A global coalition
working to
make broadband
affordable for all

A4AI ALLIANCE FOR
AFFORDABLE INTERNET

www.a4ai.org

Africa
Regional Snapshot

2017 Affordability Report

The Affordability Report is an annual report published by the **Alliance for Affordable Internet** that examines the policy and regulatory frameworks that have allowed some countries to make broadband internet access more affordable, accessible, and universal, and what others can do to catch up quickly. The 2017 Affordability Report explores the policy progress made across 58 low- and middle-income countries.
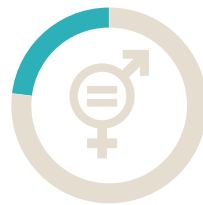
In Africa…

25%
ONLINE POPULATION
(ITU, 2016)

16%
MOBILE BROADBAND PENETRATION
(GSMA, 2016)

23%
INTERNET USE GENDER GAP
(ITU, 2016)

Africa 2017 ADI Rankings

The **Affordability Drivers Index (ADI)** does not provide a direct measure of affordability; rather, it scores all 58 countries based on an in-depth analysis of communications infrastructure and access and affordability indicators. Good scores on the ADI are likely to lead to lower prices.

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
11	31	Namibia	61.29	33.66	48.24
12	32	Uganda	58.57	35.77	47.93
13	34	Tunisia	56.58	36.37	47.23
14	36	Egypt	52.78	35.93	45.07
15	37	Zambia	57.06	31.41	44.95
16	38	Gambia	53.07	35.38	44.94
17	39	Tanzania	53.43	32.64	43.73
18	44	Mali	49.25	31.07	40.81
19	45	Mozambique	47.47	31.58	40.16
20	47	Senegal	49.63	27.26	39.07
21	50	Zimbabwe	47.26	21.56	34.97
22	51	Malawi	40.07	28.10	34.64
23	52	Cameroon	41.03	25.33	33.71
24	53	Sudan	45.21	18.08	32.16
25	54	Burkina Faso	34.76	23.66	29.68
26	55	Ethiopia	41.39	2.34	22.22
27	56	Sierra Leone	29.70	13.13	21.76

What is affordable internet?

"1 for 2"
1GB of mobile prepaid data for 2% or less of average monthly income

How affordable is access in Africa?

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

Mauritius
Morocco
Tunisia
Egypt
Sudan

1GB

1GB of data costs an average citizen nearly
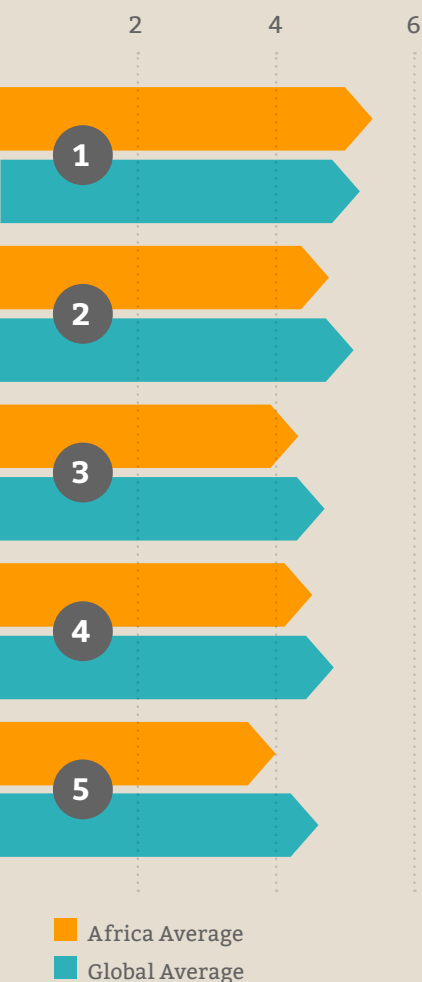
18%
of their monthly income

Countries are scored out of 10, to gauge their performance in implementation of policy measures to improve affordability.

Overall, African countries score

less than 5 out of 10

in all policy areas, indicating the crucial need for improvement.

Africa Policy Scores
v. Global Policy Scores

2   4   6

1

2

3

4

5

■ Africa Average
■ Global Average

Progressing Towards Affordability

1 Policy & Regulation for Competition

Regulatory independence, transparent and evidence-based decision-making, simplified licensing regimes

African countries score higher than the global average

✔ Some countries, including Mozambique and Botswana, have introduced new policies to streamline licensing regimes and to discourage anti-competitive behaviour

✘ Complicated licensing regimes in a number of other countries increase operator costs, while monopolistic practices *discourage* new market entrants (e.g., Cameroon, Ethiopia)

2 Broadband Policy

Lays out clear, time-bound targets and interventions for reducing costs and increasing access

African countries score lower than the global average

✔ A number of countries have broadband plans with detailed, time-bound targets, including Mauritius and Nigeria; 19 out of 27 countries have approved broadband plans in the last five years

✘ Majority of countries surveyed have vague broadband plans with no clear targets; a few have no plan at all

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

Support for and use of public access programmes and Universal Service and Access Funds (USAFs) to expand access, support local content development, and increase digital skills

African countries score lower than the global average

✔ 60% of countries surveyed (16 out of 27) have active USAFs and countries like Morocco and Rwanda have introduced public access programmes

✘ Only 4 countries have public access policies in place with sufficient resources committed for implementation

4 Infrastructure Sharing

Government actively encourages and facilitates resource sharing across operators

African countries score lower than the global average

✔ Regulators in various countries, including Nigeria and Kenya, are encouraging infrastructure sharing among telecommunications companies; other countries, like Ghana, have seen actors across different sectors start to share infrastructure

✘ On the whole, infrastructure sharing is still under-utilised and not frequently incentivised by government

5 Spectrum Policy

Detailed plan outlining the timely release of sufficient spectrum to meet projected increases in demand

African countries score lower than the global average

✔ Countries like Benin and Botswana are starting to open up access to additional spectrum for broadband

✘ Most countries have failed to introduce any policy changes to increase or encourage spectrum availability or release; a number of countries continue to have significant amounts of unused spectrum allocated to companies or agencies that are not providing mobile service

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