Ghana

Affordability Report Highlights 2017

Over the past decade, internet access in Ghana has improved — thanks primarily to growth in the mobile telecommunications sector. Affordable broadband access in Ghana has the capacity to further advance economic development and access to knowledge and information for all citizens.
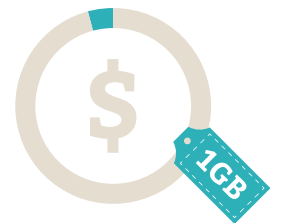
24%
ONLINE POPULATION
→ **JUST 30% OF THESE USERS ARE WOMEN[1]**
(World Bank, 2015)

16%
MOBILE BROADBAND PENETRATION
(GSMA, 2015)

4%
COST OF 1GB OF MOBILE PREPAID INTERNET (AS % OF GNI PC)
(A4AI, 2016)

Ghana's Performance on the 2017 Affordability Drivers Index

Ghana ranks 26th (out of 58 countries surveyed) on the 2017 Affordability Drivers Index (ADI). This is the same ranking Ghana earned in the 2015-16 Affordability Drivers Index[2], indicating the slow pace of policy and regulatory progress.

ADI RANK	COUNTRY	ACCESS	INFRASTRUCTURE	ADI SCORE	
26	Ghana	60.68	37.75	50.01	

1   GIFEC (2013) "Global Broadband and Innovations Program Study of the Digital Divide in Ghana: Analysis and Recommendations"
2   The ADI scores countries on a scale of 0-100 across two main policy groups: (1) infrastructure and (2) access. It does not measure affordability directly. For more information please see a4ai.org/affordability-report/report/2017

1 Policy & Regulation for Competition

Score: 5.5 (out of 10)

Ghana scores higher than the regional average for policy and regulation for competition. Ghana's regulator encourages public consultation in the development of new telecommunications projects, and also issues fines to discourage anti-competitive behaviour. Ghana's ICT Policy, developed in 2005, opened up competition in the market; however, the policy is over ten years old and contains no references to new technologies and market entrants, including TV white spaces, and over-the-top service providers. Ghana still uses a multi-class licensing framework rather than a unified or general authorisation scheme. Operators are restricted as to the services they can offer with their spectrum allocations. In 2016, the regulator opened public consultations on a unified service license; to date, the consultations have been carried out in an open and transparent manner.[3]

2 Broadband Policy

Score: 4.5

Ghana scores lower than the regional average for broadband policy. While Ghana's 2012 broadband policy does lay out clear, time-bound targets, it has not been updated since 2013.[4] Ghana could also do more to target efforts to expand affordable broadband access to women and other communities that comprise the majority of the country's offline population. Though the national ICT policy recognises ICTs as a tool for fighting gender inequality (and the 2015 national gender policy notes the gender gap in access to technology, digital knowledge, and ICT skills), Ghana's broadband policy still lacks clear targets to measure progress toward closing the digital gender gap, and data on female internet users is not regularly collected.

In 2015, President John Dramani Mahama inaugurated the Eastern Corridor Fibre Optic Backbone Infrastructure project, which aims to expand access to more of the country by deploying 800km of fibre across Ghana and facilitating network access across 120 district and municipal assemblies (and their surrounding communities). However, uptake has been slow — an issue attributed by internet service providers to high wholesale costs.[5]

3 Public Access Policies + Use of Universal Service & Access Funds

Score: 5.3

Ghana's efforts to expand public access score higher than the regional average. The government has used funds from its Universal Service and Access Fund — the Ghana Investment Fund for Electronic Communication (GIFEC) — to expand access. Funds have been used to build Community Information Centres (CIC), distribute laptops with educational content to students, and support digital skills training, including for people working in the services sector (e.g., fishermen, carpenters, mechanics, hairdressers, etc.) and for marginalised groups (e.g., prisoners). However, connectivity to the internet at many of these initiatives is still limited and the CICs face long-term sustainability issues, due to the high cost of connectivity (via V-SAT).

4 Infrastructure Sharing

Score: 5.2

Ghana scores higher than the regional average on infrastructure sharing. However, there remains room for improvement: guidelines on the sharing of fibre are non-existent, as sharing is driven by the market, and transparency of pricing remains an issue. Guidelines for tower sharing need updating. Also, a holistic strategy is needed to address excess capacity on the coast from subsea cables, as well as insufficient terrestrial fibre for last-mile connectivity.
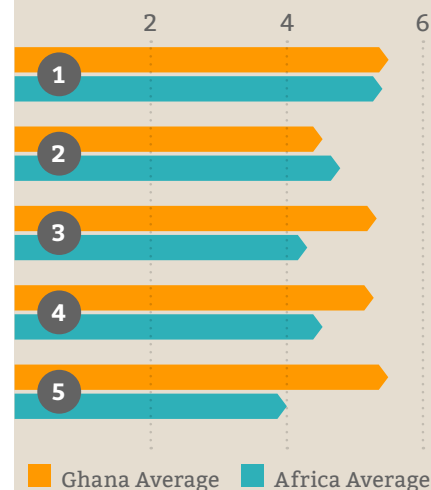
Ghana's national electricity power transmission provider, the Ghana Grid Company (GRIDCO), is leasing passive capacity[6] to mobile network operators in the country, to further support efforts on infrastructure sharing. The country's three major tower companies (ATC, Eaton, Helios) have been sharing passive infrastructure successfully since 2012. New players, including Google, have started laying fibre in selected towns, starting with Accra, on an open access basis — a development that could boost local the capacity of smaller internet service providers.

5 Spectrum Policy

Score: 5.5

Ghana scores higher than the regional average on spectrum policy. The NCA has a general strategy for managing spectrum, has made public its frequency allocation table, and has followed a competitive and transparent process in the allocation of spectrum. However, high spectrum prices have prevented most operators from buying into 4G spectrum bands. In 2015, the NCA sold 800MHz of 4G spectrum for US $67.5 million; out of the four major operators, only MTN could afford this price. In 2011, the auction of spectrum in the higher 2.6GHz band to three Broadband Wireless Access (BWA) operators failed to expand data services as needed. Ghana will need to update its spectrum policy and regulations to promote greater pricing transparency, competition, and rapid expansion of internet services to rural areas.

3   NCA has a webpage dedicated to public consultations.
4   Ghana Ministry of Communications (2012), National Broadband Policy & Implementation Strategy
5   Focus group with Telecoms Chamber (2016), operators complained that high wholesale costs by NITA were prohibitive in encouraging the leasing of fibre.
6   A4AI (2016), Ghana Infrastructure Sharing Report Public Consultation

GHANA AVERAGE V. AFRICA AVERAGE

■ Ghana Average   ■ Africa Average

Recommendations for Improving Internet Affordability and Access in Ghana

1. **Update and revamp outdated national ICT and broadband plans.** These updated plans should include bold, smart targets for bringing women and other marginalised groups online, while incorporating good practices.

2. **Focus on public access initiatives.** Build upon the success of GIFEC's previous efforts to expand the provision of free or subsidised internet services and public WiFi, particularly in under-served areas, ideally through more public-private partnerships.

3. **Expand efforts to tackle demand-side access issues.** Encourage the development of local and locally relevant digital content, and improve digital literacy through trainings and incentives to develop technology and innovation hubs.

4. **Reduce taxes on end-user devices**, such as smartphones and computers.

5. **Implement guidelines to encourage and incentivise infrastructure sharing**, open access, and reduced bureaucratic bottlenecks (e.g., streamline permit process across multiple agencies).