GSMA

Gabon digital economy

Policy reforms that will drive Gabon's digital future



Contents

Executive Summary 3

1. National development objectives and strategy 9

- 1.1. Gabon's economic development strategy 10
- 1.2. National digitalisation strategy 17
- 1.3. Digitalisation of healthcare 21
- 1.4. Digitalisation of agriculture and timber industry 21
- 1.5. Digital government 22
- 1.6. Digital innovation and entrepreneurship 25

2. Current status of digitalisation in Gabon 26

- 2.1. Gabonese mobile telecoms market 27
- 2.2. Broadband adoption and network coverage 28
- 2.3. Prices and affordability 40
- 2.4. Mobile financial services 43
- 2.5. Conclusions on digital adoption in Gabon 49

3. Policy recommendations 51

- 3.1. Reducing the cost of network expansion and upgrades 54
- 3.2. Updating the sector tax framework to improve access and affordability 59
- 3.3. Improving device affordability through lower taxes and financing 63
- 3.4. Increasing demand for digital services 64

4. Impact analysis 71

- 4.1. Scenario impact 73
- 4.2. Combined impact 73
- 4.3. The impact on government revenues 75

5. Conclusion 77

Annex 1 – Methodology for estimating broadband adoption 78

Annex 2 – Impact analysis modelling methodology 80

Annex 3 – Institutional leadership for the recommendations 81

Annex 4 – Skills for the future 82

Glossary 83

Executive Summary

The opportunity in brief: Gabon has built broadband networks, the task now is to get people using them productively. A targeted reform package – lower sector-specific charges, VAT relief on entry-level smartphones, cheaper power for rural sites, a published spectrum roadmap and faster delivery of digital public services – would add around 180,000 mobile internet users by 2031 and create around 10,000 jobs. It would pay for itself by 2028 and return a net XAF 63 billion a year to public revenues by 2031. Every year of delay postpones these gains.

Digitalisation is central to Gabon's strategy for inclusive and sustainable development. Gabon 2050 and the Plan National de Croissance et de Développement 2026–2030 put it at the centre of two national priorities: modernising the state and diversifying an economy that remains heavily dependent on petroleum and other extractive industries. Mobile broadband can improve access to public services and extend economic opportunity to households that have not yet shared equally in Gabon's resource wealth.

Gabon begins from a strong connectivity base. Unique mobile internet subscriber penetration reached 40% of the population in 2026, well above the regional average of 22%, while 4G networks cover 95% of the population. Mobile money is also widely used: 62% of adults have a mobile money account, compared with fewer than 25% who have a traditional bank account. These foundations give Gabon the opportunity to accelerate digitalisation more quickly than other countries in the region.

The central challenge is to turn coverage into broad and productive use. In 2026, the mobile internet usage gap was 57%, meaning that more than half of the population lived within mobile broadband coverage but did not use it. The remaining coverage gap is concentrated in rural areas, where 4G coverage is 70% and new sites are costly to build and operate. Gabon therefore faces a dual task: completing coverage in commercially difficult areas while increasing adoption among people who are already covered.

The adoption challenge is shaped by Gabon's highly urbanised population and unequal distribution of income. Only 8% of the population lives in rural areas, and more poor households are in small and medium-sized towns than in the largest cities. Among adults in the poorest 40% of households, 83% have a personal mobile phone but only about half have a smartphone. The priority group is lower-income households that cannot yet afford, or do not yet see sufficient value in, moving to mobile broadband.
To overcome the adoption challenge, policies need to address both affordability and the lack of demand for mobile broadband.

Affordability depends on the total cost of mobile ownership, particularly the upfront cost of an entry-level smartphone. Gabon's high average income makes mobile services appear relatively affordable in national comparisons, but this masks the burden on lower-income households. Smartphones are subject to 18% VAT while laptop and desktop computers benefit from a reduced rate of 10%. Reducing taxes on entry-level smartphones and supporting financing designed around the circumstances of lower-income users would help more people migrate from basic phones to mobile broadband.

Digital public services can give these households a stronger reason to make that transition. The government has already prioritised the digitalisation of public administration and introduced systems for tax, customs, health, identity and payments. The next step is to accelerate the delivery of high-value services and design them around the needs of lower-income users in small and medium-sized towns. Making routine transactions simpler and more transparent starting with health and education — would improve public administration and give people a reason to get online. Digital literacy programmes need to be delivered alongside them so that the availability of services translates into regular use.

Higher digital adoption would also support economic diversification. Smartphones reduce the cost of operating a business, allow small firms to reach customers and suppliers, and extend access to payments, finance and information. This can strengthen the non-oil private sector, create jobs and broaden the tax base. Digital government can also reduce leakage and improve revenue collection.

Mobile money in Gabon must move towards everyday digital payments model. Widespread merchant acceptance would extend the tax base by bringing informal businesses into the formal economy. Government should spearhead this initiative to drive the transition. Such an approach has been very successful in other African countries. In 2025, the Ethiopian government mandated that all public offices accept payment from every licensed digital payment provider. Ethio Telecom's telebirr reached 60.6 million customers in the 2025–2026 financial year.[1]

The recommendations in this report address four linked challenges: the cost of extending and upgrading networks; the high and unpredictable burden of sector-specific taxes and fees; the affordability of entry-level smartphones; and insufficient demand for digital services. They will be most effective if implemented as a package. Lower network and device costs will have less effect without useful services and digital skills, while demand-side measures cannot reach people who lack coverage or an affordable device.

Some of the most valuable reforms cost nothing. Issuing the overdue implementing decrees for the electronic communications (2018), electronic transactions (2021) and cybersecurity (2023) laws, publishing a spectrum roadmap and publishing Universal Service Fund accounts would give investors the certainty they need at no cost to the budget. These can be done in the first six months.

Gabon's mobile broadband market in 2026

40%
mobile internet users

95%
4G coverage

57%
usage gap

62%
adults have mobile money account

Impact by 2031

XAF 63 billion
annual net gain

+180,000
additional mobile broadband users

[1] "Data overtakes voice as top earner for Ethio Telecom", The Reporter (Ethiopia), 2026; "Ethiopia mandates government offices to accept digital payments", Techpoint Africa, June 2025.

Policy challenge 1
Network expansion, reliable power and 5G require sustained investment

Recommendation 1.1: Issue outstanding sector legal and regulatory documents
Lack of legal and regulatory clarity is an obstacle to sector development. As an immediate action to be implemented within the first 6 months, Secretariat General of Government / MENDI should consider:

- Issuing outstanding implementing decrees for the electronic communications (2018), electronic transactions (2021) and cybersecurity (2023) laws,
- Publishing a spectrum roadmap,
- Publishing Universal Service Fund accounts.

Recommendation 1.2: Support the connection of new mobile sites to the electricity grid
Around 70% of existing mobile sites are connected to the electricity grid, but 68% of the sites required to extend coverage are more than 1 km from it. Connecting new sites where grid extension is economically viable would reduce operating costs, improve the business case for rural expansion and help keep mobile internet affordable.

Recommendation 1.3: Support the operating costs of off-grid sites needed to extend coverage
Even with better grid access, some sites required to reach remote and sparsely populated areas will not generate enough revenue to be financially sustainable. Targeted public support for the operating costs of these sites will be needed to close the remaining coverage gap. Support should be directed to sites that are necessary for coverage but cannot be sustained on commercial terms.

Recommendation 1.4: Develop a clear spectrum roadmap and predictable regulatory fees
The government should publish a spectrum roadmap covering frequency bands, assignment timelines and a framework for stable licence and fee conditions. The roadmap should be developed in consultation with industry stakeholders in a way that reflects both the government's digital strategy and the economic realities of the market.

The 5G spectrum roadmap should include expected timing for the release of spectrum in low, mid and high bands or mmWave bands. 100 MHz of contiguous mid-band spectrum per operator should be awarded. Low-band spectrum capacity should be increased by assigning all available bands (including 700 MHz), and making 2 GHz of mid-band spectrum available by 2030 (e.g. through 3500 MHz and 6 GHz assignments). The government should consult with industry over the need for mmWave to cover busy hotspots, allowing for an initial assignment of 800 MHz per operator.

As part of the review of the spectrum assignment process, the approach to setting spectrum fees should also be considered with a view to optimising investment and the affordability of services.

Policy challenge 2
The mobile sector-specific tax and fee burden is high and unpredictable

Recommendation 2.1: Reduce sector-specific charges from 11% to 3% of gross revenue
The Universal Service Fund contribution, regulatory fee and spectrum fee together amount to 11% of gross revenue. These charges reduce the resources available for network investment and ultimately feed through into higher consumer prices. Reducing them to 3% would lower consumer prices and increase operators' capacity to invest. A phased reduction tied to the Finance Law cycle should be implemented. The final proposed rates are:

Charge	Current rate	Proposed rate
Universal Service Fund contribution	2% of gross revenue	0.5%
Regulatory fee	3% of gross revenue	0.5%
Spectrum fee, including 5G	6% of gross revenue on average	2%
Total	**11%**	**3%**

Recommendation 2.2: Simplify the wider fee regime and reduce charges that discourage network investment
Operators face additional charges imposed by different authorities, including an annual fee of XAF 3 million per tower and a copyright and data-protection fee of XAF 1,000 per subscriber. The government should rationalise and reduce these charges, clarify which authority may impose them, and make the overall regime more transparent and predictable. Regulatory certainty is essential for long-term network planning.

Recommendation 2.3: Exempt strategic digital infrastructure, including data centres, from VAT
The reduced VAT rate for computers demonstrates that tax policy can be used to support strategic digital priorities. The government should identify other infrastructure that is critical to digitalisation, including data centres, and exempt it from VAT.

Policy challenge 3
Smartphone affordability remains a barrier for lower-income households

Recommendation 3.1: Reduce VAT for entry-level smartphones
Smartphones are the main means of accessing digital services, particularly for lower-income households, yet they face higher VAT than laptop and desktop computers. The government should reduce VAT on a clearly defined category of entry-level smartphones so that relief is concentrated on the devices most relevant to first-time mobile internet users.

Recommendation 3.2: Promote flexible financing for entry-level smartphones
Lower prices alone will not remove the upfront affordability barrier for many households. The government should work with mobile operators and consumer-finance providers to develop financing schemes for entry-level devices with flexible repayment arrangements that take account of users' concerns about debt and fixed financial commitments. Schemes should be designed specifically for lower-income households in small and medium-sized towns.

Policy challenge 4
Digitalisation of the public administration is needed to aid its efficiency as well as to promote adoption of mobile broadband

Recommendation 4.1: Accelerate digital government programmes
Accelerating the rate of digitalisation is prioritised in the national transition strategy. The government has demonstrated its commitment to digitalisation of public administration. The success of implementation will depend on the quality of delivery, as well as the adoption rate. If services are available, but citizens do not use them, the benefit to society will be limited. It is therefore important that the e-government platforms respond to citizens' particular needs. The government should carry through the e-government plans set out under the Digital Gabon project and accelerate their delivery. Priority should go to the services most used by lower-income households in small and medium-sized towns, such as education, healthcare and administrative procedures.

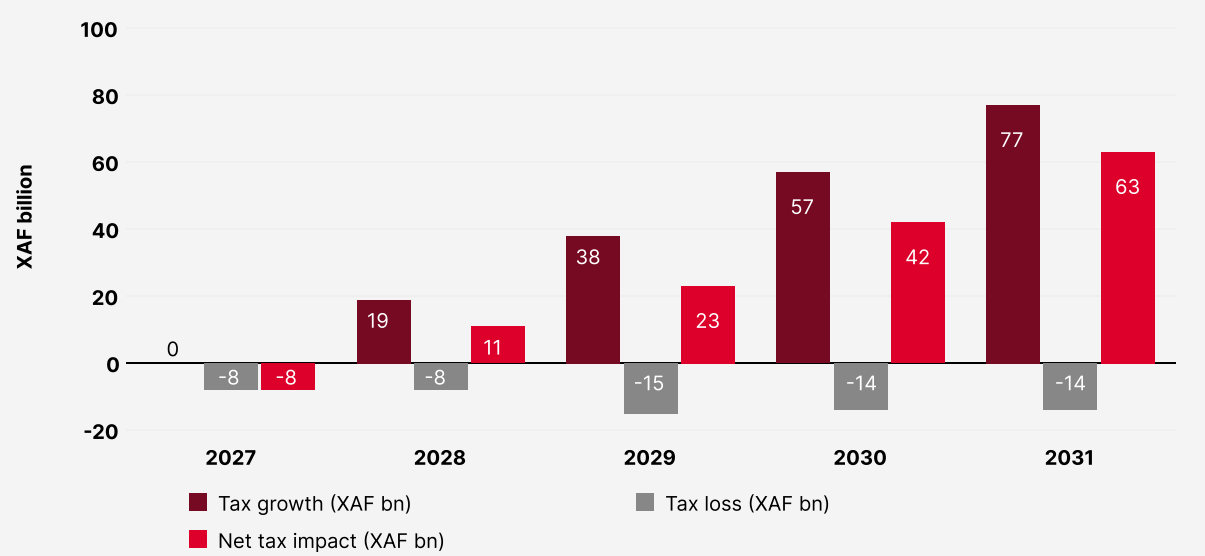
Recommendation 4.2: Promote digital literacy, particularly for marginalised communities
Analysis suggests that more of the underserved, poorer population lives in small and medium-sized towns than in the largest cities. Digital literacy programmes should be directed at this group and at other marginalised communities, so that people have the skills to use a smartphone, digital financial services and online public services. They should be delivered through public-private partnerships, for example with young people trained as digital ambassadors in underserved areas.

Recommendation 4.3: Move mobile money from transfers to everyday payments
The government should make digital payments the default for transactions with the state and in the wider economy. It should accept mobile money for all public services through MaDigiPaie; pay suppliers, allowances and social transfers into accounts and wallets; work with BEAC, COBAC and operators on an interoperable merchant payment standard on GIMACPAY; and keep the tax regime technology-neutral and free of transaction-specific levies. A national digital payments roadmap, with targets for merchant acceptance, should be agreed with industry within 12 months.

Implemented together, the modelled policy measures would materially accelerate mobile internet adoption. Unique mobile internet subscribers are projected to increase from 1.06 million in 2026 to 1.48 million in 2031, growth of approximately 40%, compared with 22% growth to 1.30 million in the business-as-usual case. The package would therefore add around 180,000 subscribers above the base case and reduce the usage gap by a further six percentage points, to 48% by 2031. Demand-stimulation measures have the largest standalone effect, confirming the importance of useful public services and digital skills alongside coverage and affordability reforms.

The modelled reforms would increase public sector revenue. Reductions in the taxes imposed on the sector will be more than offset by increases in tax revenues from other sources. The net loss of tax revenue is estimated at approximately XAF 8 billion in the first year. However, higher mobile internet adoption would increase economic activity, broaden the tax base and improve digital revenue collection. GDP growth due to digitalisation is projected to reach XAF 420 billion, or 2.8% of 2031 GDP of XAF 15 trillion. These gains are projected to outweigh the initial loss by 2028, with the net positive annual impact on government revenue reaching XAF 63 billion by 2031 (Figure 1).[2]

Figure 1
Impact of the modelled policy measures on government revenue, 2026–2031.



Source: GSMA Analysis.

Gabon has already built much of the infrastructure and institutional foundation needed for rapid digitalisation. The priority now is to complete coverage where commercial investment alone is insufficient and deliver public services that people value and have the skills to use.

Together, these measures would make digitalisation a stronger driver of economic diversification and growth.

[2] XAF 63 billion is 0.5% of Gabon's 2025 GDP of 12.6 trillion and 4% of Gabon's 2025 non-oil tax revenue. (WEO Database, IMF, July 2026. "Loi n°041/2025 du 29 décembre 2025 déterminant les ressources et les charges de l'État pour l'année 2026", Journal officiel de la République Gabonaise, No. 96 Quater, Spécial, 30 December 2025).

1. National development objectives and strategy



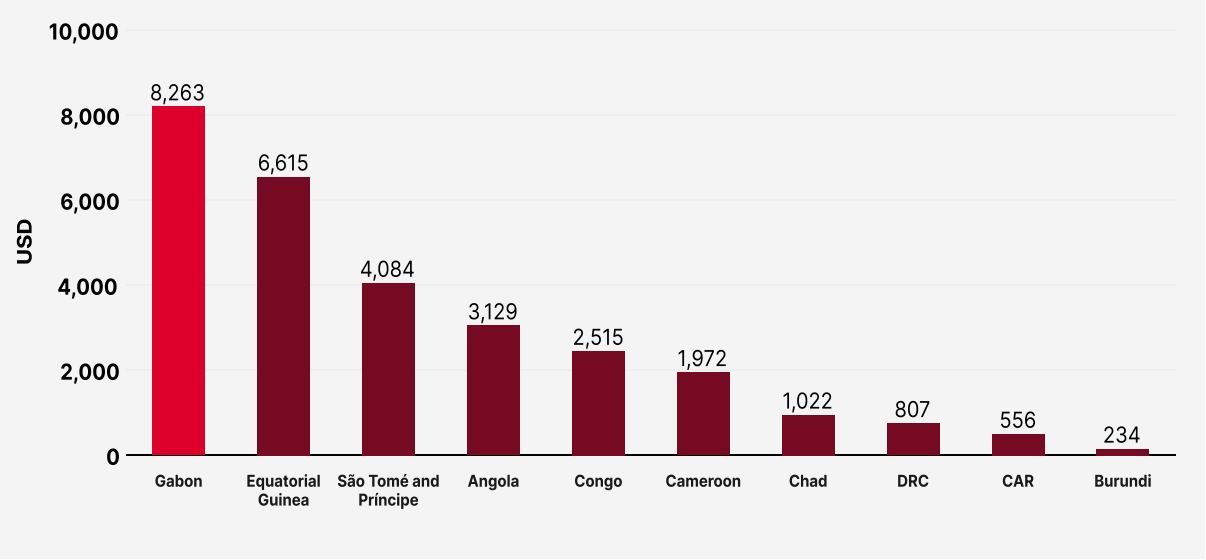
1. National development objectives and strategy

1.1. Gabon's economic development strategy

Gabon is one of the wealthiest countries in Africa thanks to its rich endowment of natural resources. It is classified as an upper-middle-income country and has one of the highest levels of GDP per capita in sub-Saharan Africa. Its wealth stems primarily from its petroleum, timber and manganese reserves. Gabon's location on the west coast of Africa provides direct access to the major shipping routes on which its exports depend.

Income inequality is pronounced. High GDP per capita does not mean all Gabonese people benefit equally. An estimated 32% of Gabonese people lived on less than the poverty line of USD 8.30 per day in 2024.[3]

Figure 2
GDP per capita (USD), Central African countries, 2025.



Source: World Development Indicators, 2025.

[3] Figure in 2021 purchasing power parity (PPP) terms. Poverty & Equity Brief Gabon, World Bank, October 2026.

Table 1
Gabon, key economic indicators, 2025.

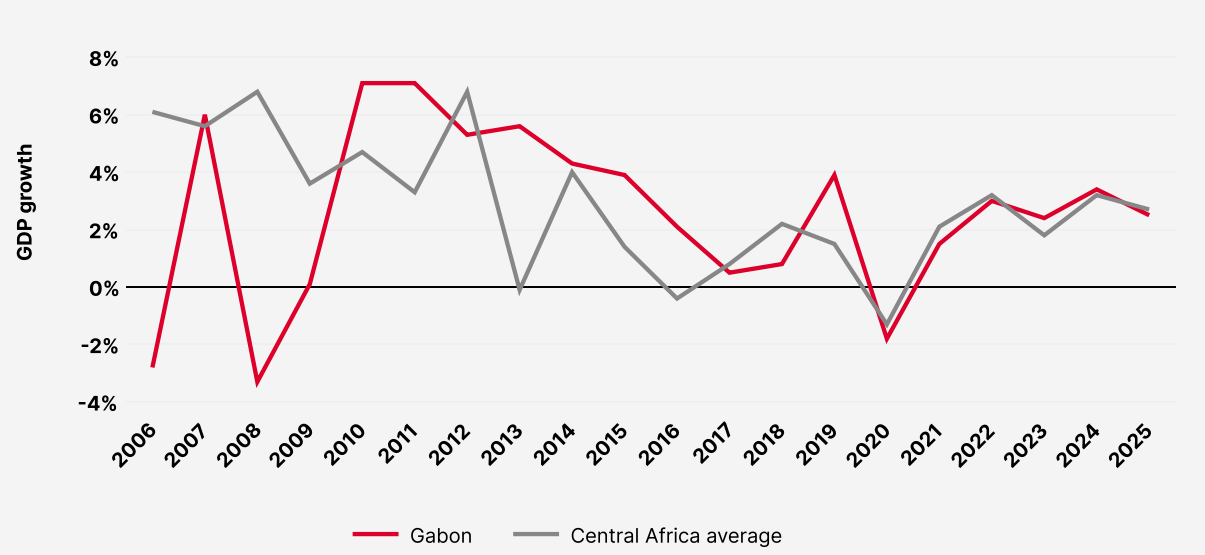
Gross Domestic Product (GDP, XAF)	12.6 trillion
Gross Domestic Product (GDP, US$)	21.4 billion
GDP growth (annual %)	2
GNI per capita (Atlas method, current US$)	8,090
Infant mortality rate (per 1,000)	26*
Life expectancy (years)	69*
Population, total	2,593,130
Percentage of rural population	8%

Source: World Development Indicators, 2024, 2025, WEO Database, IMF, 2026.
* Indicates 2024 figure as 2025 data is not available.

The petroleum industry plays a critical role in government revenues. The petroleum sector accounts for around one-third of the total GDP of the country and more than two-thirds of merchandise exports. It provides 40% of overall government revenue, mostly through royalties rather than conventional taxes.[4] Gabon also has a large informal economy, which does not contribute to tax revenues, despite playing a major role in citizens' lives.

The main weakness of the Gabonese economy is its lack of diversification. Gabon is highly dependent on commodity exports: 97% of exports consist of oil, manganese and timber.[5] That concentration leaves the economy vulnerable to external shocks, as the sharp contraction in GDP during the COVID-19 pandemic in 2020 showed. Growth has been stable since then.

Figure 3
GDP growth compared with other countries in Central Africa, 2006–2025.

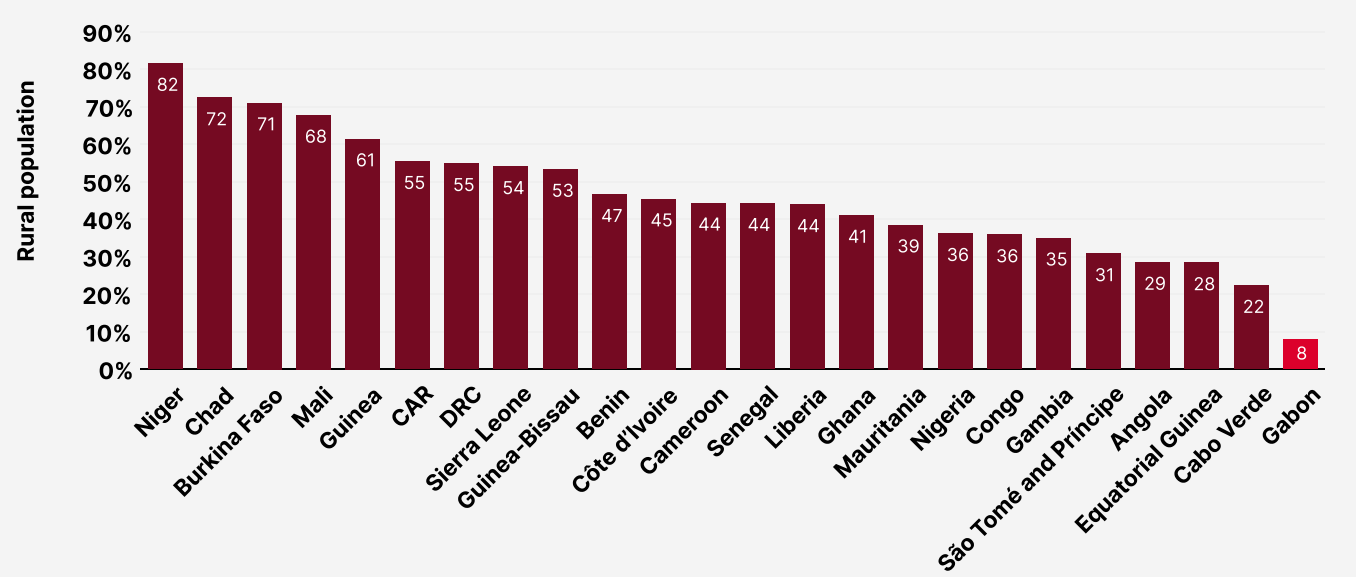


Source: World Bank.

4 "Gabon's Diversification Journey: What is Missing?", IMF, 31 May 2024.
5 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.

Gabon is a highly urbanised society, with only 8% of the population living in rural areas. This makes Gabon an outlier in Central and Western Africa, where the rural share of the population averages 47%.[6]

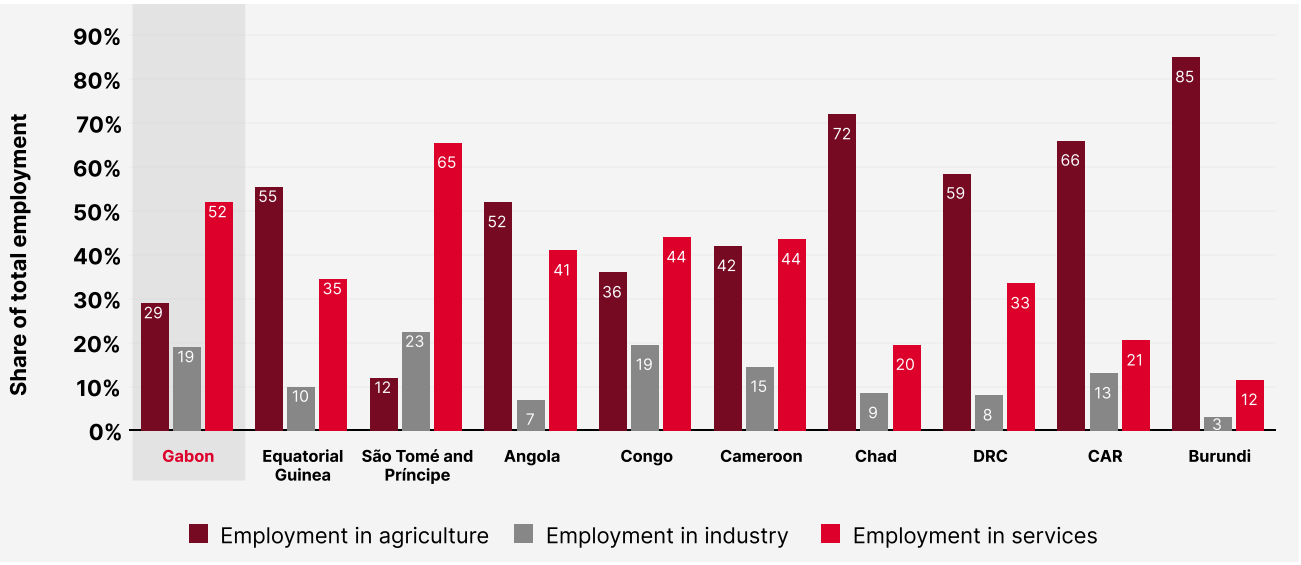
Figure 4
Percentage of rural population, country comparison, 2025.



Source: World Bank.

Consistent with Gabon's high level of urbanisation, the share of the workforce employed in agriculture is low by regional standards. Less than a third of the workforce is employed in agriculture, compared with a regional average of 51%. More than half of Gabonese workers are employed in services.[7]

Figure 5
Employment by sector, as a proportion of total employment, 2025.



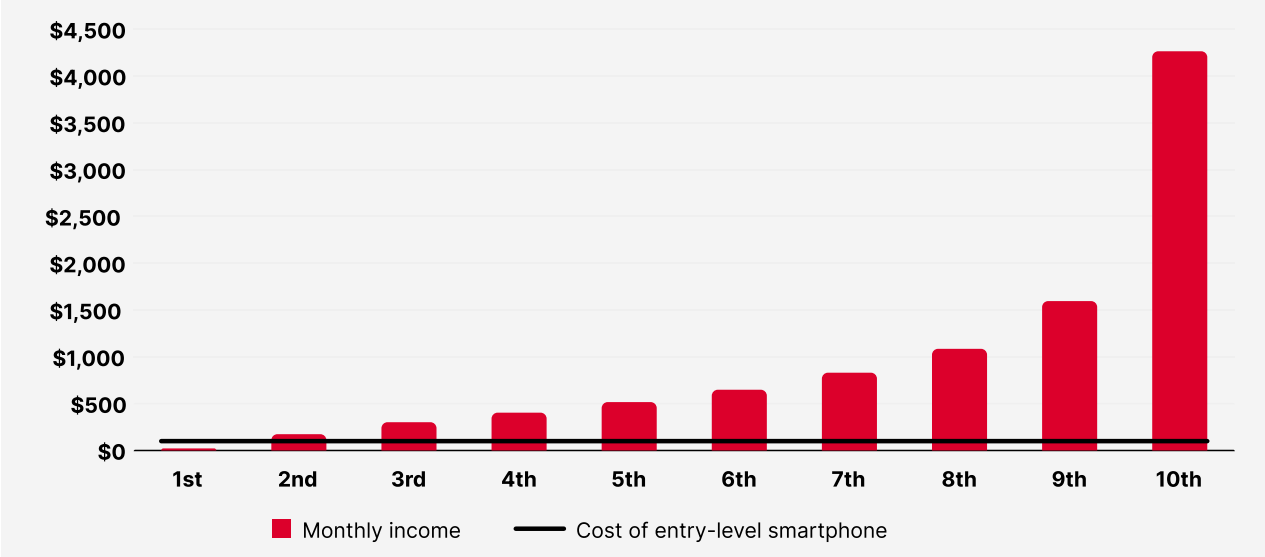
Source: World Bank.

[6] Source: World Bank.
[7] Source: World Bank.

Poverty remains a challenge despite Gabon's high average income level. The average monthly income of the wealthiest 10% of the population is over USD 4,000 compared with USD 22 for the poorest 10% of the population.[8]

An entry-level smartphone that costs USD 100 is prohibitively expensive for many – it represents nearly five months of income for the poorest decile (Figure 6).

Figure 6
Monthly income by population decile compared with the cost of an entry-level smartphone (priced at USD 100), (USD), 2024.



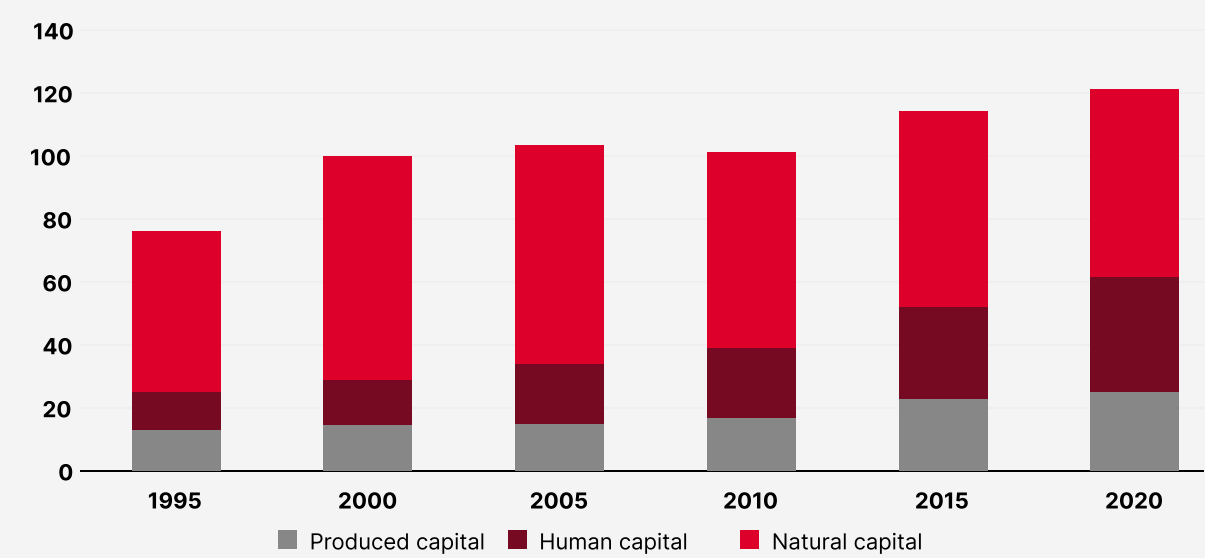
Source: World Inequality Database.



[8] Source: World Inequality Database.

Economic development has not kept pace with population growth. National wealth increased by 35% between 1995 and 2020 while per capita wealth decreased by 34.7% over the same period. Progress has been held back by inadequate infrastructure, weak job creation, an outsized public sector, an underdeveloped private sector and governance challenges.[9]

Figure 7
Evolution of Gabon's national wealth, 1995–2020 (in real chained 2019 USD).



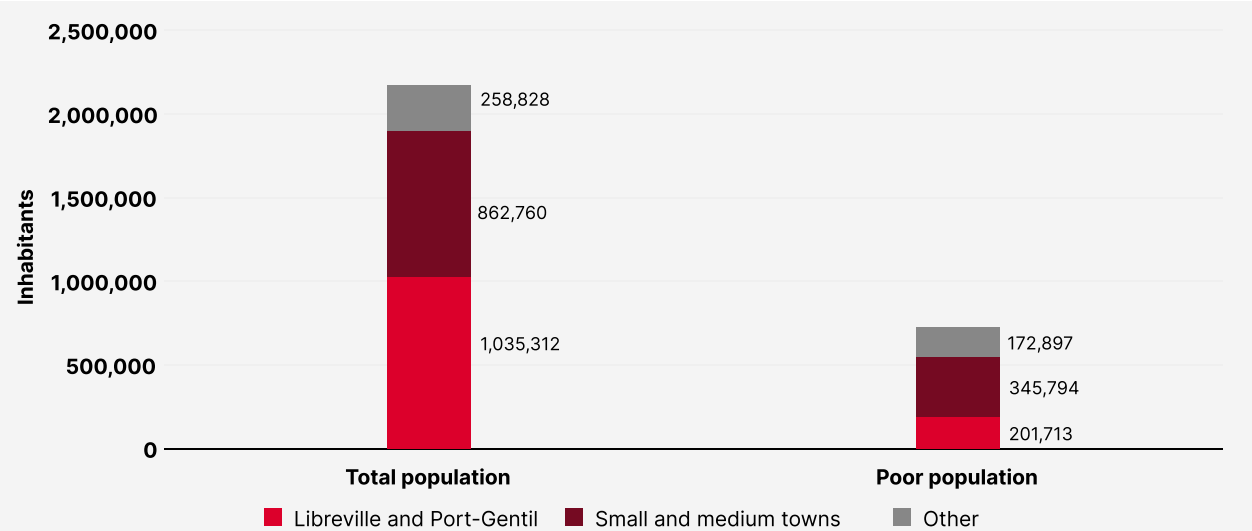
Source: Changing Wealth of Nations, CWON database.

High average incomes have not translated into jobs or lower. Gabon's wealth is concentrated in capital-intensive industries that employ relatively few people, so escaping poverty is difficult. An estimated 32% of Gabonese people live in poverty (classified as less than USD 8.30 per day in 2021 PPP). A shortage of jobs remains a systemic problem, with unemployment estimated at 20%.[10]

The majority of poor people in Gabon live in urban areas, particularly towns and small cities. The two largest cities, Libreville and Port-Gentil, which are home to half of Gabon's population, host fewer poor households than small and medium-sized towns (Figure 8). Poverty is more widespread in towns of under 50,000 inhabitants than in cities of over 100,000. Rural poverty rates are nonetheless higher: in 2017, 59.5% of the rural population were classified as poor, and rural poverty was almost three times deeper than urban poverty.[11]

[9] 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.
[10] 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.
[11] Gabon Poverty Assessment, World Bank, 2020.

Figure 8
Poverty prevalence, 2017.

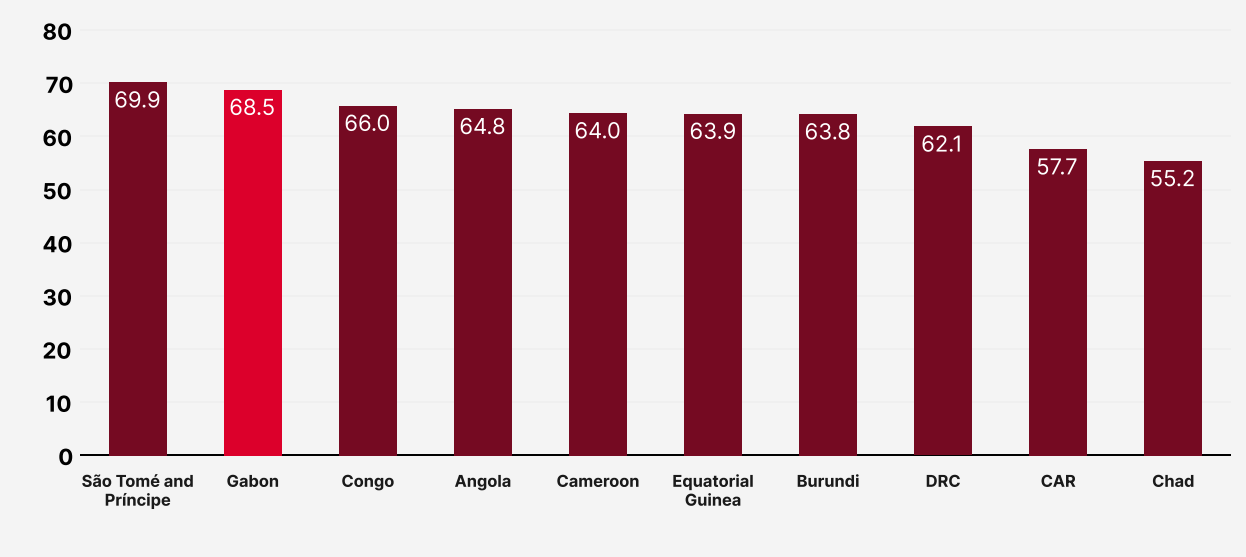


Source: World Bank.

Gabon performs well on some social indicators but public expenditure on social services has declined. Life expectancy at birth is above the regional average and rising: people born in 2024 can expect to reach 69 years, up from 67 years in 2021.[12]

Despite steady population growth, social spending as a proportion of the total budget has decreased, limiting the government's ability to alleviate poverty.[13]

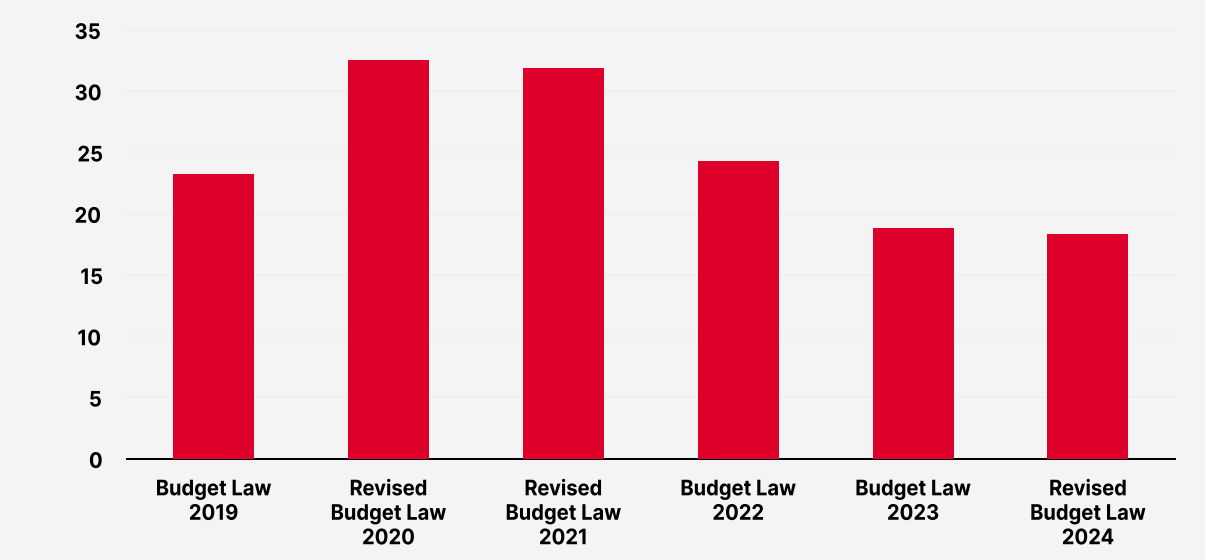
Figure 9
Life expectancy at birth, 2024.



Source: World Bank.

[12] Source: World Bank.
[13] 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.

Figure 10
Evolution of social spending as a proportion of total budget, 2019–2024.



Source: International Bank for Reconstruction and Development / The World Bank.

The government's national development strategy focuses on modernising the state and diversifying the economy. Gabon 2050 defines the current long-term strategic vision. It aims to implement deep reforms to restore citizens' trust and ensure inclusive and sustainable development of the country.

Past national development strategies were ambitious and laid the foundations, but sometimes fell short of the targets. In 1996, the government published the Étude Nationale Prospective GABON 2025 which set out to make Gabon a model of sustainable development, reconciling human well-being, social equity, sustainable growth, and environmental conservation.[14] The Plan Stratégique Gabon Emergent (PSGE): Vision 2025, set out in 2009 and published in 2012, was based on three strategic pillars: Industrial Gabon, Green Gabon, and Gabon of services ((i) le Gabon industriel, (ii) le Gabon vert, (iii) le Gabon des services). The plan set a clear strategic direction, but was hindered by governance problems, poor implementation and persistent inequalities.[15]

Following the change of government in August 2023, Gabon 2050 was developed. The strategy sets a new direction and provides a framework for achieving the vision by 2050. The government prioritises infrastructure development as well as healthcare, education, electrification and digitalisation. Economic diversification is pursued through development of the agrotourism, tourism, fishing, digital services and biotechnology sectors. Forestry is now the largest source of private-sector employment.[16]

[14] Etude nationale prospective Gabon 2050 – Synthese, Ministère de la Planification et de la Prospective, 2024.
[15] Plan stratégique Gabon émergent: Vision 2025 et orientations stratégiques 2011–2016, 2012.
[16] 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.

The Vision 2050 of Gabon:

Gabon, a model of subregional and international development based on a production economy, good governance, the preservation of its nature, and inclusive and sustainable human development.

Pillar 1: Gabon, an economic model of shared production and prosperity;

Pillar 2: Gabon, an example of good governance;

Pillar 3: Gabon, a country that shines at the subregional and international levels;

Pillar 4: Gabon, a reference in biodiversity preservation;

Pillar 5: Gabon, a country with inclusive and sustainable human development.

Institutional reforms are necessary to support private sector development. Businesses face both institutional and infrastructure challenges. Weak enforcement of contracts and property rights limits trust. Unreliable access to electricity and water further hinders growth and investment.[17]

Initiatives to support entrepreneurs and small and medium-sized enterprises (SMEs) are at an early stage but promising. The government has made some efforts to support business establishment and growth. For instance, business registration fees have been reduced to promote entrepreneurship. The Banque pour le Commerce et l'Entrepreneuriat du Gabon (BCEG) was established to provide public guarantees to facilitate access to credit for smaller businesses.[18]

1.2. National digitalisation strategy

Modernising and improving the efficiency and effectiveness of the state is a top strategic priority for the government. Despite a high overall level of GDP and relatively well developed infrastructure, Gabon faces many challenges in delivering a modern, efficient and effective state. This is holding back the diversification of the economy and productivity growth.

Digital technologies are a key foundation of the modernisation strategy. By catching up with other African countries in the way that such technologies are integrated into public administration, Gabon can rapidly accelerate progress towards its strategic objectives.

This is reflected in Gabon 2050 in which digitalisation is a critical component. Development of the digital industry and associated services appears explicitly in all three implementation phases set out under the strategy's 'Structural transformation of the economy' section.[19]

Digitalisation has been an important part of the national development strategy since 2009. PSGE Vision 2025 identified digital transformation as a national-development priority and set out a plan to accelerate digitalisation. It recognised that rates of digitalisation were unequal and the digital divide (fossé numérique) was a challenge for the country.[20] PSGE recognised that digital infrastructure needed to be built across the entire territory to enable the development of e-services. It aligned with Gabon Digital to promote internet adoption through five priorities: extending coverage, particularly in rural areas; improving quality of service and increasing bandwidth; constructing a national fibre-optic backbone; reducing costs; and developing the necessary legal and regulatory framework.

[17] 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.
[18] 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.
[19] Etude nationale prospective Gabon 2050 – Synthese, Ministère de la Planification et de la Prospective, 2024.
[20] Plan stratégique Gabon émergent: Vision 2025 et orientations stratégiques 2011–2016, 2012.

By 2020, and following the implementation of PSGE, Gabon had achieved relatively high levels of mobile connectivity but government digitalisation was lagging. Low digital literacy and a lack of public digital platforms meant that the existing infrastructure was not delivering its full potential. The government's digitalisation strategy and the projects that it has launched in recent years aim to accelerate government digitalisation to match the level of its mobile connectivity.

Since the 2023 transition, the government has prioritised faster digitalisation. The Plan National de Développement pour la Transition 2024–2026 (PNDT) provides a medium-term plan for transforming the country, with infrastructure development as a critical first step. It positions the digital economy as an enabler of economic diversification, social inclusion and national sovereignty. The government aims to accelerate strategic infrastructure, digitalise public services, strengthen the legal and regulatory framework and deepen international cooperation.[21] The Plan National de Croissance et de Développement (PNCD) 2026–2030 also places digitalisation at the heart of the economic diversification strategy, while recognising that the digital ecosystem in Gabon is in its infancy.

Digital Gabon, a World Bank-funded project approved in 2021 and launched in November 2024, aims to increase the adoption of digital public services. It recognises Gabon's progress in implementing parts of PSGE, notably the roll-out and uptake of broadband. It also lists several key constraints that limit the level of digitalisation in the country, such as:

- delays in adopting reforms to the legal and regulatory framework;
- e-government services that were over-reliant on public infrastructure;
- cybersecurity arrangements and legal reforms required to allow a digital ID ecosystem to be built; and
- inadequate data hosting capacity to support the full digitalisation of public services.[22]

The baseline indicators for Digital Gabon start from a very low level, in most cases zero. They reflect the difficult starting position Gabon faced when the project was designed, and the size of the gap to be closed.[23]

Table 2
The baseline indicator metrics from the Digital Gabon project, 2021.

Sector Area	Baseline Indicator	Value	End Target
Legal Identity	Population (16+) issued a deduplicated biometric NIP ID credential	0.00%	90.00%
Data Interoperability	Government entities securely exchanging data on a shared platform	0	5 MDAs
Civil Registration	Administrative offices digitally recording vital acts (births/ deaths)	0	15

[21] Plan National de Développement pour la Transition 2024–2026, Ministère de l'Économie et des Participations, 2024.
[22] Project Appraisal Document on a Proposed Loan in the Amount of Euro 56.2 Million (US$68.5 Million Equivalent) to the Gabonese Republic for a Digital Gabon Project, World Bank, 2021.
[23] Project Appraisal Document on a Proposed Loan in the Amount of Euro 56.2 Million (US$68.5 Million Equivalent) to the Gabonese Republic for a Digital Gabon Project, World Bank, 2021.

Sector Area	Baseline Indicator	Value	End Target
Digital Services	Completed digital public service transactions by citizens	0	100,000
Social Insurance Integration	Social protection (CNAM-GS) beneficiary records linked to a unique ID	0	500,000
e-Procurement	Share of public contracts awarded via an end-to-end digital platform	0%	40.00%

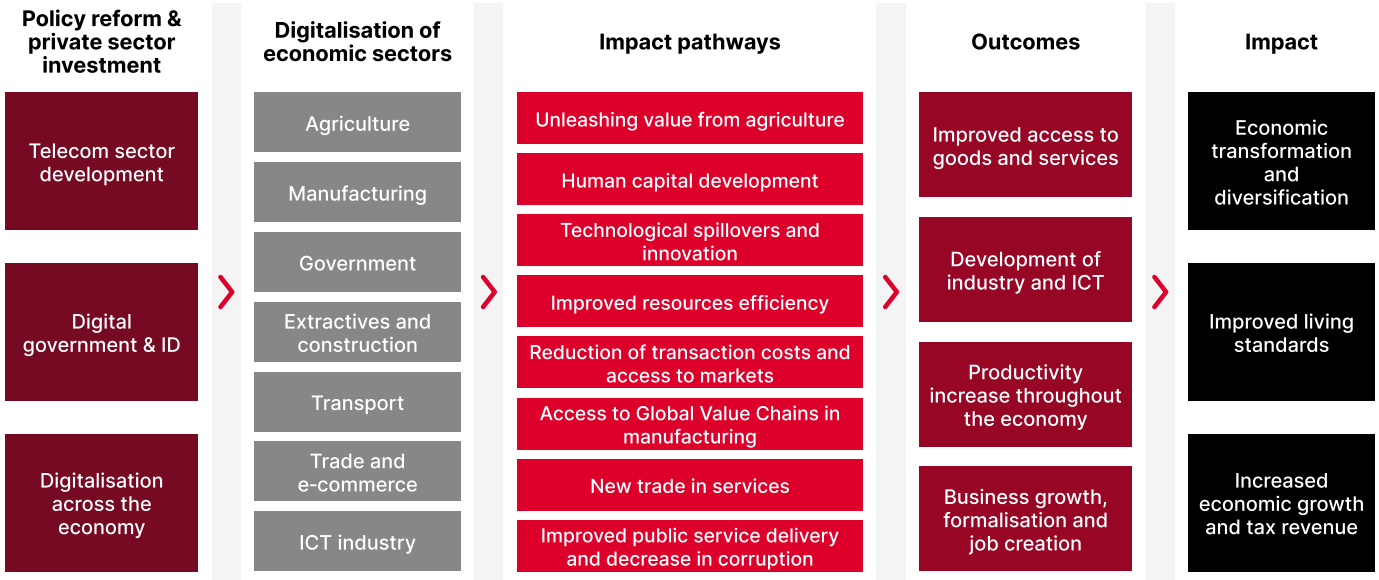
Source: World Bank.

The Digital Gabon project and the eGabon project that preceded it focus on digitalisation, but significant work remains to be done. Gabon still lags behind comparator countries for government digitalisation. Gabon's score on the UN E-Government Development Index rose steadily from 0.54 in 2020 to 0.57 in 2024, but its global ranking slipped from 113th to 121st over the same period. Gabon's score for Telecommunications Infrastructure has climbed significantly since 2020, but its scores for Human Capital and Online Services have both fallen.

The Human Capital sub-index fell from 0.67 in 2020 to 0.58 in 2024. In addition, Gabon's E-Participation score, which measures citizen-facing consultation and e-voting/e-feedback mechanisms, has fallen to 0.12 in 2024, placing it 174th globally.[24]

Adoption of digital technologies has a positive impact on public service delivery and private sector productivity. Digitalisation improves productivity, job creation and formalisation of the economy, which in turn lead to increased standards of living, higher economic growth and greater availability of public resources.

Figure 11
Digital pathways to economic transformation.



Source: GSMA Analysis

[24] UN E-Government Knowledgebase, Gabon, 2026.

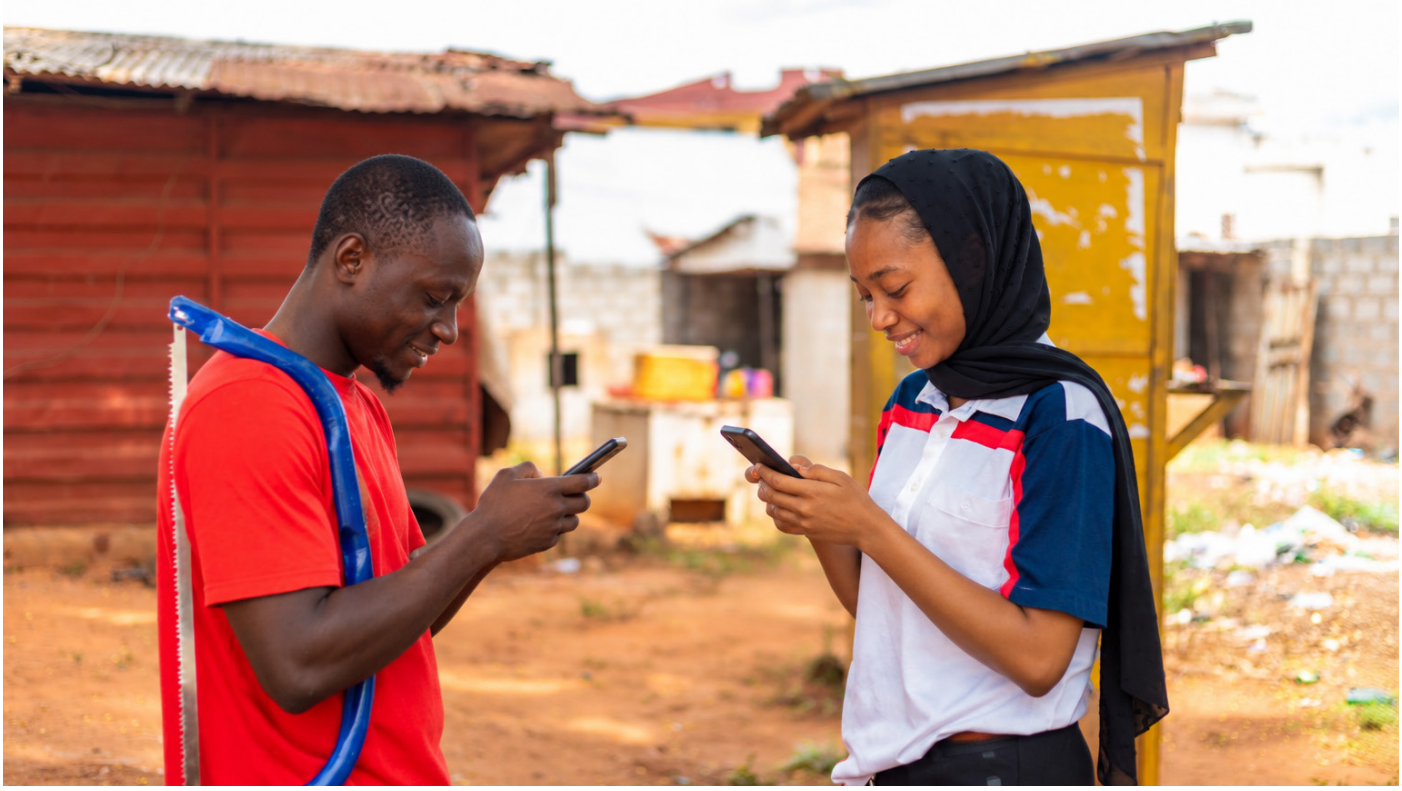
Box 1
Impact of digitalisation on extractive industries.

Extractive industries are key sectors for the Gabonese economy. They are also the main drivers of tax revenue and exports. Increasing the performance of the mining industry is therefore a central pillar of the government's overall economic development strategy.

The Moanda Mine is one of the world's largest manganese mining operations. Run by COMILOG, co-owned by Eramet and the Gabonese state, it is a natural priority for industrial connectivity. Reliable coverage across the mine, processing facilities and transport routed could support real-time tracking of fleet, communications, equipment condition monitoring, as well as predictive maintenance. Eramet is already considering sensors on vehicles at the mine to monitor fuel consumption, maintenance and speed limits. Elsewhere in Gabon, Eramet is already using AI and locomotive sensors to predict deterioration on the Transgabonais railway to help maintenance teams to improve operational efficiency and safety.[25]

Moanda was identified as one of the locations for the progressive 5G rollout.[26] 5G could widen the scope of applications available to improve operations: high definition video, collision and proximity warnings, remote control of drills and loading equipment, and autonomous or semi-autonomous haulage systems. These applications would improve equipment utilisation and reduce workers' risk.

The opportunity for Moanda that arises from the deployment of 5G-based technologies is consistent with the experience in other countries. BCG found that mining companies that successfully digitalised experienced significant gains in productivity and safety, and reductions in cost. Metal production increased in the range of 3-5%, while asset lives increased by 8-10% and fuel costs reduced by 5-10%.[27]



[25] "La data et l'intelligence artificielle au service de la performance de nos sites", Eramet, 18 February 2025.
[26] "Deux ans pour entrer dans l'ère 5G : l'État, l'Arcep et les opérateurs à l'offensive", Gabon Review, 18 December 2025.
[27] "Racing Toward a Digital Future in Metals and Mining", BCG, 2021.

1.3. Digitalisation of healthcare

Healthcare reform is one of the government's priorities. The current healthcare and education systems do not meet the needs of Gabon's young population.[28] President Oligui Nguema identified health as one of his key concerns in his inauguration speech on 3 May 2025.[29] Consistent with that commitment, the Plan National de Développement Sanitaire (PNDS) 2024–2028 identifies strengthening the SNIS as a strategic priority.[30]

The National Health Information System (Système National d'Information Sanitaire, SNIS) is Gabon's central healthcare information system. Its purpose is to collect, manage and analyse healthcare data to support evidence-based decision-making. It was supported by a USD 56 million loan from the World Bank in 2016. The aim of the overall project was to harness ICT to improve Gabon's healthcare.[31]

The initiative is run by the Ministry of Digital Economy, Digitalisation and Innovation (MENDI). Phase 2 distributed computer and technical equipment to additional health facilities in 2025.[32] As part of the SNIS, training is being delivered on data collection, processing and analysis, so that policy can be based on reliable data.[33] The digitalised system, eGabon-SIS, was presented in June 2026.[34]

Mobile broadband brings a unique opportunity to improve health outcomes by following the patient journey between hospital treatment, outpatient monitoring and home-based care. Hospitals remain central to acute treatment, but more and more care happens at home and in a community environment. Mobile broadband allows real-time patient monitoring, assessment of patients' symptoms using AI diagnostics and early warning notifications.[35]

1.4. Digitalisation of agriculture and timber industry

Agriculture employs a smaller share of Gabon's workforce than in most countries in the region, but it remains economically important. Agriculture employed 29% of the workforce, but agriculture, forestry and fishing together accounted for only 6.8% of GDP in 2025.[36] The disparity is partly explained by the petroleum sector's large contribution to GDP, but it also points to scope for productivity improvements.

Digitalisation of agriculture promises to increase productivity, improve produce quality, and help farmers to access new markets.[37] Projet de digitalisation de l'agriculture en milieu paysan was introduced in the PNDT and allocated a budget of XAF 1.5 billion.[38] The project is intended to help farmers plan activities, monitor crop growth and manage resources more effectively.[39] This could raise agricultural production in rural areas.[40]

[28] Gabon, Agence Française de Développement (AFD), 2026.
[29] 'Discours d'investiture du Président de la République', L'Union, 3 May 2025.
[30] Plan National de Développement Sanitaire du Gabon 2024–2028, Ministère de la Santé, 2024.
[31] "Gabon to improve efficiency of service delivery in public health", World Bank, June 2016.
[32] "Gabon Advances Digital Health Strategy with Tech Deployment to Hospitals", Tech Africa News, July 2025.
[33] "eGabon SIS : un outil désormais disponible pour une meilleure gouvernance sanitaire", Gabon Media Time, June 2026.
[34] "eGabon-SIS : le Système d'information de santé fait peau neuve", L'Union, June 2026.
[35] "Mobile and health industries unite to advance connected healthcare", GSMA, 2026; "How 5G is Transforming Healthcare", GSMA, 2022.
[36] World Development Indicators, World Bank, 2026.
[37] "Transition numérique : comment la digitalisation de l'agriculture révolutionne le secteur paysan au Gabon", AfricaCoeurNews, April 2024.
[38] Plan National de Développement pour la Transition 2024–2026, Ministère de l'Économie et des Participations, 2024.
[39] "Gabon: vers la digitalisation de l'agriculture en milieu paysan", Gabon Media Time, April 2024.
[40] "Transition numérique : comment la digitalisation de l'agriculture révolutionne le secteur paysan au Gabon", AfricaCoeurNews, April 2024.

The government's commitment is evident in recent initiatives. The Ministry of Agriculture, Livestock and Rural Development recently launched a 'Market Study on the Digitalisation of Agricultural Value Chains'.[41]

Private initiatives are also emerging. SING (Société d'Incubation Numérique du Gabon) is Gabon's first digital incubator. Together with the Pivot 4.0 Association, it launched Agri'Futur, an agritech entrepreneurship initiative, in September 2025. It aims to support start-ups bringing innovative approaches to farming and thus accelerate adoption of modern farming techniques in Gabon.[42]

Forestry is one of Gabon's key industries, representing 3.2% of GDP and 6% of exports in 2023. Sustainable development of forest ecosystems is essential to protect and develop Gabon's timber industry and support sustainable production over the long term.[43] Initiatives are underway to digitalise wood tracing and logging licensing which should improve transparency and sustainability.[44]

1.5. Digital government

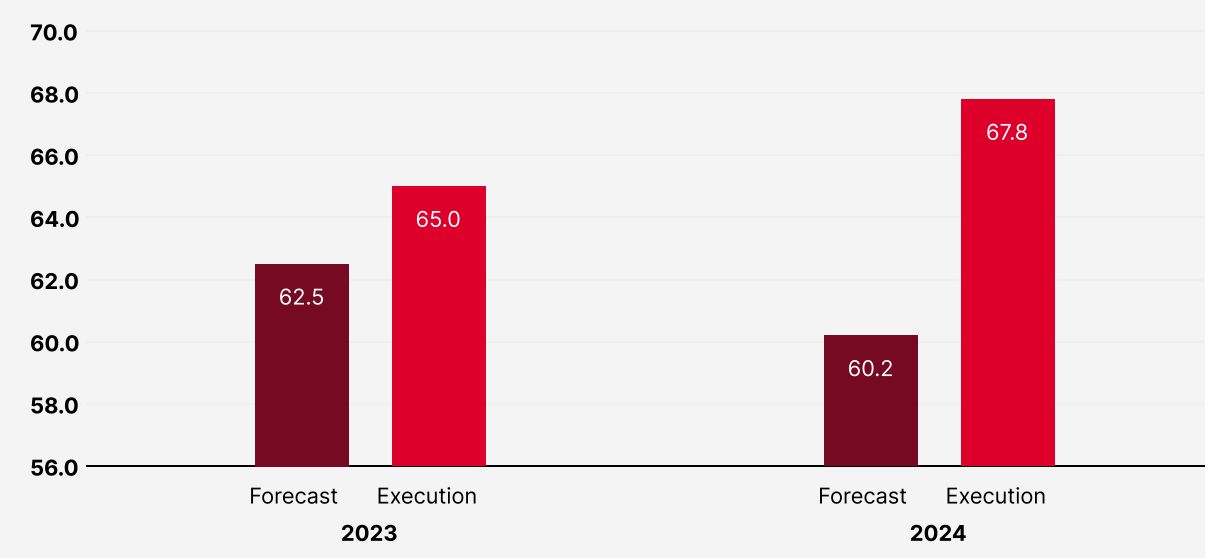
Accelerating e-government is a key part of the national strategy to modernise and improve public services. Digitalisation can improve efficiency, transparency and cost effectiveness. The aim is to replace burdensome paper-based procedures with user-focused, transparent processes and halve costs and processing times for individuals and businesses. The État-Plateforme et Guichet Unique Numérique will provide a single point of access to administrative services, including customs and tax. The PNCD 2026–2030 focuses on two programmes: digitalising public services and promoting digital innovation and entrepreneurship.

Gabon introduced Digitax in 2024 as an online platform for filing and paying taxes, with mandatory digital filing rolled out progressively (Box 2). In December 2023, the northern border customs offices, the last not connected to the Sydonia World system, were digitalised. Tax and customs collections subsequently exceeded forecasts, while government revenue remained stable despite lower oil prices. This is despite the frequent tax exemptions granted to companies to attract investment, which limit total revenues. Full digitalisation of VAT invoicing is expected to strengthen revenue collection further.[45]



[41] "Digitalisation agricole au Gabon : vers une étude de marché pour booster performance et transparence", Gabon Review, May 2025.
[42] "L'Association Pivot 4.0 et SIIAG lancent la phase d'incubation du programme Agri'Futur", SING, September 2025.
[43] Gabon, Agence Française de Développement (AFD), 2026.
[44] 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.
[45] 2025 Gabon Economic Update, International Bank for Reconstruction and Development / The World Bank, 2025.

Figure 12
Tax revenues as a % of total government revenues, forecast and realised, 2023–2024.



Source: International Bank for Reconstruction and Development / The World Bank.

Box 2
Digital tax portal in Gabon[46].

e-tax is the taxpayer portal of Digitax, the system the tax administration put into service in April 2024. Its aim is to improve tax collection while easing the administrative burden on users, improving the quality of service for taxpayers. Digitax also includes the software the tax administration uses to manage procedures and a console that handles payments through banks.[47]

Upon registration, users can perform a variety of tasks:

- **eDeclaration**

Tax return filing and consultation of filing history

- **Payment order validation**

Possibility to have payment orders validated by multiple signatories, based on configurable thresholds

- **ePayment**

Online execution of tax payment orders and consultation of order history

- **Message account**

Secure messaging and document exchange with a tax administration agent

[46] E-tax, Portail fiscal gabonais, Direction Générale des Impôts – Gabon, 2026.
[47] "Digitax : vers une collaboration renforcée pour optimiser le paiement des impôts au Gabon", Gabon Review, February 2025.

Digital financial services have grown on the back of private investment, and the government is now working to link them to public services. MaDigiPaie is Gabon's digital payments and interoperability programme. It enables transfers between mobile money accounts and bank accounts in Gabon and across the Economic and Monetary Community of Central Africa (CEMAC). It runs on GIMACPAY, the regional payment system created by the Groupement Interbancaire Monétique de l'Afrique Centrale (GIMAC), at the initiative of the Bank of Central African States (BEAC).[48] The government has explicitly linked MaDigiPaie to public service payments, and its billing services were launched in July 2026.[49] The government also plans to create a national payment platform to centralise the collection of public revenues.[50]

Digital ID will streamline access to e-government services and encourage adoption, and its first elements are in place. A law adopted in December 2020 created the Numéro d'Identification Personnel (NIP), a unique number to be issued to every person in Gabon whatever their nationality.[51] NIPs have been issued since 2024 and a mass enrolment campaign is planned.[52] The government announced in the PNDT that it plans to implement a national digital identity system (SNID).[53] The Digital Gabon project finances the population register, the identity credential and the shared platforms that this system needs.

Tourism has become a focus of efforts to diversify the economy. An e-visa platform was launched in 2025 with the aim of simplifying the visa application process and encouraging more tourism. Applications are free and visas are issued within 48 hours. The system supports wider national objectives of modernising entry procedures for foreign visitors, securing tourist flows, and promoting Gabon's national heritage.[54]

There is also a strong emphasis on improving digital skills throughout the population. Starting with primary education, the government aims for 95% of public and private primary schools in Gabon to be covered by a digitalisation programme by 2027.[55] Launched in 2022, the digital education platform has been piloted in primary schools in the Estuaire, Ogooué Lolo and Moyen Ogooué provinces. The project was established in cooperation with UNICEF and the Gabonese government. The project provided 500 tablets to 1,500 children, as well as laptops and projectors to participating schools. In partnership with Airtel, internet connection was provided to three participating schools.[56] In 2024, primary school digitalisation was accelerated through the 'Learning Passport Gabon' platform. 27 schools were already connected, with 90 more due to be added that year. The programme includes digital education, course monitoring and assessment of learning.[57] Effective training of teachers, school principals and other education leaders is an important foundation for students' learning. In 2025, the Innovative Training on Digital Teaching and Learning was launched in the Estuaire province. The aim is to strengthen teachers' digital skills and to embed digital tools in daily learning.[58]

48 Madigipaie.com, 2026.
49 "Paiements publics : le Gabon accélère la digitalisation avec le déploiement des services de facturation MADIGIPAIE", Gabon Review, July 2026.
50 Report of a strategic meeting devoted to the modernisation of public administration and acceleration of digitalisation, Ministère de l'Économie numérique, de la Digitalisation et de l'Innovation, January 2026. Available at LinkedIn.
51 Project Appraisal Document on a Proposed Loan in the Amount of Euro 56.2 Million (US$68.5 Million Equivalent) to the Gabonese Republic for a Digital Gabon Project, World Bank, 2021.
52 Digital Gabon Project: Restructuring Paper (Report No. RES01969), World Bank, 2026.
53 Plan National de Développement pour la Transition 2024–2026, Ministère de l'Économie et des Participations, 2024.
54 "Gabon launches new free tourist e-Visa system", VisasNews, July 2025.
55 "La digitalisation de l'enseignement au Gabon ambitionne de connecter 90 écoles additionnelles", UNICEF, April 2024.
56 "Digitalising primary education: Online courses are piloted in nine schools in Estuaire, Ogooué Lolo and Moyen Ogooué", UNICEF, December 2022.
57 "La digitalisation de l'enseignement au Gabon ambitionne de connecter 90 écoles additionnelles", UNICEF, April 2024.
58 "Lancement d'une formation innovante en enseignement-apprentissage numérique", UNICEF, October 2025.

Government programmes, private initiatives, non-profit organisations and public-private partnerships all have a role in helping Gabonese people gain the digital skills needed to benefit from digital transformation. Africa DigiEmpower provides free digital skills training to young people across Africa, including 1,000 Gabonese. It is run by the THEYA Foundation, an initiative of Cybastion, in cooperation with African governments. The aim is to build skills that translate directly into employment or self-employment. The agreement between Cybastion and the Gabonese government was signed in June 2025.[59] D-CLIC in Gabon provides personal and professional digital skills training to young people and women. Originally launched in 2022, the programme's fourth instalment began in April 2026. The current phase will train 300 young people in digital marketing, digital creation and web development.[60]

1.6. Digital innovation and entrepreneurship

Digital innovation is a stated government priority. The PNCD 2026–2030 includes a target of tripling the rate of job creation by digital start-ups.[61] The Minister of Digital Economy, Digitalisation and Innovation has outlined a digital strategy for 2025–2030 covering four priorities: digital infrastructure, digital public services, cybersecurity and support for innovation.[62]

The government began introducing measures in 2026. In May, the Council of Ministers adopted a draft decree on the promotion and labelling of start-ups.[63] In July, the ministry and the Fédération des Entreprises du Gabon launched Kimba Connect to link start-ups with established companies.[64] The ministry also signed agreements with the Société de Garantie du Gabon to guarantee bank loans to start-ups, and with Huawei to provide training.[65] In September, preparatory work on a national artificial intelligence strategy was completed with UNDP support.[66]

A small network of incubators and investors also supports young firms. SING, Gabon's first digital incubator, and Ogooué Labs, Gabon's first digital innovation hub, help young businesses. Ogooué Labs has established a number of successful digital skills training initiatives, such as École 241, a school that trains young people for digital-sector careers, and École 241 Kids, an introductory digital-skills programme for children.[67] Ogooué Labs has also launched Katana Ventures with GAIN, a network of Gabonese investors, to help new businesses get established.

Access to finance remains the main constraint on this young industry. The PNCD 2026–2030 identifies high interest rates, insufficient collateral and a lack of mentoring as obstacles for young entrepreneurs. It also reports too few incubators and accelerators to meet demand, and funding shortages among those already operating.[68]

[59] Africa DigiEmpower.org, 2026.
[60] "4e édition de D-CLIC au Gabon: 300 jeunes en formation aux métiers du numérique", Organisation internationale de la Francophonie, April 2026.
[61] Plan National de Croissance et de Développement 2026–2030, Ministère de la Planification et de la Prospective, 2026.
[62] "Gabon unveils $133m digital economy drive", ITWeb Africa, June 2026.
[63] "Gabon : vers un cadre renforcé pour la promotion et la labellisation des startups", Gabon Review, May 2026.
[64] "Kimba Connect : le Gabon lance son premier défi national d'Open Innovation pour accélérer la transformation numérique", Gabon Review, July 2026.
[65] "Gabon Taps State Guarantee and Huawei to Boost Digital Startups", We are tech.Africa, July 2026.
[66] "22 défis, 36 recommandations : la feuille de route de l'IA gabonaise prend forme", Gabon Review, October 2026.
[67] "Nos programmes", Ogooué Labs, 2026.
[68] Plan National de Croissance et de Développement 2026–2030, Ministère de la Planification et de la Prospective, 2026.

2. Current status of digitalisation in Gabon

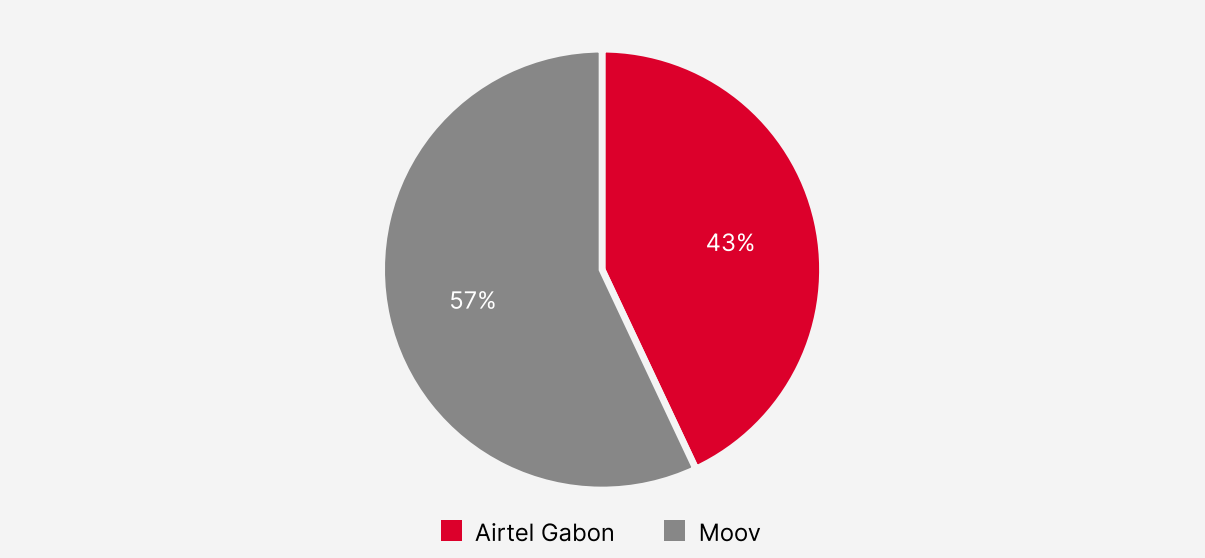


2. Current status of digitalisation in Gabon

2.1. Gabonese mobile telecoms market

Gabon's mobile market is a duopoly. ARCEP reports that Moov leads the mobile broadband market with a 57% share, followed by Airtel with 43% (Figure 13)[69].

Figure 13
Subscriber market shares in the mobile broadband market, Q1 2026.



Source: ARCEP.

Both operators are owned by multinational telecommunications groups. The market was liberalised in 1999 with three mobile licences and the establishment of an independent regulatory authority.[70] Gabon Telecom SA was the incumbent operator, created in 2001 when the postal and telecommunications businesses were separated. The Gabonese government sold 51% of the company to Maroc Telecom in 2007, following an international tender.

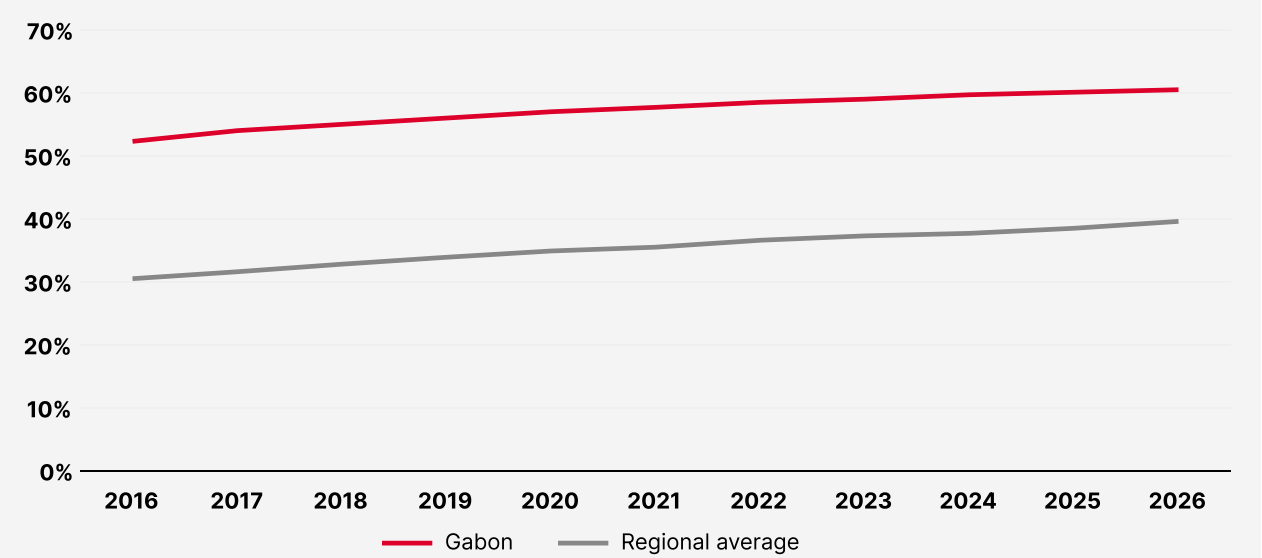
The transaction was completed in 2010. Maroc Telecom then merged Gabon Telecom with Moov Gabon, another of its acquisitions in the country, in June 2016. The new entity was rebranded as Moov Africa Gabon Telecom on 1 January 2021.[71] Airtel Gabon, part of Bharti Airtel Limited, was founded in 1999 as Celtel Gabon before becoming Zain Gabon in 2008. When Bharti Airtel acquired Zain's African operations in 2010, the operator was rebranded to Airtel.[72]

[69] Observatoire des marchés: 1er trimestre 2026, ARCEP, 2026.
[70] "Gabon's government prepares to sell stake in incumbent operator", Developing Telecoms, March 2022.
[71] "Gabon Telecom", Maroc Telecom Group, 2026.
[72] "Airtel connects with Africa – to become the first Indian brand to go truly global", Bharti Airtel, June 2010.

2.2. Broadband adoption and network coverage

Mobile penetration is high compared with other countries in the region, but there is still potential for growth. Gabon has had consistently higher mobile penetration than other countries in the region.[73] More than 60% of people own a mobile phone, compared with a regional average of 39% (Figure 14).[74] Around 64% of the population is aged 15 or over, so around nine in ten adults have a mobile subscription.

Figure 14
Mobile penetration, unique mobile subscribers, 2016–2026.

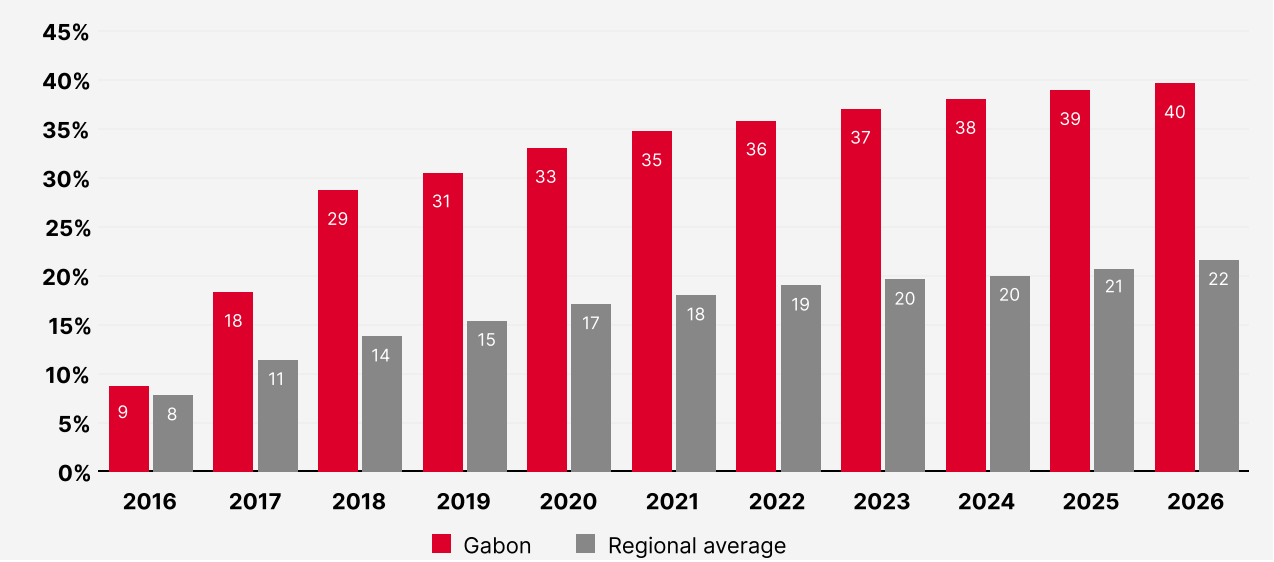


Note: Charts show unique subscribers as opposed to the total number of connections or active SIM cards.
Source: GSMA Intelligence.

Mobile broadband penetration, measured by unique subscribers, reached 40% in 2026. The number of unique broadband subscribers grew rapidly for the five years following 2016. The rate of growth has subsequently slowed down but penetration remains well above the regional average of 22%. With a population of 2.6 million, this is equivalent to approximately 62% of the population aged 15 and over (Figure 15).[75] [76] [77]

[73] Regional benchmarks include Angola, Burundi, Cameroon, the Central African Republic, Chad, Congo, the Democratic Republic of the Congo, Equatorial Guinea, and São Tomé and Príncipe.
[74] GSMA Intelligence, 2026.
[75] GSMA Intelligence, 2026.
[76] There are two useful indicators of mobile adoption: active SIMs and unique users. "Active SIMs" (sometimes referred to as "subscribers" or "connections") is the metric monitored by regulators and the MNOs. It is useful in providing a broad standard measure of telecoms/digital adoption. The data is easily collected from operators and checked by the regulator. "Unique users" measures the number of individuals that use mobile services (in total and also internet). It measures the degree of adoption among the population. It accounts for multiple SIM usage by people and is calculated using modelling, estimation and surveys. It is useful for estimating economic and social impact. Both metrics can be used to show progress over time and to do cross-country comparisons. In this report, both metrics are used. Data suggest that an average user in Gabon has between 2.2 and 2.9 SIM cards.
[77] Annex 1 sets out the full GSMA methodology for measuring subscribers and internet users.

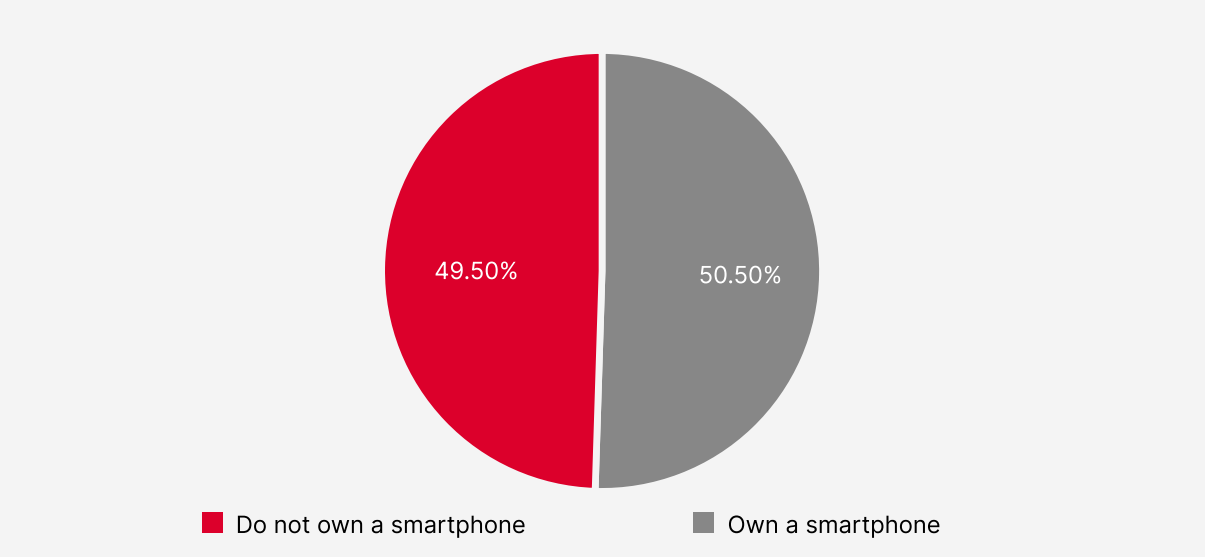
Figure 15
Mobile broadband penetration, unique mobile internet subscribers, 2016–2026.



Source: GSMA Intelligence.

Broadband adoption among lower-income households lags behind the national average. 82.9% of adults in the poorest 40% of households report owning a personal mobile phone, but only just over half own a smartphone. These households form the main target population for policies aimed at increasing digital adoption.[78]

Figure 16
Percentage of adults in the poorest 40% of households owning a personal smartphone, 2024.

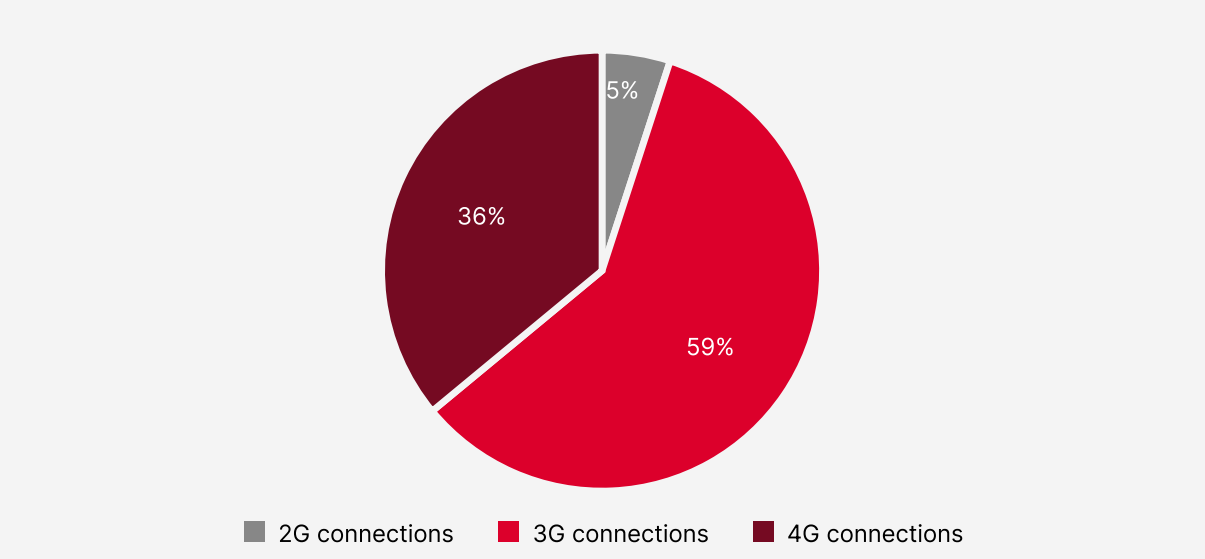


Source: World Bank.

[78] Findex, The little data book on financial inclusion, World Bank, 2025.

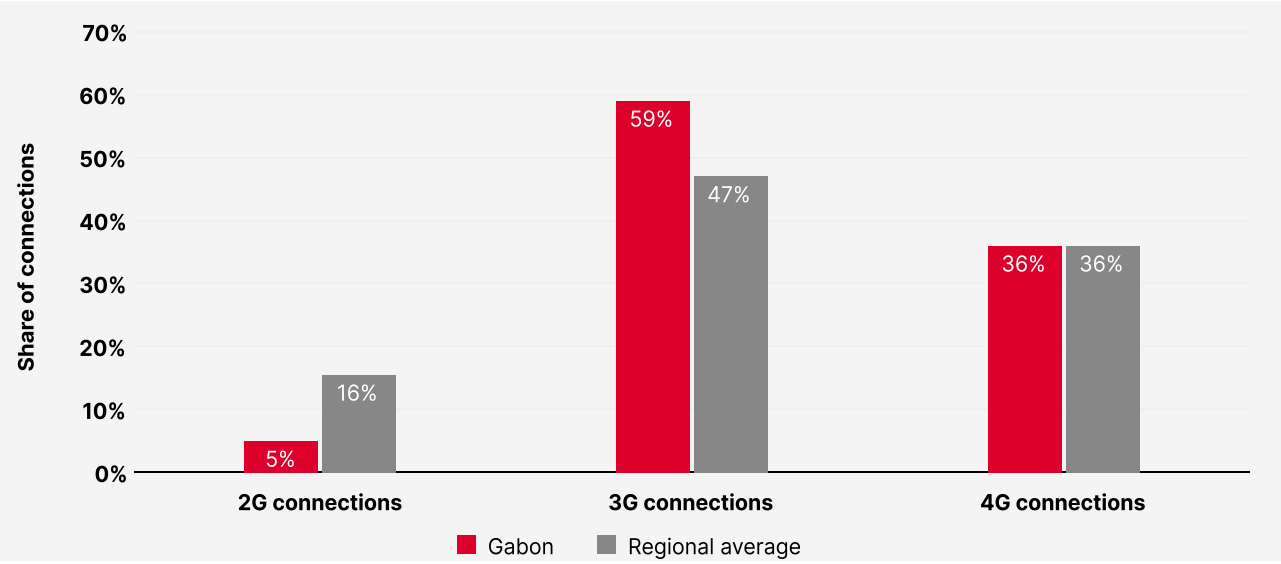
The majority of mobile connections in Gabon are 3G. Only 5% of connections are 2G only, so the majority are broadband-enabled. That low 2G share is unusual in the regional context. On average, countries report that 16% of connections are 2G, 47% are 3G and 36% are 4G (Figure 18). Gabon's proportion of 4G connections is comparable to levels reported in other countries.[79]

Figure 17
Proportion of connections by technology in Gabon, 2026.



Source: GSMA Intelligence.

Figure 18
Proportion of connections by technology, regional comparison, 2026.



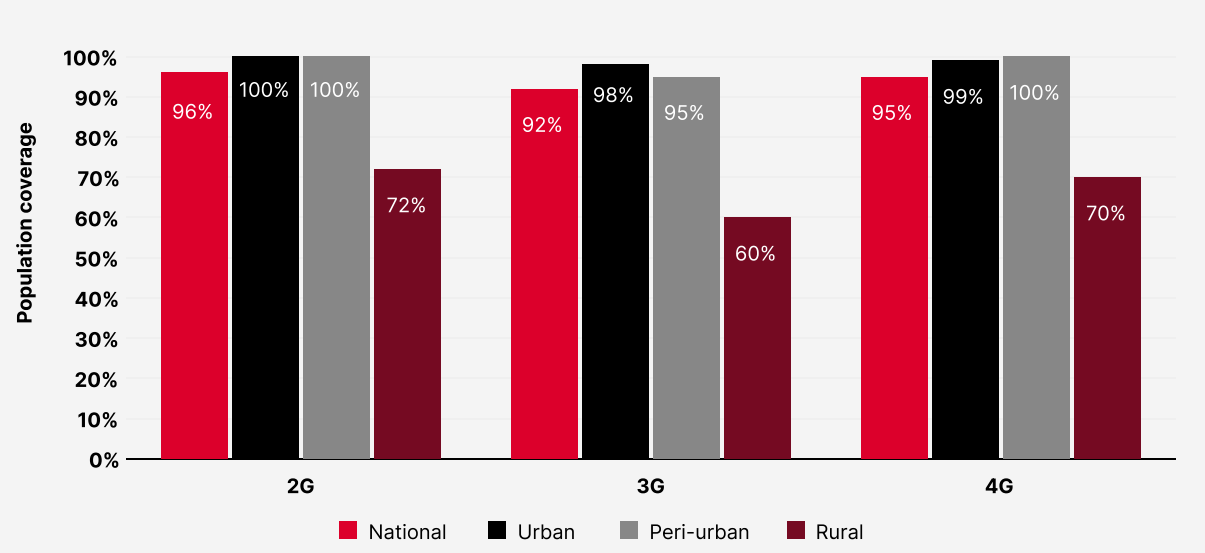
Source: GSMA Intelligence.

[79] GSMA Intelligence, 2026.

Mobile broadband coverage is high in urban areas but lower in rural areas. Urban 2G coverage is complete, while 3G and 4G coverage is nearly universal. Rural coverage stands at 60% for 3G and 70% for 4G, according to the latest modelling.

5G is being launched in October 2026. Because Gabon's population is predominantly urban, weaker rural coverage has little effect on the national averages (Figure 19).

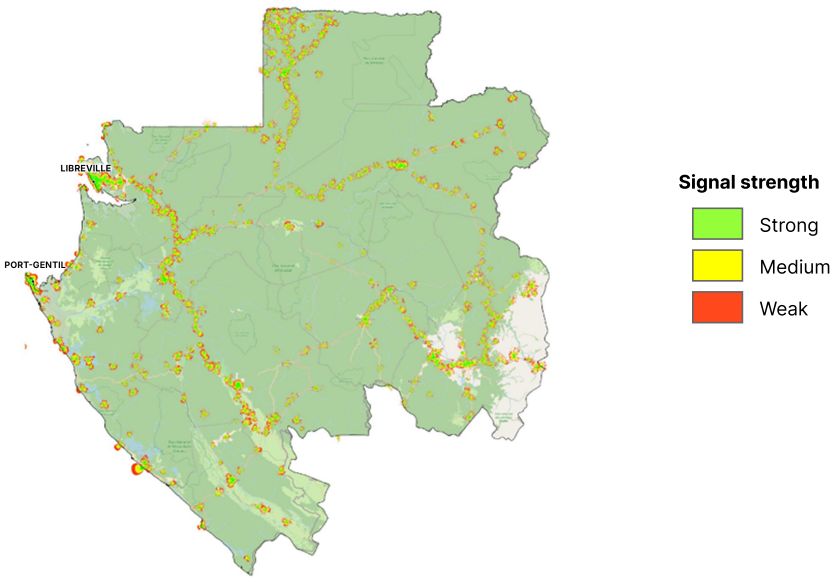
Figure 19
Population coverage by technology and degree of urbanisation, 2026.



Source: GSMA Analysis.

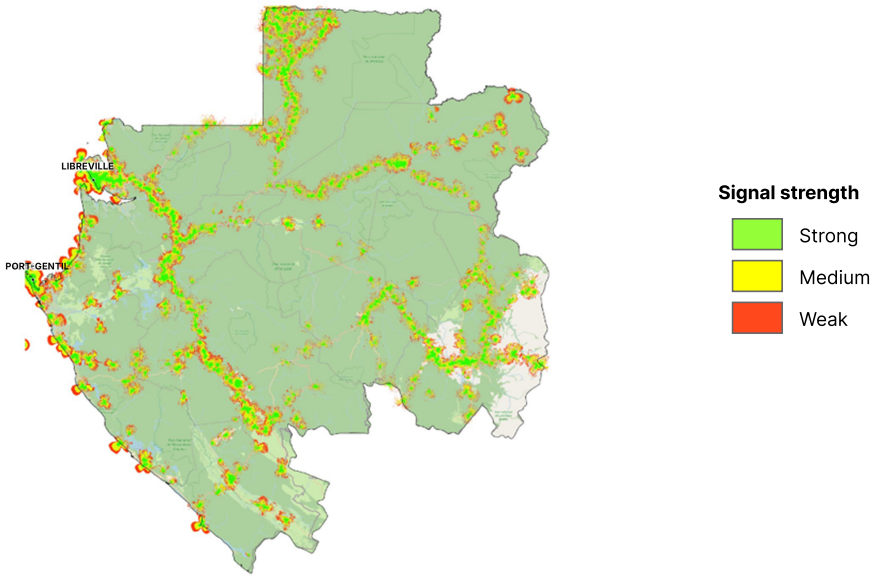
The four figures below compare the modelled signal strength and resulting population coverage of 3G and 4G. The modelled 4G footprint is larger than the 3G footprint, reflecting operators' prioritisation of 4G deployment. This leaves Gabon well placed for the mass roll-out of e-services.

Figure 20
3G coverage map, 2026.



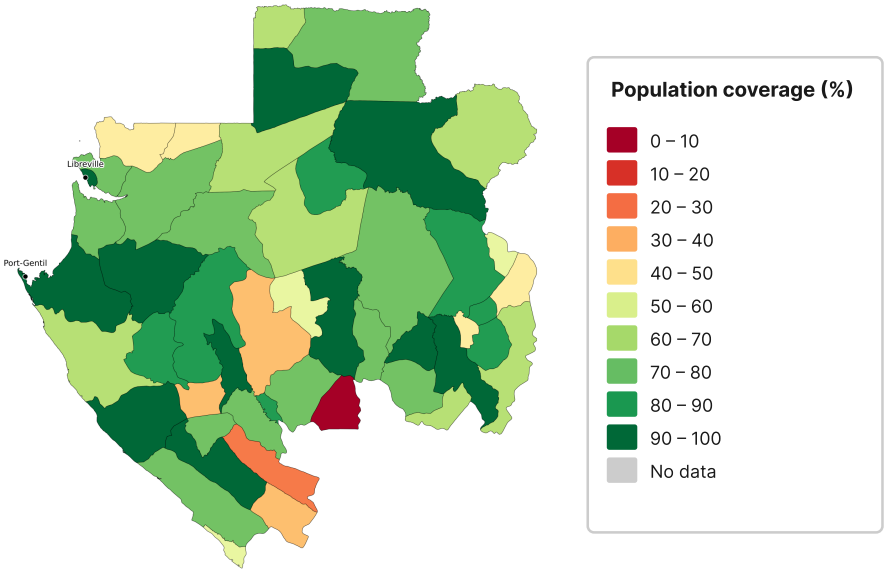
Source: GSMA Analysis.

Figure 21
4G coverage map, 2026.



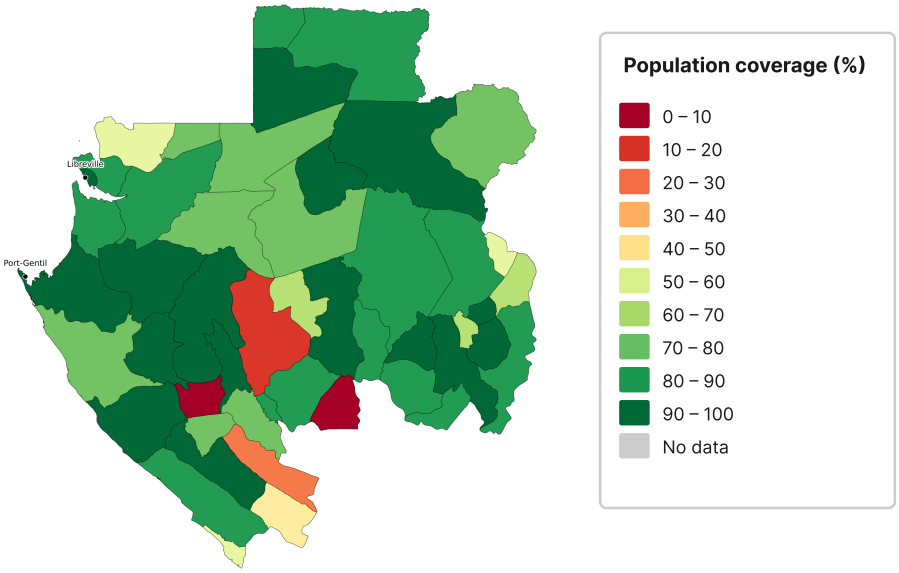
Source: GSMA Analysis.

Figure 22
3G population coverage map, 2026.



Source: GSMA Analysis.

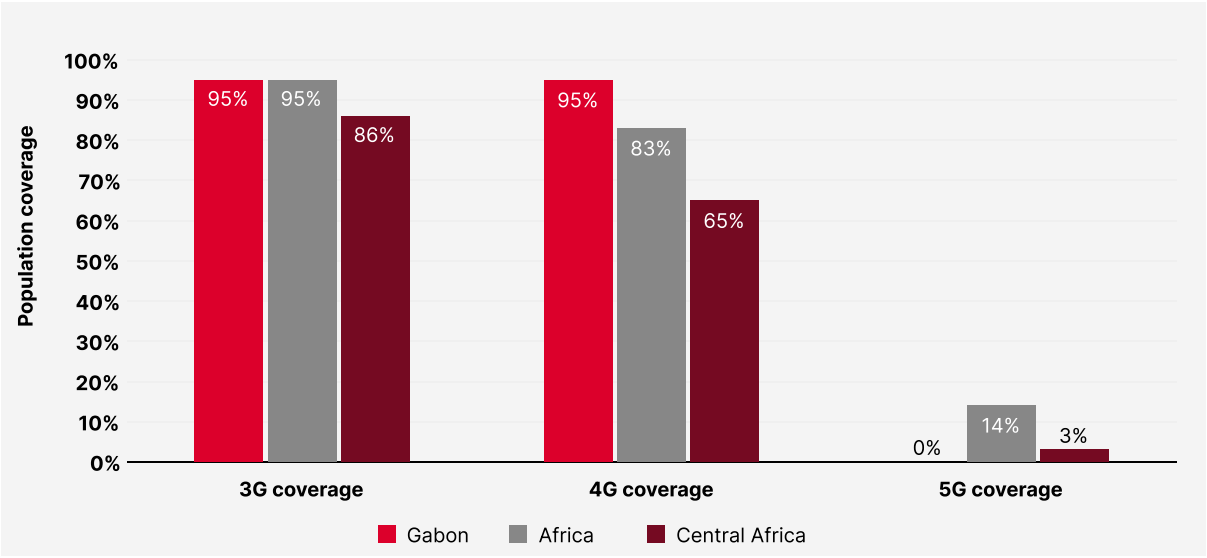
Figure 23
4G population coverage map, 2026.



Source: GSMA Analysis.

The overall level of broadband coverage is very high by African standards. Gabon has some of the highest levels of 4G coverage in Africa. 4G population coverage stands at 95%, with the average for Africa being 83% and Central Africa being 65%. While rural 4G coverage is only 70%, Gabon's majority-urban population means that national 4G coverage is dominated by near-universal urban 4G coverage. 5G coverage is at an early stage in Africa but has begun growing in recent years. Gabon is launching 5G in October 2026.

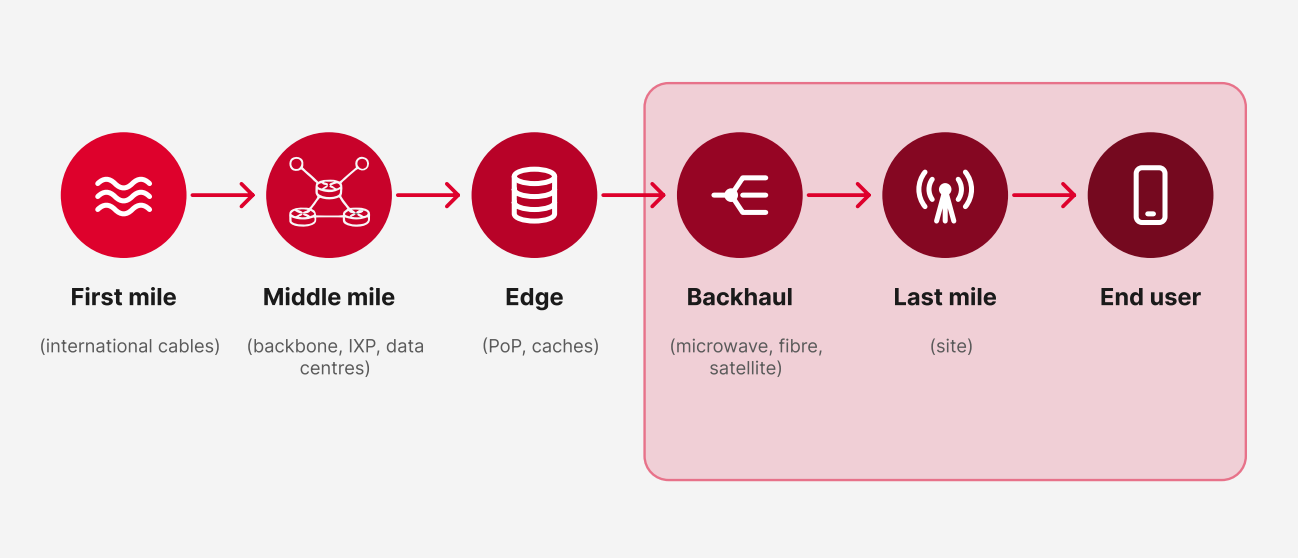
Figure 24
Population coverage by technology, 2025.



Source: GSMA Intelligence.

Reaching 100% 4G coverage will require investment in rural regions where coverage currently lags. Gabon already has extensive national coverage, but extending it to the remaining population is a considerable undertaking, and almost all of that expansion is needed in rural areas. 80% of network costs relate to sites and the majority of these in rural areas are towers and civil works, power and backhaul (Figure 25). Achieving universal 4G coverage therefore requires addressing the economic challenges in deploying networks to remote and sparsely populated areas.

Figure 25
End-to-end mobile internet network.

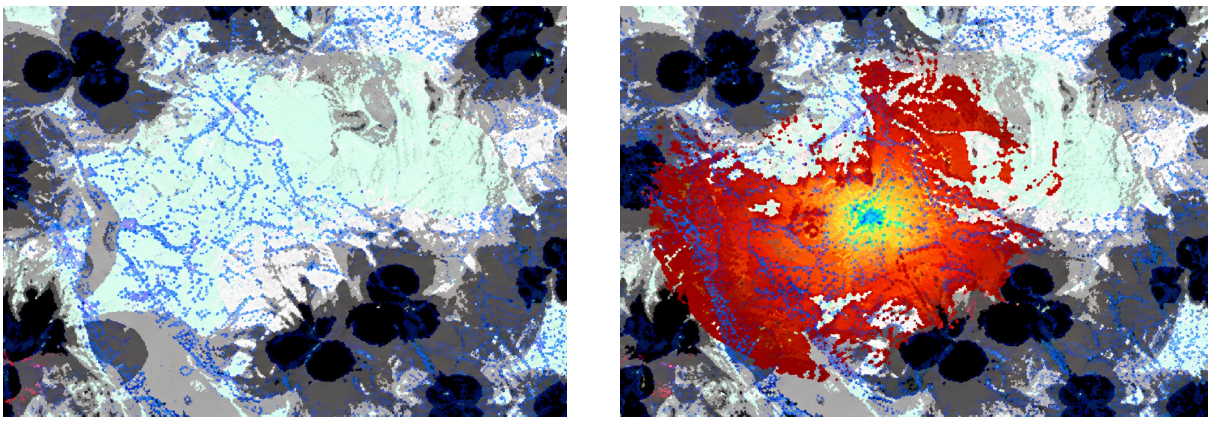


Source: GSMA Analysis.

Low population density in rural regions makes investment in new sites challenging. The financial viability of a site depends on the number of potential customers it can reach. In areas of low population density, even sites that have high geographical coverage can only bring limited revenue, making investment unprofitable. Figure 26 and Figure 27 below show a comparison of two sites, one in a high-density settlement, the other in a low-density settlement. The location determines their financial sustainability. Figure 26 displays a site in an area of dense population settlement (in blue).

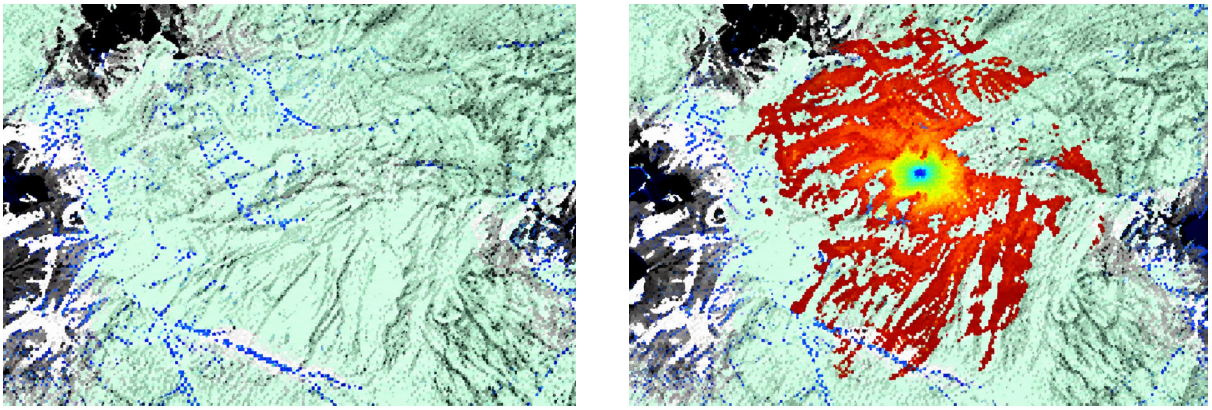
The new site covers multiple settlements scattered between the coverage of existing sites (grey). The site shown in Figure 27, by contrast, covers few settlements, despite having good coverage. Because it reaches fewer customers, the investment in building this site earns a low return. On profitability grounds alone, an operator would not choose to build it.

Figure 26
High profitability greenfield site.



Source: GSMA Analysis.

Figure 27
Low profitability greenfield site.



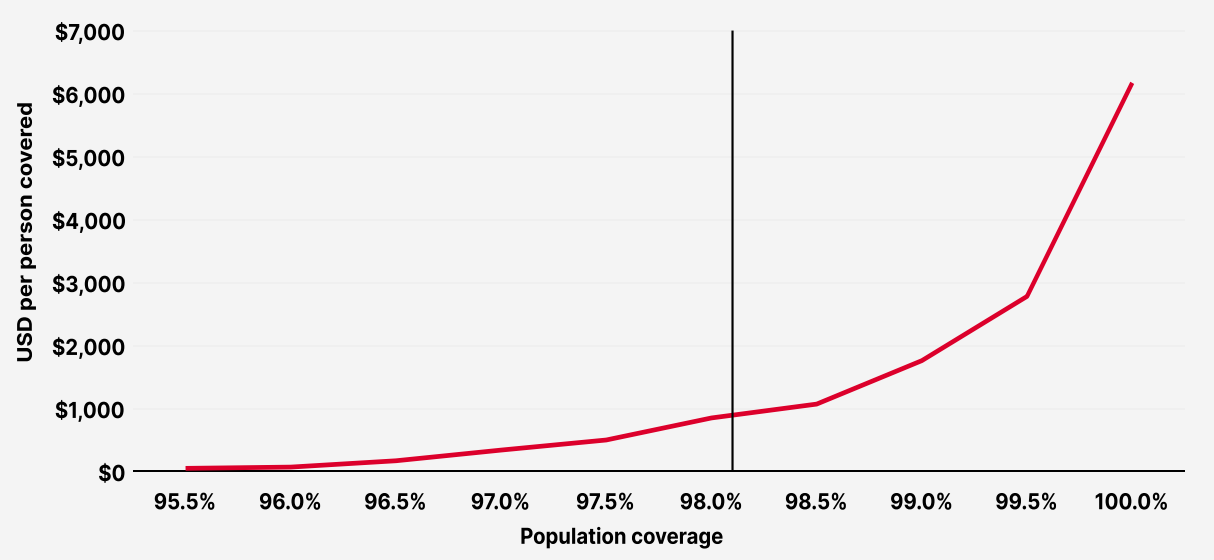
Source: GSMA Analysis.

The average cost of extending the networks rises steeply as population coverage approaches 100%. Gabon already has high mobile coverage, particularly in densely populated areas. To extend it further, operators would need to build sites in areas with fewer settlements, and so fewer paying customers, which pushes up the average cost per person covered.

The analysis suggests that reaching 'universal coverage' would cost approximately USD 1,000 for each additional person covered (Figure 28).[80]

[80] When modelling the cost of 'universal' 4G coverage, it is typically not considered realistic to estimate 100% population coverage. This is because, at some point, the number of sites needed to cover each population increment increases exponentially – in Gabon, this happens at around 98% of the population.

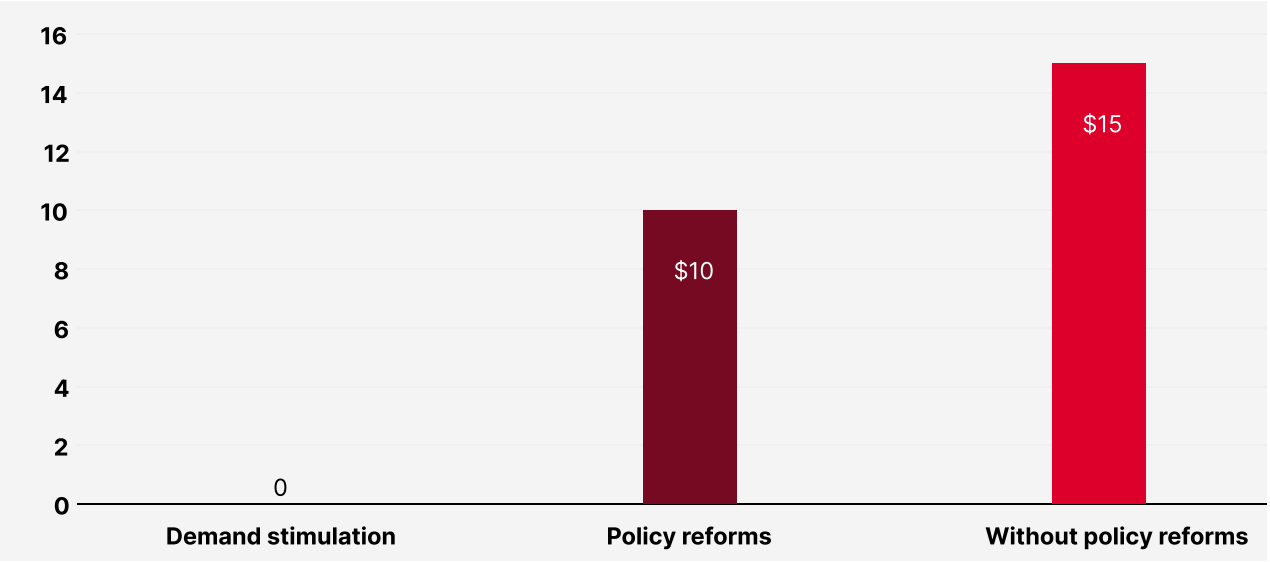
Figure 28
Cost per person covered as population coverage increases (USD), 2026.



Source: GSMA Analysis.

Expanding 4G coverage to 98% would require up to USD 15 million in subsidies to cover the financing gap, but this could be reduced with targeted policies. The net financing cost of building out broadband networks to reach 98% of the population would be approximately USD 15 million. This takes account of both capex and opex and also includes the revenue that the operators would generate from the network in these areas. The USD 15 million is the financial shortfall that the operators would experience and therefore is the amount that they would need in subsidies to make such network extension commercially viable. Policy reforms that cut energy costs by connecting new sites to the grid (main or mini-grids), together with lower sector-specific taxes, would reduce the financing gap to USD 10 million. Demand stimulation could eliminate the gap entirely (Figure 29).

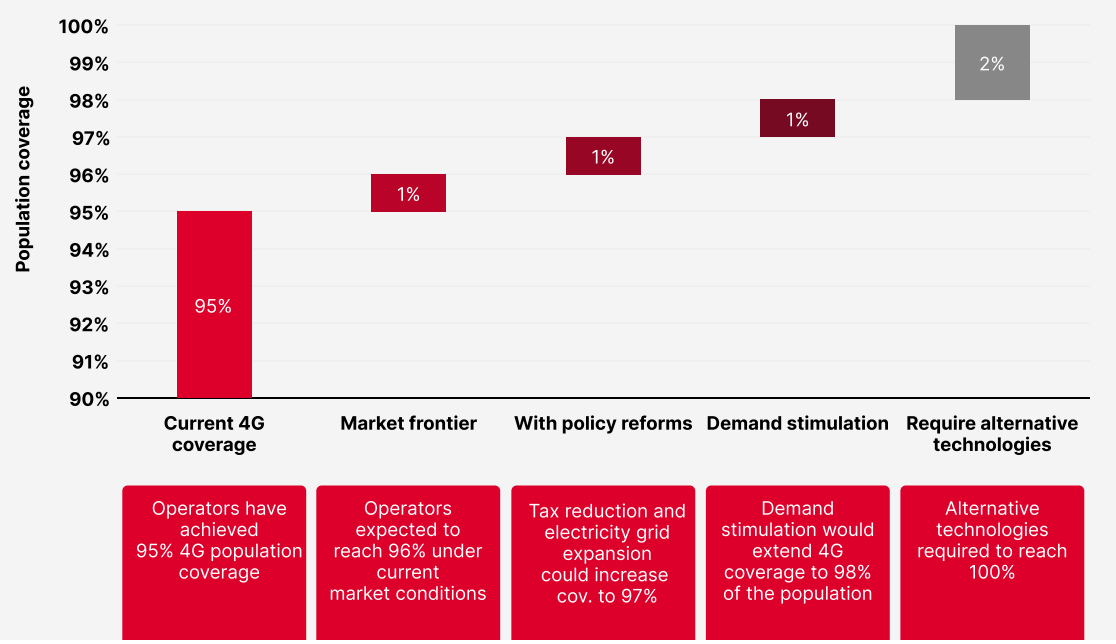
Figure 29
Financing gap to achieve 98% population coverage (USD million), 2026.



Source: GSMA Analysis.

Each type of policy reform would increase the level of population coverage that would be commercially viable for operators to build. However, even with the optimal policy environment, 2% of the population would remain beyond the reach of commercially viable networks. Providing broadband networks to this group of the population will require deployment of alternative technologies (Figure 30).[81]

Figure 30
Potential impact of interventions on population coverage.



Source: GSMA Analysis.

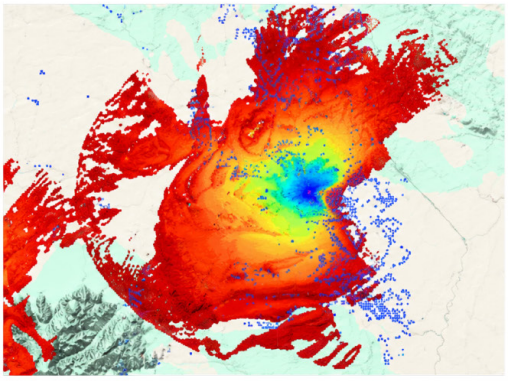
Infrastructure sharing provides an opportunity to expand coverage in the most efficient way. Sharing has been shown to lower mobile data prices by reducing costs; to improve quality of service where one operator lacks capacity or coverage but its competitor's network is stronger; to free up investment for coverage and technological upgrades; and to speed up network roll-out. The investment needed to extend coverage further is significant, and sharing reduces that cost while serving the customers of both operators, something that is particularly important at a time of rising cost pressures. Moov and Airtel signed an infrastructure-sharing agreement on 7 May 2026.[82] The agreement is intended to reduce duplicate spending and redirect investment to strategic priorities.

Regulatory coverage obligations and QoS requirements need to strike the right balance between desired service quality and the investment needed to achieve it. Higher signal strength and higher QoS are achieved by spending more on sites and network equipment. Figure 31 below shows how much larger the coverage of a single site becomes at a lower signal-strength threshold. To meet the same coverage requirement at the higher threshold, an operator would need to build additional sites or fit existing ones with taller towers and more powerful equipment. Signal-strength thresholds defined by the regulatory authority therefore have a major impact on the cost of building and operating a mobile network.

[81] GSMA Analysis, 2026.
[82] "Gabon's Telecom Operators Join Forces to Expand Coverage and Cut Costs", Ecofin agency, May 2026.

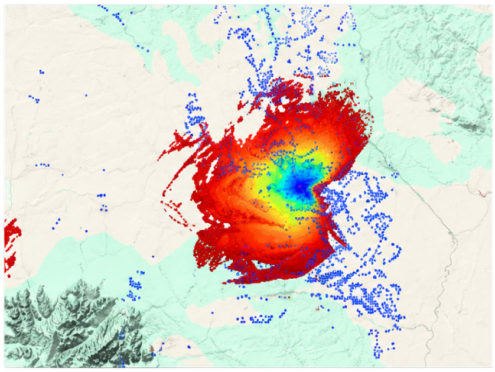
Figure 31
Coverage of a site using different signal-strength thresholds.

4G threshold using -115 dBm



Coverage for one cell

4G threshold using -105 dBm



Coverage for one cell

Source: GSMA Analysis.

KPIs should evolve with technology and focus on customer experience. QoS regulation needs to reflect both current users' needs and the country's long-term strategic priorities. It should maintain acceptable service for the large number of customers still using 3G, while avoiding standards that divert disproportionate investment from coverage expansion and the transition to 4G and 5G.

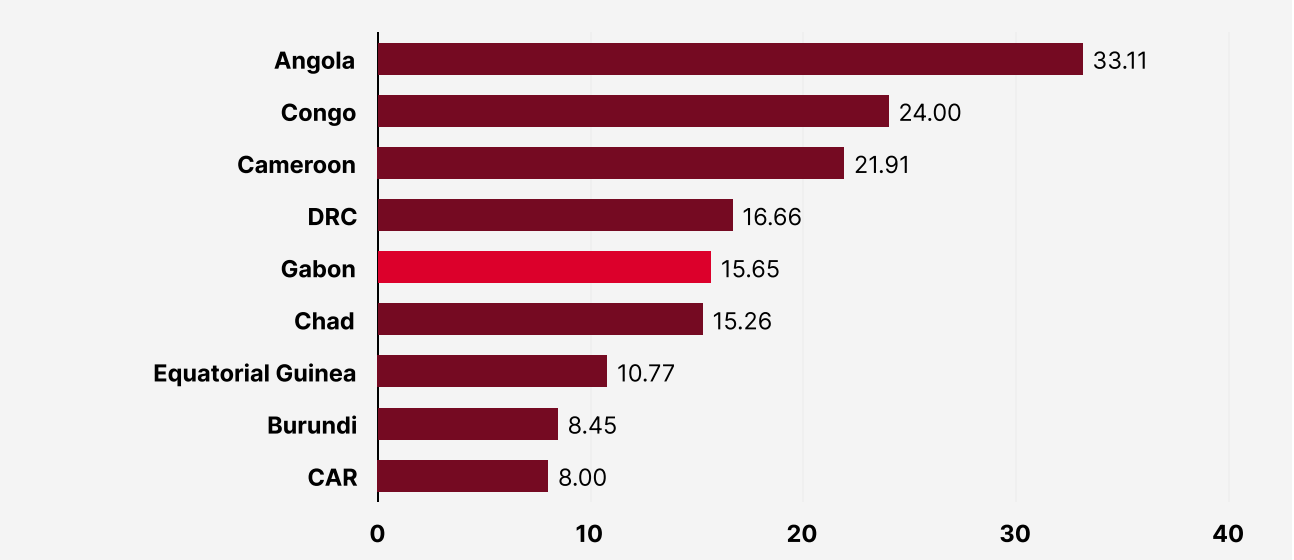
Operators and ARCEP recently reached an agreement on compliance with the QoS standards currently in place. Both sides agreed that the priority should be improving quality of service and extending network coverage. ARCEP therefore reduced the fine it had originally imposed, on the understanding that the difference would instead be invested in the network for the benefit of customers.[83]

Submarine cables, such as ACE and 2Africa, provide substantial international capacity at lower cost. The recently launched 2Africa is the world's longest open-access subsea cable system. It connects Europe, Africa, the Middle East and South Asia, and Gabon is one of the designated landing points. Its trunk capacity of up to 180 Tbps allows internet providers and mobile operators to secure capacity at lower wholesale prices.[84] Access to high capacity international bandwidth will contribute to lower retail prices of telecommunications services.

Mobile broadband speeds in Gabon are comparable to regional peers. GSMA's Mobile Connectivity Index (MCI) compares Gabon with regional peers and indicates that mobile broadband speeds are around the regional average.[85]

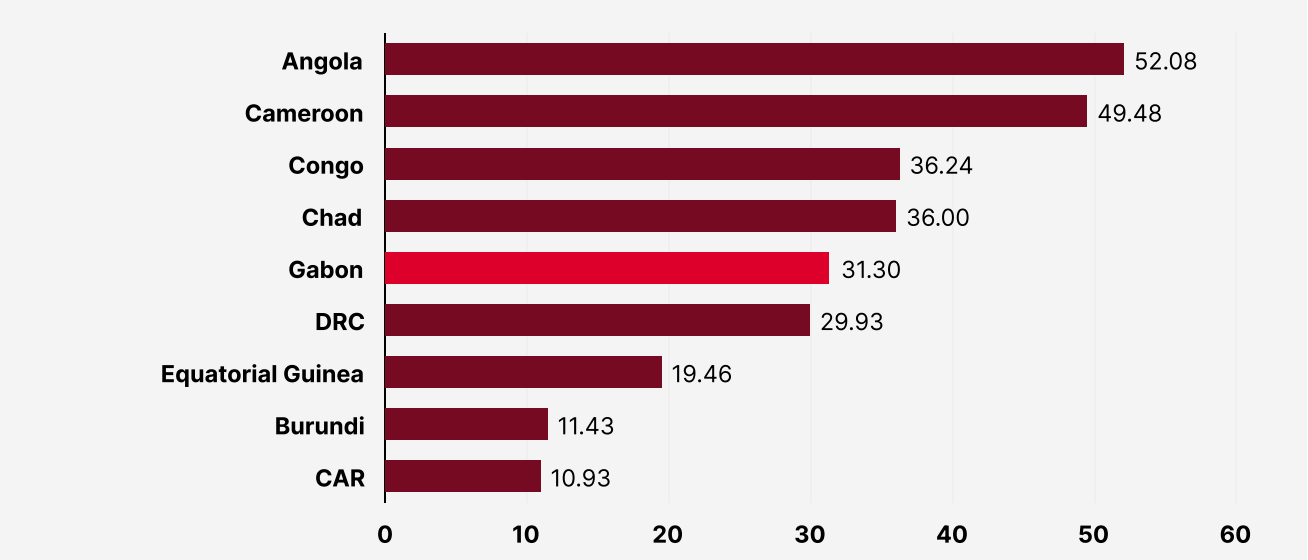
[83] Stakeholder discussions.
[84] "Announcing the Completion of the Core 2Africa System: Building the Future of Connectivity Together", Engineering at Meta, November 2025.
[85] Mobile Connectivity Index, GSMA, 2025.

Figure 32
MCI, Mobile download speeds, 2025.



Source: Mobile Connectivity Index.

Figure 33
MCI, Mobile upload speeds, 2025.

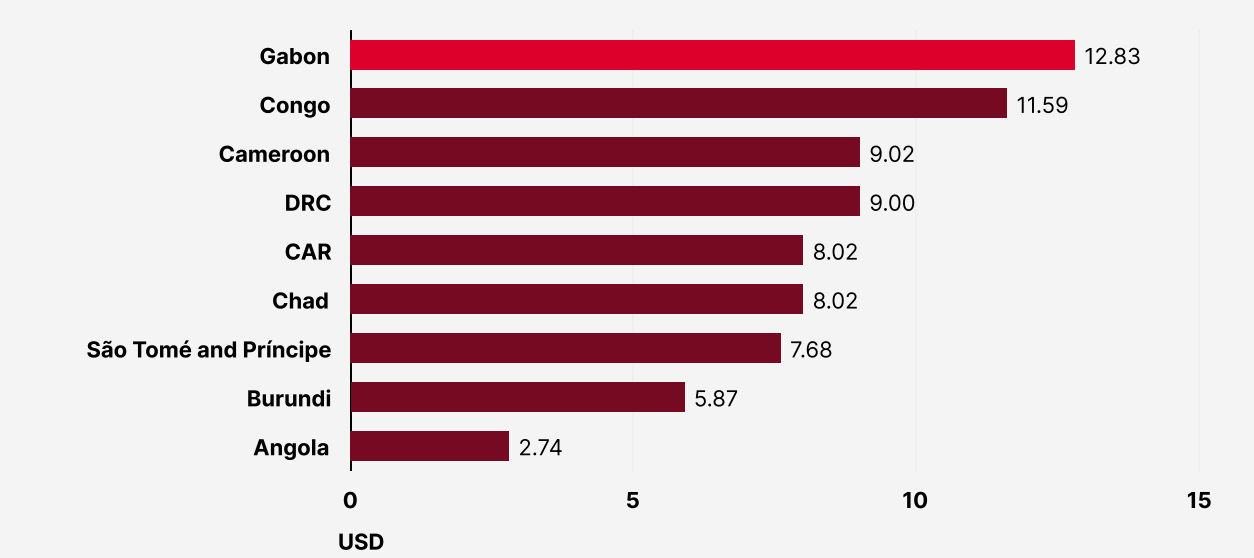


Source: Mobile Connectivity Index.

2.3. Prices and affordability

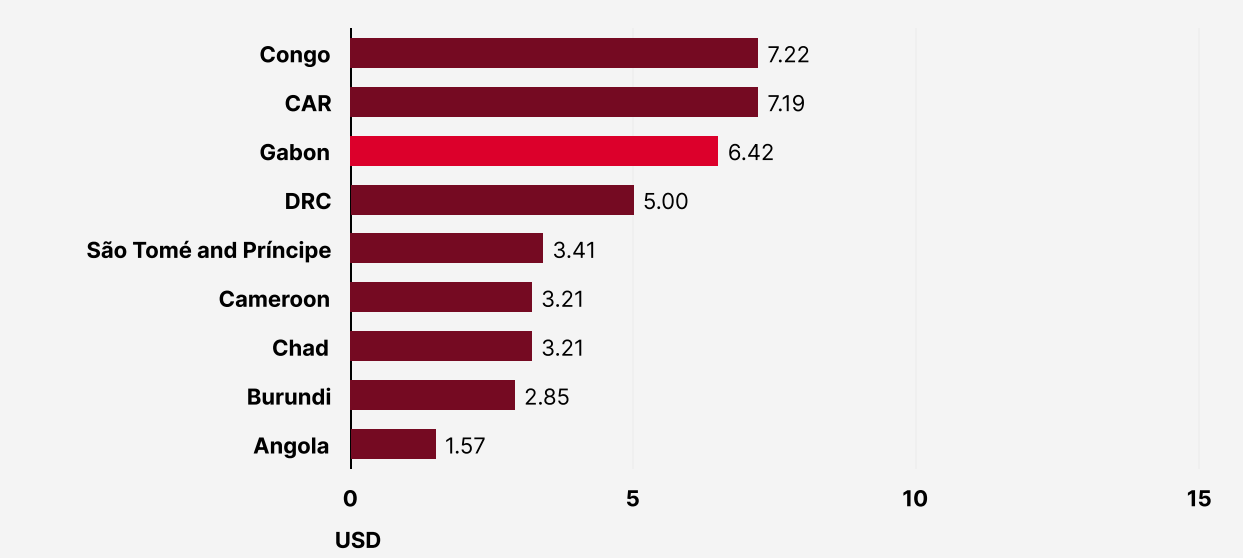
Mobile data prices reflect high general price levels in Gabon. Average revenue per user (ARPU) is also higher than the regional average, but this should not be read as evidence of poor value: both figures reflect Gabon's higher general price level and higher average incomes.[86] The figures below compare nominal mobile data prices across the region.

Figure 34
Cost of mobile data and voice low-consumption basket (70min+50sms+1 GB, USD), 2025.



Source: ITU.

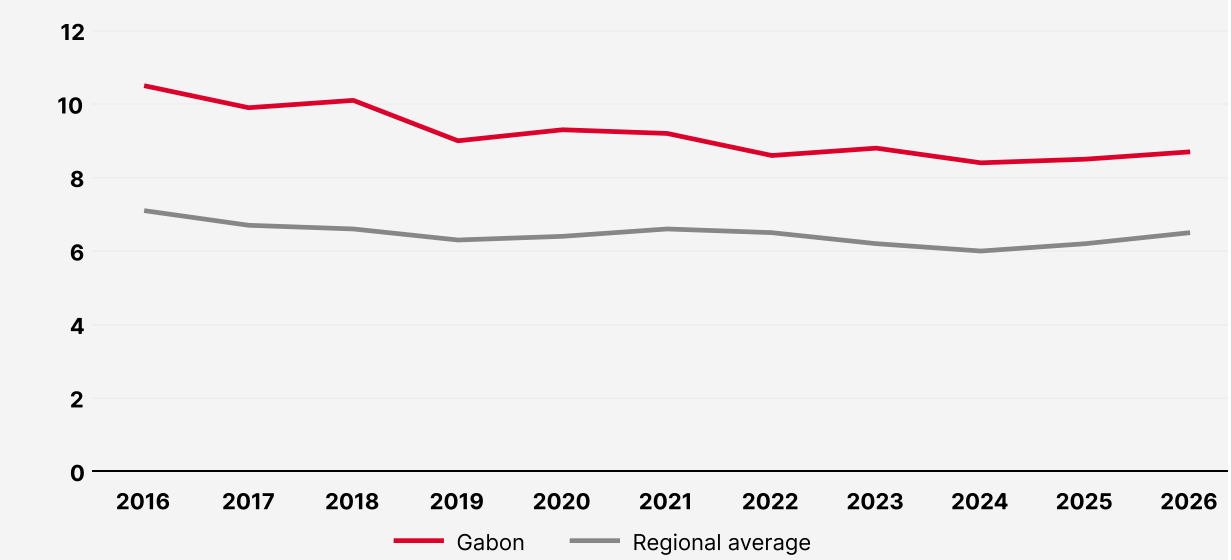
Figure 35
Cost of data-only mobile broadband 1 GB (USD), 2025.



Source: ITU.

[86] Also note that prices are subject to 18% VAT and 5% excise tax.

Figure 36
ARPU, by mobile connection (USD), 2016–2026.

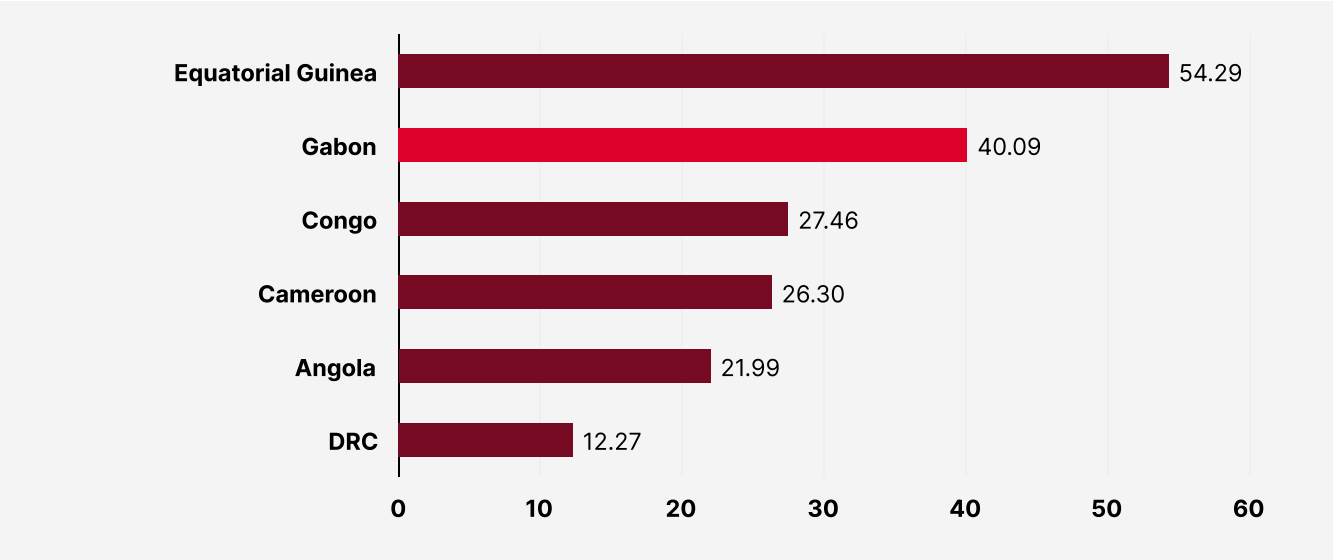


Source: GSMA Intelligence.

The high burden of taxation on the mobile industry contributes to the level of prices in Gabon. In addition to 18% VAT and 5% excise duty on services, fees and levies on the operators amounting to a further 11% of revenues further push up the price paid by consumers. Taxes and levies on devices adds to the affordability challenge, particularly for low-income households (see Section 3.2).

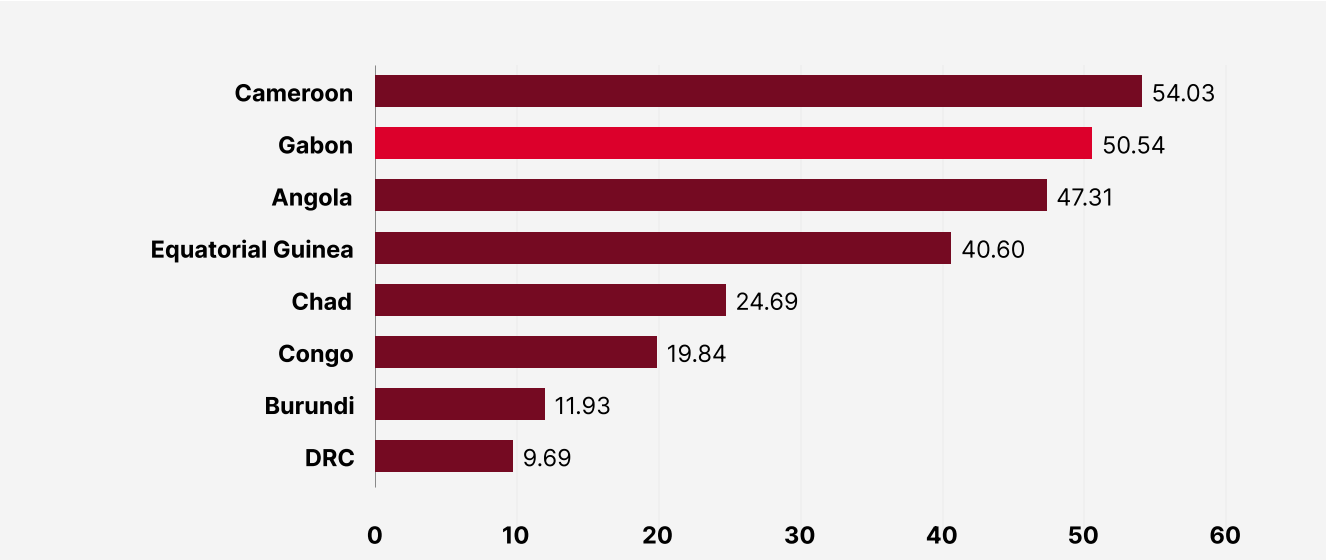
When compared with average incomes, the price of communications services in Gabon are quite affordable. GSMA's Mobile Connectivity Index (MCI) includes a measure of affordability of mobile devices and services across the world. Its entry-level basket measure is a normalised index of how affordable 1 GB of data is for the poorest 40% of the population: the higher the score, the more affordable the service. MCI scores suggest that, compared with other countries in the region, data services and devices are affordable in Gabon, a result that is largely driven by Gabon's high GDP per capita.

Figure 37
MCI, Device affordability for poorest 40%, 2025.



Source: MCI.

Figure 38
MCI, Affordability of entry basket (1 GB) for poorest 40%, 2025.



Source: MCI.

Despite this, there is a significant proportion of the population for whom access to the internet remains unaffordable. The total cost of accessing the internet includes both the price of the device and the ongoing data costs. Additionally, there are electricity costs, repair and battery replacements, accessories costs, as well as expected renewals. The poverty levels described in Section 1 mean that the one-off purchase price of a smartphone is a material barrier to mobile broadband adoption for many Gabonese people. The extent of this challenge varies across the country. There is a wide variation in poverty levels between provinces which means that the internet affordability challenge also varies regionally. In provinces with low average incomes and high levels of poverty, a greater share of the population will struggle to afford the one-off and ongoing costs of internet access.



Table 3
Regional poverty incidence in Gabon, 2017.

Region	Poverty percentage[87]
Gabon average	33.4%
Libreville	21%
Port-Gentil	22.3%
Franceville	44.5%
Other urban	38.2%
Rural	59.5%

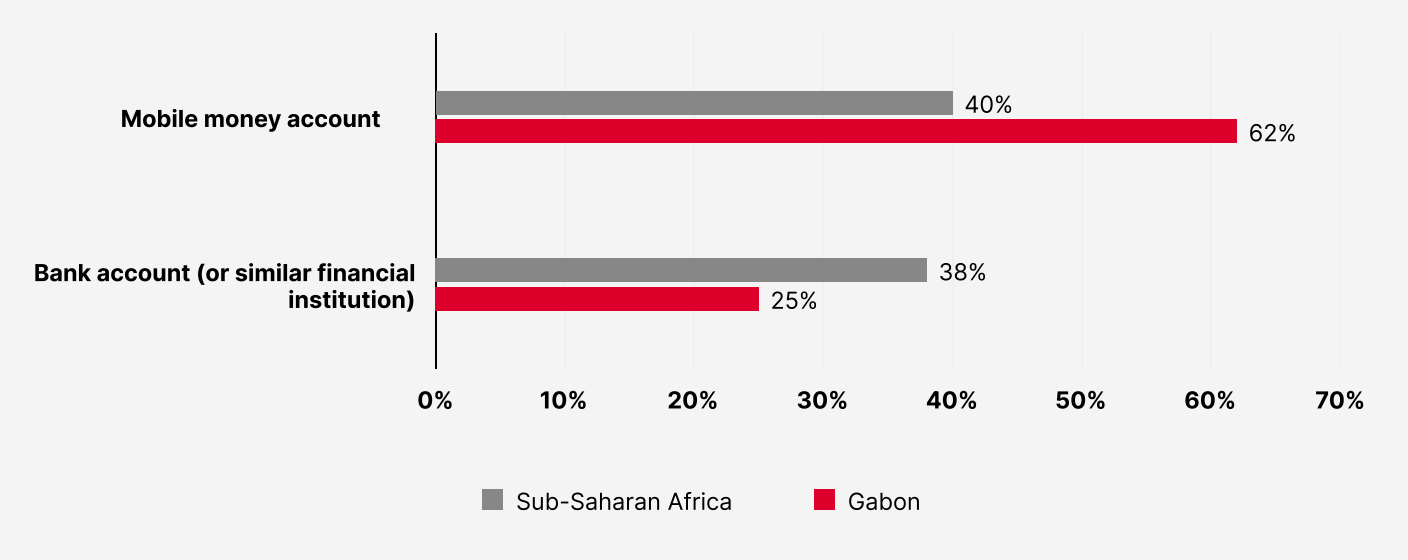
Source: World Bank.

2.4. Mobile financial services

Mobile money is more widespread than formal banking in Gabon. Fewer than 25% of adults have a traditional bank account, whereas 62% of adults have a mobile money account – well above the sub-Saharan African average of 40%.[88]

This reflects a structural change in the Gabonese financial landscape: for a significant portion of the population, mobile money is now the first, if not the only, entry point to formal financial services.

Figure 39
Financial inclusion, 2024.

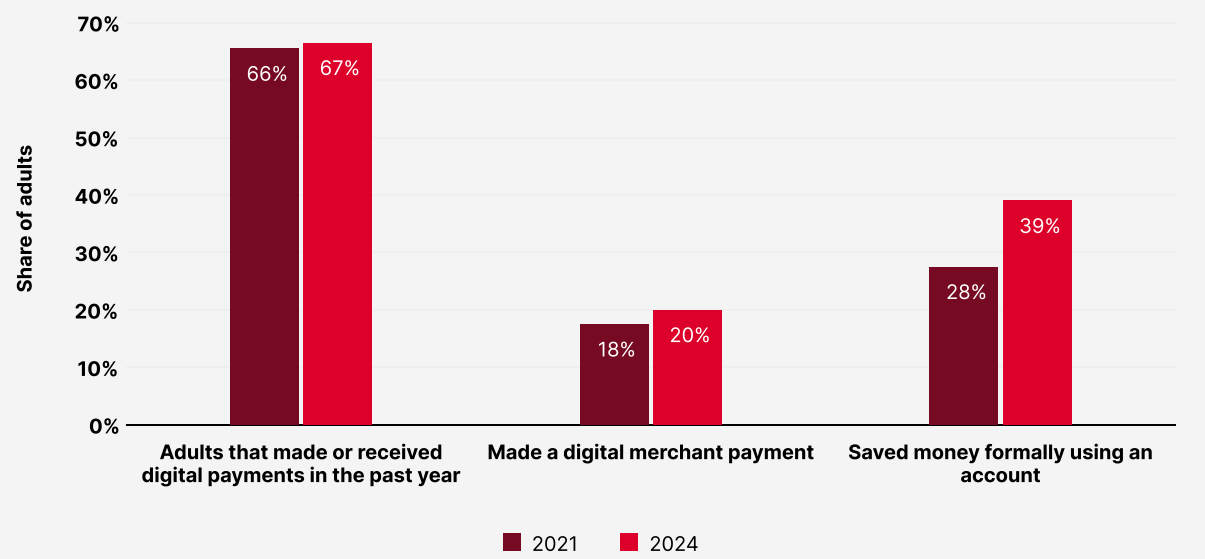


Source: World Bank.

[87] Poverty line set at CFAF 840,400 per capita per year.
[88] Findex, The little data book on financial inclusion, World Bank, 2025.

The financial access landscape is evolving. Mobile money use has continued to grow. The share of adults making or receiving digital payments was almost unchanged between 2021 and 2024, at around two-thirds, but more adults now pay merchants digitally and avoid cash or traditional account payments (Figure 40).

Figure 40
Use of digital payments and formal saving, 2021 and 2024.



Source: World Bank.

Mobile money drives financial inclusion, in line with the government's strategic priority of inclusive development. The PNCD 2026–2030 places digitalisation at the centre of economic transformation, a key national priority. Digital tools drive economic growth, improve the efficiency of the public sector and widen financial inclusion.

Mobile money helps to reduce the geographical, economic and administrative barriers that limit access to traditional banking services. It thus plays a decisive role in the financial integration of rural populations, workers in the informal sector, youth and women.

Box 3
National Strategy for Financial Inclusion.

Mobile money could become one of the main instruments for implementing a national strategy for financial inclusion. Measurable goals of such a strategy could target:

- inclusion of vulnerable populations
- improving access to financial services
- reduction of the informal economy
- digitalisation of payments
- women's economic participation
- financial inclusion of young people
- development of entrepreneurship and SMEs.

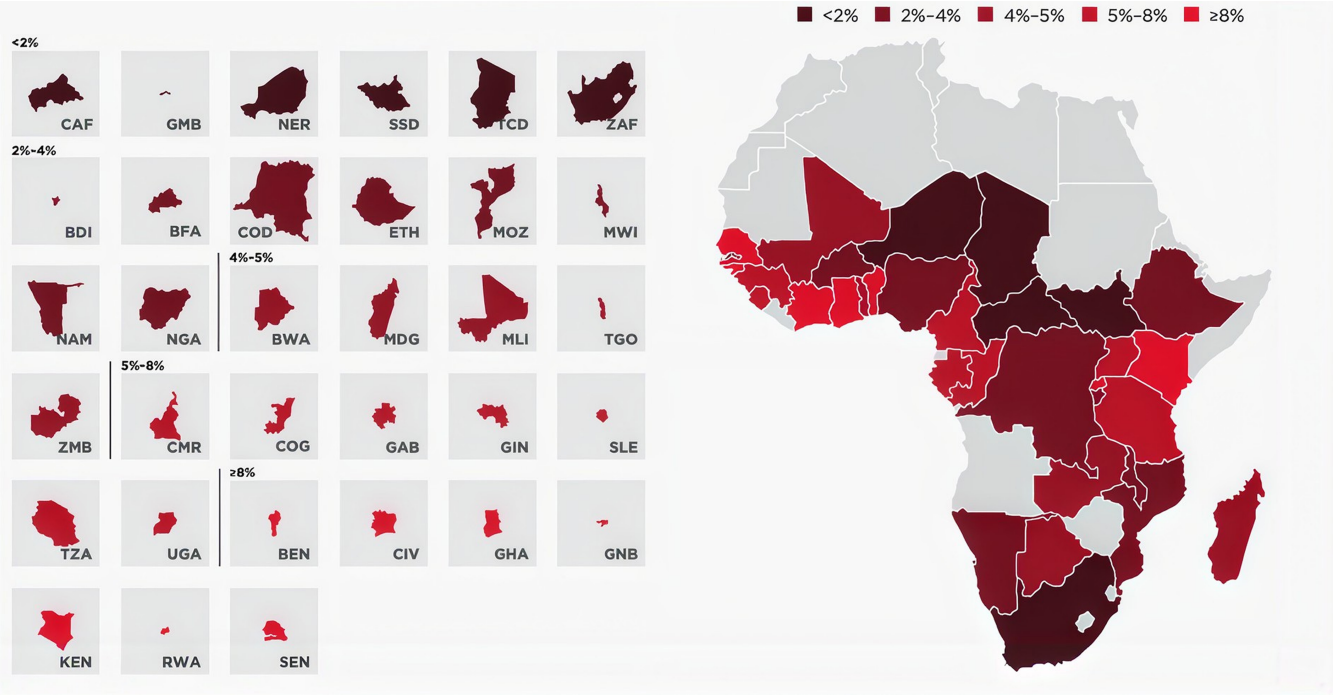
Mobile money in Gabon must now move from a money transfer model to an everyday digital payments model. Gabon's well-developed infrastructure provides a strong base for further expansion of the mobile financial services ecosystem. Going forward, success should be measured by how digital payments are integrated into the real economy. Businesses that rely on digital payments improve productivity, gain access to their own business analytics, can build digital commerce and reach a wider customer base. Digital merchant payments further improve transparency and traceability of transactions, which combats corruption and helps to increase tax revenue.

Gabon's high mobile penetration provides an opportunity for widespread mobile money adoption which will bring significant economic benefits. GSMA found that between 2013 and 2023, a 10-percentage point increase in mobile money adoption increased GDP by 0.6% to 1.0%.[89]

Box 4
Mobile money's contribution to GDP in Sub-Saharan Africa, 2023.

In Kenya, the number of registered mobile money accounts more than tripled between 2013 and 2023. At the same time, mobile money contribution to Kenya's GDP rose from 3.9% to 8.6%. In Ghana, mobile money contribution reached 9.3%.[90]

Gabon has slightly higher mobile internet penetration (40%) than Kenya (37%) and Ghana (38%), and therefore has higher potential for mobile money adoption.[91] However, the current mobile money contribution to GDP in Gabon is lower.



Source: GSMA.

[89] The State of the Industry Report on Mobile Money 2025.
[90] Mobile money's economic impact in five African countries, GSMA, 2025.
[91] GSMA Intelligence, 2026.

Box 5
Pochi la Biashara, Safaricom Kenya.

Mobile money drives innovation for small merchants

Pochi la Biashara or "business pocket" is an innovative digital payment system provided by Safaricom in Kenya for small merchants such as food vendors and small kiosks. Business owners can make and receive M-Pesa payments and keep their business finances separate from personal funds. The system reported 72% year-on-year growth and was used by 1.5 million business owners by October 2025.[92]

Strengthening consumer confidence is essential for adoption of digital financial services. Mechanisms for user protection should be further developed to build trust and support widespread adoption of digital financial services. A solid consumer protection framework, cybersecurity, effective fraud prosecution, legal requirements of price transparency and timely processing of claims will help solidify consumers' trust.



[92] What Will It Take to Scale Merchant Payments? Harnessing the Digital Opportunity, GSMA, 2026.

Box 6
Roadmap for market acceptance of mobile payments.

To accelerate the acceptance of digital payments as a standard rather than an add-on, a coherent national strategy should be developed and implemented in cooperation between the public and private stakeholders.

Alongside the actions shown below, the roadmap should also cover:

- paying government suppliers, allowances and social transfers directly into accounts and wallets, not only collecting public payments digitally;
- a simplified, low-fee onboarding tier so that informal micro-traders can accept digital payments;
- using merchant transaction histories, with the customer's consent, to unlock working-capital credit for small firms; and
- keeping digital payments free of transaction-specific taxes, so that paying digitally never costs more than paying cash.

Digital public payments	• local taxes; • administrative fees; • health services; • school fees; • administration's collection and disbursement.
SMEs and small local businesses	• deploy interoperable QR codes; • reduce acceptance costs; • support the digital equipment of merchants;
Corporations	• encourage the acceptance of mobile money in large-scale retail; • transport; • the hotel industry; • tourism; • petrol stations.
Regulatory incentives	• implement regulatory or tax mechanisms that favour merchants and businesses adopting digital payments.

Box 7
Case study: from transfers to trade – mobile money in merchant payments.

Kenya shows what happens when mobile money moves from sending money to running businesses. M-PESA began in 2007 as a person-to-person transfer service. Its merchant products, Lipa na M-PESA tills for established businesses and Pochi la Biashara, a business wallet for micro-traders, have made it the payment system of the everyday economy. In the year to March 2026, the number of merchants using these products rose by about 70% to 3.1 million: 1.0 million Lipa na M-PESA merchants and 2.1 million Pochi la Biashara merchants. Women make up just over half of active Pochi users.[93]

Merchant payments create the data that unlocks credit and growth. Every digital sale builds a transaction history that lenders can use to extend working capital to small firms that have no collateral. Research calibrated on Kenyan firm data found that entrepreneurs who pay suppliers by mobile money are more likely to obtain trade credit, with substantial effects on entrepreneurial growth and macroeconomic development.[94]

Ghana shows that tax design matters. Ghana introduced a 1.75% electronic transfer levy (E-Levy) in 2022, later cut to 1%, and Parliament repealed it in March 2025 after businesses and analysts argued that it was discouraging digital transactions. In April 2025, mobile money transactions reached a record GHS 365 billion, with 24.2 million active accounts, and analysts cited the repeal as one of the drivers.[95]

Ethiopia shows how quickly scale can be reached when the state leads demand. Ethio Telecom's telebirr, launched in 2021, served 60.6 million customers in the 2025–2026 financial year. It processed 2.61 billion transactions worth ETB 4.19 trillion and extended ETB 19.5 billion in collateral-free digital loans to 5.65 million customers. In 2025, the government required all public offices to accept payment from every licensed digital payment provider.[96]

What this means for Gabon. Gabon already has the building blocks: 62% of adults have a mobile money account, GIMACPAY interoperability operates across CEMAC and MaDigiPaie now handles public payments. The next step is to make digital the default way to pay the state and to pay merchants, while keeping digital payments free of transaction-specific taxes. Wider merchant acceptance would bring informal businesses into the formal economy, widen the tax base and give small firms access to credit.

Source: Safaricom, Bank of Ghana, Ethio Telecom, as cited; GSMA Analysis.

[93] "Pochi la Biashara growth FY26: Safaricom", Techweez, 14 July 2026; Safaricom PLC, FY25 Results Press Release, 9 May 2025.
[94] T. Beck, H. Pamuk, R. Ramrattan and B. R. Uras, "Payment instruments, finance and development", Journal of Development Economics, Vol. 133, 2018, pp. 162–186.
[95] "Parliament abolishes E-Levy, returns GH¢2 billion to Ghanaians", Ghana News Agency, March 2025.
[96] "Data overtakes voice as top earner for Ethio Telecom", The Reporter (Ethiopia), 2026; "Ethiopia mandates government offices to accept digital payments", Techpoint Africa, June 2025.

Initiatives launched in cooperation with international institutions can accelerate development of the ecosystem. The Digital Finance for Resilience (DFS4Res) programme is a joint initiative by the European Union and the Organisation of African, Caribbean and Pacific States (ACP Group), launched in the aftermath of COVID-19 and implemented by the United Nations Capital Development Fund (UNCDF).[97] The Ministry of Digital Economy partnered with the UNCDF in 2025 with the aim of accelerating digitalisation and strengthening the financial services ecosystem.[98] UNCDF works with the Ministry of Digital Economy and General Directorate for Competition, Consumption, and Anti-Fraud Affairs (Direction générale de la concurrence, de la consommation et de la répression des fraudes, DGCCRF) to build the capacity of the government to expand the system.[99]

Stronger institutional capacity is essential. Mobile financial services offer considerable potential but also create risks. The legal framework must protect consumers, especially vulnerable users, in areas such as data security. Responsibilities across government must be clear, regulation predictable and rules communicated promptly to industry and consumers. New entrants cite unclear fintech regulation and a difficult approval process as obstacles.[100] In particular, a predictable and technology-neutral tax regime should be maintained to support the expansion of mobile money and encourage investment in digital financial services. Ghana introduced an electronic transfer levy in 2022. This was removed in March 2025 because businesses and analysts argued that it discouraged digital transactions. In April 2025, mobile money transactions reached a record high of GHS 365 billion, a development that shows the impact that tax design can have on mobile financial services.[101]

Initiatives such as Digital Gabon will support increased penetration of mobile financial services. Many of these constraints on further development of digital financial services require legal and institutional reforms to be undertaken by government. These are recognised as priorities in the government digital strategy and are included in projects such as Digital Gabon. Implementation of these initiatives need to be prioritised so that the digital financial services ecosystem in Gabon can catch up with other countries in the region.

2.5. Conclusions on digital adoption in Gabon

Gabon combines high mobile broadband coverage with lower levels of digital adoption. 4G networks cover 95% of the population and mobile internet penetration is above the regional average, but a large usage gap remains.

The remaining coverage challenge is concentrated in rural areas. Covering the remaining population will require investment in extending networks in rural areas. A combination of targeted policy interventions and demand stimulation could close the financing gap for nearly universal 4G coverage. The success of the interventions relies on clear identification of the target customers, understanding of the issues operators face, and efficient implementation.

5G roll-out is the next technological horizon to focus on. 5G is being launched in October 2026. The sector policy framework should encourage investment into both 4G and 5G networks. Government institutions will need to work with operators to ensure the financial viability of this investment. In particular, investment into expansion and upgrading of 5G networks needs to be matched by demand from the customers.

[97] État du marché des services financiers numériques au Gabon, UNCDF, 2023.
[98] "African Nation of Gabon's Fintech Ecosystem in 2026", The Fintech Times, April 2026.
[99] La réglementation au service de la finance numérique au Gabon, UNCDF, 2024.
[100] La réglementation au service de la finance numérique au Gabon, UNCDF, 2024.
[101] "Parliament abolishes E-Levy, returns GH¢2 billion to Ghanaians", Ghana News Agency, March 2025; "Mobile Money transactions hit record GH¢365 billion in April 2025", Graphic Online, 2025 (Bank of Ghana data).

Adoption of mobile broadband lags behind coverage, particularly among lower-income households. Broadband networks are available to the vast majority of the population but over one-third of adults still do not have a broadband subscription. This is due to a combination of affordability, lack of digital skills and a perception that the benefits of smartphone ownership do not outweigh the costs.

Affordability remains a problem for significant population cohorts due to poverty. Despite the high average GDP per capita in Gabon, the high level of income inequality means that there is remains a significant segment of the population who struggle to afford the purchase and the cost of ownership of a smartphone. Most adults – even in poorer households – own a mobile phone, but in those households only half own a smartphone.[102] Policies to increase mobile broadband adoption should primarily target this customer group.

Digitalisation of public services will improve efficiency of public administration and drive the government's national economic strategy of sustainable, inclusive development. Unlike other countries in Africa, Gabon is highly urbanised and many of the people who do not currently use broadband live in small and medium-sized towns.[103] For these people, the content that is accessible via broadband is not sufficiently relevant to their daily life to justify the additional expenditure. The government's development strategy is focused on improving the quality and availability of public services. It also aims at diversification of the economy and of government revenues away from over-reliance on the petroleum sector. The government has been committed to the digitalisation of public administration. This effort should be accelerated. Digitalised public services are more efficient and more transparent, both of which are necessary if Gabon is to close the digital divide. Improved efficiency is likely to increase government revenue by reducing revenue leaks and delays. Digitalisation also offers opportunities to grow the non-petroleum sectors of the economy which will contribute to economic diversification.

Gabon is making progress with its digital transformation, but benchmarking against other African countries shows the need to accelerate progress. The GSMA Digital Nations and Society Index (DNSI) shows that Gabon is below the African average for the adoption and integration of digital technologies. The DNSI measures the extent to which digital technologies are adopted and integrated into daily life by consumers and businesses. It includes a range of metrics which are then combined to form an overall index score that measures the level of digitalisation in each country in Africa. It allows countries to compare themselves against their peers and it provides guidance to countries on how they can accelerate digital development.

The extent of the digital divide varies regionally within Gabon. Both network connectivity and poverty levels are unevenly distributed across the country. As a result, national averages mask significant differences between regions and among different social groups. As part of an implementation strategy, the government should consider undertaking a province-level diagnosis on effective coverage, network quality, availability of reliable and affordable electricity and access to public services. Identifying locations where schools, healthcare centres, public administration offices, businesses and individuals encounter the greatest difficulties in accessing broadband will allow the government to prioritise interventions in digital.

[102] Findex, The little data book on financial inclusion, World Bank, 2025.
[103] Gabon Poverty Assessment, World Bank, 2020.

3. Policy recommendations



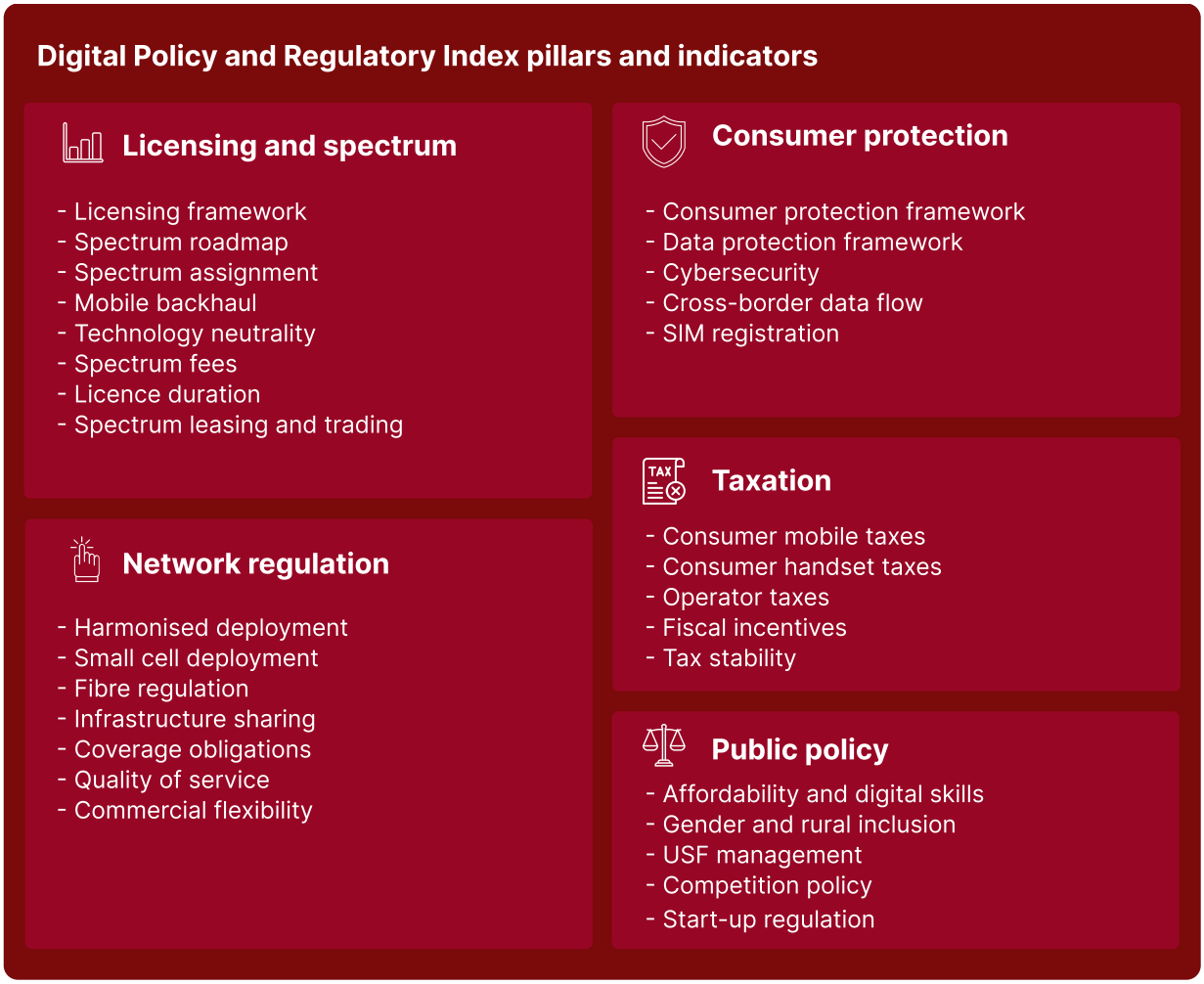
3. Policy recommendations

GSMA's Digital Africa Index (DAI) provides a framework for targeted policy recommendations. The index assesses country progress on digital development, and provides a basis for designing the policies that drive it.

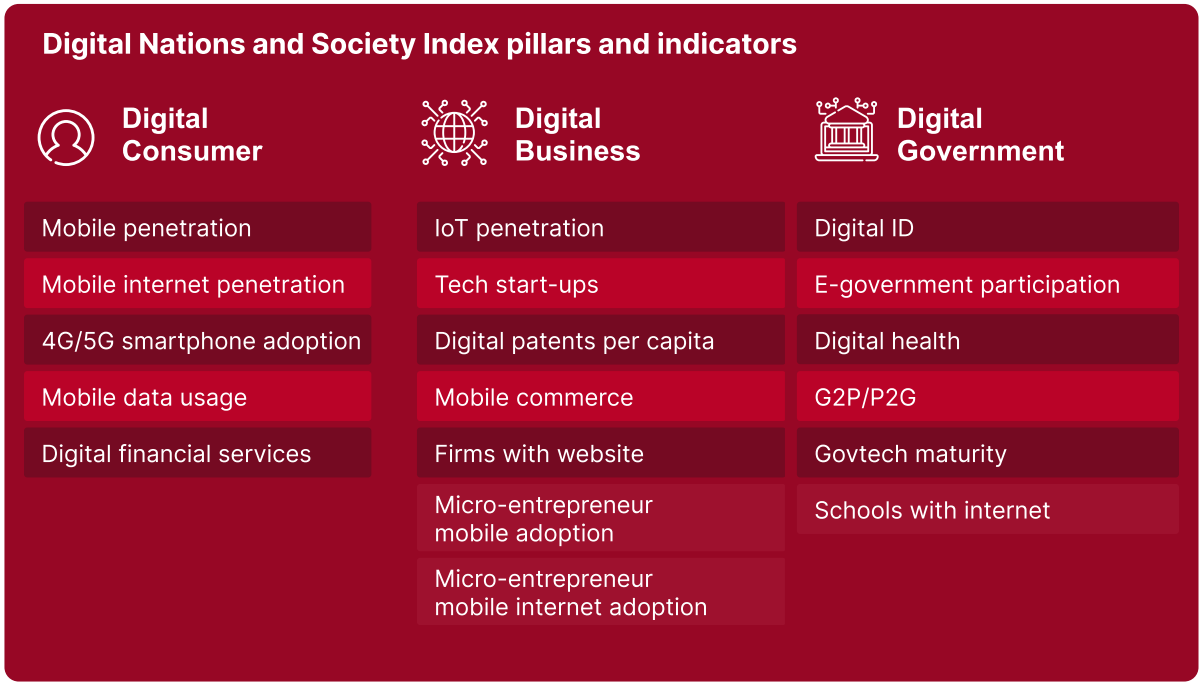
The DAI itself is made up of sub-indices that reflect particular areas of digital policy and performance.[104]

The Digital Policy and Regulatory Index (DPRI) focuses on the policy and regulatory environment. It evaluates how a country's policies are supporting the growth and development of digital services. The Digital Nations and Society Index (DNSI) measures how consumers, businesses and governments leverage mobile technologies to accelerate socioeconomic development.

Figure 41
DAI pillars and indicators.



[104] DAI consists of four composite indices: the Digital Nations and Society Index ('DNSI'); the Digital Policy and Regulatory Index ('DPRI'); the Mobile Connectivity Index (MCI), and the Mobile Money Regulatory Index (MMRI).



Source: GSMA Intelligence.

Gabon scores 43.6 on the DPRI and 31.8 on the DNSI. Both of these scores suggest that there is significant room to grow, both in connectivity and digitalisation of the society.

This report provides short-term policy recommendations within specific areas of the DAI framework. It does not aim to cover the full scope of the DPRI and DNSI but rather focuses on concrete policy steps that will drive digitalisation in Gabon. These recommendations cover four areas: network regulation, taxation, affordability and stimulating digital demand.

Following the report launch, an implementation plan should be designed for each of the recommendations. This should identify the government institution with primary responsibility for leading the initiative, public and private stakeholders to be consulted, indicative timetable, costs and possible sources of funding, risks and the result indicators. A monitoring framework should also be designed according to the needs of each policy recommendation. Annex 3 sets out suggestions for where the institutional responsibility should lie for each recommendation.

Policy recommendations to support digitalisation in Gabon are organised around four challenges.



Mobile broadband adoption is the cornerstone of the digital economy. The recommendations of this report focus on mobile connectivity and the policies to promote it. They do not, on their own, constitute a comprehensive strategy for the digital economy.

A complementary framework will need to address, among other things, fixed and hosting infrastructure, digital identity, payments, interoperability, data, cybersecurity, skills and business transformation.

3.1. Reducing the cost of network expansion and upgrades

An overarching element which holds back network expansion and upgrading in Gabon is the lack of clarity in the legal and regulatory framework that governs the sector. Multiple laws governing electronic communications lay the groundwork of the ecosystem, but the accompanying decrees setting out the specific provisions have not been completed. This concerns Law No. 026/2018 regulating electronic communications, which has not been followed by an implementing decree, Law No. 025/2021 on electronic transactions, of which Article 139 refers to a decree designating the certification authority that has not yet been issued, and Law No. 027/2023 on cybersecurity, of which Article 25 also calls for a decree that remained without further action. The resulting regulatory ambiguity inhibits progress and should be addressed as a priority.

Recommendation 1.1: Issue outstanding sector legal and regulatory documents

Lack of legal and regulatory clarity is an obstacle to sector development. As an immediate action to be implemented within the first 6 months, Secretariat General of Government / MENDI should:

- Issue outstanding implementing decrees for the electronic communications (2018), electronic transactions (2021) and cybersecurity (2023) laws;
- Publish a spectrum roadmap;
- Publish Universal Service Fund accounts.

Recommendation 1.2: Support the connection of new mobile sites to the electricity grid

Around 70% of existing mobile sites are connected to the electricity grid, but 68% of the sites required to extend coverage are more than 1 km from it. Connecting new sites where grid extension is economically viable would reduce operating costs, improve the business case for rural expansion and help keep mobile internet affordable.

Recommendation 1.3: Support the operating costs of off-grid sites needed to extend coverage

Even with better grid access, some sites required to reach remote and sparsely populated areas will not generate enough revenue to be financially sustainable. Targeted public support for the operating costs of these sites will be needed to close the remaining coverage gap. Support should be directed to sites that are necessary for coverage but cannot be sustained on commercial terms.

The majority of current sites are connected to the grid, but most new sites will require off-grid power. 70% of current sites are connected to the electricity grid.

This is high by African standards and provides a good foundation for managing operating costs.

Physical distance between the site and nearest electricity grid infrastructure is a key factor in the cost and feasibility of connection. The closer a site is to the grid, the more feasible it is to connect it. 64% of existing sites are within 1 km of the grid (although not all of these are connected). Of the new sites needed to expand coverage, 68% are more than 1 km from the grid.[105] The majority of the new sites will therefore likely require off-grid power solutions.

Off-grid sites are more expensive to power. The higher operating costs of these sites drive up prices for consumers and hold back digital adoption. In addition, higher operating costs harm the business case for new mobile sites in off-grid locations, meaning that rural and lower-income communities are less likely to have mobile broadband coverage, or benefit from newer mobile technologies.

Table 4
Site cost assumptions used in the modelling, 2026.

	Capex (USD)		Annual Opex (USD)	
	Off-grid (diesel)	**On-grid**	**Off-grid (diesel)**	**On-grid**
New greenfield 4G site (rural)	226,000	226,000	62,000	44,000
5G capacity site (urban)	–	45,000	–	7,000

Source: GSMA Intelligence.

Extending the broadband networks to cover 98% of the population will require public support. The revenue generated by new sites in these very rural areas will not cover the costs of building and operating them. If operators are to extend their networks, they will need public financial support to ensure that they are commercially viable.

Both 4G and 5G technologies have an important role to play in improving coverage and access to the internet in Gabon. Both technologies operate on a range of frequencies with lower bands used to expand coverage while higher bands provide higher speed connectivity. In Gabon, the 4G networks will support further digital inclusion in the short-run as there are more 4G capable devices available within the country. The role of 5G will accelerate as networks expand and the number of 5G devices in the country grows.

Gabon is particularly well placed to benefit from 5G. Relative to other countries in the region, the country's advanced infrastructure, high level of network coverage and high rates of mobile broadband adoption all indicate that 5G is likely to have a positive impact both on individuals and on enterprises.

SMEs in particular are likely to drive 5G enterprise adoption in the early years. 5G will generate economic value in two ways. Firstly, with the creation of new business opportunities that take advantage of the high-quality connectivity to offer new products and services. Secondly, for existing businesses, the integration of digital connectivity into their operations will increase productivity and expand output.[106]

The recent decision to launch 5G in Gabon in October 2026 will allow operators to begin rolling out 5G network services. The demand for such services in the short-term remains to be seen as the stock of 5G compatible devices in the country is currently quite limited. This situation is likely to improve over time as more 5G compatible devices enter the country.

[105] GSMA Analysis, 2026.
[106] The Mobile Economy 2026, GSMA, 2026.

Demand for spectrum will increase as 5G take-up accelerates. The capacity demands of 5G devices on the networks far surpass those of 3G and 4G. Meeting this additional demand requires additional spectrum. On average, the amount of spectrum dedicated to mobile networks has nearly doubled since 2014. However, that extra traffic has not translated into extra revenue: average revenue per MHz of spectrum fell by 67% between 2014 and 2024.[107]

High spectrum costs ultimately harm consumers because they reduce operators' capacity to invest. The cost of spectrum impacts connectivity. When spectrum costs do not reflect its value, investment incentives are distorted. High spectrum prices mean lower speeds, reduced coverage, lower affordability and ultimately lower adoption.[108] The best approach to spectrum pricing maximises the social value of spectrum and benefits consumers.

A secondary market for frequencies should be considered as it invites market forces to create efficient outcomes.

In Gabon, spectrum fees are paid annually and are dependent on the frequency band and geographic zone. ANINF notifies each operator of the annual amount payable, based on its spectrum holdings. These payment agreements are time-limited: the current one covers 2026 and 2027, during which no increase in royalties is planned. Operators have no medium- or long-term visibility on fees beyond 2027. This hinders investment and efficient use of spectrum.

The methodology for calculating spectrum charges should be updated. Spectrum charges should reflect the total amount of spectrum allocated rather than separate billing of upstream and downstream frequencies in paired bands. The methodology should be transparent, predictable and follow international best practice.

Figure 42
GSMA spectrum pricing recommendations.

New spectrum	Licence renewal
1. Regulators should not anchor administratively set prices to historical prices and outdated benchmarks.	1. Fees should not be linked to historical spectrum prices, given the decrease in underlying value.
2. Setting reserve prices at a low level allows room for price discovery and minimises the risk of unsold spectrum.	2. Renewal fees contribute to the build up of spectrum cost and can have negative impacts on consumers. A spectrum trading framework can provide the same incentives without imposing additional costs.
3. Making all spectrum allocated to mobile services available to operators ensures there is no artificial scarcity and supports better outcomes for consumers.	3. Regulators can consider renewals in exchange for investment commitments for coverage or quality of service.
4. The cost of meeting obligations or investment commitments attached to spectrum licences should be reflected in their price.	4. Alternatively, administrative review can be the most cost-effective way of ensuring that spectrum remains in efficient use.

Source: GSMA.

In order to maximise the economic impact of 5G, operators need a balanced portfolio of spectrum.[109] Low-band spectrum has superior propagation characteristics which allow signals to travel further and penetrate buildings more effectively.

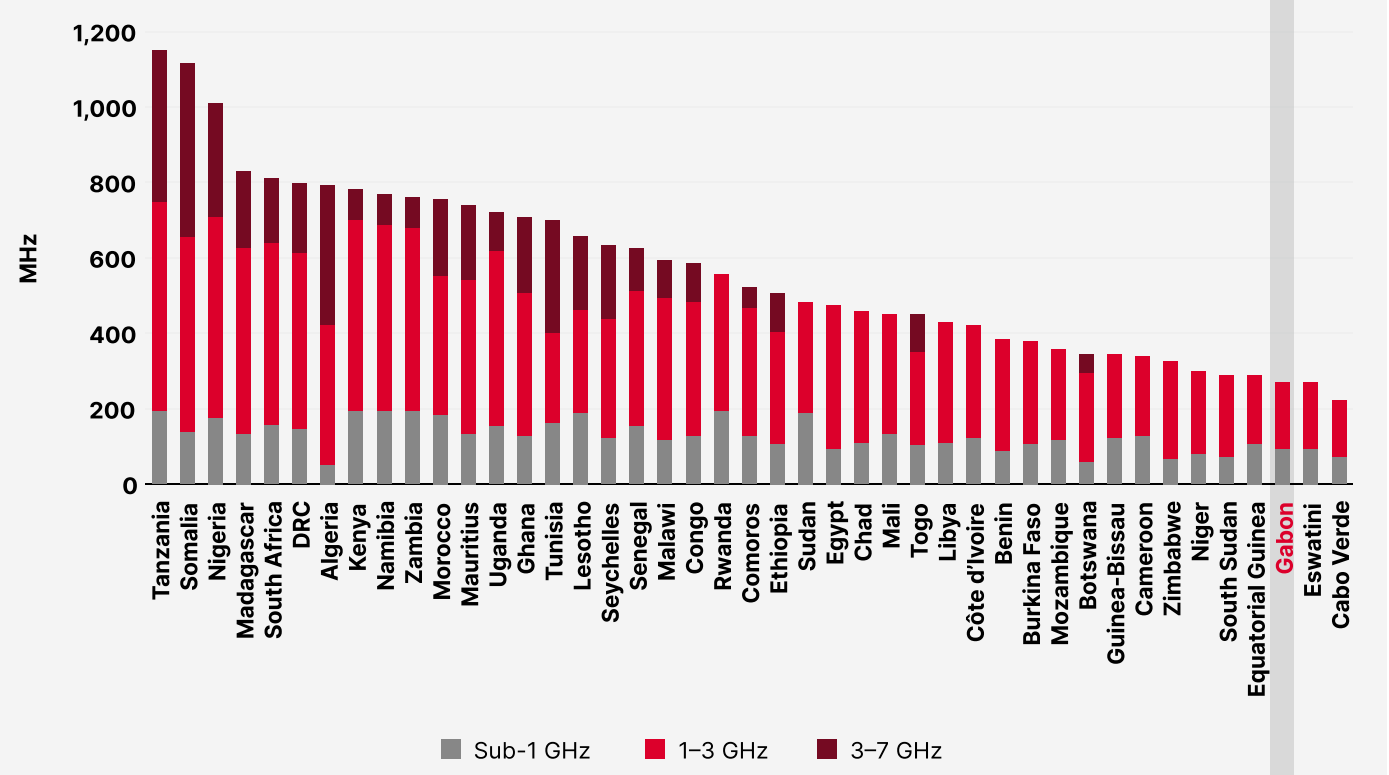
GSMA found that an additional 50 MHz of sub-1 GHz spectrum is associated with an 11 percentage-point increase in 5G coverage in rural areas as well as improved performance.[110] But spectrum is needed across low, mid- and high bands to deliver capacity in all areas and support the full range of use cases.

[107] Global Spectrum Pricing, GSMA, 2025.
[108] GSMA study found that a 10 pp increase in the spectrum cost-to-revenue ratio leads to 4 pp lower 4G coverage, 6 pp lower 5G coverage and 8% lower download speeds. Spectrum Policy in Africa, GSMA, 2026.
[109] Technology neutrality should be preserved, that is, operators should be able to use available spectrum for different technologies, ensuring efficient use of their spectrum holdings.
[110] Spectrum and rural connectivity, GSMA, 2026.

All three ranges therefore have important roles to play (Table 5).

Regional comparison shows that Gabonese operators have relatively low amount of spectrum at their disposal (Figure 43).

Figure 43
Spectrum holdings by band and country in Africa, 2025.



Source: GSMA Intelligence.

Table 5
Spectrum bands for 5G.

Low-band spectrum (below 1 GHz, e.g., 700 MHz frequency band)
• needed to drive digital equality, provide capacity in wider and rural areas, and for deep indoor coverage • Increased low-band capacity creates greater equality between urban and rural mobile broadband connectivity and supports addressing the digital divide
Mid-bands (1–7 GHz, e.g., 3500 MHz frequency band)
• provide city-wide 5G capacity • play a core role in delivering enhanced mobile broadband and applications which impact how we manufacture goods, deliver education, and build smart cities • to date, mid-band spectrum has been the most used to launch 5G networks around the globe
High-bands or mmWave (above 24 GHz, e.g., 26 GHz frequency band)
• deliver the fastest broadband speeds and lowest latencies • deliver the highest performance for 5G but only cover shorter distances so are used for high-capacity hotspots

Source: GSMA.

5G needs substantial amounts of harmonised spectrum which will require prime bands to be cleared. The key components of a balanced approach to 5G spectrum include:

- Awarding 100 MHz of contiguous mid-band spectrum per operator;
- Increasing low-band spectrum capacity by assigning all available bands (including 700 MHz);
- Making 2 GHz of mid-band spectrum available per market by 2030 (e.g. through 3500 MHz and 6 GHz assignments);
- Consulting with industry over the need for mmWave to cover busy hotspots, allowing for an initial assignment of 800 MHz per operator.

Regulatory uncertainty about the national spectrum strategy in Gabon undermines network planning and investment. Network planning and investment decisions take time and require a clear understanding of what spectrum resources are likely to be available in the future. Uncertainty about this causes operators to delay investment decisions and may result in inefficient technology choices. The Digital Africa Index (DAI) score for Gabon on licensing and spectrum is 37.3 out of 100. Its spectrum roadmap score is zero, reflecting the absence of any published roadmap – a significant constraint on 5G roll-out.

The national spectrum strategy should be laid out in a roadmap covering both 4G and 5G. A roadmap should give stakeholders a clear understanding of what spectrum is going to be made available over the medium-term, a timetable for the process, how it is to be assigned and the principles by which fees will be set. Clear terms of licence renewal would further allow long term planning, with licences of at least 20 years encouraging more infrastructure investment, particularly for rural areas.

The spectrum roadmap should be developed in consultation with all stakeholders, including the network operators. This consultation process should take into account demand, band availability, capacity requirements, costs, and expected economic impacts. Separate 4G and 5G strategies are required. The 4G roadmap should focus on the reduction of the usage and coverage gaps, 5G should target demand clusters where the investment is most sensible. Such a roadmap will provide operators with the visibility they need to plan effectively.

Spectrum policy, from assignment and pricing to licence conditions, QoS and renewal terms must be conducive to sustainable investment and efficient use of spectrum. Striking the right balance will allow operators to expand coverage, improve quality, support growing traffic demand and accelerate digital adoption while ensuring that operators have the capacity to continue investing in the networks needed to drive digitalisation.

Recommendation 1.4: Develop a clear spectrum roadmap and predictable regulatory fees

The government should publish a spectrum roadmap covering frequency bands, assignment timelines and a framework for stable licence and fee conditions. The roadmap should be developed in consultation with industry stakeholders in a way that reflects both the government's digital strategy and the economic realities of the market.

The 5G spectrum roadmap should include expected timing for the release of spectrum in low, mid and high bands or mmWave bands. 100 MHz of contiguous mid-band spectrum per operator should be awarded. Low-band spectrum capacity should be increased by assigning all available bands (including 700 MHz), and making 2 GHz of mid-band spectrum available by 2030 (e.g. through 3500 MHz and 6 GHz assignments). The government should consult with industry over the need for mmWave to cover busy hotspots, allowing for an initial assignment of 800 MHz per operator.

As part of the review of the spectrum assignment process, the approach to setting spectrum fees should also be considered with a view to optimising investment and the affordability of services.

3.2. Updating the sector tax framework to improve access and affordability

Taxes on mobile operators directly impact consumers through prices. In competitive markets like mobile telecoms, changes in taxes and sector levies are largely passed through to customers via changes in prices. Empirical evidence from African mobile telecoms markets indicates that 90% of changes in consumer taxes are passed through to consumers while 85% of changes in operator taxes are passed through to prices.[111]

A high tax burden reduces operators' ability to invest in and upgrade their networks. Tax policy should balance the need for capital investment and lower prices for customers with the need for the government to collect revenue. This is especially important in times of transformative technological change that requires major investment, such as 5G roll-out. In Gabon, the additional sites required to extend coverage are in remote rural areas. High taxes reduce the financial viability of such sites and therefore make the business case for extending the network even harder to justify.

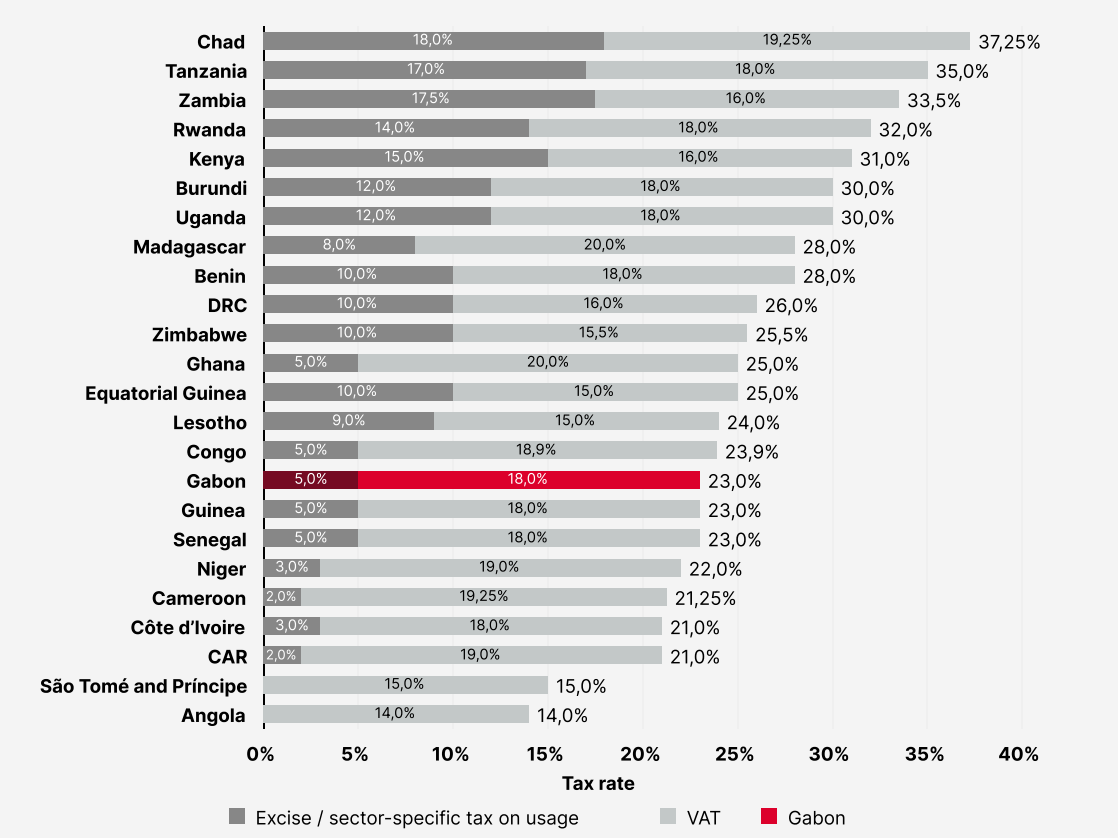
The government has recognised that taxes can be a tool for achieving sector objectives and that high taxes hold back mobile uptake. It reduced VAT on laptops and desktop computers to 5% under Article 221 of the General Tax Code, as amended by the 2025 Finance Law (Loi n°033/2024 of 30 December 2024). Other strategic priorities, such as smartphones and data centres, were not included in that decision.[112] The 2026 Finance Law raised the rate on computers to 10%.[113]

Customers and operators in Gabon face a moderate level of direct taxes but additional levies make the overall burden on the sector very high. VAT and excise on mobile usage are slightly below the average for comparable African markets (Figure 44). However, the Universal Service Fund (USF) contribution, regulatory fee and spectrum fee together amount to 11% of gross revenue. This is on top of corporate income tax of 30%.



[111] Using Geospatial Analysis to Overhaul Connectivity Policies, World Bank, 2022.
[112] Journal officiel de la République Gabonaise, No. 51 Bis Spécial, 20 January 2025.
[113] "Gabon : les principales mesures de la Loi de Finances pour 2026", Deloitte Société d'Avocats, April 2026.

Figure 44
VAT and excise on mobile usage among regional benchmarks, 2026.



Source: GSMA, Assessing Rwanda's mobile tax regime, 2024.

Table 6
Overview of mobile taxes in Gabon, 2026.

Tax	Rate
Operator sector-specific charges	
USF (Contribution au Fonds du Service Universel des télécommunications)	2% of gross revenue
Regulatory fee (Contribution à la Régulation des communications électroniques)	3% of gross revenue
Spectrum fee	Average 6% of gross revenue
Total	11%
Consumer taxes	
VAT (TVA)	18% on handsets; 10% on laptops
Excise duty on mobile services (droit d'accise spécifique sur l'utilisation des services mobiles)	5%

Tax	Rate
Import duties	
Customs duty on network equipment	30%
Customs duty on handsets (Droits de douane classiques sur l'importation des téléphones)	10%
African Union Levy	0.2%
Community tax of integration (CCI) on goods from outside CEMAC	0.4%
OHADA withholding duty	0.05%
Other fees	
Tower fee	XAF 3 million per mobile tower per year
Copyright and data protection fee	XAF 1,000 per subscriber

The tax system's lack of transparency and predictability makes investment planning more difficult. Mobile operators are subject both to national government levies and to fees imposed by other authorities – for example an annual fee of XAF 3 million per mobile tower, and a copyright and data protection fee of XAF 1,000 per subscriber.

While the Universal Service Fund contributions have been set, there are operational challenges that need to be addressed. Operators report that they have built sites that qualify for reimbursement but they have not yet received any funds. The contributions as well as the distribution system should be reviewed in view of Gabon's current needs in order to ensure that the Fund serves its purpose as efficiently as possible. The eligibility criteria, eligible costs, coverage and quality obligations should be clearly set out in a transparent way. The amounts collected, committed, distributed and spent should be published annually to maintain transparency.

The Fund's interventions should be targeted at priority regions which have been identified as being underserved. For instance, the expected non-geostationary orbit (NGSO) satellite solutions could deliver universal service in rural locations at lower cost than conventional mobile towers, thereby reducing the Fund's financial needs. The Fund could also be used to directly target the smartphone adoption problem by providing financial assistance to end consumers.

The requirement to obtain government approval for imported devices adds cost and delay. At the moment, every device model must be reviewed individually. The process is cumbersome for importers and slows the arrival of new handsets. The government should consider simplifying and speeding up the approval process.

Recommendation 2.1: Reduce sector-specific charges from 11% to 3% of gross revenue

The Universal Service Fund contribution, regulatory fee and spectrum fee together amount to 11% of gross revenue. These charges reduce the resources available for network investment and ultimately feed through into higher consumer prices. Reducing them to 3% would lower consumer prices and increase operators' capacity to invest. A phased reduction of these rates over three years and tied to the Finance Law cycle should be implemented. The final proposed rates are:

Charge	Current rate	Proposed rate
USF (Contribution au Fonds du Service Universel des télécommunications)	2% of gross revenue	0.5%[114]
Regulatory fee (Contribution à la Régulation des communications électroniques)	3% of gross revenue	0.5%
Spectrum fee (including 5G)	Average 6% of gross revenue	2%
Total	11%	3%

Recommendation 2.2: Simplify the wider fee regime and reduce charges that discourage network investment

Operators face additional charges imposed by different authorities, including an annual fee of XAF 3 million per tower and a copyright and data-protection fee of XAF 1,000 per subscriber. The government should rationalise and reduce these charges, clarify which authority may impose them, and make the overall regime more transparent and predictable. Regulatory certainty is essential for long-term network planning.

Charge	Current charge	Proposed action
Tower fee	XAF 3 million per tower per year	Review and reduce
Copyright and data-protection fee	XAF 1,000 per subscriber	Review and reduce

Recommendation 2.3: Exempt strategic digital infrastructure, including data centres, from VAT

The reduced VAT rate for computers demonstrates that tax policy can be used to support strategic digital priorities. The government should identify other infrastructure that is critical to digitalisation, including data centres, and exempt it from VAT.

[114] USF contribution of 0.5% of gross revenue is levied in other jurisdictions, such as Kenya. "Government starts search for the Universal Service Advisory Council Board Members", Communications Authority of Kenya, September 2023.

3.3. Improving device affordability through lower taxes and financing

Affordability is a critical constraint on adoption. Higher-income urban households already use mobile broadband so policies to increase adoption should focus on lower-income households, for whom affordability is the key challenge. What matters is the total cost of ownership – handset, data and energy – and, for households on low and irregular incomes, how predictable and controllable that spending is.

Most adults, including those in lower-income households, own a mobile phone, but only half of those in the poorest 40% of households own a smartphone.[115] Policy should help this group migrate from basic mobile phones to data-enabled devices. This should be done by focusing on entry-level smartphones which offer first-time users access to the digital ecosystem at low cost. Reduction of VAT on entry-level smartphones, which would accordingly lower the price for end consumers, is a policy aimed at helping the target population cohort.

Device affordability will be an increasing problem because of global increases in costs and reductions in grey market imports. Globally, device prices are increasing because of upward cost pressures in the device manufacturing industry. Manufacturers of smartphones priced below USD 200 face increases of 20-30% in the cost of materials, driven by memory prices, and average selling prices are forecast to rise by 6.9% in 2026. While mobile phone manufacturers are absorbing some of this increase for mid- and high-end devices, the same is not possible for low-end devices.[116] These increases will have a significant impact on affordability in Gabon.

The grey market for smartphones in Gabon is substantial. Despite government efforts to control it, it is estimated to account for 70% of smartphone sales. High rates of taxation are part of the reason: the higher the taxes when handsets are imported, the greater the incentive to avoid it. Lower device taxes, combined with stronger tax compliance, could increase total tax collected on devices.[117]

Empirical evidence suggests that reduction of taxes on entry-level smartphones can increase adoption. The government in South Africa removed the 9% excise duty on smartphones priced below ZAR 2,500 (USD 156) on 1 April 2025. The aim was to improve affordability and incentivise low-income households to start using mobile broadband. The tax exemption brought entry-level smartphones to the same price as some feature phones. By February 2026, monthly sales of entry-level smartphones were 80% higher than in March 2025, the month before the change, while sales of feature phones had fallen by 87% and the monthly value of smartphone sales had risen by 15%.[118] The increase in sales value helps to offset the immediate tax loss. Any VAT reduction should be limited to devices defined by ceiling price (to target entry-level smartphones only), minimum characteristics (to distinguish them from feature phones), and be subject to import control procedures. Following implementation, retail prices should be monitored to ensure tax reduction has been passed on to customers.

[115] Findex, The little data book on financial inclusion, World Bank, 2025.
[116] "2026 Smartphone Shipment Forecasts Revised Down as Memory Shortage Drives BoM Costs Up", Counterpoint Research, December 2025.
[117] The figure is an estimate based on GSMA discussions with regional stakeholders. There is no official data to quantify the proportion of grey market in Gabon specifically.
[118] "Real connectivity progress requires affordable devices", ITWeb, 2025; GSMA, "Accelerating Smartphone Adoption Through Tax Reform: Evidence from South Africa", June 2026; "Cheaper smartphones can close Africa's digital divide, says GSMA", African Business, 2026.

Financing can spread the upfront cost of a device. Traditionally, the price of purchasing a device has to be paid in one go, which is difficult for households on low and irregular incomes. Paying for the device in instalments would make an entry-level smartphone easier to afford, provided schemes are designed around these users' requirements. Any payment instalment scheme should set out who is eligible, the total cost of credit and the protections for users.

What is an entry-level smartphone?

In Africa, GSMA works with leading mobile operators, Airtel, Axian Telecom, Ethio Telecom, MTN, Orange, and Vodacom, to accelerate digital inclusion across Africa as part of the GSMA Handset Affordability Coalition. Recognising that smartphone affordability remains the key barrier to mobile broadband adoption, the initiative engages with manufacturers and technology companies to bring a 4G-enabled low-cost device to market. GSMA estimates that a USD 40 smartphone could bring 20 million people in sub-Saharan Africa online.

In the current global market, entry-level smartphones are considered to be those priced below USD 100.

Recommendation 3.1: Reduce VAT for entry-level smartphones

Smartphones are the main means of accessing digital services, particularly for lower-income households, yet they face higher VAT than laptop and desktop computers. The government should reduce VAT on a clearly defined category of entry-level smartphones so that relief is concentrated on the devices most relevant to first-time mobile internet users.

Recommendation 3.2: Promote flexible financing for entry-level smartphones

Lower prices alone will not remove the upfront affordability barrier for many households. The government should work with mobile operators and consumer-finance providers to develop financing schemes for entry-level devices with flexible repayment arrangements that take account of users' concerns about debt and fixed financial commitments. Schemes should be designed specifically for lower-income households in small and medium-sized towns.

3.4. Increasing demand for digital services

Digitalisation is a means of promoting financial inclusion because it provides access to a wide range of activities and services. In sub-Saharan Africa, digital tools are used mainly for financial transactions, communication, social networking, entertainment and information, with mobile financial services the single most common use. Mobile money and other digital financial services experienced significant growth over the last decade, overtaking social media as the most popular activity. Social media remains important, together with video streaming and video communication (Table 7).[119]

[119] Mobile's impact on the SDGs in Sub-Saharan Africa, GSMA, 2023.

Table 7
Use of digital tools in sub-Saharan Africa, 2015–2023[120].

Use cases	2015 Millions	2023 Millions	2015%	2023%
Use mobile financial services	55	280	18%	54%
Use social media	110	230	33%	44%
Watch videos	95	230	29%	43%
Make video calls	60	200	18%	37%
Read news	110	180	34%	34%
Search for information	45	140	14%	27%
Access information to support training, learning or education	35	140	10%	27%
Manage or pay bills	25	140	8%	26%
Access information to help with work or job	30	140	10%	25%
Access government services/information	25	110	8%	21%
Access health services/information	15	110	5%	20%
Buy goods or services	20	80	6%	15%
Use agricultural services	10	50	3%	10%

Source: GSMA Intelligence.

The key digital divides are linked to socio-demographic factors – gender, age, poverty, education and location:

- **Gender** (men are 7 percentage points more likely to use digital media regularly);
- **Age** (49% of people aged 18 to 35 use digital media regularly, compared with 22% of those over 55);
- **Poverty** (68% of those not living in poverty use digital media regularly, compared with 28% of those experiencing high levels of poverty);
- **Education** (81% of those with post-secondary education use digital media regularly, compared with 11% of those with no formal education);
- **Location** (59% of urban dwellers use digital media regularly, compared with 24% of rural residents).[121]

[120] Average across 39 surveyed countries in sub-Saharan Africa.
[121] "Africa's shifting media landscapes: Digital media use grows, but so do demographic divides", Afrobarometer, April 2024.

Government plays a critical role in stimulating demand for digital adoption. Government platforms used in daily life can encourage the target group to move from basic phones and services to smartphones and mobile broadband. This creates a virtuous cycle. The more attractive e-government services are, the more people adopt broadband devices to be able to access them. This means that government is able to service more people through digital channels, thereby improving the quality and reach of public service delivery. It is therefore important that the e-government platforms respond to citizens' particular needs. Analysis suggests that more of the underserved, poorer population lives in small and medium-sized towns than in the largest cities. Digital government tools should focus on the needs of this population cohort: education, healthcare, access to government administrative platforms.

Mapping out regional differences in digital adoption will help the government to use resources effectively. Gabon faces large inequalities, both in network coverage and in the incomes of its citizens. These inequalities are experienced within geographical areas but also between regions of the country. Understanding the pressing needs of each territory is essential in deciding on investment priorities and any further government support for digital infrastructure and service delivery.

Accelerated digitisation of government processes is a priority. The most frequently used public services need to be digitalised. Each service's pathway should be mapped and simplified to the extent possible before it is brought online and designed for mobile use. Digital identity, payments, interoperability and secure data exchanges should be treated as common components. A monitoring system should be established to track the procedures initiated and completed, deadlines, abandonments, satisfaction levels and costs. Lastly, it is important that the services are promoted and training is made available to the public.

The Digital Gabon project already provides for these components, and it needs to be implemented as soon as possible. The project finances the legal framework, a unique identification number, an interoperability platform and a single portal for public services. A proof of concept for the portal has been completed and a national cybersecurity strategy drafted.[122] The project's steering committee reviewed work on the interoperability platform and the national digital identity system in September 2026, and billing services for public payments were launched through MaDigiPaie in July 2026.[123] The priority now is to accelerate delivery so that people see the effect in their daily lives.

Other countries' experience of digitalisation of public services can inform Gabon's e-government strategy. Many countries in Africa are further advanced than Gabon in their digitalisation of public services. Their experience provides valuable insights that could be useful for Gabon as it accelerates the design and implementation of its own e-government strategy.



[122] Digital Gabon Project: Restructuring Paper (Report No. RES01969), World Bank, 2026.
[123] "Gabon Advances Four Digital Projects to Modernise Public Services", Tech Africa News, September 2026; "Paiements publics : le Gabon accélère la digitalisation avec le déploiement des services de facturation MADIGIPAIE", Gabon Review, July 2026.

Box 8
Case study: Kenya's e-Citizen platform.

Kenya's e-Citizen platform provides a blueprint for successful digital government services. The e-Citizen portal first went live in 2014 and was scaled up nationally in June 2023. Citizens immediately gained access to over 5,000 digital public services, reachable via USSD and offline channels as well as online. Within a year, e-Citizen had 13 million active users and hosted 20,855 services. By 2026, the service hosted 22,000 government services.[124] [125] [126]

e-Citizen did more than create websites: it integrated digital identity, payments, taxes, business registration, health, education and immigration in one place. Users can apply for a passport or a birth or marriage certificate, register a business, or access tax and customs services. The Electronic Tax Invoice Management System (eTIMS), run by the Kenya Revenue Authority and accessible directly or via e-Citizen, became mandatory for anyone engaging in business activity, making tax simpler and more transparent.[127] The platform also provides access to essential healthcare services. Citizens can access their records and engage in interactive sessions.[128] Administration of the education system has also been integrated. Students and parents can apply, pay fees, arrange accommodation and handle school records.[129]

e-Citizen mission statement: "To offer convenience and efficiency in the delivery of government services through the onboarding of services to a digital platform and enhance revenue collection through streamlined online and mobile payment gateways."[130]

Government revenue grows with digital services due to transparency, lower leakages, and operational efficiency. Kenya's president, H.E. William Samoei Ruto, has stressed that revenues collected through the platform have grown significantly, freeing resources for critical public projects.[131] Treasury data show average daily collections rising from about KES 58 million in 2021–2022 to KES 276 million in 2023–2024, almost a fivefold increase; officials have since cited KES 700 million to KES 1 billion a day.[132]



[124] "Kenya: Government launches e-citizen portal, digitalizing public service delivery", We are tech.Africa, July 2023.
[125] "The eCitizen @1 Anniversary Celebration", Ministry of Interior and National Administration, November 2024.
[126] "eCitizen: PSs Outline Platform's Resilience and Progress Before PAC", Ministry of Information, Communications and The Digital Economy, March 2026.
[127] "What is eTIMS?", Kenya Revenue Authority, 2026.
[128] "Kenya: Government launches e-citizen portal, digitalizing public service delivery", We are tech.Africa, July 2023.
[129] Ministry of Education, eCitizen, 2026.
[130] Directorate of eCitizen, Republic of Kenya, 2026.
[131] "The eCitizen @1 Anniversary Celebration", Ministry of Interior and National Administration, November 2024.
[132] "Fact-checking Kenyan President Ruto and Governors' Chair Abdullahi at the 2025 Devolution Conference", Africa Check, September 2025 (citing National Treasury exchequer data).

Box 9
Case study: Zambia's Integrated Agriculture Management Information System (ZIAMIS).

ZIAMIS is the government's integrated platform for e-vouchers, e-registers, e-extension and advisory services, designed to improve the efficiency and transparency of agricultural support.

The platform runs as an Android or Windows application, with basic functionality also available via SMS and USSD. This helps overcome connectivity constraints in poorly connected areas. SMS and USSD are used for basic access and essential updates, but farmers cannot access the full suite of services this way.[133]

Key outcomes:

- An electronic register covering 4.3 million verified and traceable farmers
- Each farmer, cooperative and vendor is given a unique digital ID, improving traceability and compliance
- Over 1 million farmers, 22 suppliers and 1,200 agro-dealers participate annually
- Information collected by the system is used by government for planning
- 2022–2025: farmers receiving digital advisories and e-extension services recorded higher maize productivity – up to 3.4 tonnes per hectare, against a national average of 2.14 tonnes per hectare.
- The system can deliver tailored information through a chatbot and an app, with some information also available over SMS and USSD.
- E-registers, e-vouchers and e-extension are integrated into a single digital ecosystem.

Local Gabonese digital businesses should be supported. Entrepreneurship and diversification of the economy more widely is a national strategic priority. The government should strive to employ local businesses when procuring its own digital services. An evaluation of jobs created as a result of public demand should be used as a measure of success, alongside the statistics of internet usage.

Digital literacy is necessary for wider adoption. Addressing gaps in digital skills and awareness can increase adoption among marginalised groups and support financial and economic inclusion, a key strategic priority in Gabon. Public-private partnerships should be exploited to maximise the impact digital literacy programmes have. For instance, young people specially trained in digital skills could serve as digital ambassadors to underserved regions. They could assist residents with smartphone usage, completing administrative procedures online, including taxes, civil-status services, and health services, using digital financial services, as well as employing digital tools for their businesses.



[133] "Driving Regional Resilience Through Digital Agriculture: Lessons from Zambia", Food and Agriculture Organization of the United Nations, October 2025.

Box 10
Digital literacy programmes.

DigiSchool, a digital literacy programme in **Kenya**, focused on building the foundational skills and familiarity with internet-enabled devices in primary education. It provided more than one million devices, including tablets for pupils and laptops for teachers, alongside teacher training.[134]

India's large-scale rural digital literacy programme, Pradhan Mantri Gramin Digital Saksharta Abhiyan (PMGDISHA), was launched in 2017 and helped rural households build digital skills and confidence, with the aim of stimulating demand for mobile data.[135]

Rwanda's Digital Ambassadors Programme (DAP) is a nationwide digital literacy initiative launched in 2017 and expanded under the Digital Acceleration Project. It deploys young digitally skilled citizens ("ambassadors") directly into rural communities to provide hands-on training in basic digital skills, e-government services, and mobile money, aiming to bridge the digital divide for millions of citizens.[136]

South Africa's National Digital and Future Skills Strategy addresses systemic unemployment by integrating digital literacy into formal education and vocational training. It focuses on equipping young people and educators with foundational computing skills, coding capabilities, and readiness for digital work to transition the workforce toward a digital economy.[137]

GSMA analysed the AI skills demanded by employers in Africa and found that Gabon lags in foundational AI skills, data engineering and machine learning and large language model operations, but does comparatively well in the governance skills.

Education programmes should focus on combining formal training with practical industry experience.[138]



[134] "DigiSchool", Education Above All's Public Policy Observatory, 2023.
[135] "Cabinet approves 'Pradhan Mantri Gramin Digital Saksharta Abhiyan' for covering 6 crore rural households", Press Information Bureau, Government of India Cabinet, February 2017.
[136] Digital Ambassadors Program (DAP), RISA.
[137] National Digital and Future Skills Strategy South Africa, Department of Communications and Digital Technologies, 2020.
[138] GSMA Analysis.

Recommendation 4.1: Accelerate digital government programmes

Accelerating the rate of digitalisation is prioritised in the national transition strategy. The government has demonstrated its commitment to digitalisation of public administration. The success of implementation will depend on the quality of delivery, as well as the adoption rate. If services are available, but citizens do not use them, the benefit to society will be limited. It is therefore important that the e-government platforms respond to citizens' particular needs. The government should carry through the e-government plans set out under the Digital Gabon project and accelerate their delivery. Priority should go to the services most used by lower-income households in small and medium-sized towns, such as education, healthcare and administrative procedures.

Recommendation 4.2: Promote digital literacy, particularly for marginalised communities

Analysis suggests that more of the underserved, poorer population lives in small and medium-sized towns than in the largest cities. Digital literacy programmes should be directed at this group and at other marginalised communities, so that people have the skills to use a smartphone, digital financial services and online public services. They should be delivered through public-private partnerships, for example with young people trained as digital ambassadors in underserved areas.

Recommendation 4.3: Move mobile money from transfers to everyday payments

The government should make digital payments the default for transactions with the state and in the wider economy. It should accept mobile money for all public services through MaDigiPaie; pay suppliers, allowances and social transfers into accounts and wallets; work with BEAC, COBAC and operators on an interoperable merchant payment standard on GIMACPAY; and keep the tax regime technology-neutral and free of transaction-specific levies. A national digital payments roadmap, with targets for merchant acceptance, should be agreed with industry within 12 months.

4. Impact analysis



4. Impact analysis

Gabon can use its strong connectivity position in Central Africa to benefit all its citizens. The foundations are in place: government action and private investment have together delivered high network coverage, mobile penetration is high, and the digitalisation of public services is under way. The challenge now is to ensure that all Gabonese benefit. Focus should be placed on lower-income households who use mobile phones but do not have access to smartphones and thus cannot benefit from the transformation brought by mobile broadband.

This report has set out the challenges facing Gabon's telecoms market and recommended how to overcome them. This section presents the results of an impact analysis that models different policy scenarios. Selected recommendations are modelled through three policy scenarios. Each scenario groups the modelled measures that act through a common mechanism:

- Scenario 1 models 5G network development, investment and grid connection;
- Scenario 2 models targeted reductions in taxes on mobile services and smartphones; and
- Scenario 3 models public-policy demand measures.

The quantified results in this section relate only to the measures included in these scenarios; other recommendations are not included in the modelling.

The measures are expected to have their largest effect when implemented together. They each address different elements of the mobile ecosystem: technology coverage, network power, service and smartphone prices, and demand. The combined scenario should therefore be read as a policy package rather than a set of isolated reforms. Only when implemented together can the recommendations deliver their full effect on mobile broadband adoption.

The modelling is based on some assumptions and projections of future market developments. Utmost care was taken to select the best available data. Nevertheless, a degree of uncertainty about future developments cannot be removed. The modelling methodology is summarised in Annex 2.

The economic impact of the policy recommendations goes beyond just increases in subscriber numbers. The impact analysis presents results in terms of increased subscriber numbers but digitalisation is not simply about the number of people that own a smartphone. Rather, it is about transformation of their life that use of digital brings. Broadband access produces measurable economic gains when individuals, businesses and the state use it. Digital adoption means access to more information, new markets, faster payments and higher productivity. A citizen who can use their digital identity to access education, start a business and receive payments creates economic opportunities that ripple through the community. A transparent online tax filing system speeds up the process and leaves less space for revenue leakage. The economic gain is captured by the projected increase in government revenues presented in section 4.3. The economic impacts should be measured and evaluated alongside the subscriber statistics.

4.1. Scenario impact

Scenario 1: Network improvements

Scenario 1 models the effect of network investment on mobile broadband adoption. 5G carries traffic more efficiently than 3G and 4G, reducing the marginal cost of serving each subscriber. Connecting more sites to the grid also lowers operating costs because on-grid sites are cheaper to run than off-grid sites. Together, these measures are projected to increase the subscriber base by 1.2%.

Scenario 2: Targeted tax reductions

Scenario 2 models two tax changes together. Firstly, the mobile sector-specific tax burden in Gabon is high, which limits operators' capacity to invest. The regime should be reviewed to strike a better balance between public finances and the incentive to invest. Secondly, the target population cohort should be those living on lower incomes in small and medium-sized towns. The majority of these people already own a mobile phone, and should therefore be encouraged to migrate to a smartphone. A reduction in VAT on entry-level smartphones is a strategy to this end. The scenario models VAT on these devices being removed in full, so a smaller reduction would have a smaller effect. Together, the tax policies could deliver a 1.7% increase in mobile broadband subscribers.

Scenario 3: Demand stimulation

Scenario 3 addresses demand, meaning users' willingness to pay for mobile broadband. Digital literacy is a prerequisite for closing the digital divide, while useful public services give people a practical reason to go online. Expanding digital public services and literacy programmes could increase mobile internet subscribers by around 11% by 2031.

Table 8
Impact of individual policy scenarios, 2031.

Scenario	Additional unique mobile internet subscribers versus business as usual, 2031	Increase versus business as usual, 2031
Scenario 1: Network improvements	15,047	1.2%
Scenario 2: Targeted tax reductions	22,057	1.7%
Scenario 3: Demand stimulation	147,023	11.3%

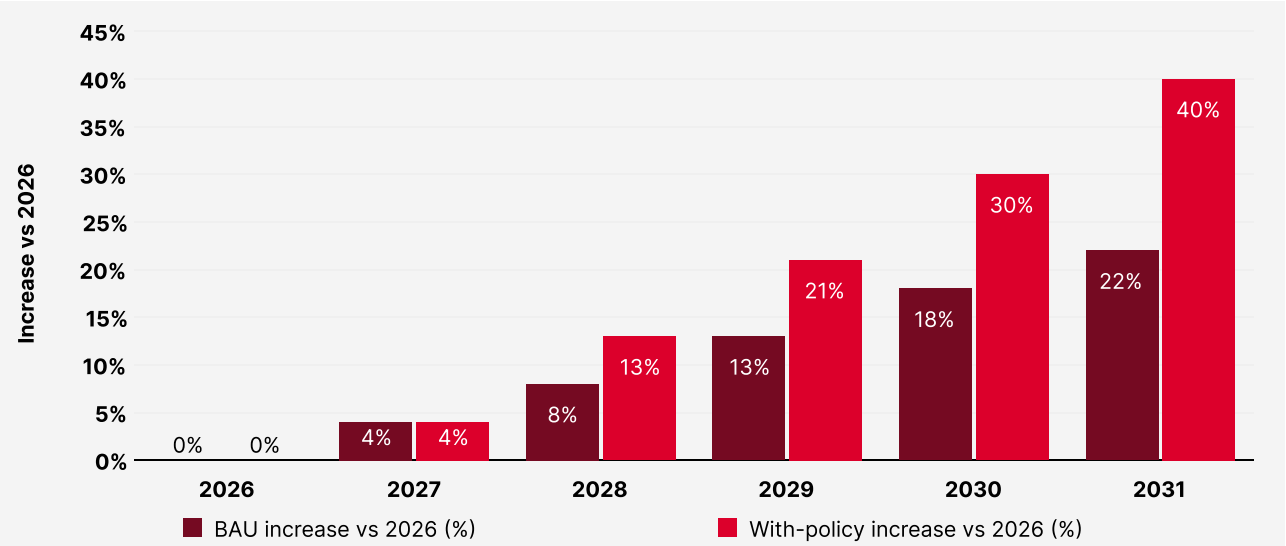
Source: GSMA Analysis.

4.2. Combined impact

Under the model, the combined policy measures would increase unique mobile internet subscribers by approximately 40% between 2026 and 2031, compared with 22% in the business-as-usual case.

Subscriber numbers would rise from 1.06 million to 1.48 million, compared with 1.30 million under business as usual.

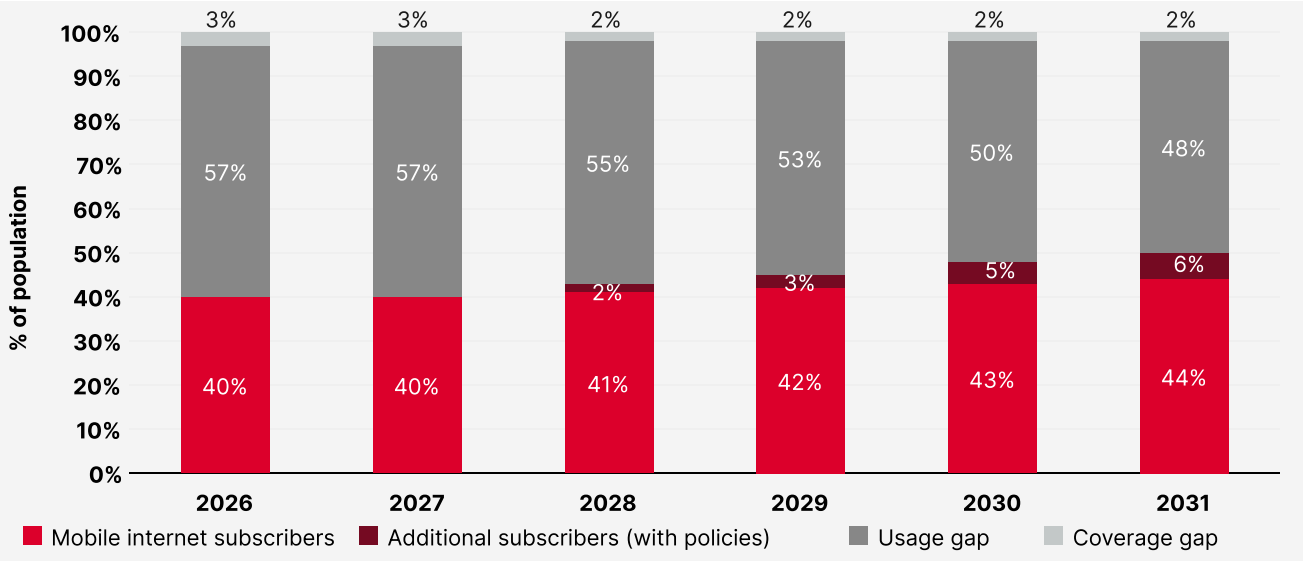
Figure 45
Combined impact of policy recommendations on the number of unique mobile internet subscribers, 2026–2031.



Source: GSMA Analysis.

The recommendations would cut the usage gap by a further 6 percentage points. As of 2026, GSMA analysis shows that 40% of the population are unique mobile internet subscribers, with a usage gap of 57%. By 2031, 3G+ coverage is forecast to grow to 98% with the usage gap shrinking slightly to 54% in the business-as-usual case. The policy recommendations would close the usage gap by a further 6 percentage points, to 48% by 2031.

Figure 46
Coverage, subscribers and gaps under combined policy recommendations, 2026–2031.



Source: GSMA Analysis.

4.3. The impact on government revenues

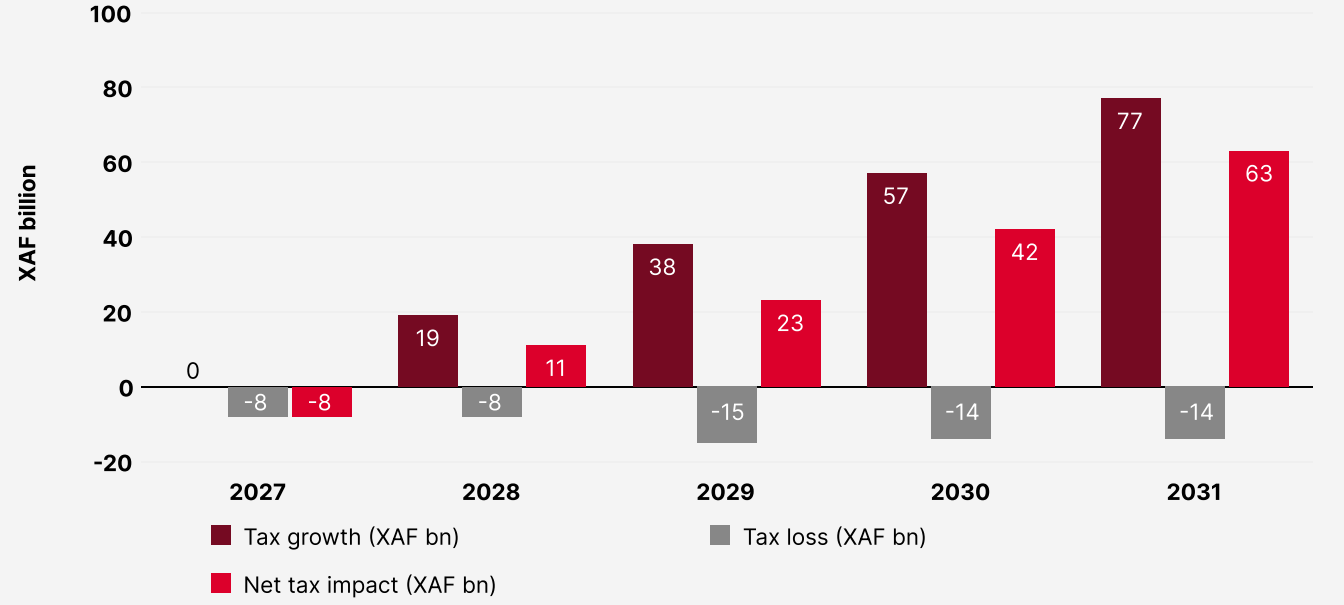
The immediate impact of the policy recommendations would be a reduction in government revenue from the sector. Lower sector-specific taxes and the reduction of additional fees would reduce collections, although the VAT reduction on entry-level smartphones is not projected to cost much, because the devices are of relatively low value. The direct revenue loss is therefore modest. Subsidies for off-grid sites and demand stimulation initiatives would require further government investment. It is estimated that the net negative impact of the policy recommendations on tax revenue in the first year will be XAF 8 billion.

A growing mobile sector will generate higher tax revenues. The negative impact on government revenues would be short-lived. The policy recommendations will lead to a higher number of mobile broadband subscribers and growth of the sector. The larger customer base will generate higher mobile tax revenues for the government.

Increased digitalisation will further spur economic growth and thus tax collection from the wider economy beyond the mobile sector. Mobile broadband adoption is the engine of digitalisation. Digitalisation will boost productivity through increased efficiency, transparency and speed of interactions. This translates to higher economic output throughout the economy.[139] [140] The growth in productivity will more than outweigh the loss of direct taxes by 2028.

The net positive annual impact on government revenues would reach XAF 63 billion by 2031. Figure 47 sets out the direct tax loss, the tax gain and the resulting net impact on government revenues between 2026 and 2031.

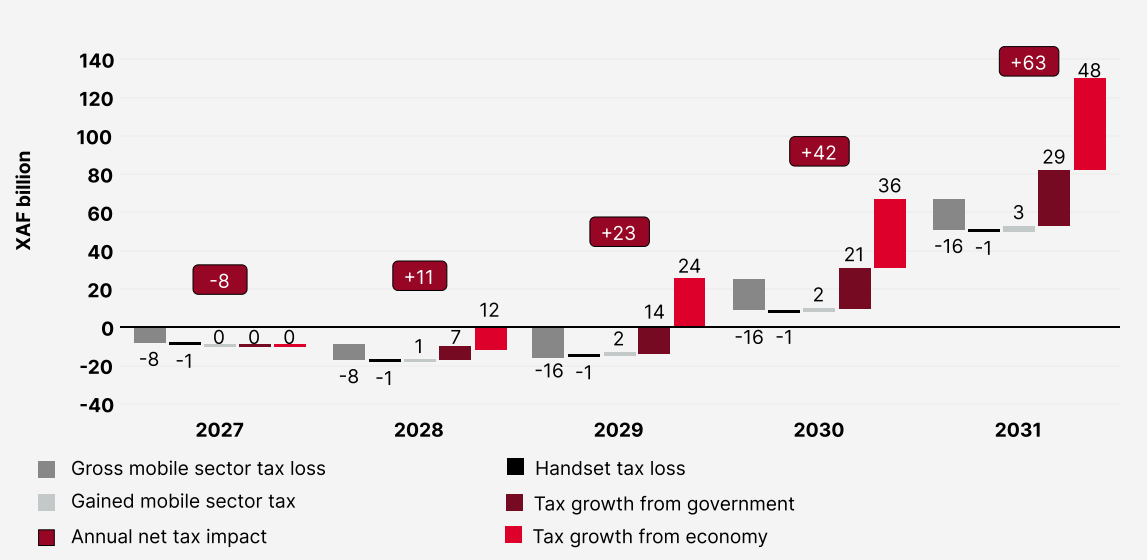
Figure 47
Impact of the policy recommendations on government revenues, 2026–2031.



Source: GSMA Analysis.

[139] The model's assumption is that a 10% increase in unique subscribers is associated with a 2% increase in GDP, a conservative reading of ITU econometric estimates for Africa (ITU, 2019).
[140] The GDP increase associated with subscriber growth is an Africa-wide estimate, not a Gabon-specific estimate. Country-specific data are not available.

Figure 48
Breakdown of the impact of policy measures on government revenues.



Source: GSMA Analysis.

Increased mobile broadband adoption will support economic diversification, a strategic goal of the Gabonese government. The government recognises that reliance on the petroleum industry as a single source of income carries a strategic risk. Mobile broadband is an enabler for entrepreneurship and private sector development.

Digital tools give ordinary Gabonese access to new sources of work and income. In Africa, small businesses rely on smartphones rather than computers, and mobile internet makes it easier to start and run one: owners can advertise directly to customers on social media, take digital payments, reach new markets, find better suppliers and stay in touch with the people they sell to.[141]

Digitalisation spurs job creation, particularly for younger workers. Jobs in the ICT sector are only the most direct effect: whole industries tend to grow up around digital tools, from digital services to e-commerce and online marketing, and existing firms become more productive. The acceleration of digitalisation described in this report is estimated to create approximately 10,000 jobs across agriculture, services and industry.

[141] The Mobile Economy Sub-Saharan Africa, GSMA, 2023.

5. Conclusion

The government of Gabon has made it clear that digitalisation is an enabler of its key strategic priority: inclusive, sustainable development. The country's national development strategy is set to achieve that by modernising the state and diversifying the economy. Although Gabon is wealthier than most other countries in Africa, it is heavily dependent on the petroleum sector, and the quality and reach of public services lag behind. The national development priorities focus on addressing these challenges. Digitalisation is a tool of inclusion – it allows all Gabonese to access education, job opportunities and efficient public services.

Gabon has a strong foundation to build the digital economy. Broadband networks cover most of the population and adoption rates are much higher than average for the region. This provides a very strong foundation on which to drive mass adoption and accelerate digitalisation.

Policy priorities for the sector should focus on expanding coverage and encouraging adoption of mobile broadband among lower-income households. There remains a significant proportion of lower-income households who either live beyond the reach of networks or cannot afford to get online. Sector policy should focus on this group of the population.

Digitalisation is essential in modernising and improving the efficiency of public services. Modernising the state, improving the quality and reach of public services are key priorities for the government. Adopting a digital-first approach to public administration is a way of reaching this goal as rapidly as possible. Fast and efficient public administration will drive demand for mobile broadband among those population cohorts that do not currently utilise it.

Digital technologies will also help in economic diversification through expanding the non-oil sectors of the economy. Adoption of digital technologies by SMEs makes it easier to launch businesses and reach customers. It reduces inefficiencies, reduces transaction costs and offers access to the financial ecosystem. It opens up possibilities for the Gabonese to access the job market and start their own businesses, regardless of geographical limitations. This will help the government's efforts to reduce dependence on the petroleum sector and other extractive industries.

The policy recommendations in this report are focused on expanding network coverage, improving affordability for low-income households, accelerating digital adoption and integration of digital technologies into the public and private sector. The foundations are laid. Both the government and private companies can build on these. Carefully targeted policies will help ensure that all Gabonese benefit from the digital transformation.

A practical sequence for action. Within six months, the government can issue the outstanding implementing decrees, publish a spectrum roadmap and publish Universal Service Fund accounts, none of which requires new public spending. The 2027 Finance Law offers the next opportunity to introduce VAT relief on entry-level smartphones and the first phase of the reduction in sector-specific charges. Over the following two years, digital public services, digital literacy and digital payments can be scaled up nationwide, with progress tracked against published targets. GSMA and its members stand ready to support the government in this work.

Annex 1 – Methodology for estimating broadband adoption

Subscriber and Internet User Definitions

Unique subscribers	Unique subscribers represent the number of individuals in a market who have access to and use their own mobile handset. Unique subscriber estimates are derived through a combination of consumer survey data and market-level mobile connection data, allowing subscriber penetration and multi-SIM ownership patterns to be reflected in each market.
Unique mobile internet subscribers	Mobile internet subscribers represent unique subscribers who use their mobile phone to access internet services. Estimates are derived from consumer survey data and are validated against market-level mobile internet connection data by technology generation.
Adult unique subscribers	Adult unique subscribers represent the number of unique subscribers aged 18 years and above.
Smartphone internet subscribers	Smartphone internet subscribers represent mobile internet subscribers who access internet services using a smartphone. Estimates are based on consumer survey responses and are cross-checked against the number of registered smartphones in each market.
Internet users	Internet users represent all individuals who access the internet, regardless of whether they personally own a mobile subscription. This includes: • Mobile internet subscribers; • Individuals who access the internet using another person's device; • Individuals who access the internet through non-mobile devices such as PCs, tablets, or fixed broadband connections.

Methodology

GSMA Intelligence subscriber and internet user estimates are primarily based on consumer survey data that captures mobile ownership, smartphone ownership, and internet usage behaviour. Survey respondents are asked whether they own or have access to a mobile phone, whether they use mobile internet services, and the type of device used to access the internet.

The survey also collects information on children within households, including whether children have access to a mobile phone and whether they access the internet. This information is used to estimate mobile ownership and internet usage among individuals below the age of 18.

Survey coverage extends across markets representing approximately 90% of the global population.
For countries not covered directly by the GSMA Consumer Survey, estimates are supplemented using a combination of third-party research sources, including government surveys, regulator publications, national statistics agencies, and other reputable market research providers.

All estimates are reviewed against market-level indicators, including mobile connections, mobile internet connections by technology generation, and smartphone adoption levels, to ensure consistency and realism across markets.

Annex 2 – Impact analysis modelling methodology

The model estimates how each scenario changes unique mobile internet subscribers, GDP and tax revenue versus the base case in each year from 2027 to 2031. It broadly follows the approach in the GSMA report Driving Digital Transformation of African Economies: Evidence and Methodology Document.[142] For the combined result, the subscriber gains in each scenario are added together and GDP and tax are calculated from the total.

The main assumptions are price elasticities of adoption of −1.3 for handsets and −0.9 for services; base-case GDP from the IMF's April 2026 World Economic Outlook projections, in 2026 prices; a tax-to-GDP ratio of 11.29% based on the WEO average from 2015 to 2021 (latest available); 0.12% more tax revenue per 1% more subscribers, through better collection (based on mobile money evidence); estimated taxes and fees of 22% of mobile revenue; and an employment elasticity to GDP growth of 0.7.

Each scenario works through a different mechanism. Scenarios 1 and 2 both lower prices. The percentage fall in handset or service prices multiplied by the relevant elasticity gives the percentage by which that year's growth in subscribers exceeds the base case, with the extra subscribers carried forward. In Scenario 1, any increase in coverage means that more of the population has access to mobile internet. This newly covered population is assumed to take up mobile internet at the national rate for that year. Lower data costs from 4G and 5G investment and from connecting sites to the grid feed through to prices. For 4G and 5G, population coverage rises 0 and 23 percentage points above the base case by 2031, with a 50% reduction in the marginal cost of providing data when customers move to the next generation. Since data prices are a weighted average across customers on all technologies, the overall reduction depends on the number of customers with access to the higher technology, reaching 5.1% by 2031.

In Scenario 2, the reduction in taxes on handsets and services feeds through to price reductions for consumers. Scenario 3 uses a proxy for the aggregate effect of demand-side policies. It lifts base-case subscribers by a percentage set at 50% of the gap in mobile internet penetration between Gabon and the average of Algeria, Morocco and South Africa. By 2031 the gap is 9.9 percentage points (% of population), so subscribers are 5.0 percentage points higher.

Additional GDP in each year is the percentage increase in subscribers over the base case, multiplied by 0.2 and by base-case GDP, so it grows as extra subscribers accumulate. The model assumes that 10% more subscribers are associated with 2% more GDP[143]. This is an estimate for Africa as a whole and is not specific to Gabon.

Tax revenue changes through three channels. Receipts from the wider economy apply the tax-to-GDP ratio to the additional GDP. The gain in tax collection applies the 0.12% effect per 1% more subscribers to base-case tax revenue, which is base-case GDP multiplied by the tax-to-GDP ratio. The direct change in mobile-sector receipts applies the tax changes to GSMA Intelligence's forecast of mobile revenues, net of tax on operators' extra revenue and on the share of tax cuts they retain. It also includes the handset taxes no longer paid, less the corporate income tax on handset sellers' margins. The net effect on tax revenue in each year is the sum of these three channels.

[142] Driving Digital Transformation of African Economies: Evidence and Methodology Document, GSMA, 2024.
[143] Economic Contribution of Broadband, Digitization and ICT Regulation: Econometric Modelling for Africa, ITU, 2019.

Annex 3 – Institutional leadership for the recommendations

Table 9 provides an initial assessment of where institutional responsibility should lie for each of the recommendations in section 3.

Table 9
Institutional leadership for each recommendation.

Recommendation	Institutional leadership
1.1 Issue outstanding sector legal and regulatory documents	Secretariat General of Government / MENDI
1.2 Support the connection of new mobile sites to the electricity grid	Ministry of Universal Access to Water and Energy
1.3 Support the operating costs of off-grid sites needed to extend coverage	ARCEP
1.4 Develop a clear spectrum roadmap and predictable regulatory fees	ARCEP and ANINF
2.1 Reduce sector-specific charges from 11% to 3% of gross revenue	Ministry of Digital Economy, Digitalisation and Innovation (MENDI) and ARCEP, with the Ministry of Economy and Finance
2.2 Simplify the wider fee regime and reduce charges that discourage network investment	Ministry of Economy and Finance
2.3 Exempt strategic digital infrastructure, including data centres, from VAT	Ministry of Economy and Finance
3.1 Reduce VAT for entry-level smartphones	Ministry of Economy and Finance
3.2 Promote flexible financing for entry-level smartphones	MENDI
4.1 Accelerate digital government programmes	MENDI
4.2 Promote digital literacy, particularly for marginalised communities	MENDI
4.3 Move mobile money from transfers to everyday payments	MENDI and Ministry of Economy and Finance, with BEAC

Source: GSMA Analysis.

Annex 4 – Skills for the future

The GSMA undertook an in-depth analysis of AI talent in Africa. **A key structural insight from the research is the misalignment between AI talent production and labour market demand.** Regions producing significant technical capability do not always correspond to those with the highest employment demand, indicating structural gaps in ecosystem development.

Top Priority Skills for Africa's AI Ecosystem

1. **Evaluation and Quality Assurance**: Skills related to model validation, benchmarking, and performance assessment are currently underdeveloped but increasingly critical for responsible AI deployment.

2. **Data Engineering for AI Systems:** Strong demand exists for professionals capable of building and managing large-scale data pipelines required for AI applications.

3. **Applied AI Development and Deployment:** Practical expertise in integrating AI solutions into real-world products and services remains essential for scaling AI adoption.

4. **Governance, Ethics, and Responsible AI:** Growing regulatory and societal concerns require stronger expertise in ethical AI design, policy frameworks, and risk management.

5. **MLOps and LLMOps Infrastructure:** Operational skills for managing AI model deployment and lifecycle management remain limited across much of the continent.

Overall, the skill demand structure demonstrates that employers across Africa are primarily seeking core technical and infrastructure capabilities, followed by application, evaluation, and governance competencies. The dominance of Foundational and Data Engineering skills suggests that the continent's AI ecosystem is still in a capacity-building phase, emphasising model development and data readiness, while deployment-oriented roles such as MLOps remain comparatively less widespread. AI talent regional champions are Ghana, Nigeria and Egypt. Gabon lags in foundational AI skills, data engineering and machine learning and large language model operations, but does comparatively well in the governance skills cluster.

Pathways for Developing AI and LLM Talent

The research finds that **no single training pathway is sufficient to produce job-ready AI professionals.** Instead, the most effective approaches combine multiple learning environments.

Overall, the evidence suggests that **hybrid learning models that combine formal education with hands-on industry experience are the most effective pathways for developing AI talent across Africa.**

Recommendations and Next Steps

To strengthen Africa's AI talent ecosystem, the research identifies several strategic priorities. Governments need to:

- Invest in AI Infrastructure and Sovereign Compute Capacity
- Strengthen Industry–Academia Collaboration for AI Skills Development
- Expand Practice-Based AI Training Ecosystems
- Prioritise Development of Underrepresented AI Skill Clusters
- Support Open-Source AI Ecosystems and Developer Communities
- Implement AI Talent Retention and Global Talent Mobility Strategies
- Promote AI Solutions for African Societal Challenges

Glossary

This glossary covers the abbreviations used in this report. The subscriber and internet user metrics are defined in Annex 1.

Abbreviation	Description
ANINF	Agence Nationale des Infrastructures Numériques et des Fréquences, Gabon's agency for digital infrastructure and frequencies
ARCEP	Autorité de Régulation des Communications Électroniques et des Postes, Gabon's regulator for electronic communications and posts
ARPU	Average revenue per user
BEAC	Bank of Central African States
CAR	Central African Republic
CEMAC	Economic and Monetary Community of Central Africa
CNAM-GS	Caisse Nationale d'Assurance Maladie et de Garantie Sociale, Gabon's health insurance and social protection fund
DAI	Digital Africa Index, the GSMA framework used in this report, made up of the DNSI, DPRI, MCI and MMRI
DNSI	Digital Nations and Society Index
DPRI	Digital Policy and Regulatory Index
DRC	Democratic Republic of the Congo
GAIN	Gabon Angel Investor Network
GB	Gigabyte
GDP	Gross domestic product
GHz, MHz	Gigahertz and megahertz, the units in which radio spectrum is measured
GIMAC	Groupement Interbancaire Monétique de l'Afrique Centrale, the interbank payments network of Central Africa
GNI	Gross national income
GSMA	GSM Association, the industry body representing mobile operators worldwide
ID	Identity, as in digital ID or an identity document
IMF	International Monetary Fund
IoT	Internet of Things
ITU	International Telecommunication Union
KES	Kenyan shilling
LLM	Large language model
MCI	Mobile Connectivity Index
MDAs	Ministries, departments and agencies
MENDI	Ministry of Digital Economy, Digitalisation and Innovation
MMRI	Mobile Money Regulatory Index
mmWave	Millimetre wave, the high-frequency spectrum above 24 GHz
MNO	Mobile network operator

Abbreviation	Description
NGSO	Non-geostationary orbit, describing satellite systems in low or medium Earth orbit
NIP	Numéro d'Identification Personnel, the personal identification number issued to every person in Gabon
OHADA	Organisation pour l'Harmonisation en Afrique du Droit des Affaires, the Organisation for the Harmonisation of Business Law in Africa
PNCD	Plan National de Croissance et de Développement 2026–2030
PNDS	Plan National de Développement Sanitaire 2024–2028
PNDT	Plan National de Développement pour la Transition 2024–2026
PPP	Purchasing power parity
PSGE	Plan Stratégique Gabon Emergent
QoS	Quality of service
SIM	Subscriber identity module, the card or profile that identifies a subscriber on a mobile network
SING	Société d'Incubation Numérique du Gabon
SMEs	Small and medium-sized enterprises
SMS	Short message service
SNID	The national digital identity system planned by the government
SNIS	Système National d'Information Sanitaire, Gabon's National Health Information System
UNCDF	United Nations Capital Development Fund
UNDP	United Nations Development Programme
UNICEF	United Nations Children's Fund
USD	United States dollar
USF	Universal Service Fund
USSD	Unstructured supplementary service data, a text-based menu service that works on any mobile handset without an internet connection
VAT	Value added tax
XAF	Central African CFA franc
ZAR	South African rand
ZIAMIS	Zambia Integrated Agriculture Management Information System

GSMA

GSMA Head Office
One Angel Lane
London, U.K.
EC4R 3AB
United Kingdom
Tel: +44 (0)20 7356 0600
Fax: +44 (0)20 7356 0601