Nigeria has made some progress over the last few years and now meets the 1 for 2 broadband affordability target, however it still has some way to go to ensure affordable internet access for a majority of its citizens. Though the government and regulator have introduced much needed reforms, further efforts to reduce the cost of broadband for all – especially for the significant number of citizens living under the poverty line – are needed.

**Nigeria’s Performance on the 2018 Affordability Drivers Index**

Nigeria ranks 18th (out of 61 countries surveyed) on the 2018 Affordability Drivers Index (ADI). This is seven places lower compared to what Nigeria earned in the revised 2017 Affordability Drivers Index, indicating regulatory limitations in supporting a free and competitive mobile broadband market.
1 Regulatory Environment

Score: 6.25 / 10

Under the Nigerian Communications Act 2003 (NCA), there are two broad licensing frameworks for telecommunications service: 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. Both the Nigerian Communications Commission (NCC) and the National Broadcasting Commission (NBC) regularly engage in public consultations on all major regulatory issues. The regulator could increase its use of evidence to inform its decision-making, including the use of regulatory impact assessments where appropriate.

2 Broadband Strategy

Score: 6.75 / 10

Nigeria’s National Broadband Plan 2013-2018 contains detailed targets for reducing broadband costs and increasing penetration and lays out parameters to monitor progress. Nigeria’s USF recently subsidised the Backbone Transmission Infrastructure Project (BTRAIN) to facilitate the connection of rural and semi-urban areas to the national transmission backbone infrastructure and a Rural Broadband Initiative to expand broadband services in these communities as well. However, the government’s funding and investment plans to support the implementation of the National Broadband Plan (with the exception of the country’s public fund for service provision) are not well defined.

3 Universal & Public Access

Score: 6.33 / 10

The Universal Service Provision (USP) Fund encourages the installation of network facilities and the provision of application services in unserved and underserved areas. Projects include new base stations, School Knowledge Centres, Community Resource Centres, and inter-university connectivity. Additionally, to increase broadband penetration, the government will establish Centres for Community Access using public properties like post offices, schools computer labs, and local government headquarters across the country. Lastly, there is the Community Broadcast Centre (CBC) which is expected to provide a last mile broadband access to communities, homes, offices and schools using both fixed and wireless broadband.

4 Infrastructure Sharing

Score: 6 / 10

The Guidelines on Collocation and Infrastructure Sharing only authorize the sharing of passive elements of a mobile network. Active elements such as complete network structures, switching centers, radio network controllers, and base stations are currently not covered by the guidelines and point to an area for improvement. Implementation of the NEC-approved harmonisation of Rights of Way (ROW) for fibre deployment has been beset with challenges as states continue to set aside agreed rates. NCC’s licensed infrastructure companies offer opportunity for expanding fibre networks on an open access basis; however, some have failed to deliver as planned.

5 Spectrum Management

Score: 5.5 / 10

The National Broadband Plan sets a timeline in which additional spectrum will be released for mobile broadband and LTE services, although these deadlines have not yet been met. In addition, the digital switchover process has been delayed three times in 2012, 2015 and 2017 respectively, causing some uncertainty as to when the national switchover will actually happen. Spectrum allocations have been regularly done via auctions using clear guidelines established by the NCC. Other methods of frequency assignment exist depending on the level of competition, availability of spectrum and the aggregate demand at any point in time.