A global coalition working to make broadband affordable for all

A4AI ALLIANCE FOR AFFORDABLE INTERNET

Africa

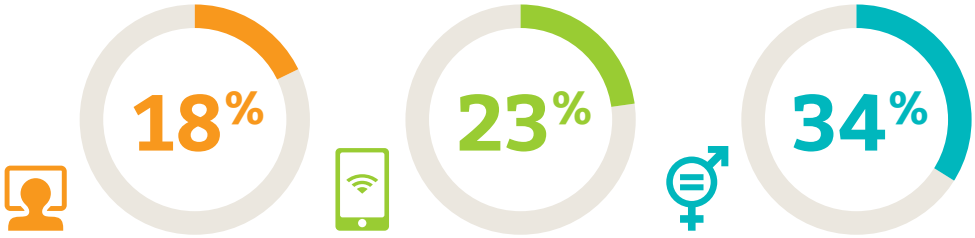
Regional Snapshot

2018 Affordability Report

www.a4ai.org

The Affordability Report is an annual report published by the **Alliance for Affordable Internet**. It examines the policy and regulatory frameworks that have allowed some countries to make broadband internet access more affordable, accessible, and universal and seeks to understand what others can do to catch up quickly. The 2018 Affordability Report explores the policy progress made across 61 low- and middle-income countries and 29 countries in Africa.

In Africa...



ONLINE POPULATION
(ITU, 2017)

MOBILE BROADBAND PENETRATION
(A4AI/GSMA, 2018)

INTERNET USE GENDER GAP
(ITU, 2017)

Africa 2018 ADI Rankings

The **Affordability Drivers Index (ADI)** scores and ranks all 61 countries based on an in-depth analysis of communications infrastructure and access and affordability indicators.

ADI RANK (AFRICA)		GLOBAL ADI RANK	COUNTRY	ACCESS SCORE	INFRASTRUCTURE SCORE	ADI SCORE (OUT OF 100)
1	●	12	Mauritius	76.7	45.8	64.8
2	▲ 1	14	Morocco	69.8	48.7	62.8
3	▼ 1	18	Nigeria	65.1	44.7	58.2
4	▲ 2	19	South Africa	66.8	43.0	58.2
5	▲ 2	20	Ghana	62.6	47.0	58.1
6	▼ 2	22	Botswana	64.6	43.8	57.4
7	▲ 6	23	Tunisia	60.2	47.1	56.8
8	▼ 3	26	Côte d'Ivoire	64.5	39.8	55.2
9	▲ 9	27	Senegal	55.7	47.6	54.7
10	▼ 2	28	Rwanda	58.6	43.9	54.3
11	▼ 1	29	Benin	54.1	46.9	53.5
12	▼ 1	33	Egypt	55.1	40.9	50.9
13	▲ 1	35	Tanzania	52.7	42.1	50.2
14	▼ 2	36	Uganda	54.8	39.6	50.0
15	▼ 6	37	Kenya	48.9	45.5	50.0
16	●	43	Mozambique	46.5	38.9	45.2
17	▲ 2	44	Namibia	38.7	43.5	43.5
18	▲ 2	45	Mali	39.2	40.4	42.2
19	▼ 2	46	Zambia	44.9	33.9	41.7
20	▼ 5	48	The Gambia	44.6	32.0	40.6
21	▲ 4	49	Burkina Faso	40.1	35.5	40.0
22	●	50	Cameroon	35.0	39.1	39.3
23	●	52	Zimbabwe	44.1	21.9	34.9
24	▼ 3	53	Sudan	41.5	24.2	34.8
25	▼ 1	54	Malawi	36.8	27.7	34.2
26	●	56	Liberia	22.1	17.7	21.1
27	▲ 1	57	Sierra Leone	19.4	11.1	16.2
28	▼ 1	58	Congo, DR	16.2	9.8	13.7
29	●	60	Ethiopia	10.6	3.7	7.6

● = No Change | ▲ 1 = Up from previous year | ▼ 1 = Down from previous year

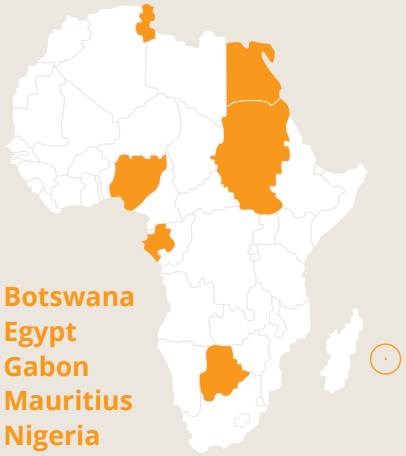
What is affordable internet?

"1 for 2"

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

How affordable is access in Africa?

7 out of **45** countries surveyed have "affordable" internet:



Botswana
Egypt
Gabon
Mauritius
Nigeria
Sudan
Tunisia

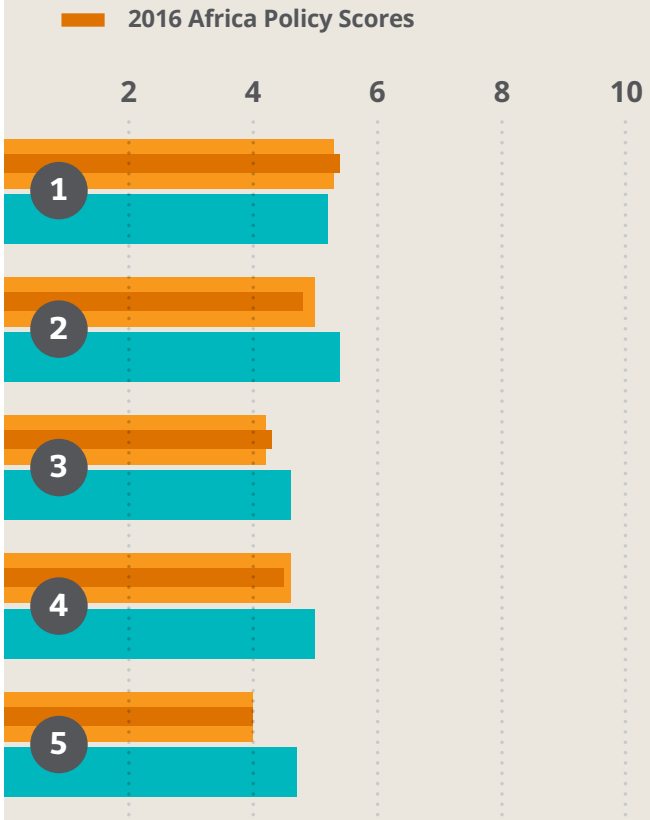
1GB of data costs an average citizen just over

9%

of their monthly income

Progressing Towards Affordability

Africa Policy Scores (■) v. Global Policy Scores (■)



1 Regulatory Environment

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

African countries score around the same as the global average

- ✔ Regional leaders for Africa – such as Botswana, Namibia, and Mauritius – benefit from established regulatory histories with open, participatory, and evidence-based practices. Zambia also took a key step in 2017 with the transition to a new converged licencing framework.
- ✖ Worryingly, a number of African countries have implemented or considered politically-driven, regressive taxation regimes particularly on social media that negatively impact consumers, undermine investor confidence, and impede digital development.

2 Broadband Strategy

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 across Francophone Africa are demonstrating clear leadership in recent years in setting relevant and effective broadband strategies. Senegal's new National Broadband Plan sets clear access targets and investment commitments. The Smart Mauritius policy has guided multi-year sector development since 2015, and Benin has seen continued success with its public-private partnerships as part of the PDI2T project.
- ✖ While some countries have started the process to update and develop new broadband policies, they are doing so at a slow pace. For example, in Liberia, Namibia and Malawi, new broadband and ICT policies have started, but have yet to transition from draft to implementation. Kenya is updating its broadband strategy, while Nigeria has started revising its broadband strategy with stakeholders including A4AI.

3 Universal & Public Access

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

- ✔ Leadership on universal access comes from strong, independent USAFs with regular and transparent reporting. Countries like Morocco and Rwanda earn high marks in the region. Others have promising investment initiatives across the continent.
- ✖ Many challenges exist in the effective deployment of USAFs: reliance on the state monopoly operator in Ethiopia; a lack of political will in the Gambia and DRC despite legal authority for universal service; and USAF operations stuck in judicial battles in Namibia. In Mozambique, A4AI is working with the Universal Access and Service Fund to develop its 5 year Strategic Plan.

4 Infrastructure Sharing

Government actively encourages and facilitates resource sharing across operators

African countries score lower than the global average

- ✔ Leaders in infrastructure sharing like Morocco, Rwanda, and Nigeria benefit from a combination of cooperative practices and political will. In other countries, such as Uganda, the new policy on infrastructure sharing shows promising potential.
- ✖ For some countries, the absence of adequately clear and respected zoning and infrastructure sharing policies frustrate network development. Opportunities exist for sharing with other sectors, but governments must lead with forward looking policy.

5 Spectrum Management

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

African countries score lower than the global average

- ✔ African countries have demonstrated leadership on spectrum management in a variety of ways. Authorities in Nigeria and Mali have supported market growth with by making more spectrum available to meet demand. In Morocco, public auctions and rules for unlicensed spectrum use support innovation.
- ✖ Spectrum mismanagement can hinder the ability for market competition to deliver more affordable prices to consumers. In South Africa and Sierra Leone, operators' inability to reliably obtain spectrum for mobile broadband limits their capacity. Operators in countries like Liberia and the DRC have to deal with vague and unclear standards for spectrum allocation.

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