



REPORT ON THE GSMA WEST AFRICA MEMBERS MEETING

**Tuesday 07 June 2016, Radisson Blu Hotel, Dakar, SENEGAL
15:00 – 18:00**

Attendees

Operators	
Country	Name & Title
Burkina Faso	Telecel Faso – Philippe Goagba, GM Carrier Relations Wholesales and Roaming Telecel Faso – Djelika Bilgho, Roaming & Interconnexion Assistant
Nigeria	Airtel - Shola Adeyemi, Director Legal & Regulatory Affairs Etisalat – Chidozie Arinze, Economic & Technical Regulation
Senegal	Tigo - Pape Ndiaye KA, Regulatory & Government Relations Manager
Niger	Airtel - Aichatou Abdou, Legal Manager
Cape Verde	CV Movel - Marlene Centeio, International Roaming Manager CV Movel - Debora Carvalho, Commercial Director CV Telecom - Mario Ivo Fonseca, Interconnection Department
Ghana	Vodafone - David Jones Amoah, Regulatory & Government Affairs Manager
Sierra Leone	Airtel - Haffie Haffner, Legal & Regulatory Head
Kenya/Africa	Airtel Africa– Alice Kariuki, Group Regulatory Affairs Director
GSMA	
	Mortimer Hope, Director Africa Aurelie Adam Soule, Senior Policy Manager Africa

1. Welcome and Opening Remarks

Mr. Hope opened the meeting and welcomed participants. He recalled the purpose of the meeting which was to update our members on GSMA's programmes and activities in the region and to discuss regional/specific policy areas in which operators require support from the GSMA.

2. CPROG Governance

Mr. Hope explained the role of the GSMA as the global industry association which helps shape the future of the mobile industry and provided an overview of the GSMA programmes. He



further explained the governance scheme of the Chief Policy Regulatory Officer Group (CPROG) of the GSMA. In particular, the CPROG SSA represents interests of mobile operators in Sub Saharan Africa on the policy & regulatory agenda of the GSMA Board and gives strategic direction of GSMA in Sub Saharan Africa.

3. Update on GSMA Africa programmes

Security and SIM Registration

Ms. Aurelie Adam Soule proceeded to the presentation on the GSMA updated white paper on mandatory SIM Registration (publicly available on GSMA website) and on the study on proportionality of fines related to non-compliance with SIM registration policies that the GSMA conducted to respond to the recent emergence of SIM registration issues in SSA, Latam and Asia. She provided an overview of the implementation best practices, advocacy messages and recommendations (six recommendations) for Governments as proposed in the GSMA study, highlighting that the report is for use by GSMA member operators only.

Mr Shola Adeyemi (Airtel Nigeria) called on the GSMA to be more forceful with the industry messaging towards Policy-makers and Regulators while acknowledging that mobile operators should also be more challenging regarding national regulations in order to anticipate risk of non-compliance.

Taxation

Ms. Aurelie Adam Soule presented the activity related to sector specific taxation, updated the meeting on the GSMA tax studies and engagement for FY15/16 and provided an overview of the GSMA's approach to tax advocacy for FY16/17. She provided an overview of taxation campaign and the advocacy status in Nigeria and updated the meeting on GSMA engagement with international institutions – such as The World Bank – with the objective to influence governments to lower industry taxes to enable greater long term economic contribution.

She further informed the meeting that the priority countries for tax studies during 2016 is yet to be approved by the CPROG.

Spectrum Advocacy Review: Agenda for 2016

Mr Hope updated the group on the outcomes of the WRC-15 which has allocated three globally harmonized frequency bands to the mobile service and one further new band in large parts of Africa. He indicated that the next steps after WRC-15 is to start planning to make these new frequency bands available for mobile use (definition of frequency arrangements, advocacy towards publication of spectrum roadmaps by Policy-makers and Regulators, etc).

As regards to market engagement, Mr Hope stressed that the various bands allocated to mobile services are at different stages of implementation depending on spectrum policies status in the various markets. He updated the meeting on spectrum advocacy activities in Nigeria and Senegal, as well as on the main outcomes of recent (sub-) regional meetings of ECOWAS and ATU.

Finally he stressed the need for the various operators to start planning to take an active role in the preparation for WRC-19 by not only being part of national delegations and taking responsibilities but also by sending representatives to the regional and sub-regional meetings, as well as the ITU WRC itself. Therefore there is a need for operators to plan for this early enough (budget).



The meeting further discussed spectrum trading which is supported and appears to be considered by operators attending the meeting as a way to ensure efficient access and use of mobile spectrum.

Regulatory Modernisation

Ms. Aurelie Adam Soule updated the group on the objectives of the regulatory modernisation programme including the approach to developing actionable market-specific recommendations based on the global principles for a new regulatory framework and the proposed work items on competition policy.

She further presented the background information on the regulatory environment in Nigeria and the rationale in proposing Nigeria as a priority market for Regulatory Modernisation along with the proposed key Policy asks to be further discussed and confirmed with the local operators in Nigeria.

Finally she informed the meeting that the CPROG SSA decided to identify a second (French speaking) market for Regulatory Modernisation and indicated that consultation to decide on the elected country is still on going.

Mr Arinze (Etisalat Nigeria) informed the meeting that there were currently two Competition Policy Bills under consideration by the National Assembly in Nigeria and Public Hearing had been held two weeks ago.

Capacity Building activities

Mr Hope presented the GSMA capacity building activities in (West) Africa. Several CB courses have been delivered by the GSMA on Spectrum Management, Mobile and Socio economic development, Mobile Money and Child Online Protection to several bodies including the Ecole Superieure Multinationale des Telecommunications, an ITU Center of Excellence in Senegal with which the GSMA has recently signed a MoU.

Mobile Money

Ms Aurelie Adam Soule outlined the Mobile Money fast growing trend in West Africa and stressed the fact that West Africa is also leading the way with Mobile Money remittance. She updated the meeting on the GSMA Mobile Money activities in West Africa (Benin, Cote d'Ivoire, Ghana, Nigeria, Mali) and provided an overview of the objective and key focus areas of the GSMA Mobile Money programme as well as planned areas of activities over the next few months (implementation of MM code of conduct, testing of new business models, etc), stressing that interested Members can reach out to the GSMA team for more information and support.

4. Priority topics for Policy-Makers in West Africa

Mr Hope indicated that the GSMA has noticed a rise of three main topics related activities in West Africa, namely International Mobile Roaming (IMR), Quality of Service (QoS) and Rural Connectivity (RC).



On IMR:

- The WATRA have launched an expression of interest to consulting firms to submit proposals for a roaming study. This is likely to lead to consultations with operators and to a validation workshop.
- From GSMA contacts with the sub-regional organisations, there is strong expectation (from ECOWAS) that operators will actively contribute directly to this process. In fact, MNOs are invited to participate in and present at a WATRA workshop on roaming to be held in Senegal on 12-15 July 2016.
- ECOWAS is also considering to undertake a study on roaming tariffs in West Africa - the World Bank has issued the EOI for the same.

On QoS:

Mr Hope updated the meeting on recent QoS related activities and recalled that so far the CPROG SSA decided that QoS KPIs proposed by the GSMA was for internal use only as there is a risk that Regulators can use it against operators.

Regarding QoS matters, the meeting further discussed the relevance of defining QoS KPIs taking into account whether they are related to urban or rural areas.

On RC:

Mr Hope emphasized the role of the GSMA in educating policymakers and regulators on the commercial challenges of rural network coverage expansion. He also stressed the need for the industry to address the complaints from regulators that the mobile industry is not addressing lack of connectivity in rural areas and indicated how the GSMA can provide appropriate support to Members through internal resources and studies.

5. Regional Engagement Plan

Ms Aurelie Adam Soule outlined the sub-regional engagement plan across West Africa with ECOWAS, WATRA and the Alliance for Affordable Internet.

- In West Africa, GSMA has liaised with the ECOWAS secretariat in view of their upcoming Ministers meeting to be held 20-24 June 2016. The GSMA has been invited to deliver a presentation during the ECOWAS ICT Experts meeting and to attend the ICT Ministers meeting as an observer.
- The GSMA is also making arrangement to organize a spectrum valuation workshop with WATRA.
- At a pan-African level, the next ATU meeting (WRC-19 Preparatory meeting) will take place on 1-5 August 2016 in Cameroon and the GSMA is making arrangement to attend and deliver a presentation.
- Finally, it was indicated that the Mobile 360 Africa in Tanzania (26-28 July) would provide a good platform for a SIM Registration roundtable discussion between industry and policy-makers.



6. Thought Leadership – GSMA resources and events

Ms Aurelie Adam Soule provided an overview of the GSMA resources and stressed that most of them are publicly available on the GSMA website www.gsma.com :

- GSMA Mobile Policy Handbook (English & French versions)
- GSMA Competition Policy Handbook (English & French versions)
- Various reports on policy matters (Taxation, Spectrum, Digital Inclusion, USF, etc)

She further outlined the GSMA Infrastructure Economics Toolkit which ultimate objective is to connect the unconnected population by building and actively supporting local operators' collaborations in the implementation of economically efficient model for the provision of mobile broadband access to the underserved, identifying and advocating regulatory adjustments and providing best practices to the industry.

Finally she highlighted the GSMA flagship event namely Mobile World Congress and associated SSA Ministerial Programme. She further invited member operators to also attend and participate in Mobile 360 Africa which next edition is to be held in Dar Es Salaam on 26-28 July 2016 and which will gather operators, government officials, ICT, finance, NGO and media leaders across Sub-Saharan Africa and beyond to evaluate how the mobile industry can elevate access across the region with focus on digital inclusion, network coverage and customers' quality of experience.

7. AOB, Action Points and next meeting

Ms. Haffie Haffner (Airtel Sierra Leone) informed the meeting of a one of its kind situation current on going in Sierra Leone where Policy-makers and Regulator refuse to engage with mobile operators' association, reason being that licences had been delivered to distinct mobile operators.

Ms. Aichatou Abdou (Airtel Niger) also reported that following recent directives given to mobile operators by the Regulator, the Government of Niger has indicated that they are to sue mobile operators operating in Niger. It was further agreed that the GSMA will take the matter separately with member operators in Niger to assess support needed.

The meeting further discussed usefulness of the meeting and relevance to organize the same next year. Feedbacks from participants were that the meeting succeeded in providing relevant and useful information about GSMA work and activities in the West African region and that a similar meeting next year will be most welcomed. This could again be along sides with West Africa Com.

Mr Hope and Ms Aurelie Adam Soule gave a summary of the action points from the meeting.

	Action	Responsibility	Due date
1	Send link to the GSMA updated white paper on mandatory SIM Registration	Aurelie Adam Soule	24 June 2016
2	Send the GSMA briefing document on Proportionality of fines related to non-compliance with SIM registration policies (for internal use only)	Aurelie Adam Soule	24 June 2016
3	Send GSMA Capacity Building course catalogue	Aurelie Adam Soule	24 June 2016



4	Take actions to be part of national delegation in charge of WRC-19 preparation and take responsibilities	All member operators	30 July 2016
5	Budget to send representatives to the WRC in 2019	All member operators	30 June 2018
6	Participate in and present at a WATRA workshop on roaming to be held in Senegal on 12-15 July 2016	All member operators	15 July 2016
7	Circulate GSMA policy position on QoS to all participants (for internal use only)	Aurelie Adam Soule	24 June 2016
8	Study the relevance of defining distinct QoS KPIs based on the considered areas (urban vs rural)	Aurelie Adam Soule	30 July 2016
9	Attend and participate in Mobile 360 Africa, Dar Es Salaam, 26-28 July 2016 http://www.mobile360series.com/africa/	All member operators	28 July 2016
10	Liaise with local mobile operators in Niger to assess support needed as regard to the Government's plan to sue them	Aurelie Adam Soule	24 June 2016
11	Organize the 2017 GSMA West Africa Members meeting	Aurelie Adam Soule	TBD

There being no other business, Mr Hope thanked all and declared the meeting closed.