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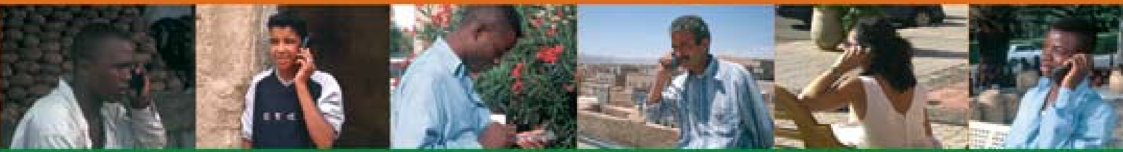

AFRICAN TELECOMMUNICATION/ICT INDICATORS 2008: AT A CROSSROADS

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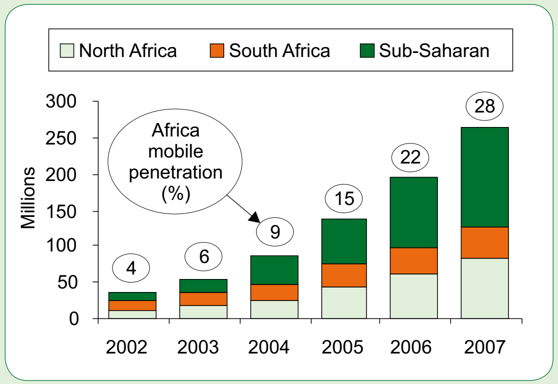
Growth in Africa's mobile sector has defied all predictions and Africa remains the region with the highest mobile annual growth rate. In 2007, Africa added no less than 65 million new mobile subscribers. **In early 2008, there were over a quarter billion mobile subscribers on the continent and mobile penetration has risen from just one in fifty people in 2000 to close to a third of the population today.** Mobile subscribers are also now more evenly distributed: In 2000, South Africa accounted for over half of all Africa's mobile subscribers, but by 2007, almost 85 percent were in other countries.

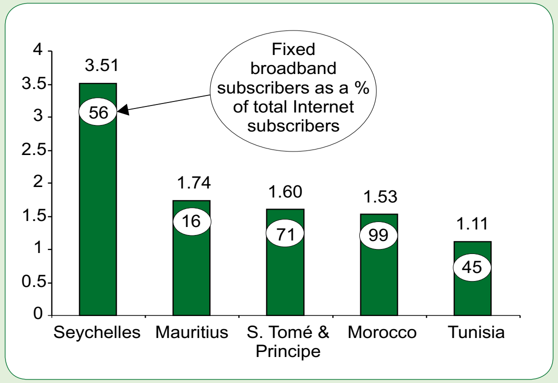
The mobile success story, driven largely by competition and a reduction in prices, is also spawning new services such as micro payment prepaid recharging, single rate inter-regional roaming and the uptake of m-commerce applications.

Africa at a crossroads: To sustain and deepen growth in the mobile sector, the market needs to address lower income groups. ICT policy makers can do their share to make the right regulatory choices, help bring down prices and attract private investment.

Mobile subscribers in Africa, 2002-2007



Fixed broadband subscribers per 100 population, 2007, top 5 in Africa



With some 50 million Internet users, only one out of 20 Africans is online. Over half of all Internet users are located in North and South Africa. In Sub Saharan Africa, Internet penetration stands at three percent. Despite low income levels, Africa has the highest Internet access prices of all regions.

➡ **In 2007, the continent counted two million fixed broadband subscribers, less than a quarter of the population of metropolitan Lagos.**

➡ **Only five African countries had a broadband penetration of more than one per 100 inhabitants; the overall average in the region is 0.2 percent. This compares to around 15 % in Europe and 4% in Asia.**

Africa at a crossroads: A number of steps could be taken to boost the broadband market, including the promotion of wireless broadband through efficient spectrum allocation. Wireless broadband deployment could be included in universal access policies.

Although Africa's average broadband prices remain very high, some countries are offering more affordable high-speed access. Morocco has not only one of the highest broadband penetration rates in Africa, but also one of the lowest average broadband prices, at US$ 18 per month for a 256 kbps package. Broadband has proven so popular in Morocco, that by the end of 2007, over 95 percent of Internet subscribers had a high-speed connection.

Africa has made great strides in connecting its people, mainly through mobile communications. At the same time, it faces a number of challenges that ICT policy makers need to address:

- Reduce the costs of ICTs in a region where income levels remain low
- Improve the regulatory environment to attract investment and lower costs
- Address the lack of electricity that affects users and operators and contributes to high prices

Beside the analytical part, the African Telecommunication/ICT Indicators Report 2008 includes:

- 21 regional tables covering key telecommunication/ICT indicators (2006/2007 data)
- 53 individual country pages with a five year profile from 2002-2007
- A complete list of telecommunication ministries, regulators and operators in the region
  NEW: Operators are listed by the type of service they provide, with a distinction made between GSM Mobile, CDMA Mobile and CDMA Fixed

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