2017 Affordability Report

A global coalition working to make broadband affordable for all

a4ai.org
@a4a_internet
The 2017 Affordability Report

- Annual effort to track policy & regulatory progress towards affordable internet
- Based on primary research across 58 low- and middle-income countries
- Why have some countries succeeded in improving internet access and affordability? What can other countries do to catch up quickly?
Progress toward affordable internet: 
A global overview

Public Access

Only 45% of countries studied have public access policies in place that are also backed by financial support for implementation.

Resource Sharing

45% of countries have plans to facilitate resource sharing among telecommunications companies (e.g., sharing of infrastructure, including towers and fibre networks); even where countries have plans, implementation is rare.

Efficient Use of Spectrum

Only one in three countries have detailed, time-bound plans for making more spectrum available to meet increasing demands.

USAFs

Universal Service and Access Funds, an important tool to finance strategic investments in the sector, either don’t exist or are dormant in over a third of countries.

Broadband Plans

National broadband plans to guide the policy reforms needed to achieve universal access have never been developed or are badly outdated in 41% of countries.
Failing to take needed action to provide affordable internet

Globally, policies have barely changed since 2014
<< Average increase in policy scores across all areas: 10% >>

Just 19 countries meet “1 for 2” affordability target

--1GB of mobile broadband priced at 2% or less of average monthly income --
What is the ADI?

ADI = Affordability Drivers Index

Does not directly measure affordability; Measures the extent to which countries have implemented policies to improve internet affordability

ACCESS

INFRASTRUCTURE
# 2017 ADI: Global rankings

## ADI Top 15

<table>
<thead>
<tr>
<th>ADI RANK</th>
<th>COUNTRY</th>
<th>ACCESS SCORE</th>
<th>INFRASTRUCTURE SCORE</th>
<th>ADI SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Colombia</td>
<td>85.28</td>
<td>58.15</td>
<td>72.87</td>
</tr>
<tr>
<td>2</td>
<td>Mexico</td>
<td>87.23</td>
<td>53.43</td>
<td>71.47</td>
</tr>
<tr>
<td>3</td>
<td>Peru</td>
<td>80.54</td>
<td>58.89</td>
<td>70.84</td>
</tr>
<tr>
<td>4</td>
<td>Malaysia</td>
<td>85.25</td>
<td>49.86</td>
<td>68.65</td>
</tr>
<tr>
<td>5</td>
<td>Costa Rica</td>
<td>88.36</td>
<td>44.30</td>
<td>67.40</td>
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<tr>
<td>6</td>
<td>Ecuador</td>
<td>79.48</td>
<td>46.10</td>
<td>63.81</td>
</tr>
<tr>
<td>7</td>
<td>Argentina</td>
<td>76.26</td>
<td>48.95</td>
<td>63.62</td>
</tr>
<tr>
<td>8</td>
<td>Mauritius</td>
<td>78.06</td>
<td>43.39</td>
<td>61.70</td>
</tr>
<tr>
<td>9</td>
<td>Turkey</td>
<td>71.73</td>
<td>48.58</td>
<td>61.13</td>
</tr>
<tr>
<td>10</td>
<td>Brazil</td>
<td>68.57</td>
<td>51.05</td>
<td>60.78</td>
</tr>
<tr>
<td>11</td>
<td>Morocco</td>
<td>72.94</td>
<td>40.73</td>
<td>57.75</td>
</tr>
<tr>
<td>12</td>
<td>Jamaica</td>
<td>74.84</td>
<td>37.12</td>
<td>56.88</td>
</tr>
<tr>
<td>13</td>
<td>Nigeria</td>
<td>67.66</td>
<td>43.70</td>
<td>56.58</td>
</tr>
<tr>
<td>14</td>
<td>Dominican Republic</td>
<td>68.80</td>
<td>40.42</td>
<td>55.49</td>
</tr>
<tr>
<td>15</td>
<td>Botswana</td>
<td>67.06</td>
<td>41.91</td>
<td>55.37</td>
</tr>
</tbody>
</table>
Internet Affordability in Africa
Affordable internet in Africa

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

- **25%**
  - Online Population
  - (ITU, 2016)

- **16%**
  - Mobile Broadband Penetration
  - (GSMA, 2016)

- **23%**
  - Internet Use Gender Gap
  - (ITU, 2016)

Mauritius
Morocco
Tunisia
Egypt
Sudan
Internet use across Africa in 2017

- **25%**
  - Online Population
  - (ITU, 2016)

- **16%**
  - Mobile Broadband Penetration
  - (GSMA, 2016)

- **23%**
  - Internet Use Gender Gap
  - (ITU, 2016)
How affordable is internet in Africa?

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

Just 5 out of 27 countries surveyed have “affordable” internet:

- Mauritius
- Morocco
- Tunisia
- Egypt
- Sudan
# African countries on the 2017 ADI

## Africa Top 10

<table>
<thead>
<tr>
<th>ADI RANK (AFRICA)</th>
<th>GLOBAL ADI RANK</th>
<th>COUNTRY</th>
<th>ACCESS POLICY SCORE</th>
<th>INFRASTRUCTURE POLICY SCORE</th>
<th>ADI SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>8</td>
<td>Mauritius</td>
<td>78.06</td>
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<td>4</td>
<td>15</td>
<td>Botswana</td>
<td>67.06</td>
<td>41.91</td>
<td>55.37</td>
</tr>
<tr>
<td>5</td>
<td>18</td>
<td>Côte d'Ivoire</td>
<td>64.97</td>
<td>39.84</td>
<td>53.25</td>
</tr>
<tr>
<td>6</td>
<td>21</td>
<td>Rwanda</td>
<td>66.09</td>
<td>35.23</td>
<td>51.48</td>
</tr>
<tr>
<td>7</td>
<td>22</td>
<td>South Africa</td>
<td>61.00</td>
<td>39.78</td>
<td>51.20</td>
</tr>
<tr>
<td>8</td>
<td>26</td>
<td>Ghana</td>
<td>60.68</td>
<td>37.75</td>
<td>50.01</td>
</tr>
<tr>
<td>9</td>
<td>29</td>
<td>Benin</td>
<td>56.87</td>
<td>39.47</td>
<td>48.95</td>
</tr>
<tr>
<td>10</td>
<td>30</td>
<td>Kenya</td>
<td>61.55</td>
<td>34.53</td>
<td>48.82</td>
</tr>
</tbody>
</table>
Policy toward affordable internet

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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Policy Area</th>
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<tbody>
<tr>
<td>1</td>
<td>Policy &amp; regulation for competition</td>
</tr>
<tr>
<td>2</td>
<td>Broadband policy</td>
</tr>
<tr>
<td>3</td>
<td>Public access policies &amp; use of USAFs</td>
</tr>
<tr>
<td>4</td>
<td>Infrastructure sharing</td>
</tr>
<tr>
<td>5</td>
<td>Spectrum policy</td>
</tr>
</tbody>
</table>

[Chart showing comparison between Africa Average and Global Average]
Ghana’s Performance on the 2017 Affordability Report
Internet use in Ghana

24% ONLINE POPULATION

16% MOBILE BROADBAND PENETRATION

4% COST OF 1GB OF MOBILE PREPAID INTERNET

→ JUST 30% OF THESE USERS ARE WOMEN

(World Bank, 2015)

(GSMA, 2015)

(A4AI, 2016)
Ghana’s performance on the 2017 ADI

**ADI RANKING**: 26

**ADI SCORE**: 50.01

**Access**

**Infrastructure**: 37.75

Africa Top 10

1. Mauritius
1. Morocco
1. Nigeria
1. Botswana
1. Côte d’Ivoire
1. Rwanda
1. South Africa
1. Ghana
1. Benin
1. Kenya
Policy toward affordable internet

Overall, Ghana scores **5.2 out of 10** in all policy areas — better than the African average, but still indicating the need for urgent action to expand access.

1. Policy & regulation for competition
2. Broadband policy
3. Public access policies & use of USAFs
4. Infrastructure sharing
5. Spectrum policy
Making Universal, Affordable Internet Access a Reality
What action must we take to make universal access a reality in Ghana?

- **Update & revamp outdated national ICT and broadband plans**
- **Focus on public access initiatives**
- **Expand efforts to tackle demand-side access issues**
- **Reduce taxes on end-user devices**
- **Implement guidelines to encourage & incentivise infrastructure sharing**
Thank you!

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