

Senegal

Senegal is aiming to leverage digital technologies to cement its position as an ICT hub for the West Africa subregion.

Mobile services: There are three nationwide mobile operators: the incumbent SONATEL, offering service under the Orange brand; TIGO, a subsidiary of Luxembourg-headquartered MILLICOM, which has been in the Senegalese market since 1999; and EXPRESSO, which launched operations in 2009 and is a subsidiary of SUDATEL, the incumbent telecommunication operator in Sudan. Senegal has one of the highest levels of mobile access in sub-Saharan Africa. In 2015, 93 per cent of households had a portable telephone, with not a huge difference between urban (97 per cent) and rural (89 per cent) areas.⁴⁰² In 2009, EXPRESSO launched the country's first wireless broadband network based on less-used CDMA technology. In 2010, it then launched a 3G+ network, followed by SONATEL in 2011 and TIGO in 2013. SONATEL commercially launched LTE in 2016, when its license was renewed. Under the conditions of its license renewal, SONATEL is obligated to provide LTE coverage to 70 per cent of the population by 2020 and 90 per cent by 2025.

Fixed services: SONATEL was partly privatized in 1997, when shares were sold to then-France Telecom (now Orange). Some of its shares were listed on the regional stock exchange and some offered to employees, resulting in a mixed ownership (Orange France Group (42 per cent), the Government of Senegal (27 per cent), publicly held (25 per cent) and employees (8 per cent)). SONATEL has also emerged as a significant regional investor, establishing operations in Mali in 2002, Guinea and Guinea-Bissau in 2007, and Sierra Leone in 2016. SONATEL dominates the fixed telecommunication market. A universal service provider launched operations in the region of Matam in 2013. Most fixed-broadband connections are using ADSL. Although fibre-optic connections are available and offered by all operators, they are mainly targeted at large businesses or government. In early 2017, three new ISP licenses were issued. There is also discussion about establishing neutral wholesale international and national backbone operators. There are some 9 000 km of fibre-optic cable deployed across the country. SONATEL and the Government have their own nationwide backbones, while the other two operators also have some fibre-optic infrastructure, as does the electrical utility. In 2017, Sonatel began fibre-optic deployment (FTTH) and inaugurated a Tier 3+ Data Centre, which will promote Cloud development in Senegal and the West African region.

Key indicators for Senegal (2017)	Africa	World	
Fixed-telephone sub. per 100 inhab.	1.8	0.9	13.0
Mobile-cellular sub. per 100 inhab.	99.4	74.4	103.6
Active mobile-broadband sub. per 100 inhab.	26.9	24.8	61.9
3G coverage (% of population)	85.0	62.7	87.9
LTE/WiMAX coverage (% of population)	39.0	28.4	76.3
Individuals using the Internet (%)	29.6	22.1	48.6
Households with a computer (%)	16.8	8.9	47.1
Households with Internet access (%)	24.2	19.4	54.7
International bandwidth per Internet user (kbit/s)	6.6	11.2	76.6
Fixed-broadband sub. per 100 inhab.	0.7	0.6	13.6
Fixed-broadband sub. by speed tiers, % distribution			
<i>-256 kbit/s to 2 Mbit/s</i>	46.0	38.7	4.2
<i>-2 to 10 Mbit/s</i>	43.9	37.2	13.2
<i>-equal to or above 10 Mbit/s</i>	10.1	24.1	82.6

Note: Data in italics are ITU estimates. Source: ITU (as of June 2018).

Leveraging its favourable geography on the West Coast of Africa, Senegal was one of the first countries in the region to connect to an undersea fibre-optic network through the Atlantis-2 cable in 2000. Since then, two other cables have landed in Dakar: SAT-3/WASC in 2002, and ACE in 2012. There are plans to launch an IXP.

Government policy: The Ministry of Posts and Telecommunications is responsible for ICT policy and strategy in the country. The Telecommunications and Post Regulatory Authority was created in 2001 as sector regulator. The 2011 Code of Telecommunications governs its activities. The key policy document is the 2016 Digital Senegal Strategy. It calls for making broadband a priority by supporting public-private partnerships for infrastructure sharing and deploying networks in unserved areas. The policy's vision is "digital for all" by 2025. The strategy calls for application of broadband across different areas such as connecting schools, putting government services online and wider use of electronic commerce. A large technology park is being constructed near Diamniadio, around 100 km from Dakar. With state-of-the-art broadband infrastructure, it aims to be the leading ICT cluster in West Africa.

Conclusion: Senegal began the process of ICT sector reform early on by partly privatizing its incumbent telecommunication operator SONATEL in 1997. The Government licensed a second mobile operator in 1998, created a sector regulator in 2001 and issued a third operator license in 2007. Though most of these steps took place in the "narrowband" era, they laid the foundation for deployment of broadband technologies. The Government's recent efforts will further strengthen Senegal as a leading ICT hub in West Africa.