Ministry of Finance</p> <p>Ministry of Women, Child Affairs and Social Empowerment</p>	IST and ST	
	<p>6.2.6. Adopt responsible environmental, social and governance (ESG) practices and regulations across industry and government</p>	<p>Ministry of Technology</p> <p>Department of Commerce</p>	MT	
<p>6.3. Promote innovation and market access for the digital industry</p>	<p>6.3.1. Promote the Sri Lankan digital industry around the world (e.g., in key export markets, trade missions, bilateral/multilateral trade negotiations, start-up collaborations), with a view to positioning the country as a world-class dynamic digital hub and a viable and attractive destination for Research and Development (R&D), investment and talent.</p>	<p>Ministry of Technology</p> <p>Department of Commerce</p>	MT ad LT	<p>300 local companies have acquired at least 3 new qualified international lead annually by 2026</p>

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	6.3.2. Adopt policies that support the development of local R&D capabilities (such as tax incentives and preferred financing)	Ministry of Technology	IST and ST	
	6.3.3. Implement policies and initiatives for public procurement that diversify access to tendering opportunities for digital projects.	Ministry of Finance Ministry of Public Administration and Home Affairs	ST and MT	
	6.3.4. Create regulatory sandboxes and innovation testbeds, particularly for emerging technologies (such as AI and Internet of Things), to ease the market entry of firms, develop partnerships, strengthen competition, and inform regulation.	Ministry of Technology	ST and MT	
	6.3.5. Review and adopt legislation that can facilitate access to cross-border markets, such as allowing the entry of international payment providers for inward payments.	Ministry of Industries Department of Commerce CBSL	ST and MT	
6.4. Develop digital skills and talent for Government and Industry	6.4.1. Introduce skills-based hiring practices to bridge digital skills gaps across industry and encourage the redistribution of labour and skill sets to promote talent and create adaptable and agile workforces.	Ministry of Technology Ministry of Public Administration and Home Affairs	IST and ST	200'000-strong digital (ICT-BPM) workforce by 2025
	6.4.2. Develop an integrated Digital skills development and capacity-building strategy for a connected government, across all skills levels, which promotes recruitment and retention of digitally skilled staff, and the establishment of a Digital Academy for training and curriculum development.	Ministry of Technology Ministry of Public Administration and Home Affairs	IST and ST	

Focus Areas and Description	Key Areas for Action / Objective-Oriented	Responsibility	Timeline	KPI(s)
	6.4.3. Design and make available, in collaboration with industry, reskilling and up-skilling programs (including train-the-trainer programmes) to build a future-ready workforce and a digital economy that remains relevant and competitive.	Ministry of Technology Ministry of Public Administration and Home Affairs	IST and ST	
	6.4.4. Create specific programs and initiatives to develop digital skills (including advanced skills) among women, youth, rural, unemployed, and marginalized communities, to boost their participation in the digital economy and fill important digital skills gaps.	Ministry of Technology	IST and ST	
	6.4.5. Create a unified Jobs Portal, in collaboration with industry, to help businesses fill important digital talent gaps, promote job mobility and workforce adaptability, and enhance access for job seekers to employment opportunities in the digital space.	Ministry of Public Administration and Home Affairs Ministry of Sports and Youth Affairs Ministry of Women and Child Affairs Ministry of Labour	MT	

Annex B: Sri Lanka's Digital Landscape: Current State of Play (Background Paper)

This background paper aims to provide an overview of Sri Lanka's current digital landscape, with a focus on the key strategic areas of the national digital strategy. Each section assesses the current state of play for the relevant strategic area, citing key indicators and references, as well as important gaps and bottlenecks. The paper concludes with a section on the outlook to 2030.

Infrastructure, Connectivity and Access

The digital sector in Sri Lanka is well-established and mature. There is a high level of competitionⁱ across all services (except for DSL, where a single operator maintains a strong monopoly), with fixed infrastructure sharing implemented through commercial agreements. Since 1991, the market has been regulated by an independent and autonomous regulatory body - the Telecommunication Regulatory Commission of Sri Lanka or TRCSLⁱⁱ. The country's digital regulatory readiness has been ranked as advanced by the ITU G5 benchmark (ITU-ICT Eye, 2020).

Digital infrastructure facilities in Sri Lanka have developed relatively well over the last two decades. Both mobile voice and mobile data connections are on the rise. Operators are phasing out the Broadband 3G coverage and two mobile operators have already shut down their 3G networks based on the guideline given by TRCSL mobile coverage is available throughout the country. The regulator TRCSL has been working towards enhancing island-wide 4G coverage to ensure seamless access to digital services across the country, in collaboration with the private sector, namely through its project 'Gamata Sanniwedanaya' ('Communication to the village'): under this project, 38 tower sites were built and made operational by the end of 2022. Due to financial constraints and economic stresses, the project was delayed and is now set to be completed by 2026 (CBSL, 2023). Furthermore, 5G trials are being conducted by operators with the approval of TRC. TRCSL had expressed its intention of deploying commercial 5G services by the end of Q1 2024.

The country has four mobile service providers (Dialog Axiata, SLT Mobitel, Hutchison Telecommunications Lanka, and Bharti Airtel Lanka), and three fixed access service providers (Sri Lanka Telecom (SLT), Dialog Broadband Networks, and Lanka Bell). In addition, there is one facility-based Internet Service Provider (ISP) and three non-facility-based ISPs (TRCSL, 2023). High-speed fiber connectivity is being extended beyond urban areas to rural areas, e.g., the SLT Group recently expanded its fiber network across the country to cover a total of 65,000 km (SLT Mobitel, 2022).

Prices for internet data in Sri Lanka are relatively affordable when compared to other countries. According to a research report by Cable, a UK-based provider of broadband, TV, phone and mobile services, Sri Lanka was ranked the 8th country in terms of mobile data affordability for consumers in 2020. The average price for a gigabyte of mobile data in Sri Lanka decreased significantly by 34.6% to USD 0.51 in 2020, relative to the previous year, based on the analysis of 38 mobile data plans offered by providers in Sri Lanka (Daily Mirror, 2020a). This is largely attributed to the presence of a dynamic and competitive market.

Despite the progress made on infrastructure rollout, and the affordable retail prices, Internet usage remains limited in the country, due to low awareness, and poor digital literacy and skills: 62% of aged 15-65 Sri Lankans have heard of the internet but only 37% use it. 61% of non-internet users state that they do not know what the internet is or what it has to offer and 6% do not know how to get online or

make use of the internet. These figures are even lower for women and the elderly, and in rural, less educated, and low-income communities (LIRNEAsia, 2019a).

On average, mobile users spend USD 5.30 per month on voice, SMS, and data, or 1.6% GDP per capita (LIRNEAsia, 2019a), which is below the Broadband Commission's affordability thresholdⁱⁱⁱ. Indeed, as is the case with Internet use, affordability is not the only critical factor hindering mobile phone usage: social and cultural issues, individual needs, and level of education and literacy are even more relevant. According to a 2019 Policy Brief from LIRNEAsia, among those who do not use a mobile phone, 58% state that they do not need a mobile phone and 11% state that they do not know how to use one (LIRNEAsia, 2019b). The same study found that 47% of mobile phone users use a smartphone while the rest use either a feature phone^{iv} (7%) or a basic phone (46%). Significant access and usage disparities exist between urban and rural areas: mobile phone ownership among individuals aged 15-65 years stands at 84% in urban areas vs 77% in rural areas; Internet usage stands at 45% in urban areas vs 35% in rural areas (LIRNEAsia, 2019a); and the percentage of households with computers is 35.6% in urban areas vs only 20.3% in rural areas (Department of Census and Statistics, Sri Lanka, 2022). Gender disparities, too, persist, although these are comparatively lower than in some other South Asian countries: women lag men in terms of mobile phone ownership (72% vs. 86%), Internet use (30% vs. 45%), and social media usage (21% vs. 39%) (LIRNEAsia, 2019a).

Surveys conducted by the country's Department of Census and Statistics measure computer literacy rates, and these have risen by 5.7% from 2017 – 2021 (with the greatest increase reported among individuals proficient in the English language), reaching 34.3% in 2021 (but still higher among men, at 36.1%, than among women, at 32.6%). Computer literacy among school children and the youth population improved between 2019 and 2020. For example, the literacy rate of the age group 15-19 has jumped from 64.9% to 67.9% within a period of a year, with other adjacent age groups showing similar improvements. However, the survey's definition of computer literacy as "anybody who uses a computer on his/her own" is limited in scope: under this definition, for instance, even a 5-year-old child playing a simple computer game would be considered literate. A more comprehensive and meaningful definition of "digital literacy" would be necessary to better identify measures and initiatives that would leverage the benefits of a digital economy for all. Furthermore, the rationale behind using a population sample of aged only between 5-69 years may need to be clarified and revisited.

Skills, Literacy, Industry and Jobs

The information and communications technology (ICT) sector in Sri Lanka has experienced remarkable growth, with its contribution to the national economy increasing from USD 166 million in 2006 to USD 1.2 billion in 2021. Sri Lankan software and services companies have established a strong presence in the international market (EDB, undated). However, the Information and Communication Technology-led Business Process Outsourcing (ICT/BPO) sector faced significant challenges in 2022 due to the country's economic crisis. Economic instability led many professionals in the sector to seek better opportunities abroad, leading to a significant brain drain. If this trend continues, it could pose a severe threat to the growth of the ICT sector in Sri Lanka. Another significant hurdle during the year was the mandatory conversion of export service proceeds, which was enforced for a brief period in 2022. These unfavorable developments contributed to a negative growth in the export of computer services in 2022 compared to the previous year, further impacting the overall performance of the sector (CBSL, 2023).

The ICT-BPM (Business Process Management) workforce in Sri Lanka is undergoing deep structural changes, with digital skills in this area steadily improving. According to the latest ICT-BPM survey

released in 2019, the overall strength of the ICT-BPM workforce has grown from 82,854 in 2014 to 124,873 in 2018, or 51% over five years. Assuming the same growth rate for the next three years, the total ICT-BPM workforce has the potential to reach 207,000 by end of 2023 (a conservative estimate as the rate itself is also likely to increase annually). The survey also finds that 84% of the workforce possess at least a basic degree in either ICT or a non-ICT field, and 12% of the workforce even hold a Master's degree or above. There has also been some progress in gender equality: between 2013 and 2018, women's participation in the ICT-BPM workforce grew from 29% to 34%. BPM companies have maintained a nearly balanced gender ratio, with over 48% women participation. The survey also highlights a growing demand for ICT professionals: over 21,000 new professionals will be needed annually, compared to a supply of only 12,000 (in 2018).

Historically, state-owned non-fee-levying universities were the primary source of both ICT and non-ICT graduates. The situation has since changed, with fee-levying degree-awarding institutions now producing a higher share of ICT-trained graduates, accounting for 70% of the total, while state-owned universities contribute 30% (ICTA, 2019). Although this indicates an improvement of digital skills in the ICT-trained workforce, it also highlights the important gap between skills supply and demand. Students not selected by state or fee-levying universities often choose to pursue vocational training courses provided by state and private institutes. Technical and Vocational Education and Training (TVET) programs in Sri Lanka encompass a wide range of subjects (from agriculture to ICT) but graduates tend to be employed by local companies at salaries significantly lower than university graduates. In 2005, the National Vocational Qualification (NVQ) framework was introduced to establish a standardized system for evaluating and certifying vocational skills. In 2022, the Ministry of Education, in collaboration with ICTA and the private sector, developed the 'National Policy for Digital Transformation of Education', which just received approval from the Cabinet of Ministers (May 2023). The policy serves as a guiding framework for the advancement of digital education and the development of a skilled ICT workforce in Sri Lanka.

Sri Lanka's startup ecosystem is in its early stages and is valued at USD 228 million in 2021. Key initiatives such as the Startup Sri Lanka^v, the Startup Sri Lanka Accelerator^{vi}, and the SLASSCOM Women Technopreneurs initiative^{vii} are significantly making a value addition towards the growth of the startups in the country. In 2016, the Suhuruliya ('smart woman') program was launched to empower women by promoting entrepreneurship and digital literacy: the program provides support to women leaders in villages and women entrepreneurs (ICTA, 2018). Recognizing the importance of startups, the government has made amendments to the procurement law in 2021, allowing startups to participate in government digitization projects valued up to LKR 2 million (approximately USD 6600). However, a major impediment faced by the ecosystem is the lack of an innovative and entrepreneurial culture, where cultural norms that favor traditional jobs and joining the government service discourage young people, especially women, from engaging in entrepreneurial activities (SLASSCOM, 2021).

Connected Digital Government

Fueled by increasing data demand, Sri Lanka's digital data and services infrastructure is undergoing a rapid transformation led by both the government and the private sector. In 2022, the total monthly data usage in Sri Lanka, based on data from operators collated by the Central Bank of Sri Lanka, was between 200-240 in Peta Bytes, up from 80-160 Peta Bytes in 2020-21 (CBSL, 2023).

Although there was a surge in the use of digital services during COVID-19, this was only a temporary phenomenon. Several digital government services are already available to citizens, but are not frequently used, particularly when offline alternatives exist. Although 26% of Sri Lankan Internet users have accessed government information online, a mere 2% have interacted with government

officers through web-based platforms, and only 4% have transacted with the government (LIRNEAsia, 2019a). For example, although the online E-Revenue License (whereby vehicle owners obtain and renew vehicle licenses) has been operational since 2009), in February 2023 only 3% availed themselves of the online service (ICTA, 2023a).

The adoption of data services requires foundational identity system based on acceptance and trust. With a view to promoting trust, the government issued in May 2023 a call for proposals to develop a biometric-based Unique Digital Identity Framework (SLUDI). The primary objective is to establish a foundational ID platform that will enable the issuance of new national identity cards for over 16.5 million adult individuals in the country. The establishment of this foundational ID platform will pave the way for enhanced digital identity management and improved service delivery to the citizens of Sri Lanka, including e-KYC services for both public and private transactions.

Despite the existence of government policies such as the Digital Government/Governance Policy^{viii}, Data Sharing Policy^x, Information and Services Classification^x, and the Lanka Interoperability Framework (LIFe)^{xi}, a whole-of-government approach to the digital government agenda has not yet been adopted: state entities continue to operate within digital silos instead of adopting a cohesive ‘connected government’ framework. To address this issue and facilitate smooth transactions across various government departments, the nationwide Government Enterprise Architecture (GEA) was developed and presented to the government by the Information and Communication Technology Agency (ICTA) (Figure 02). The GEA has the potential to enable seamless and efficient data exchange between diverse government organization, facilitated by a National Data Exchange (NDX).

The government's cloud computing infrastructure, known as The Lanka Government Cloud (LGC 2.0), provides secure and reliable infrastructure facilities to the government to host any type of application or system (ICTA, 2018). Public agencies store their data largely on LGC 2.0, but private companies are making good use of international public cloud services. Sri Lanka boasts two tier 3 data centers in Colombo and would have the potential to become an international data hub. However, this would require the country to reposition itself on the international market rather than merely catering to local demand.

Digital Financial Services

During 2022, the value of credit and debit card transactions grew by 42.1% and 67.4% to USD 1.1 billion and USD 1.45 billion, respectively, while the volume and value of the cheques dropped. This is a clear indication of the increasing popularity of digital transactions (CBSL, 2023). It is not surprising therefore that mobile banking applications on offer by banks, telecom companies, and third-party providers have gained popularity for their increased convenience and security. Popular services include eZ Cash (from mobile operator Dialog Axiata) and mCash (from mobile operator SLT Mobitel). Applications that enable bill payments of utility services (water, electricity, telecom) are also becoming increasingly popular.

The Sri Lanka e-commerce sector is currently experiencing significant growth, despite being highly concentrated in Colombo. Recent reports (such as The World Bank's DE4SA Digital Economy for South Asia: Country Report Sri Lanka) indicate that the online retail industry in Sri Lanka was valued between USD 85-90 million in 2020. The current market leader, Daraz, a subsidiary of Alibaba, has established a formidable presence in Sri Lanka since its launch in 2016 (World Bank, 2021). Furthermore, various businesses, such as select supermarket chains, bookstores, and consumer goods delivery shops, offer online shopping platforms.

Sri Lanka surpasses the average financial account ownership rate in South Asia, currently standing at an impressive 88%. However, more work needs to be done to increase financial inclusion and make

sure no one is left behind. For instance, although the government established a monthly support program of LKR 5,000 (approximately USD 16) for impoverished families during COVID-19 lockdowns, many eligible families were not able to receive assistance, as, in the absence of established payment systems, distributions were carried out manually through the village government officers (or ‘grama niladharis’). There were also instances of misappropriation of funds (Daily Mirror, 2020b). Furthermore, low financial inclusion has given rise to informal channels for cross-border transactions, such as Hawala and Undiyal. The Central Bank of Sri Lanka has conducted an analysis on this matter and identified potential risks associated with informal money transfer methods, from a decrease in tax revenue to terrorist financing and money laundering. Considering these significant threats to the economy, efforts to restrict the growth of Hawala and Undiyal channels were reinforced in 2021 (CBSL, 2022).

In 2021, the government, through the Central Bank of Sri Lanka, launched its first National Financial Inclusion Strategy (NFIS), with the primary objective to enhance the accessibility, efficiency, and affordability of financial services, primarily over digital channels. To achieve these goals, the NFIS intends to facilitate financial service outreach, by increasing the number of physical banking facilities, such as branches, automated teller machines (ATMs), and Point of Sale (POS) devices, as well as by expanding online digital services. Moreover, the strategy strives to foster a heightened demand for financial services by cultivating an environment that encourages their utilization. A noteworthy aspect of the NFIS is its commitment to bridging the gender gap by empowering women entrepreneurs to promote gender equality and inclusivity (CBSL, 2022).

All electronic communications and transactions are governed by the Electronic Transactions Act No. 19 of 2006 and its Amendment Act No. 25 of 2017 (collectively referred to as the “ETA”). The ETA recognizes and facilitates the formation of contracts, the creation and exchange of data messages, electronic documents, electronic records, and other communications, in electronic form in Sri Lanka. Sri Lanka CERT |CC (www.cert.gov.lk) is Sri Lanka’s National Root Certification Authority (<https://nca.gov.lk>) and LankaSign has been appointed as the sole Certification Service Provider (ICTA, 2022).

Cybersecurity, Safety and Privacy

In a notable milestone, the government of Sri Lanka was the first country in South Asia to introduce a comprehensive legislative framework for data protection. The Personal Data Protection Act in 2022 reflects the government's commitment to ensuring the security and privacy of personal information. Under the provisions of the act, a dedicated and independent data regulator will be established to oversee and enforce compliance with data protection regulations, in close collaboration with key institutions such as the Central Bank, Securities and Exchange Commission (SEC), and the Telecommunications Regulatory Commission of Sri Lanka (TRCSL). However, at the time of writing (May 2023), the data regulator has yet to be established. It is anticipated that the government will undertake the necessary steps to establish this agency soon (Sunday Times, 2023).

In terms of cybersecurity protection, Sri Lanka has made significant strides, including the establishment of the Sri Lanka Computer Emergency Readiness Team - Coordination Centre (SLCERT|CC) as the primary agency responsible for preventing and mitigating cyber threats and incidents, in close collaboration with law enforcement agencies and other stakeholders. In addition, a Cyber Security Act is currently in the pipeline, to implement the 2019-2023 National Information and Cybersecurity Strategy, to provide for the establishment of the Digital Infrastructure Protection Agency of Sri Lanka, for the empowerment of SLCERT|CC and other key institutions, and for the protection critical information infrastructure (SLCERT|CC, 2019). The delay in passing the Cyber Security Act has resulted in a more vulnerable environment to cyber threats. According to

SLCERT|CC, reported cyber security incidents have been on the rise from 2019 to 2020. This increase is seen mainly in number of ransomware incidents (6 to 24), scams (5 to 157), financial and e-mail frauds (7 to 57), phishing (5 to 17) and server attacks (2 to 6). The year 2020 also saw 15,895 cyber security incidents related to social media (CERT, 2020). The government has recently made assurances that the Cyber Security Act will be passed by parliament before the end 2023. (Daily Mirror, 2023)

The government has also invested in training and awareness programs to educate individuals and organizations about cyber security best practices. Despite these efforts, however, cyber threats remain a concern in Sri Lanka, and continued investment and attention to cyber security is necessary to ensure the safety and security of the country's digital infrastructure. Absence of the proper security measures could result in more incidents such as the massive data loss (over 2,000 GB), at Sri Lanka's state-run medicines regulator, the National Medicines Regulatory Authority (NMRA) (Sunday Times, 2021).

Digitalization across Sectors and MSMEs

The ICT industry is currently the second largest contributor to Sri Lanka's export revenue, comprising over 500 companies and catering to a multitude of industry verticals including communications, apparel and textiles, banking financial services and insurance, healthcare, manufacturing, media, retailing, transportation, travel and leisure.

In Sri Lankan hospitals, for example, various information management systems are being used for patient and logistics management, together with different kinds of digital medical equipment. At the national and provincial levels, hospitals use the Hospital Health Information Management System (HHIMS), which significantly improves the quality of outpatient departments by providing timely access to critical clinical information, facilitating the mobilization of resources, and promoting accountability. Moreover, HHIMS offers monitoring capabilities to decision-makers, aiding in the detection and control of emerging and endemic health issues (ICTA, 2021). The country's Ministry of Health has also developed a Hospital Information Management System (HIMS), which serves as a comprehensive electronic system supporting various functions within hospitals, although private hospitals often deploy their own systems for information management purposes.

Sri Lanka's Banking and Financial sector has also embraced extensive digitization and automation in recent years to streamline operations. The Central Bank of Sri Lanka (CBSL) is currently leading the digitalization efforts of the country's payments infrastructure. The national payment system consists of two main components: the Real Time Gross Settlement (RTGS) system for high-value payments and the Common Electronic Fund Transfer Switch (CEFTS) for real-time retail transactions. To ensure seamless transactions, interoperable ATMs are managed through a Common ATM Switch (CAS), while a shared POS terminal enables the use of any debit/credit card via the Common POS Switch (CPS), regardless of the issuing bank. To further enhance financial inclusion and reduce reliance on cash, licensed financial institutions, CBSL, and LankaClear have introduced the LANKAQR code, which facilitates direct money transfers from customer accounts to service providers, offering a cost-effective digital payment solution aimed specifically at small and medium enterprises (CBSL, 2023).

In the country's education sector, ICTs are increasingly being used to cater to the needs of its 4.3 million student population. One notable example is E-thaksalawa, led by the Ministry of Education -- an online learning content management system (LCMS) that serves as a platform for various educational purposes and offering features such as online collaboration, communication tools, access to traditional and modern forms of entertainment, counseling services, and web-based learning content. The educational material in the platform is regularly updated to ensure it is aligned with the

national syllabus and made easily accessible to both students and teachers. During the COVID-19 lockdowns, this system played a vital role in ensuring uninterrupted education by enabling remote learning (Ministry of Education, Undated).

Looking Forward to 2030

In addition to the six thematic areas mentioned above, digitization has the potential to bring about long-term positive impacts in many other areas and can help achieve the Sustainable Development Goals (SDGs) from education to healthcare. Digital technologies hold great potential for disaster risk reduction: for example, cell broadcasting can be used to send out early warning messages to people in areas at risk of natural disasters. In the power and energy sector, digital transformation can help to minimize energy waste and create a more sustainable balance between power generation and environmental impact.

The advancement of emerging technologies presents a significant opportunity for Sri Lanka to achieve a sudden and substantial transformation of its digital landscape. Sri Lankan President Ranil Wickremesinghe has underscored the importance of building a robust, export-oriented economy, and emphasized the significance of fostering extensive economic and technological partnerships with neighboring countries. Furthermore, the president has disclosed that the government has allocated LKR 1 billion (USD 3.3 million) towards the development of Artificial Intelligence (AI) in 2024, with a particular emphasis on green energy and renewable energy technologies (Newswire, 2023). Meanwhile, the Ministry of Education has decided to incorporate Information Technology and Artificial Intelligence into school curricula from 2024 (Adaderana, 2023). This concerted focus is primed to be instrumental in helping the country navigate the ongoing economic challenges it confronts. It is essential that the private sector play a key role in these efforts. Furthermore, implementing measures to enhance regulatory capacity, promoting public capital investment, fostering collaboration between the private and public sectors, and striving for greater social inclusiveness are key proactive initiatives for future progress.

However, the adoption of government-wide initiatives to stimulate the digital economy is currently hindered by several challenges. One of the primary obstacles is the varying levels of maturity among governmental entities, as not all entities fully comprehend the importance of connectivity, inclusiveness, and interoperability. Another recurring issue is the disruption of implementation plans caused by changes in political leadership. Overcoming these challenges will require consistent strategy development, monitoring of progress, and strong top-level support.

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ENDNOTES

ⁱ The Fair Trading Commission Act (FTCA) was enacted in Sri Lanka in 1987, thereby introducing competition law in the country. The FTCA holds a broad purview with regards to regulating monopolies, mergers, anti-competitive practices, and shaping a national price policy. The responsibility for implementing this Act has been delegated to appropriate authorities.

ⁱⁱ Sri Lanka Telecommunication Act of 1991 created the Regulatory Authority and converted the former Department of Telecommunication to a public company.

ⁱⁱⁱ See <https://a4ai.org/affordable-internet-journey-from-1-to-5/>

^{iv} i.e., a low-priced model but with a color screen, such as Nokia 3310

^v Launched in 2015, towards fostering the entrepreneurial and innovation landscape in the country.

^{vi} Introduced in 2020, addressing the need for structured acceleration programs tailored for scale-ups.

^{vii} Launched to encourage more women entrepreneurs in the tech industry, aiming to support and catalyze the growth of women-led startups, contributing towards the industry's target of facilitating 1,000 startups by 2025.

^{viii} https://www.icta.lk/icta-assets/uploads/2022/06/Digital-Govt-Policy_Ver-4.2_Latest.pdf

^{ix} <https://www.nsd.gov.lk/national-data-sharing-policy-draft>

^x https://www.gov.lk/elaws/wordpress/wp-content/uploads/2015/08/Information_Classification_FW_Report-v3-1.pdf

^{xi} <https://www.life.gov.lk/index.php?lang=en>