MWC GSMA | KIGALI 17–19 OCTOBER 2023

Event Report:
Africa Policy Leaders Forum 2023

Contents

The most influential telecommunications leaders from across the continent gather at the GSMA's prestigious Africa Policy Leaders Forum (PLF). The 2023 edition brought together over 500 attendees from 59 delegations representing 41 countries and 18 intergovernmental organisations. The agenda saw high-level speakers debating relevant topics such as handset affordability, the investment gap and bridging the digital divide, through insightful keynotes and stimulating panel discussions.

This report highlights the deliberations and the key takeaways from the PLF 2023.

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Highlights from:

The Africa We Want needs affordable smartphones: accelerating adoption and scale

Session overview

Africa continues to experience exponential growth in internet access. Between 2012 and 2022, the number of people with mobile broadband access more than tripled, from 114 million to almost 400 million. Despite this, Africa still has the greatest connectivity gap in the world, highlighting the impact of the barriers to mobile broadband adoption. As of December 2022, over 1 billion people in Africa, or 72% of the region's population, were not connected to the internet. This accounts for more than a quarter of the total number of unconnected people globally.

The most cited barriers to mobile internet adoption are the affordability of handsets and data and the lack of literacy and digital skills.

This opening session examined the challenges and potential solutions for accelerating smartphone adoption and improving digital skills aimed at addressing the high usage gap in the region.

Key takeaways from the session

- Mobile connectivity unlocks new pathways for innovation, job creation, new services and rapid economic growth. In 2022 alone, the mobile industry contributed $170 billion to Sub-Saharan Africa's economy, over 8% of GDP. This is a 21% increase from 2021.
- The usage gap in Sub-Saharan Africa (SSA) stands at almost 60%, the highest in the world. The usage gap persists due to several barriers, including smartphone device and service affordability, digital literacy and skills, relevant content in local languages and safety and security concerns.
- Common barriers to smartphone affordability include: cost of device, features, poor internet connection, high internet cost, smartphone perception, cultural and religious aspects and relevant smartphone content.
- Increased smartphone adoption will not be realised unless we provide the right device to the consumer putting into consideration the willingness to pay and ability to pay. We have the capacity and knowledge in Africa to create authentic solutions that work for Africans.
- There have been several initiatives by different stakeholders in the region aimed at addressing smartphone affordability such as:
  - Device financing partnerships, for example, MTN Rwanda and Bank of Kigali, in the launch of a Device Financing Program 'Macye Macye' and Safaricom and Google, introducing a smartphone device financing plan 'Lipa Mdogo Mdogo.'
  - Launch of local manufactory/assembly in countries such as Uganda, Rwanda and Kenya considering the same.
  - Device subsidy initiative by the World Bank in Rwanda.
  - Globally, the GSMA has launched the Affordability Coalition – bringing together operators, device manufacturers and other organisations, such as the World Bank, to drive progress on the issue.

Proposed solutions

Affordability

- Along with manufacturing costs, import duty fees and taxation costs (VAT and Excise) can add between 10 – 30% to the price of a smartphone. Taxation policy reforms aimed at removing or reducing these taxes are necessary to reduce the cost of smartphones in the region to bridge the digital divide.
- Increase the buy now, pay later (BNPL) options for customers with innovative service bundling that is functional for consumers.
- Increase the availability of smartphones with dual SIM and 4G/5G capabilities due to high dual SIMing in the region.

Digital skills

- Roll out programs aimed at increasing digital skills to citizens. A good example is the Digital Skills Ambassadors programme in Rwanda.
- Digital skills should be taught from primary school to create interest and improve literacy levels.

Relevant content

- To improve access to relevant content, providers should consider zero-rate downloads of religious and educational content. Further, efforts should be made by different players in the ecosystem to avail content in local languages.
- Digitalising government services is a strategic tool the government can use to stimulate demand for mobile broadband services by creating relevant content for consumers and giving them a compelling reason to go online.

Other efforts

- Collaboration among relevant stakeholders is critical in driving scale when it comes to improving access to affordable smart devices in the region.
- Universal Service Funds (USPs) can play a role in addressing the usage gap in the region and some policymakers and regulators are already implementing initiatives related to this. The impact of this is unclear and requires detailed analysis for conclusive insights.
- Africa can move from smartphone assembly to a manufacturing hub, ultimately reducing costs.
- All of these issues are not new. The real question is ‘how do we scale up’ so we don’t do it piecemeal but can achieve real impact.

Relevant resources

The Mobile Economy Sub-Saharan Africa

Making Internet-Enabled Phones More Affordable in Low- and Middle-Income Countries

The State of Mobile Internet Connectivity Report 2023

Thanks to our speakers

Hon. Mrs Paula Ingabire
Minister of ICT and Innovation, Rwanda

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Minister of Technology and Science, Zambia

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Highlights from:

Financing inclusive connectivity in Africa

Session overview

With the growth of the digital economy in Africa, it is crucial to ensure that every player benefiting from the digital space makes a fair contribution towards its development. This is necessary to make the growth sustainable and to unlock the maximum value of the digital economy.

According to the GSMAi Mobile Economy, Sub-Saharan Africa report, mobile data consumption in Sub-Saharan Africa will nearly quadruple by 2027. This is mainly driven by the growing usage of data-heavy services, primarily video streaming and online gaming.

Due to this growth, African countries have started implementing, or have indicated intentions to implement different forms of digital tax to increase revenue collection for the government. As of April 2021, ten African countries have done so: Kenya, Nigeria, South Africa, Egypt, Tanzania, Mauritius, Uganda, Cameroon, Ghana, and Zimbabwe.

This session explored priority considerations to ensure sustainable financing of the digital infrastructure and sparked a debate about the 'fair contribution' by all players in the digital ecosystem in the region.

Key takeaways from the session

- Digital connectivity is at the heart of transforming economies and societies. There's no future of productivity in Africa if people are not connected.
- According to GSMAi, mobile data traffic is forecast to quadruple by 2027, requiring operators to invest significantly to expand network capacity to be able to respond to this demand.
- Africa faces huge investment requirements to achieve its digital connectivity targets - over US$100bn according to World Bank estimates.
- According to GSMA The Internet Value Chain 2022 report, internet value for Internet Access Connectivity by MNO amounts to 15% of the total global value chain while that of Online Service Providers amounts to 57% as of 2020, almost 4 times that of MNOs.
- This makes the return on investment in infrastructure for network operators low raising concerns about the sustainability of investment due to pressure on operators to keep investing CAPEX at rates of up to 20% of revenue.
- However, MNOs are committed to continue investing in the region to support national digital priorities linked to the realisation of the AU Agenda 2063 Africa We Want. They are willing to partner with various ecosystem players such as Large Traffic Originators in the realisation of this ambition. GSMAi estimates MNOs will invest $75bn CAPEX between 2023 and 2030.
- Regulators need to ensure regulations catch up with technological advancements and all players in the digital ecosystem are held accountable for the delivery of service in the various markets.
- Governments consider digitalisation as a social service, a utility, and a fundamental human right. Policy and regulatory reforms need to be prioritised to support growth and development in this area.
- Financing digital inclusivity requires a rethink of the legacy funding channels: universal service fund management reforms, tax incentives, reduced spectrum prices, content monetisation, and big tech contributions are part of the solution.

Relevant resources

The Internet Value Chain 2022

The Mobile Economy Sub-Saharan Africa 2023

Thanks to our speakers

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Highlights from:

Catalysing economic growth in Africa through progressive fiscal policy reforms

Session overview

Many SSA countries face increasing pressure to expand their tax bases and mobilise more tax revenues to finance ever-growing government debt, public services, and development projects and to support their economy. As a result, some sectors, such as telecommunications and ICTs, often face high taxes beyond their size in countries' economies.

Taxation policy reforms can play an essential role in bridging the digital divide by unlocking investment in mobile networks and improving affordability, promoting greater mobile service adoption.

This session presented the latest GSMA study on the taxation of the telecommunications sector in SSA. It proposed solutions for a fair balance between increasing state tax revenues, reducing the usage gap and connecting as many people as possible to the internet.

Key report findings

- Mobile consumers and operators in SSA are subject to a substantial tax burden, increasingly driven by sector-specific taxes and fees, exacerbating affordability and coverage barriers.
- Affordability remains a substantial barrier to internet access for lower-income and underserved populations.
- The multitude of taxes and frequent tax changes negatively impact the business environment and hinder operators' capacity to invest in network expansion and coverage.
- Case studies in the SSA region indicate that mobile taxation can adversely affect investment levels in the mobile sector and the adoption of mobile services, potentially negatively impacting government revenues.
- Governments in SSA are turning to levies imposed on Mobile Money (MM) services to generate revenue, but evidence indicates that these taxes have counterproductive effects.
- Rebalancing mobile sector taxation can foster connectivity, spur economic growth, encourage investment and enhance fiscal stability.

Key takeaways from the session

- The mobile industry supports the spirit of taxation and is willing to play its part in enabling the development of the countries they operate in. However, the industry calls for fiscal policy reforms that ensure taxation is applied in a structured, predictable manner and results in a reduction in the current high fiscal burden on the sector.
- Fiscal policy reforms play an essential role in bridging the digital divide by unlocking investment in mobile networks and improving affordability and greater mobile service adoption. A 10% increase in connectivity can improve GDP by 1.8%-2%.
- High taxation impacts impact consumers directly and affect the adoption of mobile services. Sector-specific levies, such as regulatory fees and the cost of spectrum also contribute to consumers' pay. This also creates a very unbalanced taxation environment for the sector relative to other industries.
- In 2021, the mobile industry generated 8% of GDP, representing more than $140 billion in added economic value, and nearly $8 billion in taxes and fees, accounting for approximately 35% of the total turnover of the mobile sector in the SSA region. This indicates that the sector's tax contribution is higher than its size in the economy and needs to be corrected to ensure the investment sustainability of the sector.
- Tax policy involves balancing everyone's interests for the good of all. Tax policy should be seen from Africa's perspective. We need to harmonise Africa's objectives.
- Some experimenting and some errors may be done. Still, the important thing is to understand the operating environment, be proactive and ensure adequate stakeholder engagement for successful policymaking and policy implementation.
- Three recommendations to find a better balance between revenue mobilisation and digital development:
  - Minimise/remove sector-specific taxes and levies on data and devices to improve affordability;
  - Provide a conducive environment for investment - ensure fair treatment of the mobile sector, provide fiscal certainty;
  - Embrace Digital Government, digitalising and broadening the tax base.

Key report recommendations

1) **Remove the tax-induced barriers to the affordability of mobile and mobile services by:**
   - Eliminating or decreasing sector-specific excise taxes applied to mobile services
   - Reducing or eliminating import duties on mobile handsets and refraining from imposing higher VAT rates than the standard rate
   - Removing fixed-rate taxes imposed on consumers, such as activation and numbering taxes, which disproportionately affect individuals with lower incomes and contribute to making mobile services less affordable for them

2) **Create a conducive tax environment to enhance operators' ability to invest in upgrading and expanding mobile networks by:**
   - Removing sector-specific taxes and fees on mobile operators, particularly those imposed on operators' revenues irrespective of profitability, to ensure fair treatment of the sector and encourage investment in mobile infrastructure
   - Removing import duties on the import of network equipment to reduce the cost of operators' investment in network expansion and innovation
   - Streamlining and stabilising taxes within the mobile sector to reduce operators' compliance expenses and offer them predictability, enabling more effective investment planning
   - Considering tax incentives to compensate for operators' commitments to low-return investments, such as deploying connectivity in underserved, remote and rural regions

3) **Expand and strengthen access and use of Mobile Money and digital government services by:**
   - Avoiding imposition of taxes on MM services, thereby improving their accessibility and use
   - Integrating MM into government payment systems, which could potentially lead to increased transparency, improved service delivery efficiency, and enhanced revenue mobilisation.

Relevant resources

Mobile Tax Policy and Digital Development: A Study of Markets in Sub-Saharan Africa

Tanzania Mobile Money Levy Impact Assessment

The E-levy in Ghana: Economic Impact Assessment

Thanks to our speakers

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Highlights from:

Understanding cybersecurity trends and challenges in an increasingly digital world

Session overview

The benefits of digitalisation of economies far outweighs the risk of cyber threats. Hence it is imperative to identify and mitigate these threats to continuously provide the confidence needed to use digital technologies and services.

This session focused on the cybersecurity and data protection trends and threats observed in Africa. The session also assessed the policy landscape in Africa and the policy interventions required to ensure the region has a harmonised approach to addressing data privacy and cybersecurity threats.

Key takeaways from the session

- Three cyber challenges of our age:
  - Mobile networks are critical to society and need to be robust and reliable;
  - Security requirements and conformance obligations are at risk of fragmenting;
  - Isolated initiatives introduce complexity but do not demonstrably improve security.
- General data privacy laws should allow personal data to flow across borders. Data privacy frameworks recognise that protecting personal data goes hand in hand with allowing data to flow while protecting privacy benefits society and the economy.
- Data localisation policies create cybersecurity risks where data is only stored locally with no backup.
- Policymakers have essential roles in creating an enabling environment to attract investment by supporting industry through developing strategies and frameworks to facilitate innovation.
- Smart Africa is supporting the creation of a harmonised framework for data protection legislation across Africa through the Smart Africa Data Protection Working Group, which aims to produce a mapping of legal frameworks and implementation guidelines for Smart Africa Member States, as well as recommendations on enhancing harmonisation and collaboration mechanisms between Data Protection Authorities.
- The African Union's Data Policy Framework sets the path with fairness, inclusiveness, trust, safety, and accountability. It also recommends consumer and data protection, cybersecurity, data ethics, and open data sharing systems for intra-African cross-border digital trade and e-commerce transfers.
- In June 2023, the Malabo Convention came into force. It is the only binding regional treaty on data protection outside Europe, providing general rules and principles on personal data protection, electronic commerce, cybersecurity, and cybercrimes.
- Recommendations on improving cybersecurity among youth: introduce cybersecurity in the education system early, increase awareness of cybersecurity and data protection, and create dynamic policies, safety measures, and safe spaces to interact and share information.
- Having cybersecurity frameworks is an important step, but there is a gap in implementing them. We need harmonised laws across countries and an implementation plan to execute these across borders.

Relevant resources

Safety, Privacy and Security Across the Mobile Ecosystem

GSMA Mobile Telecommunications Security Landscape 2023

Smart Data Privacy Laws

Cross-Border Data Flows Enable the Digital Economy

Thanks to our speakers

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Director General, Zambia Information and Communications Technology Authority (ZICTA)

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Highlights from:

A new dawn for Rwanda powered by 4G: re-imagining connectivity through progressive policy reforms

Session overview

In 2022, Rwanda launched a new broadband policy introducing liberalisation and competition in 4G, paving the way for high-speed broadband connectivity at lower costs.

The usage gap in Rwanda remains high, standing at 74% as of 2022, down from 75% as of 2021. Research shows digital literacy is one of the key barriers to broadband adoption. Rwanda's October 2022 Broadband Policy aims to achieve 85% adult literacy by 2024.

In response to this, the mobile industry in Rwanda, in collaboration with the government, has come together through the GSMA WeCare campaign to launch a digital literacy initiative that will contribute significantly to the achievement of this target.

This session shined a spotlight on Rwanda to demonstrate the positive impact of policy reforms in reversing their decision on the Single Wholesale Licensing Framework on 4G and future technologies and the benefits of partnerships that will see successful implementation of this decision aimed at closing the connectivity gap in Rwanda.

Key takeaways from the session

- Policy reforms must be agile and responsive to citizens' needs. Rwanda's broadband policy focuses on affordable and accessible connectivity and digital literacy. Currently, 99% of the population is covered with mobile broadband, aiming to achieve an 85% adult literacy level by 2024.
- The mobile industry in Rwanda, in collaboration with the government, has come together through the GSMA WeCare campaign to launch a digital literacy initiative that will contribute significantly to the achievement of this target.
- A conducive regulatory environment is crucial to achieving a 100% connected society. The liberalisation of 4G and future technologies improved investment, expanded infrastructure and created competition for the consumer's benefit.
- In three months since the liberalisation of 4G, there was a four times increase in traffic, high levels of adoption and reduced cost to consumers.
- Mobile operators have come to the table to support closing the connectivity gap in Rwanda and realize the targets set out in the broadband policy.
- MTN Rwanda's CHASE framework outlines MTN's approach to addressing the five key barriers to mobile internet adoption: coverage, handsets, affordability, service bundling, and education and ease of access.
- Airtel Rwanda has launched an initiative to distribute 1.2m affordable 4G smartphones priced at RWF 20,000 ($ 16). The smartphone comes with unlimited calls and texts and 1 GB of 4G data daily, all for a monthly charge of RWF 1,000 ($ 0.81).
- A call for more handset manufacturing in Africa to increase affordability and accelerate the adoption of smart devices.
- Consistency and leveraging partnerships are critical tools to address the usage gap and affordability.

Thanks to our speakers

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Highlights from:

Bridging the digital divide: leveraging universal service funds for enhanced rural connectivity in Africa

Session overview

Governments in Africa and worldwide have introduced policies to incentivise internet infrastructure rollout in underserved locations and stimulate consumer demand for services.

In Africa, at least 51 of the 54 countries in the region have introduced or are introducing The Universal Service Fund (USF) mechanism to deploy mobile broadband infrastructure in commercially unviable areas. The intention is to bridge the connectivity gap. In all cases, USFs are partly or entirely financed through contributions from telecom service providers.

This session saw the launch of a report that reviews the performance of USFs in the region and showcases recommendations to ensure USFs meet the intended objectives.

Key challenges affecting the performance of USFs in Africa

Key challenge	Details
Dormancy	Although there is a general lack of public disclosure of funds collected and disbursed, the total unused amount held by 12 USF authorities that responded to the relevant question in the survey was $265 million. This represents more than half the amount collected in these countries over the last five years.
Regulatory flexibility	While the legal framework of USFs provides certainty on key elements, such as governance and implementation, in many cases it also raises questions around flexibility (or lack of it) to accommodate the continuous evolution of the telecoms sector. For example, USFs may not yet appreciate the growing shift from voice to data and the investment requirements of mobile internet networks.
Stakeholder consultation	Service providers play a central role in the performance of USFs, as both contributors and executors. However, the majority of USF authorities do not sufficiently consult with them or offer visibility of the management of funds and the rationale behind implementation decisions. There are some best-practice examples in the region, such as Ghana, where service providers are represented on the board of GIFEC.
Reallocation of funds	There are concerns around the reallocation or misappropriation of funds on activities not remotely related to connectivity. The lack of regular reporting and performance evaluation fuels these concerns. Of the 10 USF authorities that indicated that all funds collected have been spent, less than half publish performance reports on a regular basis.
Independence	Political intervention or interference from other government agencies inevitably affects the performance of USFs. This appears to be a common feature in Africa and one exacerbated by governance scenarios where the USF authority does not function as a separate, independent unit. Lack of independence of the USF authority can affect the performance of the fund in terms of delays in budget approval, redirection of funds to other uses, and excessive bureaucracy for project approvals, resulting in redundant administrative costs that reduce the amount available for implementation.
Institutional capacity	USFs require skilled personnel throughout the entire project lifecycle, from planning and design to implementation and performance evaluation. Many USFs in Africa lack personnel with the required legal, technical and project management expertise to execute major projects, with ongoing issues around high staff turnover, particularly for leadership and technical roles, poor motivation among existing staff, and inadequate skills capacity for the tasks required.
Supporting infrastructure	Lack of supporting infrastructure – in the form of poor road networks, inadequate security and lack of grid electricity – is often not factored into the implementation of USF projects. This can lead to poorly executed or abandoned projects.
Operating expenses	Service providers face ongoing operating costs to maintain networks. These can be expensive, given the lack of supporting infrastructure, and uneconomical, given the lack of market potential in rural areas. If a workable solution is not found to the opex challenge, the appetite for coverage expansion in uneconomical areas – even with USF funding – will remain limited.
Reliable data	USFs in the region often lack relevant, reliable data on vital indicators, including coverage gaps, population density and mobility, and social and economic profiles, to design and analyse the sustainability of network projects. Poor planning leads to execution problems, a mismatch between allocated funds and project requirements, and conflicts between authorities and service providers.
Transparency	Most countries in this study do not have a formal public reporting process for USFs. This makes it difficult for contributors and other stakeholders to ascertain details of the management of funds and implementation of projects. The perceived transparency issue has the potential to create mistrust among stakeholders, to the detriment of the overall objectives of the USF.
Clear objectives	Many USF frameworks were designed at a time when the connectivity landscape looked different. As such, some objectives sound vague and contradictory when interpreted today – for example, the definition of underserved areas qualifying for USF projects.
Overall impact assessment	Most USFs in Africa are into their second or third decades. Even the most conservative estimates of the amount collected since inception would put the figure at more than $5 billion. However, there has not been a comprehensive study of the overall impact of the USF since inception in any country in the region. The lack of empirical evidence on the impact of USFs to date can limit the ability of authorities to make informed decisions on the future of USFs.

Source: GSMA Intelligence

Key takeaways from the session

- With a coverage gap of nearly 200m people and a usage gap of just over 800m, the scale of the challenge to realise universal connectivity in Africa underlines the need for an effective use of USFs.
- Several challenges hinder rural connectivity in SSA, including inadequate support infrastructure such as access roads and reliable supply of electricity, high costs of infrastructure deployment and maintenance, low population density, and digital skills gaps, and low revenue that can't cover the cost of investment.
- Tower companies play an essential role in bridging the digital divide. Tower sharing has many benefits: reduced investment, reduced operating costs, improved competition, ability to expand networks cheaper and faster in lower-income areas, and reduced carbon footprint.
- A significant challenge is transparency and clarity of how USFs are used. Four key factors for effective USFs: simplicity, affordability, sustainability and transparency. There is also a need to harmonise USF policies in Africa.
- Recommendations on improving the effectiveness of USFs in Africa: Adopt mechanisms to incentivise fund disbursement; Implement evidence-based contribution rates; Set clear and measurable targets for USFs; Prioritise stakeholder consultation throughout the entire project lifecycle; Use data-led approach to select USF projects; Ensure regular performance monitoring and reporting; Establish a project costing system that accounts for overheads; Explore alternative funding mechanisms.

Key report recommendations

- **Adopt mechanisms to incentivise disbursement of funds:** Establish clear targets and use incentives to ensure effective and timely disbursement.
- **Implement an evidence-based contribution rate:** An evidence-based approach, in consultation with service providers, should be used to decide a suitable contribution rate.
- **Set clear and measurable targets for the USF:** Clearly define the parameters for USF projects and outline key success measures following implementation.
- **Prioritise stakeholder consultation:** Stakeholder consultation should not be a one-off or an occasional call for submissions; rather, it should be a continuous process of engagement, with direct contributions and feedback from service providers.
- **Use a data-led approach to select USF projects:** Data gathering and efforts to apply relevant insights to project selection should form part of the operational reform of USFs.
- **Ensure regular performance monitoring and reporting:** Regular reporting is paramount to provide visibility and accountability.
- **Establish a project costing system that accounts for overheads:** A comprehensive costing system should account for overheads and opex from the outset, with a sustainable solution that guarantees the long-term viability of a USF project.
- **Explore alternative funding mechanisms:** The 'pay or play' model adopted in Morocco is an example of an alternative model with the potential to incentivise investments in coverage expansion and tackle the challenges associated with the traditional USF model.
- **Build capacity and develop skills within the USF:** Focus on reskilling and upskilling existing personnel, recruiting new people and retaining qualified staff at the USF authority.
- **Engage with local communities on the benefits of connectivity:** Take steps to engage with consumers and community leaders to address any perceived concerns about digital technology.
- **Consider an independent governance structure:** Seek to minimise or eliminate red tape and political interference in the management of funds and the implementation of USF projects.

Relevant resources

Universal Service Funds in Africa

Thanks to our speakers

Hon. Mr Nape Nnauye
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Highlights from:

Exploring energy challenges across Sub-Saharan Africa and how they can be addressed

Session overview

Mobile network operators (MNOs) in Sub-Saharan Africa are facing a growing number of challenges related to energy access, affordability, reliability, and sustainability. Power outages, rising energy costs, and limited access to the power grid are some of these energy-related challenges. In countries with increasingly frequent power outages, MNOs have taken steps to ensure reliable mobile connectivity for consumers and businesses, including increasing diesel generator use and installing backup batteries.

These actions can come at a substantial additional cost at a time when operators are already facing high and volatile energy prices. Renewable energy holds significant potential to address many of these energy-related challenges, but barriers related to policies, market design, and investment are hindering deployment in some markets. Addressing energy challenges in the region therefore requires comprehensive and concerted action on policy and technology.

This session brought together key stakeholders to discuss how they can work together to identify and implement solutions to increase access to reliable and clean energy across the region.

Key takeaways from the session

- All sectors require reliable digital and energy services, and mobile networks need dependable and affordable energy to connect people and businesses across SSA.
- The cost of capital of renewables in SSA is at least 2-3 times higher than in advanced economies, hindering investment in clean energy and grids.
- SSA has enormous renewable energy potential to scale up solar, wind and hydro over the coming decades. Africa is home to 60% of the best solar resources in the world but has less than 1% of global installed solar PV capacity today.
- Because of energy supply issues, mobile operators have increased diesel generator use, installed on-site renewables and batteries and implemented energy efficiency measures to maintain customer connectivity.
- Unless addressed, energy challenges jeopardise the delivery of key development goals in the region. High energy-related costs are causing delays to network expansion and new technology deployment, raising risks to achieving the region's digital and sustainable development goals.
- Energy ministries and regulators can play a key enabling role in solutions by implementing policies and regulations that allow and encourage investment in new renewable capacity and grids.
- MNOs stand ready to engage with governments, utilities, and investors to help accelerate clean energy access in the region for everyone and to help unlock the power of digital and the internet to reach Africa's development goals.
- The need for investment in clean energy is immense. No one institution or development bank can bridge this investment gap. That's why partnerships are essential.

Relevant resources

Energy Challenges for Mobile Networks in Sub-Saharan Africa

Thanks to our speakers

Yusupha M. Jobe
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Highlights from:

Spectrum for the benefit of billions

Session overview

Spectrum licensing practices have a key role to play in connecting the unconnected. Licensing spectrum on technology-specific terms remains a popular regulatory practice in Africa, even the industry as a whole seeks to meet growing demand for mobile connectivity and accelerate the adoption of the latest spectrally-efficient technologies in 4G and 5G whilst seeking out ways to phase out legacy 2G and 3G networks.

The final session of the Policy Leaders Forum examined the possibilities of WRC-23 for Sub-Saharan Africa. It also shared guidance on transitioning to a technology-neutral spectrum licensing approach and preparing for legacy technology sunsets.

Key takeaways from the session

- The rural-urban connectivity gap in Africa is 49%. People who live in rural areas are 49% less likely to be connected to the mobile internet than those in urban areas. More low-band spectrum is needed to change the status quo.
- WRC-23 opportunities for mobile: Low band for digital equality, 3.5 GHz for harmonisation and 6GHz for future 5G expansion.
- Technology neutrality is crucial to allow mobile operators to refarm spectrum used for legacy networks and replace older equipment with equipment of a newer standard.
- Countries that apply technology-neutral licensing, under service-neutral licensing conditions, have better coverage, better network quality and speeds, and almost double the adoption of 4G and 5G than countries with technology-specific licensing.
- Legacy network sunsets facilitate the opportunity to refarm spectrum for technology upgrades, improve energy efficiency, rationalise device portfolios, optimise network operations and realise capex savings.
- 40% of 5G deployments offer Fixed Wireless Access (FWA), critical to bridging the digital divide, but other health, mining, and industry verticals are showing great promise.

Relevant resources

The GSMA at WRC-23

WRC-23: Mobile Spectrum for Africa's Future

Spectrum Pricing and Licensing in Africa – Driving Mobile Broadband

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The Africa Policy Leaders Forum will be back at MWC Kigali in 2024

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