A global coalition working to make broadband affordable for all

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…

<table>
<thead>
<tr>
<th>25%</th>
<th>ONLINE POPULATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>16%</td>
<td>MOBILE BROADBAND PENETRATION</td>
</tr>
<tr>
<td>23%</td>
<td>INTERNET USE GENDER GAP</td>
</tr>
</tbody>
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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.

**Africa 2017 ADI Rankings**

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Progressing Towards Affordability

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

**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)

**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

**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

**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

**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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