

Spectrum Policies to Empower Africa

Luiz Felipe Zoghbi
Spectrum Engagement Director
GSMA



28%

Of the African population is connected to mobile broadband on their own device.

64%

live within the footprint of a mobile broadband network but are not using it...

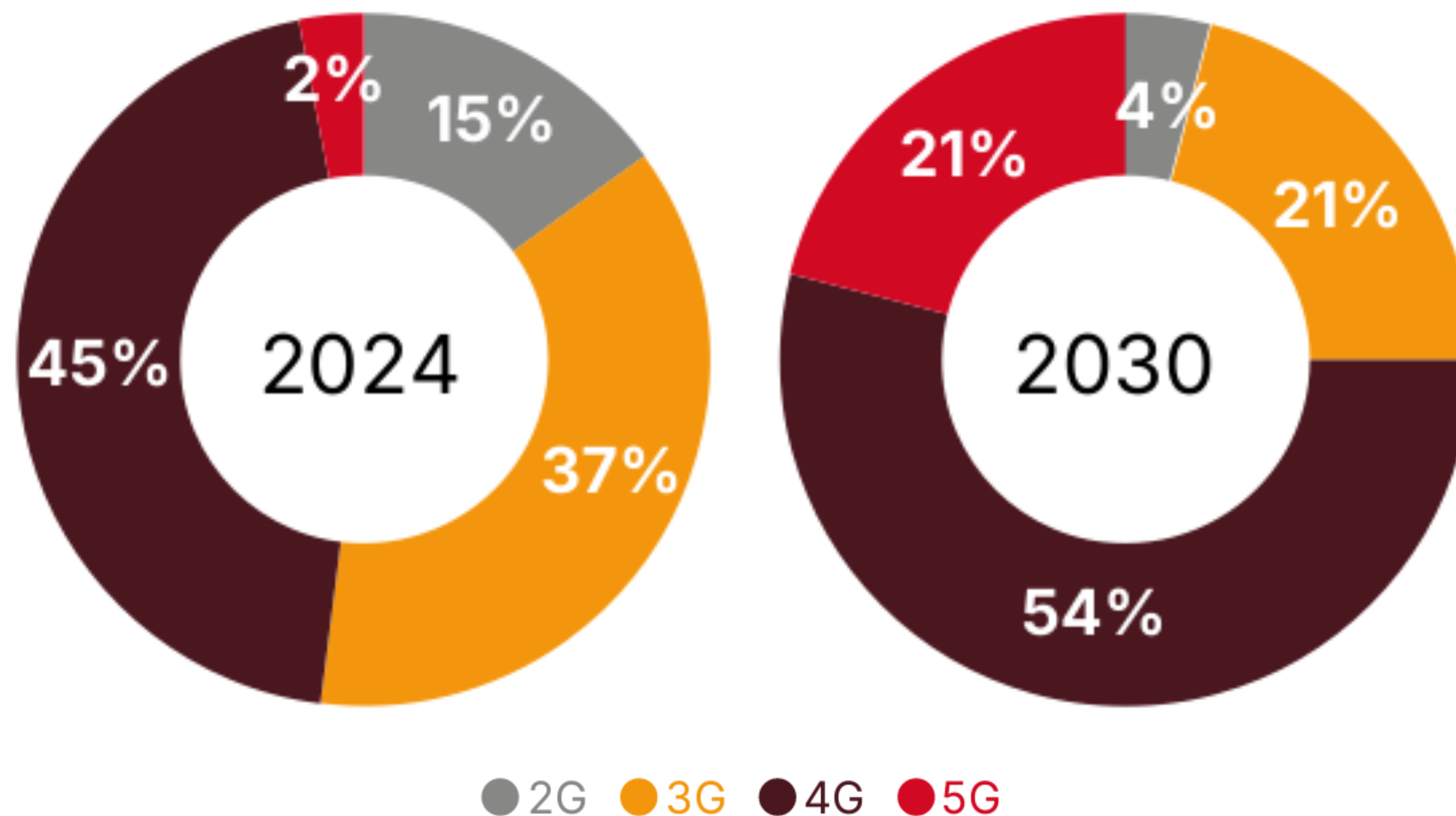
... THE USAGE GAP

9%

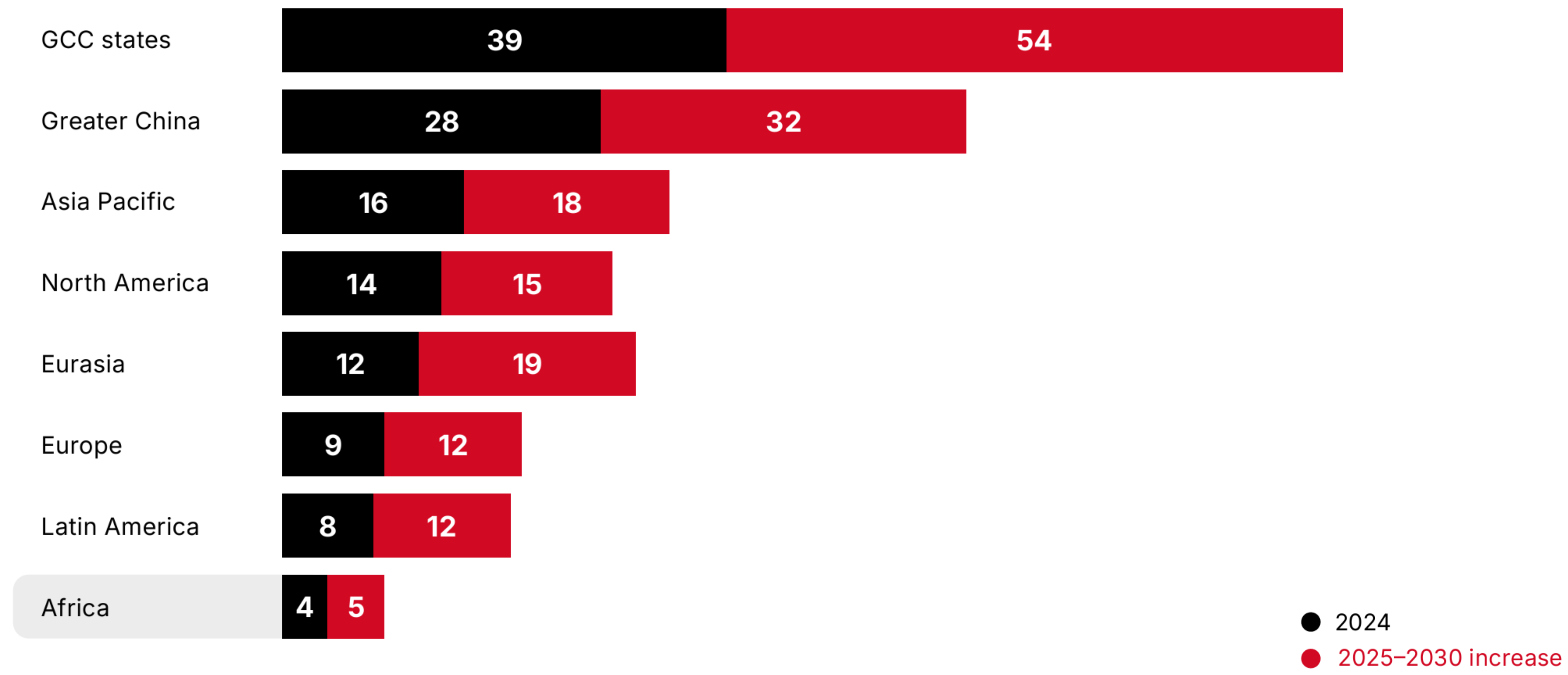
are not covered by mobile broadband...

... THE COVERAGE GAP

Forecast - Technologies in Africa



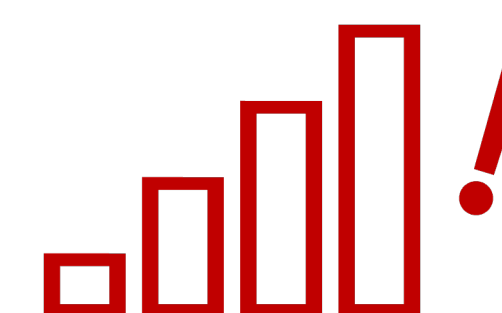
Forecast – Data Usage GB/month/user



Urban-Rural Gap



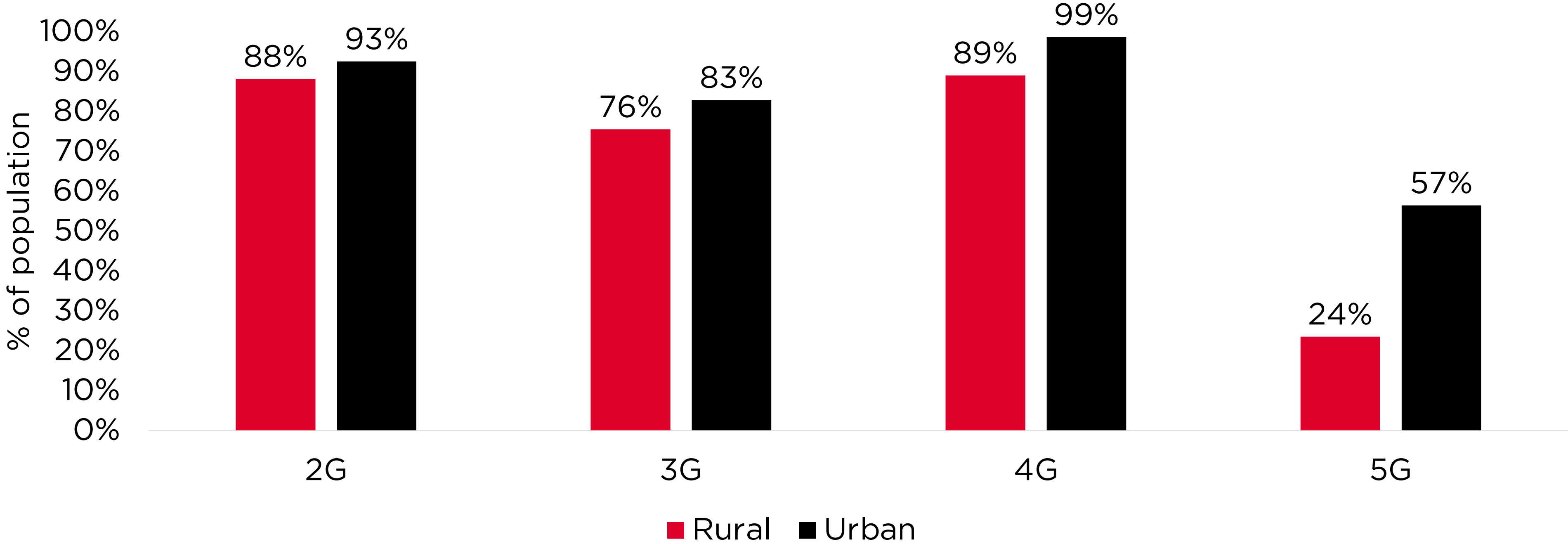
In LMICs, **rural** users are still **25% less likely to use mobile internet**, compared to urban populations



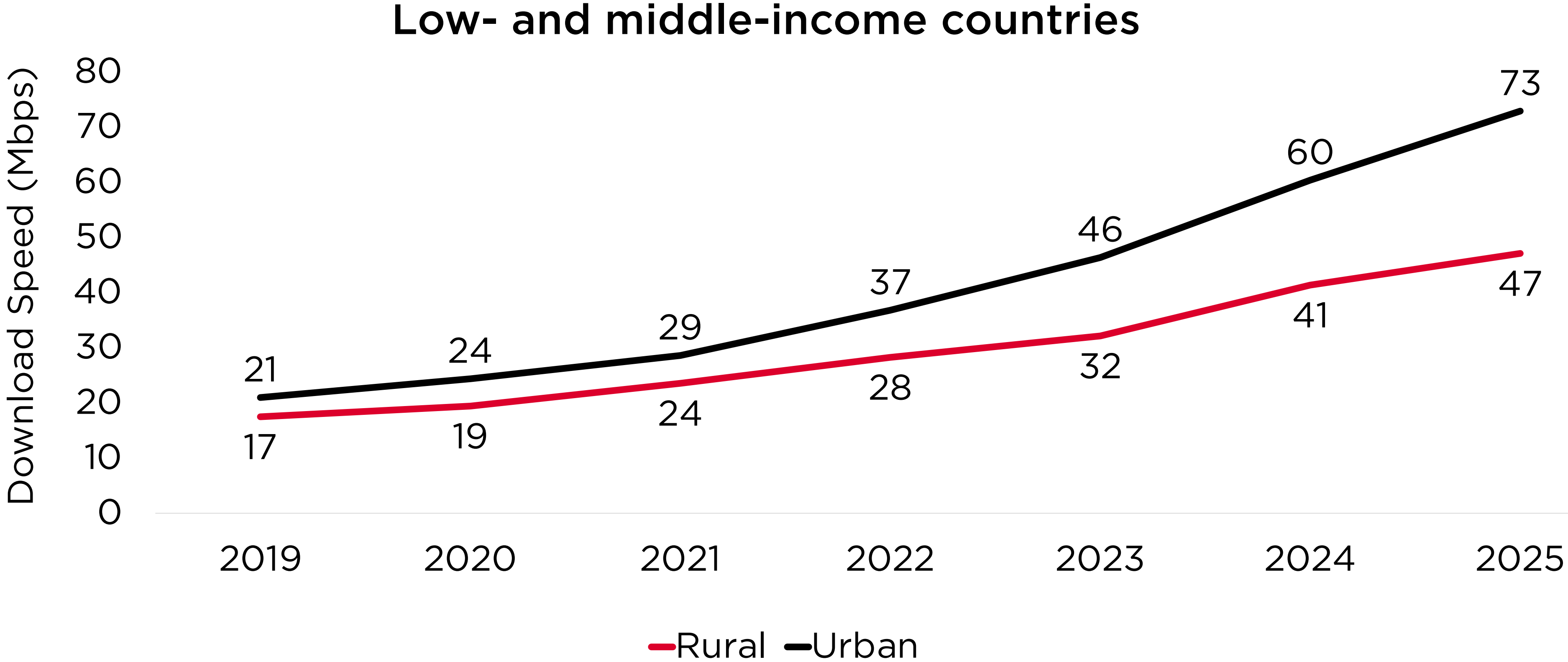
18% of rural consumers **report inconsistent coverage and slow speeds** as the main **barrier** to more intense use

Urban-Rural Coverage Gap

Low- and middle-income countries



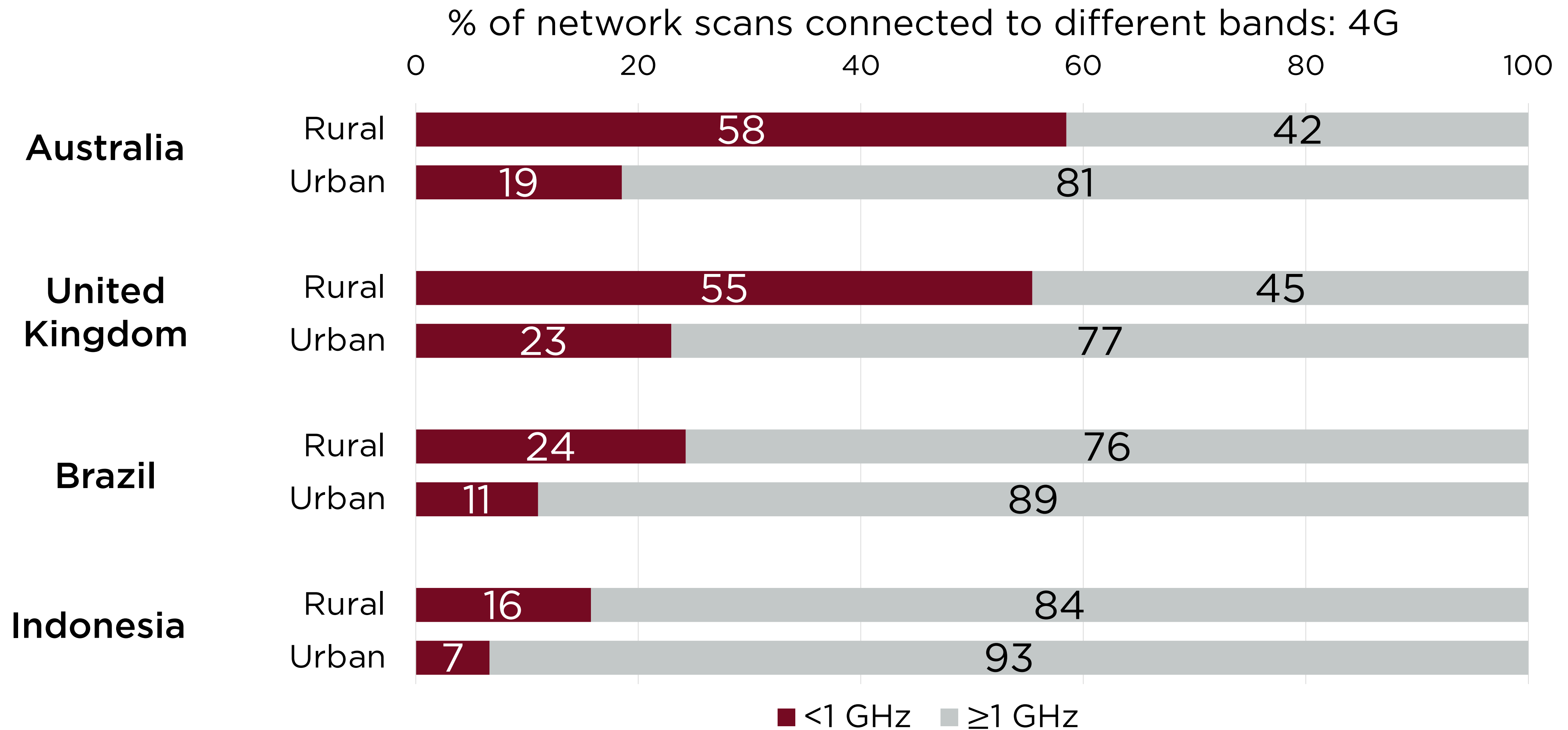
Urban-Rural Quality Gap



How can spectrum policies help empowering Africa?

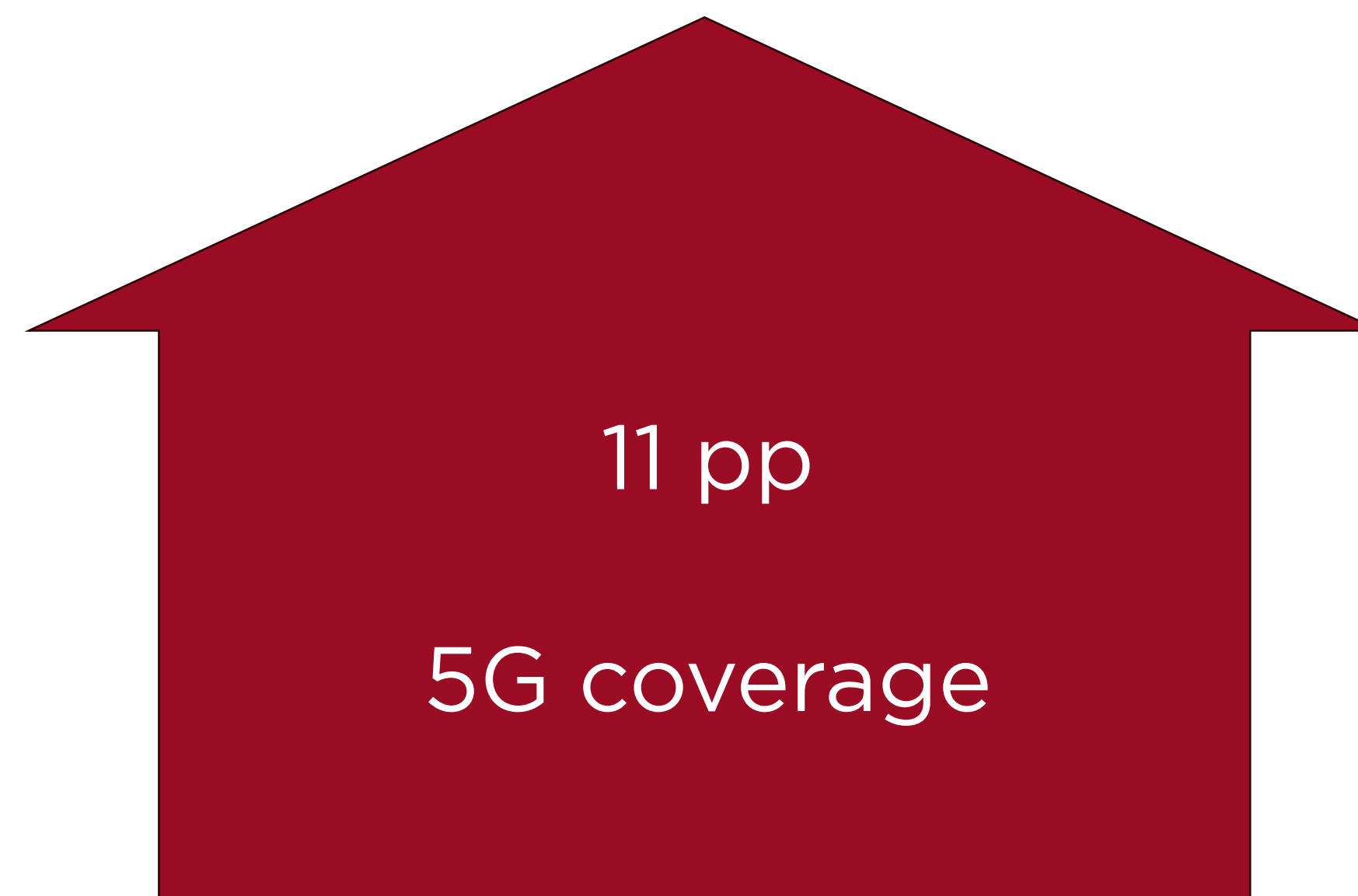
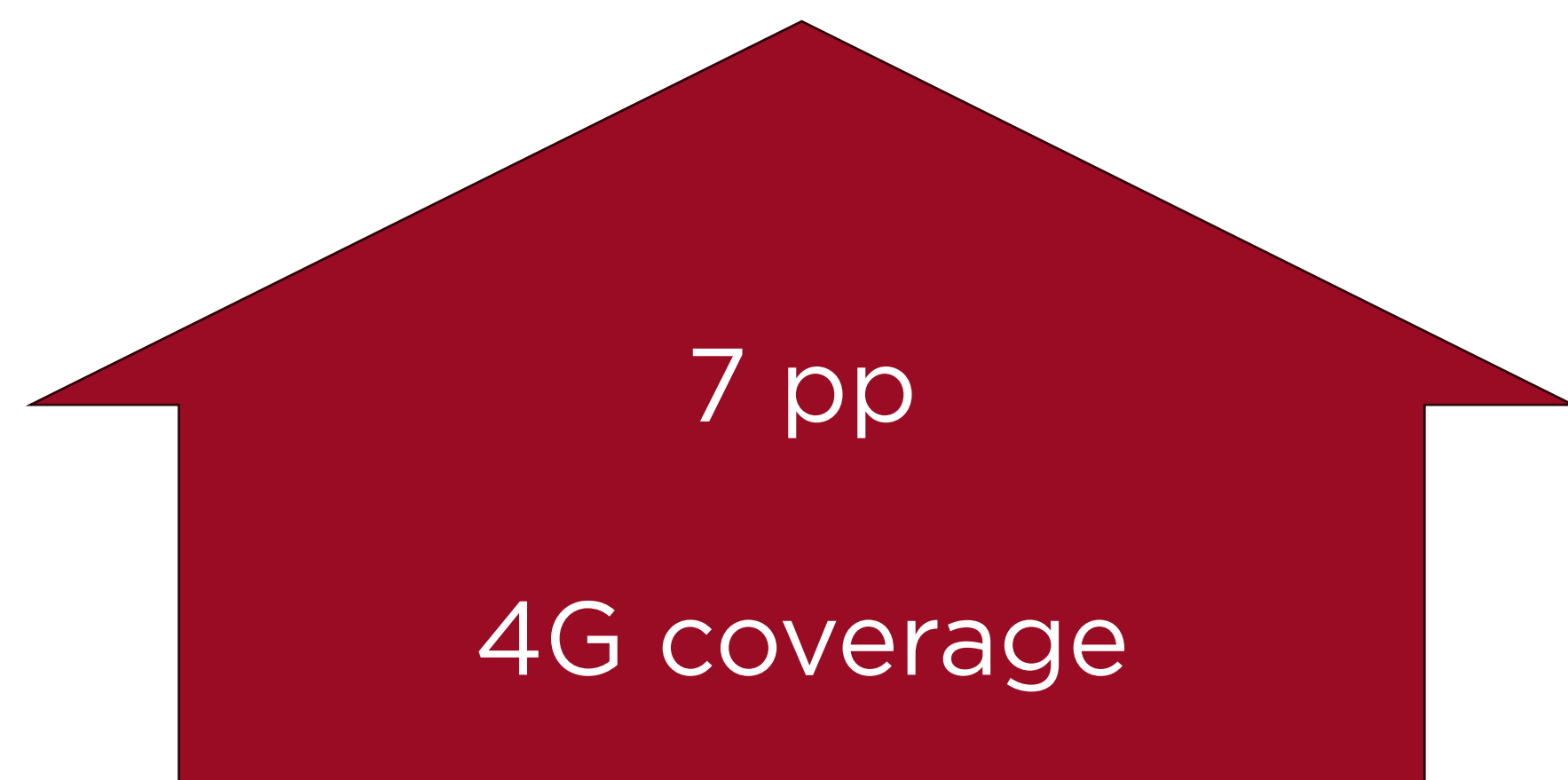


The Role of Low-bands

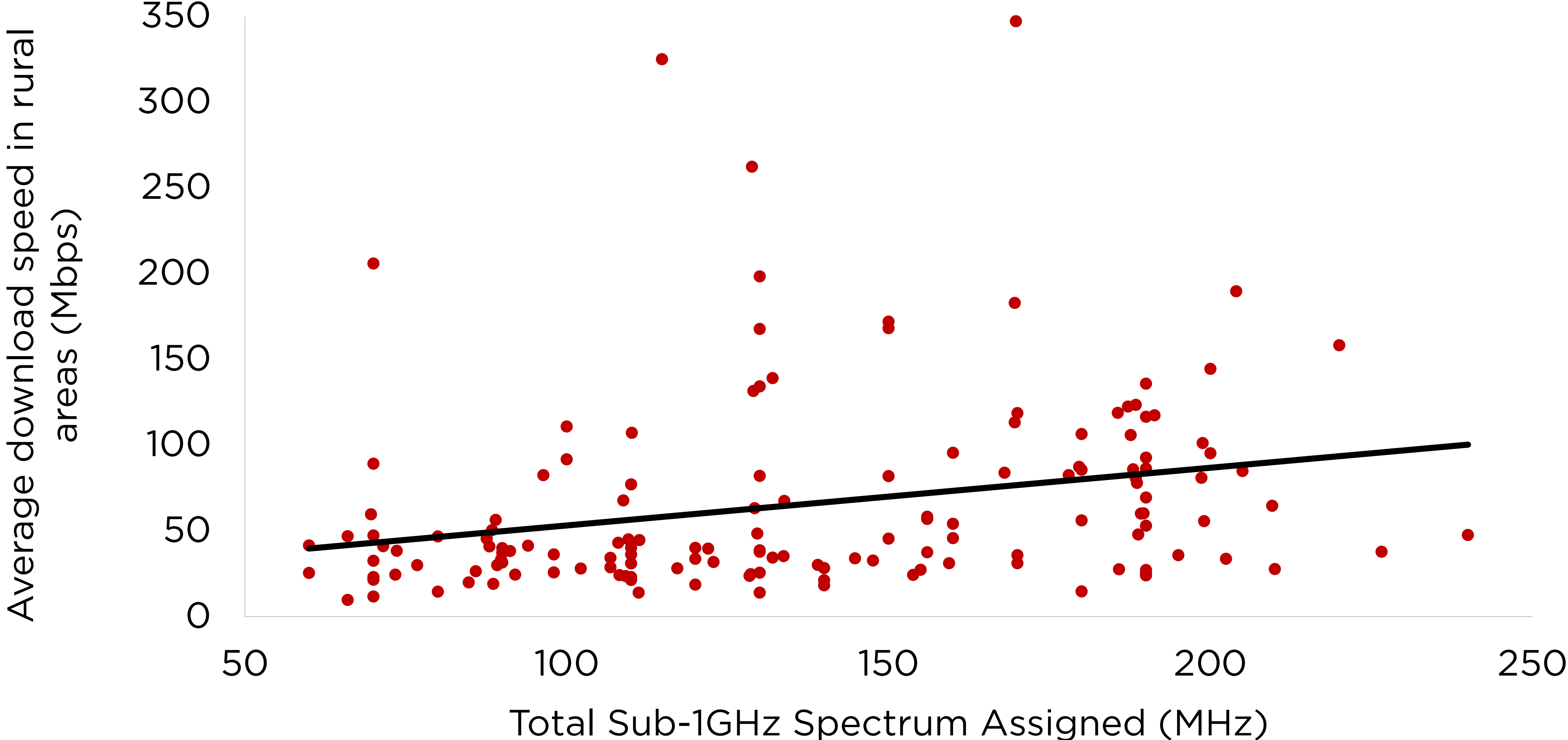


The Role of Low-bands for Coverage

Additional 50 MHz of spectrum in bands below 1 GHz are linked to:



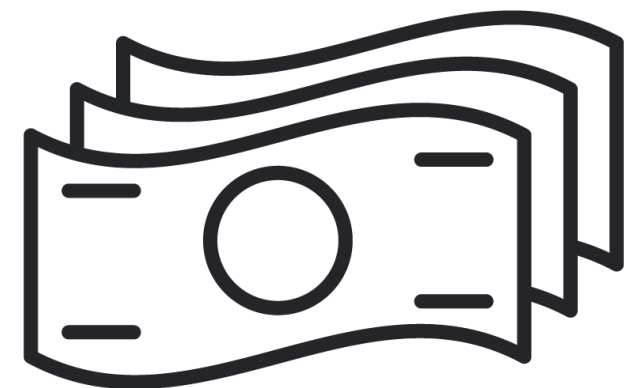
The Role of Low-bands for Speeds



Affordable Spectrum Supports Investments

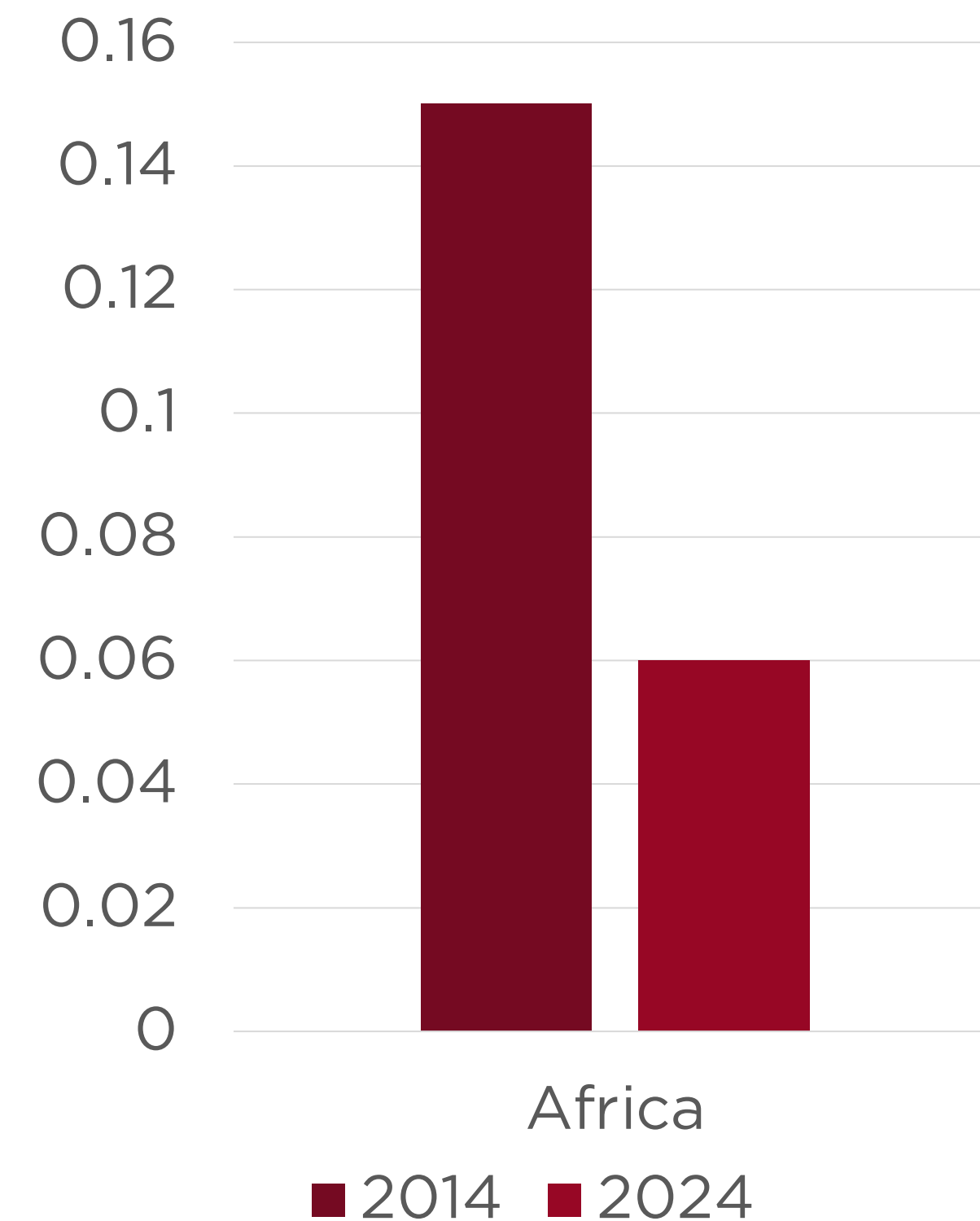


In the past decade, operators increased their spectrum holdings by 80%
Bringing 4G and 5G networks to consumers



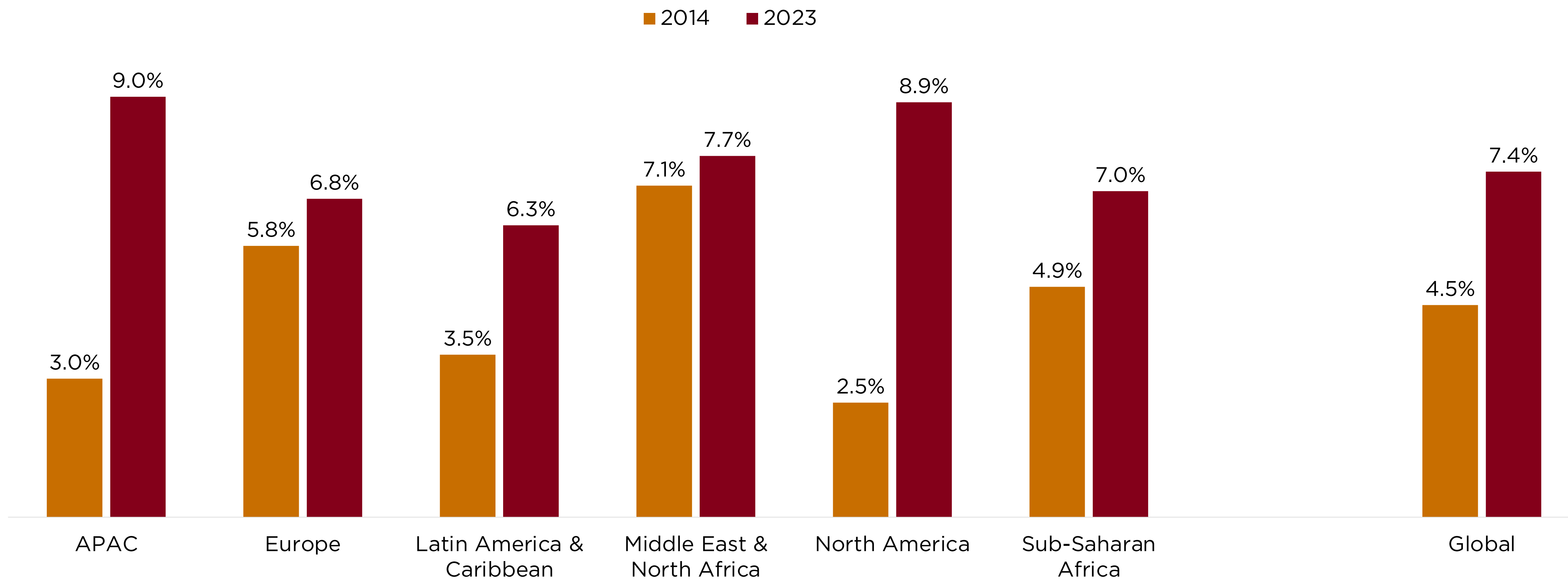
In the same period, revenue per connection has declined by 40%
Changes the reality of the economics of spectrum

Revenue generated per MHz decreased by 60% (USD)

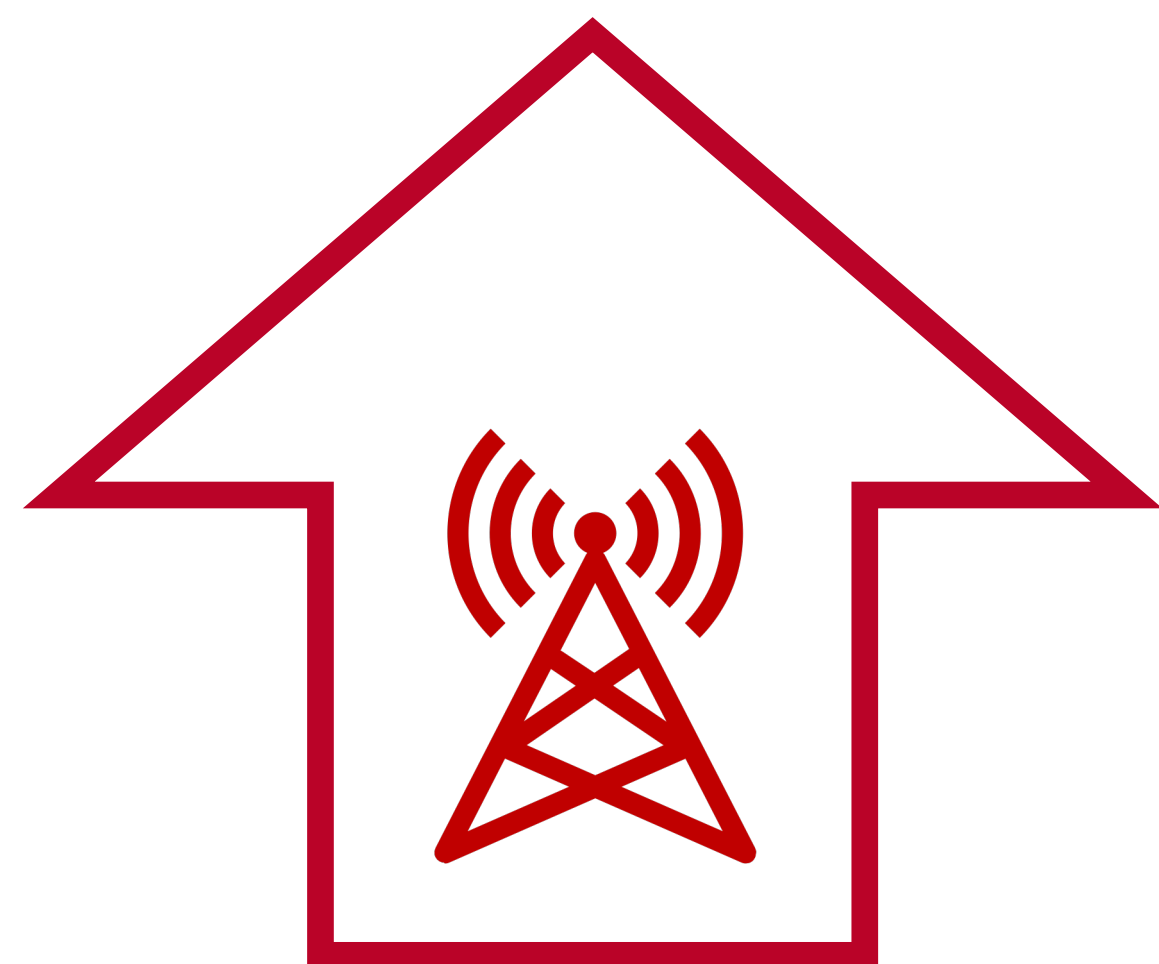


Affordable Spectrum Supports Investments

and cumulative prices went up by x%, as a ratio of revenues

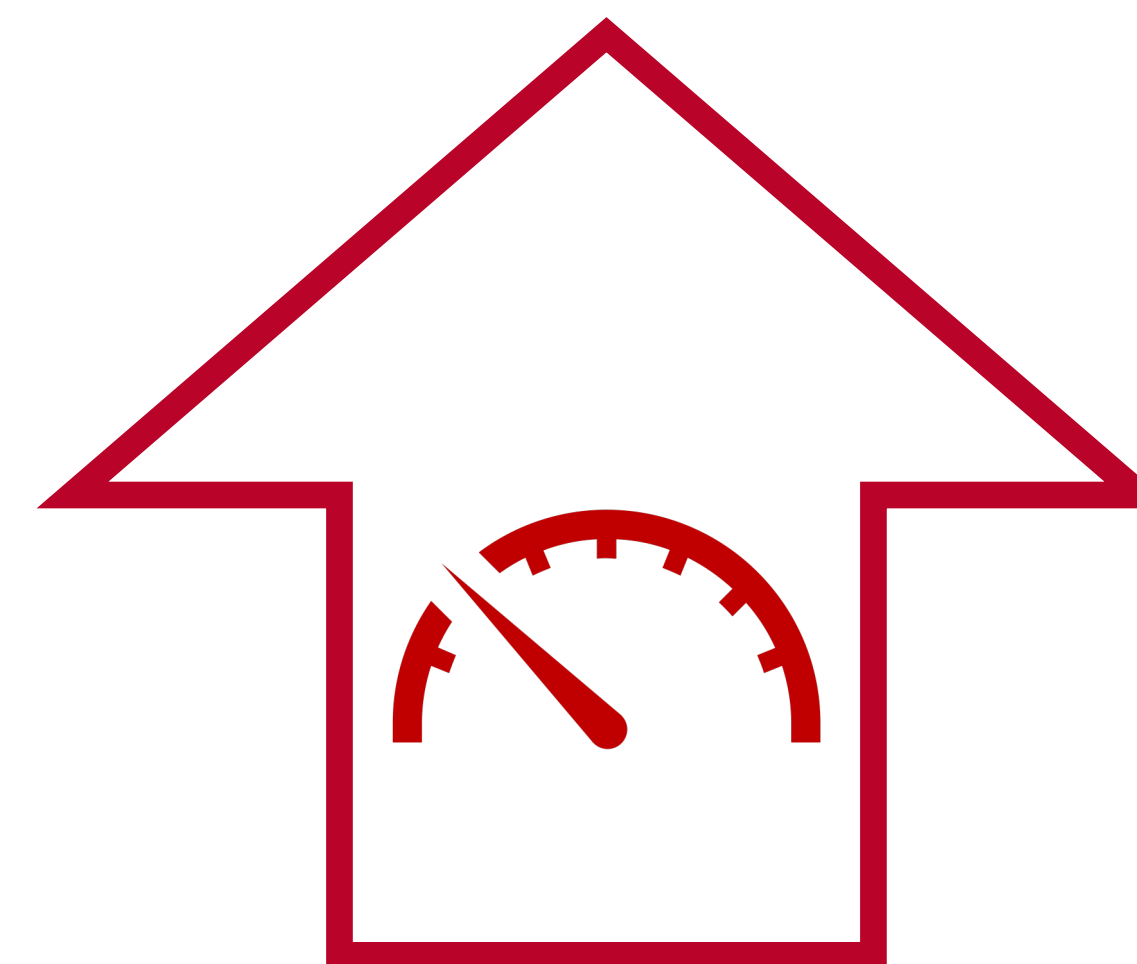


A 10pp lower spectrum cost positively impacts:



6pp

4G and 5G coverage



8%

Average speeds

To connect
all, spectrum
should be
made
available

At the
right time



For the
right price vs obligations



In the
right amount



With investment-
friendly T&Cs,
including sharing