

5G in sub-Saharan Africa: what trends in the region?

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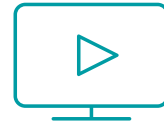
what we do

regulation made simple

Cutting through the complexity of regulation in:



telecommunications



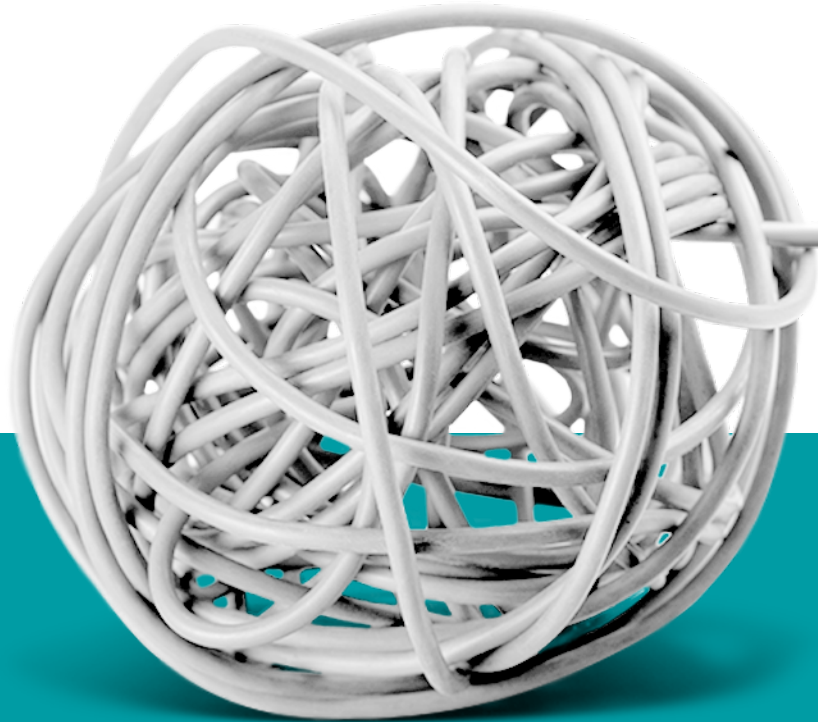
media



digital economy



postal



and



competition law

as applied in the above sectors



News Alerts



Monitoring



Benchmarks



Databases

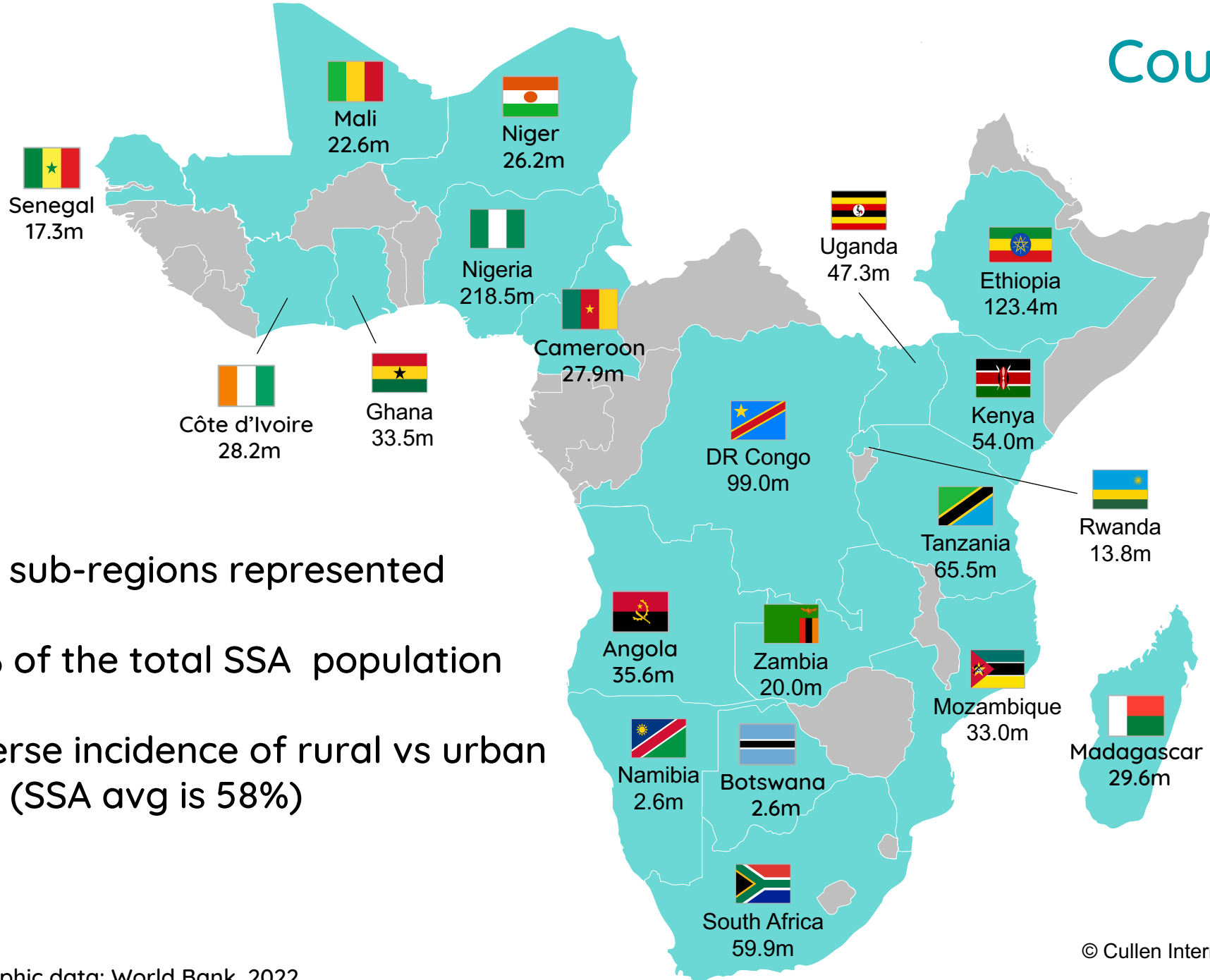


Enquiries

New Cullen International research on 5G in SSA (Aug. 2023)

- National strategies and policies on 5G
- Identifying and freeing spectrum for 5G.
Key licensing aspects
- Operators' deployments and commercial approaches on 5G in relevant SSA markets

Country selection

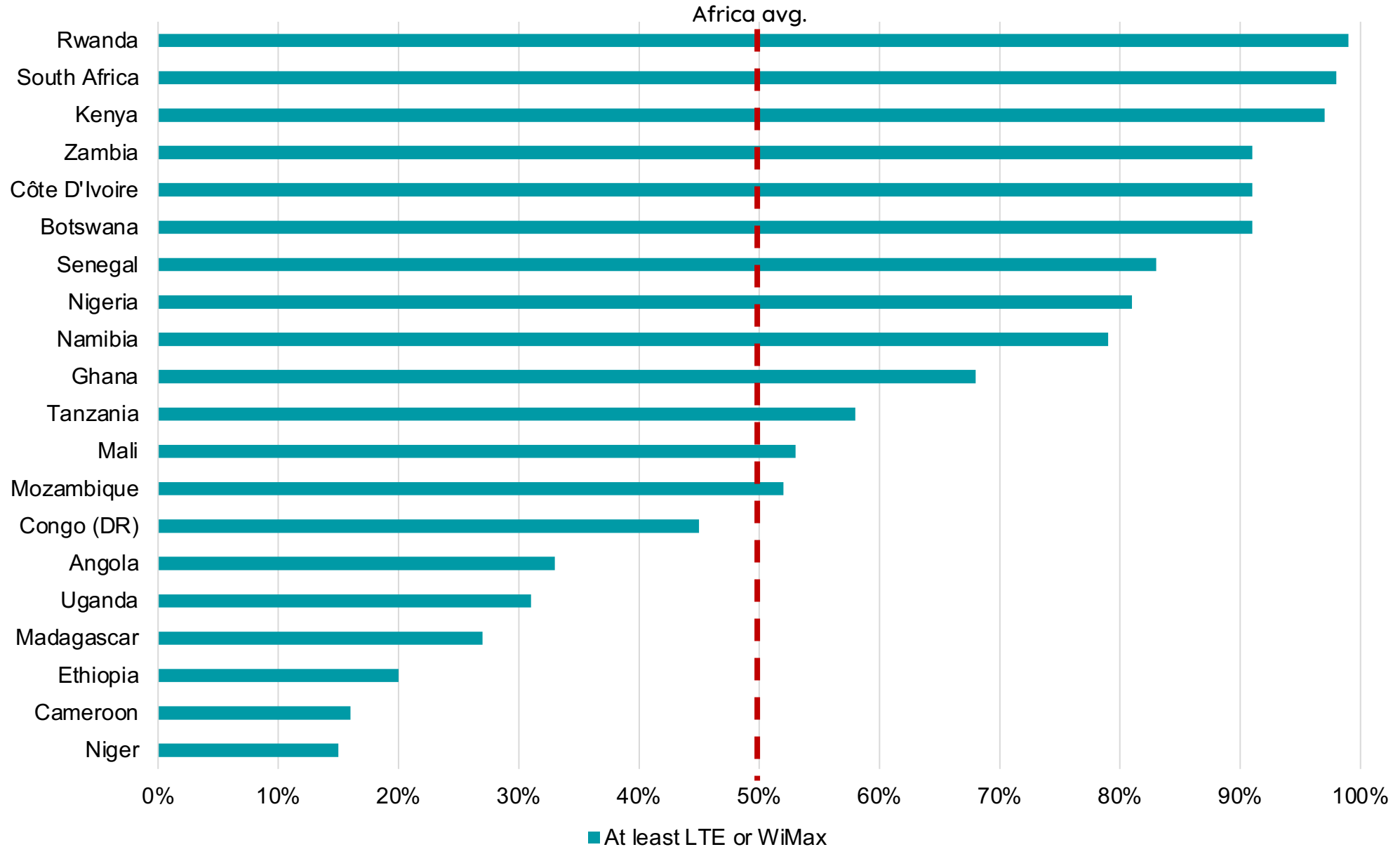


- SSA sub-regions represented
- 82% of the total SSA population
- Diverse incidence of rural vs urban pop (SSA avg is 58%)

Demographic data: World Bank, 2022



Most countries are still deploying 4G



Upgrades to 5G: three levels of engagement

Government

Strategies, roadmaps, plans on 5G

Technical & regulatory “enablers”


Radio spectrum for 5G

Industry initiative

From testing to commercial availability

Top-down or bottom-up?


Governments' commitment on 5G: examples




Nigeria adopted in Sep. 2021 a national policy on 5G networks for Nigeria's digital economy, setting precise targets bound to 5G. 3.5 GHz spectrum allocations

In the context of broadband plans and/or digital strategies


Spectrum-related and/or decisions affecting the mobile competitive context



Tanzania has been promoting a vision for 5G as well as a spectrum auction, which took place in May 2022

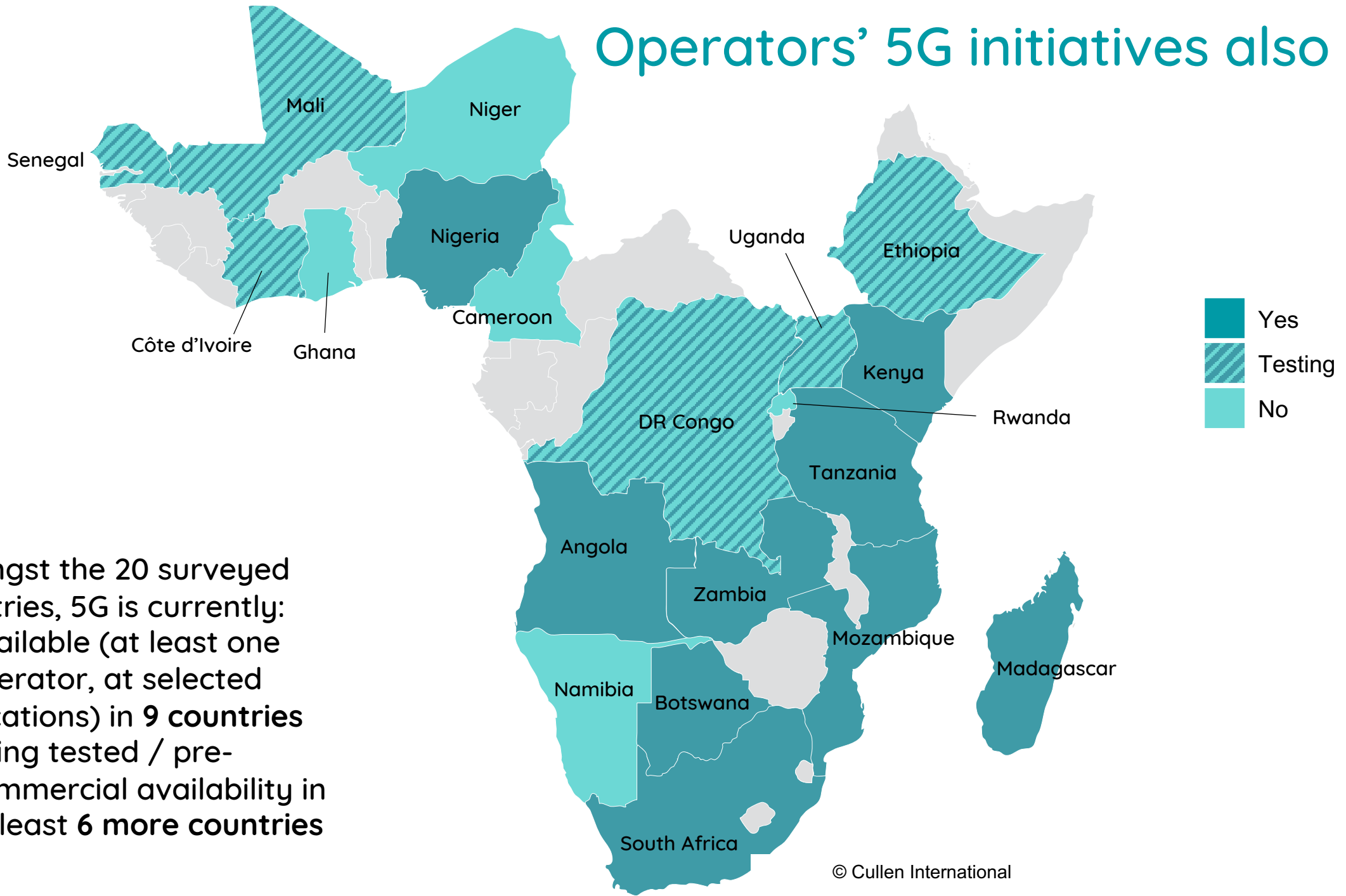


Rwanda adopted a new National Broadband Policy and Strategy in Oct. 2022. The NBPS highlights the government aims to ensure that all operators have the ability to deploy advanced broadband networks in 4G, 5G technology and beyond



Namibia adopted a Strategy in respect of the implementation of IMT-2020 for the period 2023-2027. Ongoing assignment procedure of below 1-GHz spectrum. 3.G GHz spectrum assignment scheduled in 4Q 2023

Operators' 5G initiatives also vary



Amongst the 20 surveyed countries, 5G is currently:

- available (at least one operator, at selected locations) in **9 countries**
- being tested / pre-commercial availability in **at least 6 more countries**



Thank you!

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