9th Meeting of the COMCEC Transport and Communications Working Group, Crown Plaza Hotel, Ankara, Turkiye

Theme: Increasing Broadband Internet Penetration in OIC Member Countries

Presentation of The Broadband Internet Penetration Situation in The Gambia

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OUTLINE

- Geographic And Socio-Economic Background

- Overview and Situation of BB Penetration in the Gambia

- Overview of ICT Broadband Enhancing Infrastructure, Policy and Plans in The Gambia
- Constraints/Challenges

- Intervention needs

Geographic And Socio-Economic Background

- The Gambia is about 11, 000 sq. Km. with a length of about 800 km and width of 48km.
- Situated in west Africa and surrounded by Senegal on the East, North and South and by the Atlantic Ocean on the west.
- Has a population of 1.8m according a 2013 population survey.
- A sub-Saharan country with a flat and level land top topology ideal for broadband infrastructural development.
- The Gambia is mainly an agriculture based economy but Services has accounted for 60 percent of GDP over the period 1994 to 2013,, with trade and transport, and communications being its two largest components.
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- The ICT sector has been a genuine contributor to national revenue as well as serving other socio-economic purposes like the creation of employment in both the formal and informal sectors of the Gambia.
- Increase in Broadband penetration will have the potential to enable and propel the Gambian economy to desired levels.

Overview and Situation of BB Penetration in the Gambia

- Last Mile :Most part of the country is yet to be covered by any of the ISPs or Operators on 3G, although coverage on 2G is over 95% of the country.

- Some parts are covered on internet through GPRS or EDGE.

- Mobile penetration rate is quite impressive compared to sub-saharan countries; in 2016 mobile penetration was at 35.25 per 100 inhabitants, a slight increment from 34.50 in 2015; whereas fixed penetration rate is 1.9, a slight drop from 2.7 in 2015.

- The country has one fixed line operator, four GSMs and 7 ISPS, four of which double as the GSM Operators.

Overview and Situation Broadband Penetration

- Broadband usage, despite all the infrastructural development, is still low; below the African average of 2.0. Main inhibiting factors are:
- Literacy – more than half of the population are illiterate
- Accessibility – network coverage is restricted to areas where corporate customers are available.
- Affordability – terminals are very expensive compared to the average earning of the Gambian. A niche market approach is adopted by the operators. Instead of increasing coverage and lowering prices all seven providers are concentrated in the capital and hence have to lay high prices for any Return on Investment (ROI).
- Low usage of ICT by both the public and private – there are little or no applications to help stimulate demand.

enhancing Infrastructure in The Gambia

1. *Connecting Gambia to the global information superhighway*

- International backbone – ACE high bandwidth Submarine Cable Landing Station

- **National Backbone** - the ECOWAN project, 947km fibre optic cable is being through out the lenghth of the country and in both the North and South across the country.

- **Internet Exchange Point (IXP)** – Localising national traffic for availability, efficiency and cost effectiveness.

- **Access Network** – last mile for access to customers, limited for better consumer experience.

Enabling Policy Environment

- The Gambia's E-Government Strategy (E-education, E-health, E-agriculture, E-trade, E-tourism)
- NICI II Policy Statement and Action Plans (2017-2025)
- Information and Communications Act 2009
- Sector regulations- Sim Card, Licensing etc.
- Open Access to Submarine Cable Policy
- Universal Service and Access Policy
- E-Gambia Strategy 2017
- The Gambia Broadband Demand and Simulation Study 2016
- Regional Connectivity Study

Constraints/Challenges

- Weak political support and under prioritizing of ICT in the development agenda

- Limited public resources to support the continuous roll out and funding of broadband development initiatives.

- Government mostly banks on donor funded projects to support infrastructure and policy formulation in the ICT Sector.

- Lack of awareness of the great value increased broadband penetration will have on the productivity of other sectors like education, health and agricultural due to the enabling function ICT plays. Hence there is need for funding an advocacy for the utilization of ICT in all sectors.

- High cost of internet

Constraints/Challenges

- Erratic Power supply and limited alternative energy sources also means deployment of broadband services is put in check especially in rural Gambia.

- Absence of a comprehensive Broadband Strategy in the Gambia.

- Underutilization of the Capacity of the ACE submarine Cable due to certain government controls and also the failure on the side of the Private Operators to upgrade their mostly obsolete equipment that cannot adequately support transport.

- The fact that the SOE/Incumbent GAMTEL till has monopoly over voice is unhealthy for the market and government should devise policies that encourage competition as competition breeds the desired quality of service (QoS).

INTERVENTION NEEDS (Cont.)

- Funding for government to better formulate and implement its ICT Policies and action Plans. This will be quite timely given that the two projects (WARCIP &ECOWAN) that moved the sector to the next level, have both phased out, hence the development of successor plans was done with an eye to continue and really help boast broadband penetration in the Gambia.

- Funding for the formulation and development of a comprehensive broadband Plan for the Gambia.

- Technical Cooperation to enhance the capacity of Gambians in ICT.

- Funding for investment to develop and encourage local content development in the Gambia.

- Funding for the development of an effective real-time M&E framework for the monitoring and evaluation of broadband penetration in the country. Such will capture empirical facts that will inform future broadband development and planning.

- Support the newly developed E-Gambia Strategy that strives to boost economic growth through the full utilization of ICT and broadband in the development process. Support to it will enhance market productivity if activities like E-Commerce are fully leveraged on.
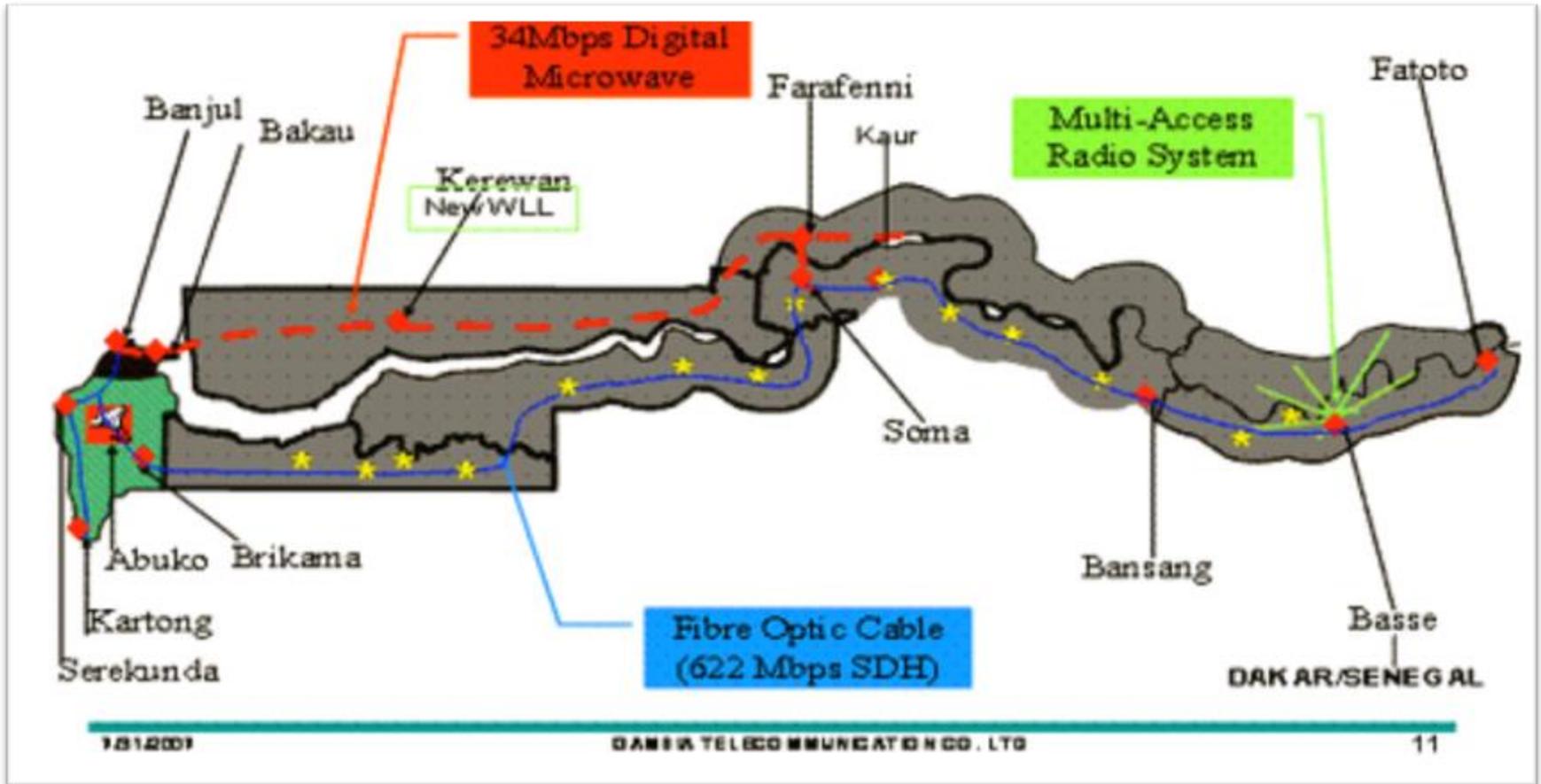
ECOWAN- NATIONAL FIBRE BACKBONE

ACE Landing Station Inauguration

THANK YOU………………