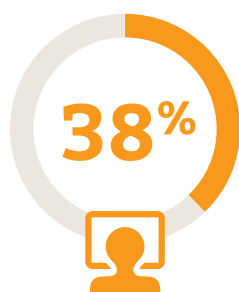




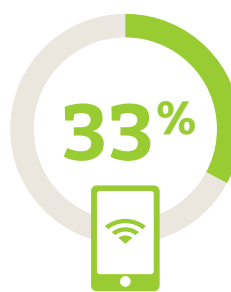
Ghana

Affordability Report Highlights 2018

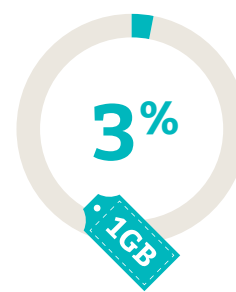
Data costs in Ghana remains above the '1 for 2' affordability threshold, meaning that internet access remains unaffordable for millions of Ghanaians who could benefit the most from accessing the world's knowledge, staying connected with family and friends, and using online services. Ghanaian officials need to urgently address an overhaul of the country's ICT strategy, setting the country's vision as a digital nation for the future.



ONLINE POPULATION
(ITU, 2017)



MOBILE BROADBAND PENETRATION
(A4AI/GSMA, 2018)



COST OF 1GB OF MOBILE PREPAID INTERNET
(AS % OF GNI/CAPITA)
(A4AI, 2016)



Africa



A global coalition working to make broadband affordable for all

www.a4ai.org

Ghana's Performance on the 2018 Affordability Drivers Index

Ghana ranks 20th (out of 61 countries surveyed) on the 2018 Affordability Drivers Index (ADI). This is two places higher compared to what Ghana earned in the revised 2017 Affordability Drivers Index, indicating small but consistent steps towards positive broadband policy change.

ADI RANK	COUNTRY	ACCESS	INFRASTRUCTURE	ADI SCORE (OUT OF 100)
20	Ghana	62.64	47.03	58.08

1 Regulatory Environment

Score: 5.25 / 10

Ghana has two licensing frameworks: an individual licence, which is operator- and service-specific; and a class licence, which authorizes a whole class of service providers to provide a specific service or operate a particular network. The National Communications Authority (NCA) encourages stakeholder consultation prior to regulatory decision making and imposes penalties for violations of license conditions and/or regulatory requirements. Competition has been promoted openly since Ghana's ICT Policy was first developed in 2005, although it has not been updated since. The NCA has often led new regulations in the absence of updated policy.

2 Broadband Strategy

Score: 5 / 10

The National Broadband and Implementation Strategy (2012) set targets for the affordability of broadband services. It includes connectivity targets of at least 40% of households in the country, including those in underserved areas to broadband access by 2015 and universal penetration of 90% by 2020. However, these milestones are yet to be achieved. The Ministry announced the formulation of a new Digital Strategy Policy in August 2018; however, the process is yet to start.

3 Universal & Public Access

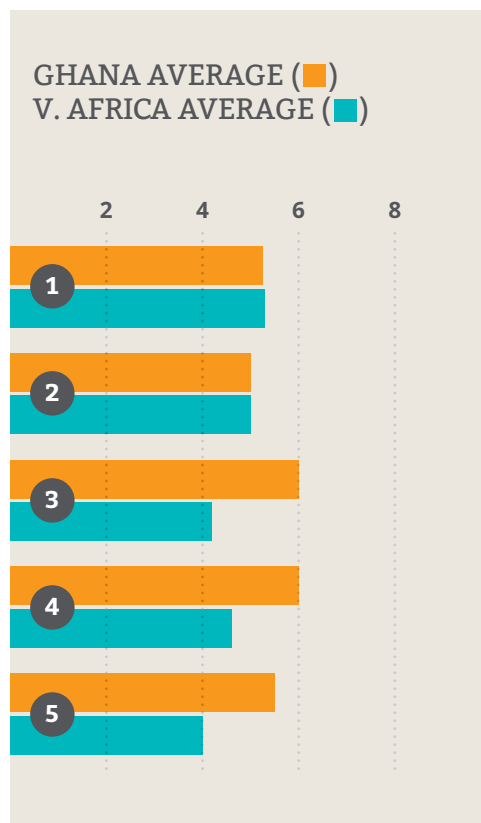
Score: 6 / 10

The Electronic Communication Act (ECA) established the Ghana Investment Fund for Electronic Communications (GIFEC), a universal service fund. GIFEC has invested in its Digital For Inclusion programme, which includes, among other things, mobile financial services via a digital payment platform. The program has reserved 60% of the local agent positions that sell services for the platform for women. Overall, however, the Fund needs to focus more on broadband infrastructure and services.

4 Infrastructure Sharing

Score: 6 / 10

There are some guidelines regarding infrastructure sharing (e.g., the NCA's Guidelines for the Deployment of Communication Towers). While these aim to simplify the process for the building and co-location of towers, this is not the case in practice with complaints of high costs. Further streamlining is required with more active support from the government to cover other aspects, particularly fibre and last mile connectivity solutions.



5 Spectrum Management

Score: 5.5 / 10

Although without a clear, holistic spectrum allocation plan, the National Telecommunications Policy (2005) states that the Authority shall periodically review the allocation of spectrum as market and technology evolve and shall reassign them in accordance with international standards and interest of Ghana's telecommunications industry and consumers. Spectrum is assigned via auctions or tenders at a fixed price and based on stated criteria. Most recently, Vodafone Ghana was awarded blocks in the 800Mhz band, which they plan to use to offer 4G services. Untapped opportunities exist in spectrum refarming and sharing and in unlicensed spectrum guidance.

Recommendations

- 1. Establish a coordinated policy approach and better regulatory alignment** among the National Information Technology Agency (NITA), GIFEC, and NCA. The Digital Development Strategy is a great opportunity for such synergy. It must incorporate incentives for investment in broadband beyond mobile, gender targets, prudent spectrum management, demand-side solutions, and subsidized or low-cost devices.
- 2. Promote infrastructure sharing** within the ICT sector and with other sectors. Regulator could do more to incentivise sharing with clear regulations to support market efforts,¹ including harmonising standards across sectors, facilitating rights of way at more economically viable rates, and implementing a dig-once policy.
- 3. Expand public access opportunities** using innovative sustainable investment models such as the GIFEC tri-partnership model for middle and direct last-mile broadband connections to premises such as libraries and schools, where demand is highest, and rural communities.
- 4. Prioritise and implement demand-side initiatives to stimulate broadband use**, starting with digital skills and relevant content development programs in existing Community Information Centres (CICs) and educational institutions, and include subsidies for broadband access to ICT hubs to boost innovation.
- 5. Prioritise closing the digital gender gap** by building and expanding upon existing efforts to introduce girls to technology beyond coding and advance their digital skills development. All sector policies should have ambitious but implementable gender targets.

¹ See page 39 of Ghana Infrastructure Sharing and Open Access Study 2017 <https://a4ai.org/research/ghana-infrastructure-sharing-and-open-access-study/>