



A global coalition working to make broadband affordable for all



a4ai.org
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The 2017 Affordability Report



- Annual effort to track policy & regulatory progress towards affordable internet
- Based on primary research across 58 low- and middle-income countries
- Why have some countries succeeded in improving internet access and affordability? What can other countries do to catch up quickly?

Progress toward affordable internet: *A global overview*



Public Access



Just half of the countries studied have public access policies in place that are also backed by financial support for implementation.

Resource Sharing

**ONLY
45%**

45% of countries have plans to facilitate resource sharing among telecommunications companies (e.g., sharing of infrastructure, including towers and fibre networks); even where countries have plans, implementation is rare.

Efficient Use of Spectrum



Only one in three countries have detailed, time-bound plans for making more spectrum available to meet increasing demands.

USAFs



Universal Service and Access Funds, an important tool to finance strategic investments in the sector, either don't exist or are dormant in over a third of countries.

Broadband Plans

**OUTDATED IN
41%
OF COUNTRIES**

National broadband plans to guide the policy reforms needed to achieve universal access have never been developed or are badly outdated in 41% of countries.

Failing to take needed action to provide affordable internet



Globally, policies have barely changed since 2014

<< Average increase in policy scores across all areas: 10% >>



Just 19 countries meet “1 for 2” affordability target

--1GB of mobile broadband priced at 2% or less of average monthly income --

What is the ADI?



ADI = Affordability Drivers Index

Does not directly measure affordability; Measures the extent to which countries have implemented policies to improve internet affordability



ACCESS



INFRASTRUCTURE

2017 ADI: Global rankings



ADI Top 15

ADI RANK	COUNTRY	ACCESS SCORE	INFRASTRUCTURE SCORE	ADI SCORE	
1	Colombia	85.28	58.15	72.87	
2	Mexico	87.23	53.43	71.47	
3	Peru	80.54	58.89	70.84	
4	Malaysia	85.25	49.86	68.65	
5	Costa Rica	88.36	44.30	67.40	
6	Ecuador	79.48	46.10	63.81	
7	Argentina	76.26	48.95	63.62	
8	Mauritius	78.06	43.39	61.70	
9	Turkey	71.73	48.58	61.13	
10	Brazil	68.57	51.05	60.78	
11	Morocco	72.94	40.73	57.75	
12	Jamaica	74.84	37.12	56.88	
13	Nigeria	67.66	43.70	56.58	
14	Dominican Republic	68.80	40.42	55.49	
15	Botswana	67.06	41.91	55.37	

A vertical decorative graphic on the left side of the slide, composed of several overlapping semi-circular segments in shades of blue, green, orange, and white. The segments contain various icons related to technology, communication, and social media, such as a play button, Wi-Fi symbol, heart, envelope, @ symbol, shopping cart, location pin, and a map of Africa. The bottom segment features a white silhouette of the African continent within a dotted circle.

Internet Affordability in Africa

Affordable internet in Africa



Just **5** out of **27** countries surveyed have “affordable” internet:



25%

**ONLINE
POPULATION**

(ITU, 2016)



16%

**MOBILE BROADBAND
PENETRATION**

(GSMA, 2016)



23%

**INTERNET USE
GENDER GAP**

(ITU, 2016)

Internet use across Africa in 2017



25%

**ONLINE
POPULATION**

(ITU, 2016)



16%

**MOBILE BROADBAND
PENETRATION**

(GSMA, 2016)



23%

**INTERNET USE
GENDER GAP**

(ITU, 2016)

How affordable is internet in Africa?



1GB of data costs an average citizen nearly

18%

of their monthly income

Just **5** out of **27** countries surveyed have “affordable” internet:



African countries on the 2017 ADI



Africa Top 10

ADI RANK (AFRICA)	GLOBAL ADI RANK	COUNTRY	ACCESS POLICY SCORE	INFRASTRUCTURE POLICY SCORE	ADI SCORE Scored out of a possible total of 100
1	8	Mauritius	78.06	43.39	61.70
2	11	Morocco	72.94	40.73	57.75
3	13	Nigeria	67.66	43.70	56.58
4	15	Botswana	67.06	41.91	55.37
5	18	Côte d'Ivoire	64.97	39.84	53.25
6	21	Rwanda	66.09	35.23	51.48
7	22	South Africa	61.00	39.78	51.20
8	26	Ghana	60.68	37.75	50.01
9	29	Benin	56.87	39.47	48.95
10	30	Kenya	61.55	34.53	48.82

Policy toward affordable internet



Overall, African countries score **less than 5 out of 10** in all policy areas, indicating the crucial need for improvement.

- 1 Policy & regulation for competition
- 2 Broadband policy
- 3 Public access policies & use of USAFs
- 4 Infrastructure sharing
- 5 Spectrum policy





Nigeria's Performance on the 2017 Affordability Report

Internet use in Nigeria



47%

**ONLINE
POPULATION**

(ITU, 2015)

→ **JUST 36% OF WOMEN
ARE ONLINE²**

(Web Foundation, 2015)



12%

**MOBILE
BROADBAND
PENETRATION**

(GSMA, 2015)



8%

**COST OF 1GB OF
MOBILE PREPAID
INTERNET**

(AS % OF GNI PC)

(A4AI, 2016)

Nigeria's performance on the 2017



ADI

ADI RANKING

13

ADI SCORE

56.58

ACCESS

43.70

INFRASTRUCTURE

67.66

Africa Top 10

1. Mauritius
2. Morocco
3. Nigeria
4. Botswana
5. Côte d'Ivoire
6. Rwanda
7. South Africa
8. Ghana
9. Benin
10. Kenya

Policy toward affordable internet



Overall, Nigeria scores

6.3 out of 10

in all policy areas — better than the African average, but still indicating the need for urgent action to expand access



1

Policy & regulation for competition

2

Broadband policy

3

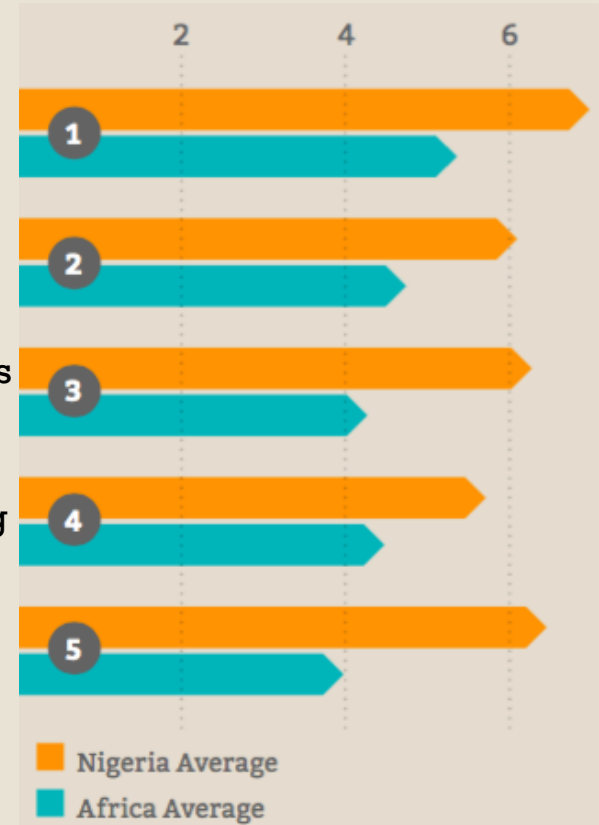
Public access policies & use of USAFs

4

Infrastructure sharing

5

Spectrum policy





Making Universal, Affordable Internet Access a Reality

What action must we take to make universal access a reality in Nigeria?



Update & revamp outdated national ICT and broadband plans

Focus on public access initiatives

Expand efforts to tackle demand-side access issues

Reduce taxes on end-user devices

Implement guidelines to encourage & incentivise infrastructure sharing

Thank you!



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