The Gambia: ICT Sector & Data Collection

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Presentation Outline

- Key Statistics
- Penetration
- 2G & 3G Services
- Rationale for Data Collection
- Data Collection in The Gambia
- Challenges
- Way Forward

Key Statistics

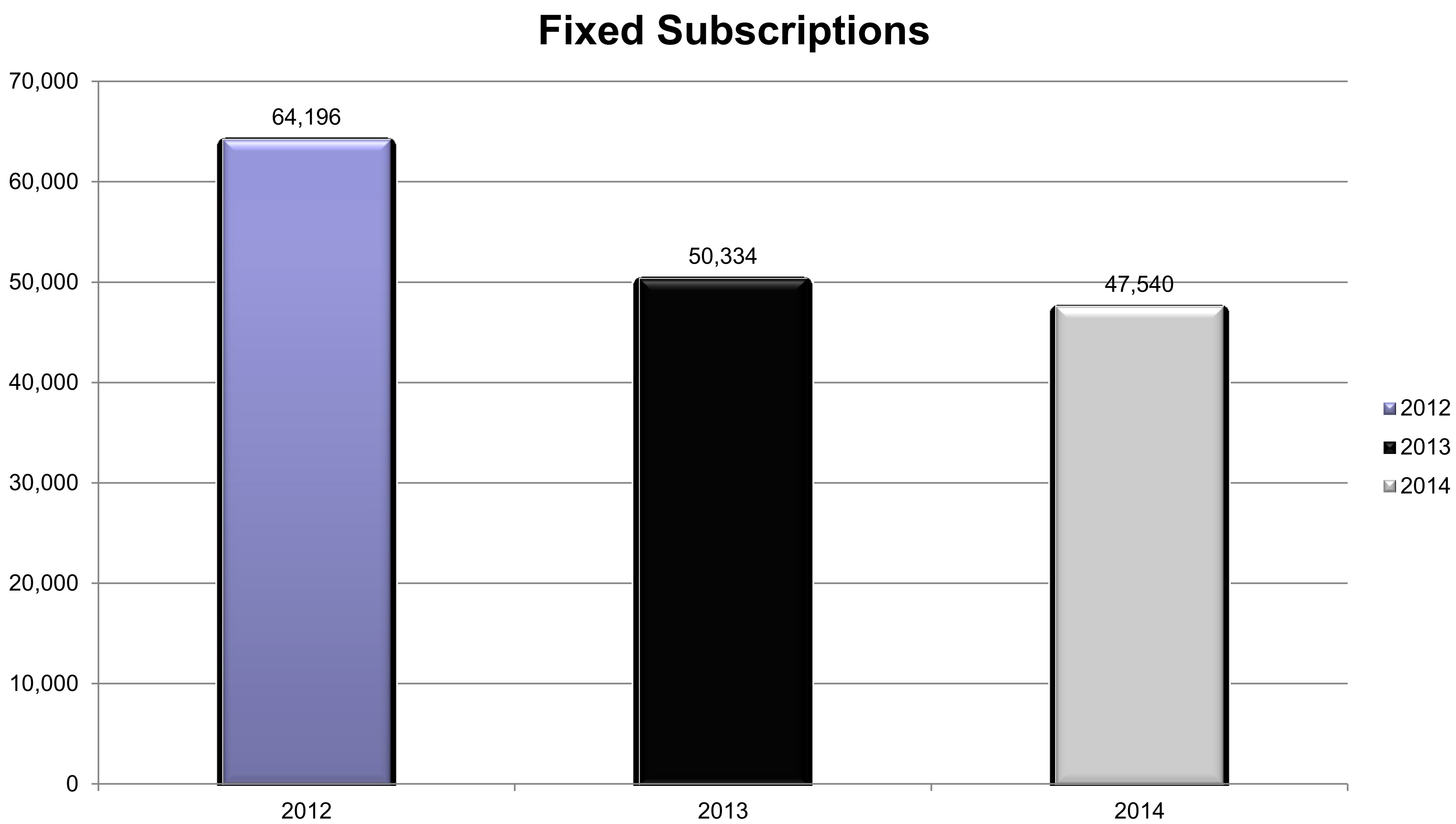
	2012	2013	2014
Fixed Line Operators	**1**	**1**	**1**
Mobile Operators	**4**	**4**	**4**
ISPs	**5**	**5**	**5**
Fixed Line Subscriptions	**64,196**	**50,334**	**47,540**
Mobile Subscriptions	**1,526,181**	**1,986,490**	**2,159,099**
Fixed Internet Subscriptions	**3,112**	**2,501**	**3,200**
Mobile Internet Subscriptions	**127,809**	**157,488**	**308,393**

Status of Submarine Cables in The Gambia

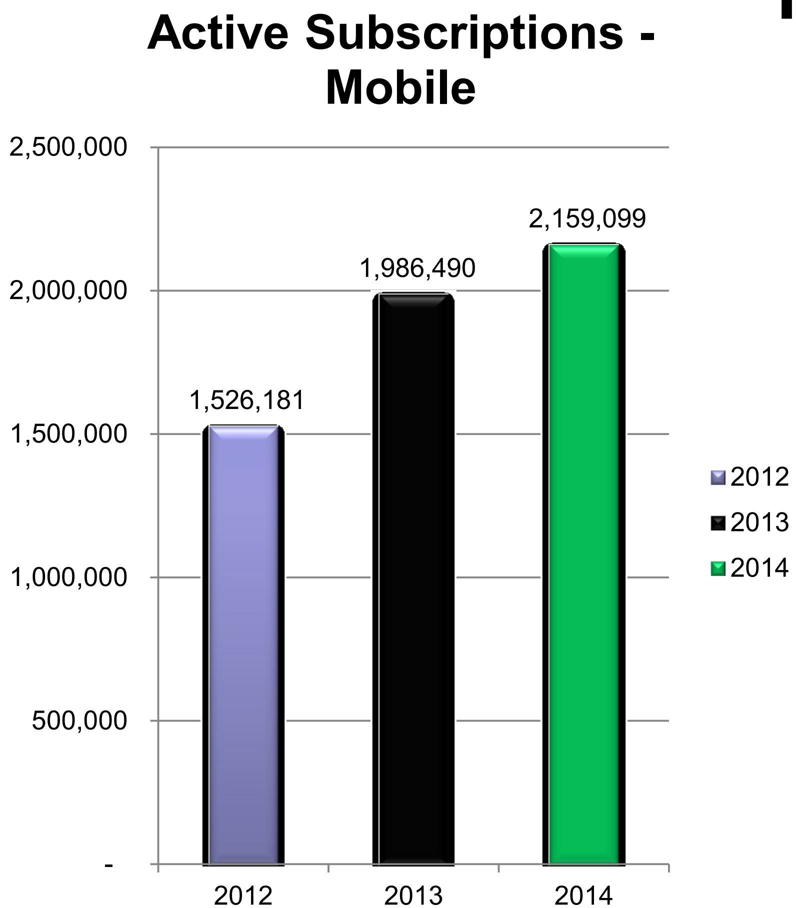
Cable Name	Landing Point	Design Capacity	Allocated Capacity (GAMBIA)	Launch Date	Est. Cable Cost
ACE	Brusubi	5.12 Tb/s	10 Gb/s	Dec. 2012	US$ 35,000,000

DYNAMIC COUNTRY!!

Fixed Lines Subscription



Mobile Subscriptions

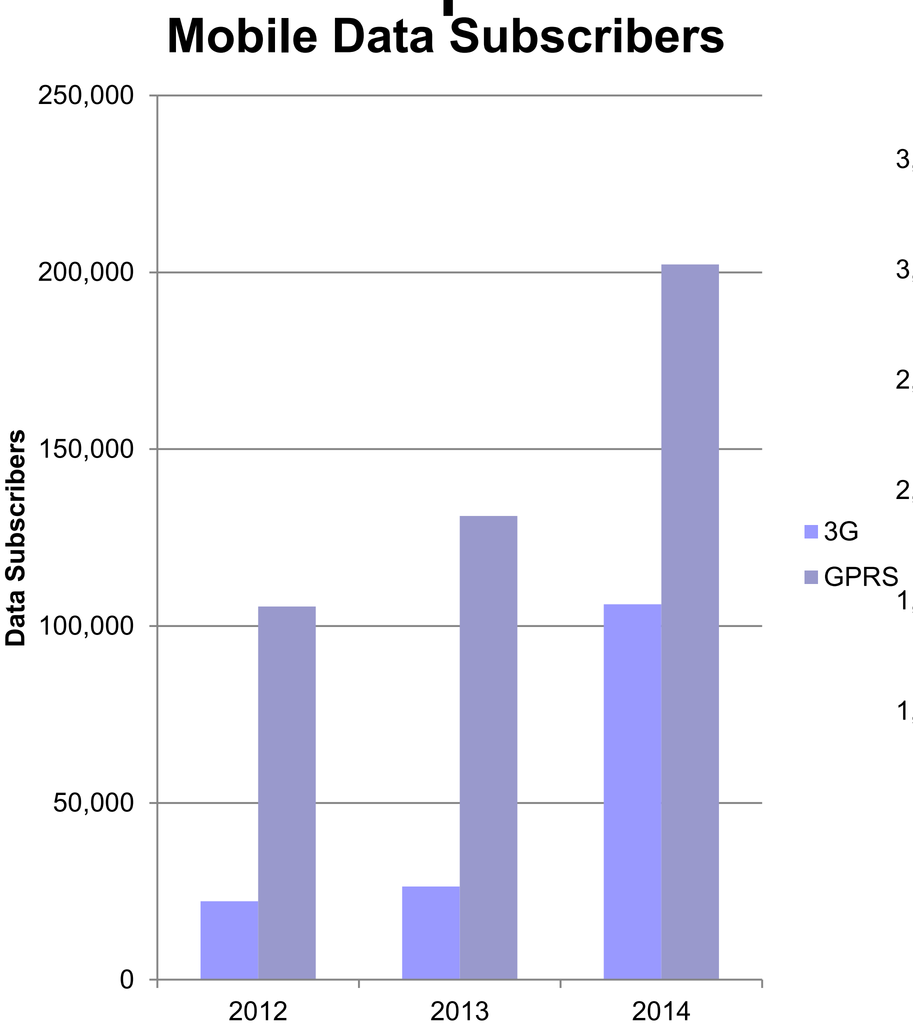


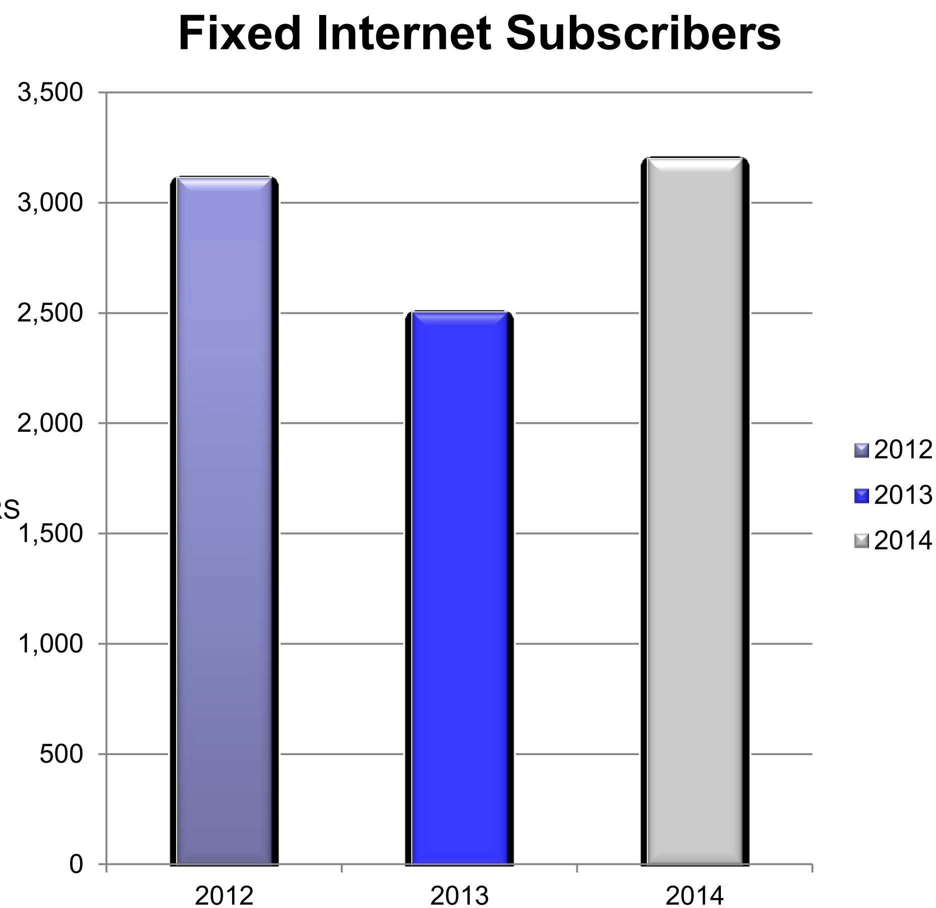
9% increase in Subscriptions 2013 -2014

SUBSCRIPTIONS

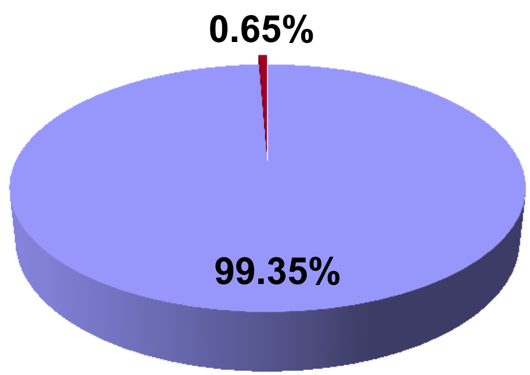
SUB. Growth Rate

Fixed & Mobile Internet Subscription

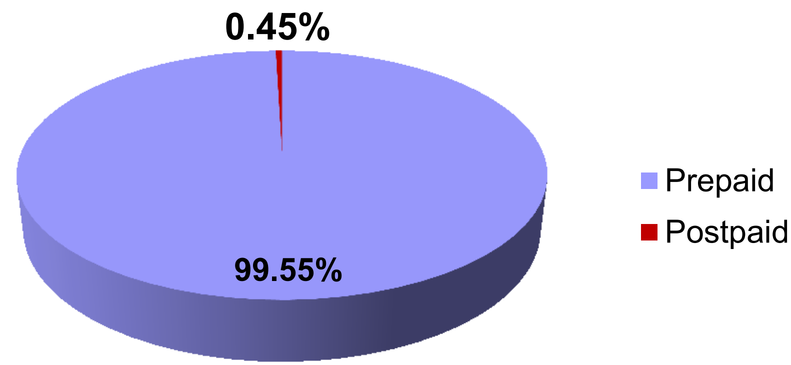




Postpaid vs Prepaid Subscriptions

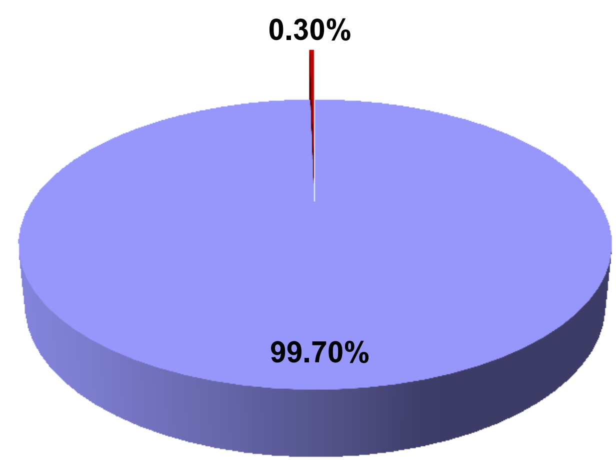


2012 Prepaid and Postpaid Subscriptions

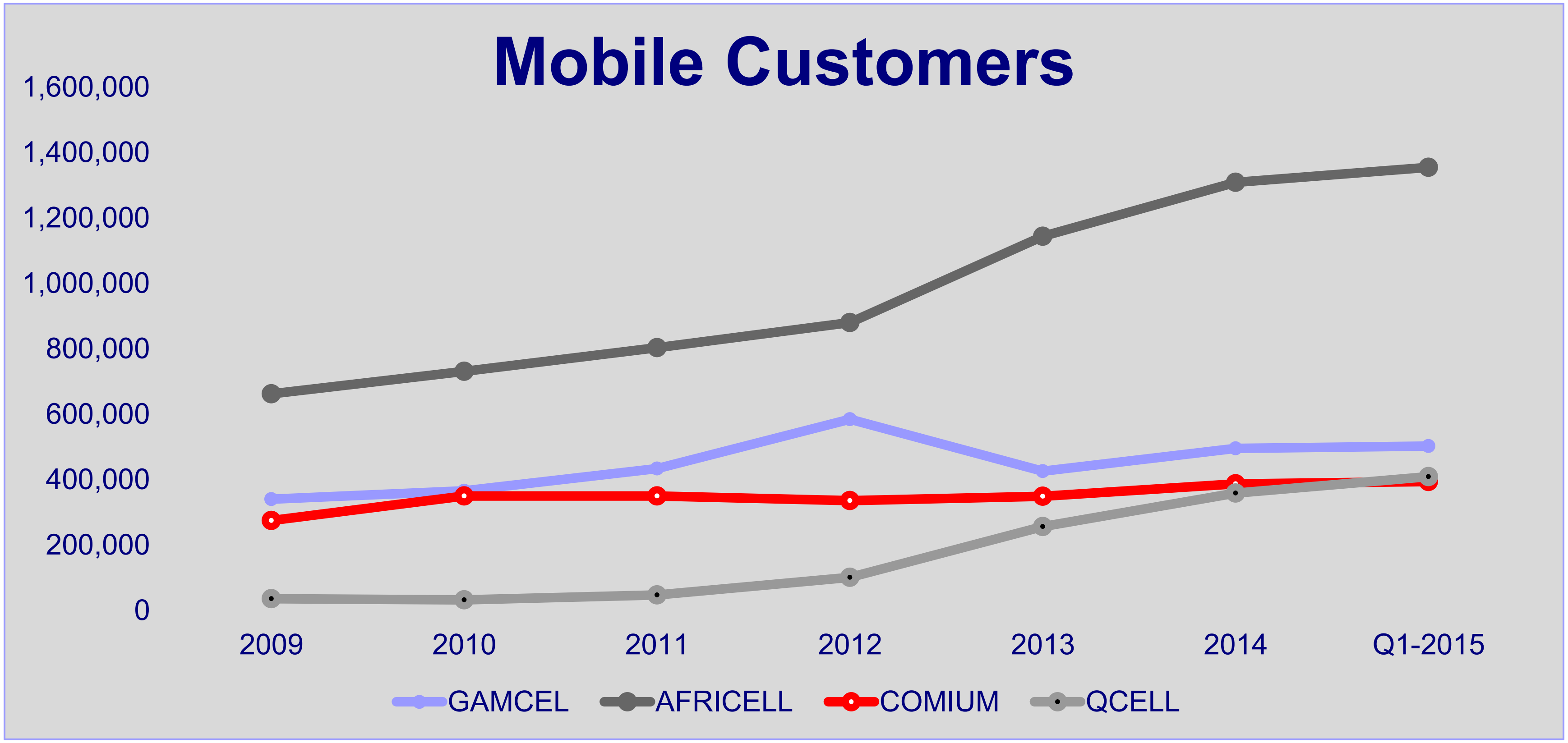


2013 Prepaid and Postpaid Subscriptions

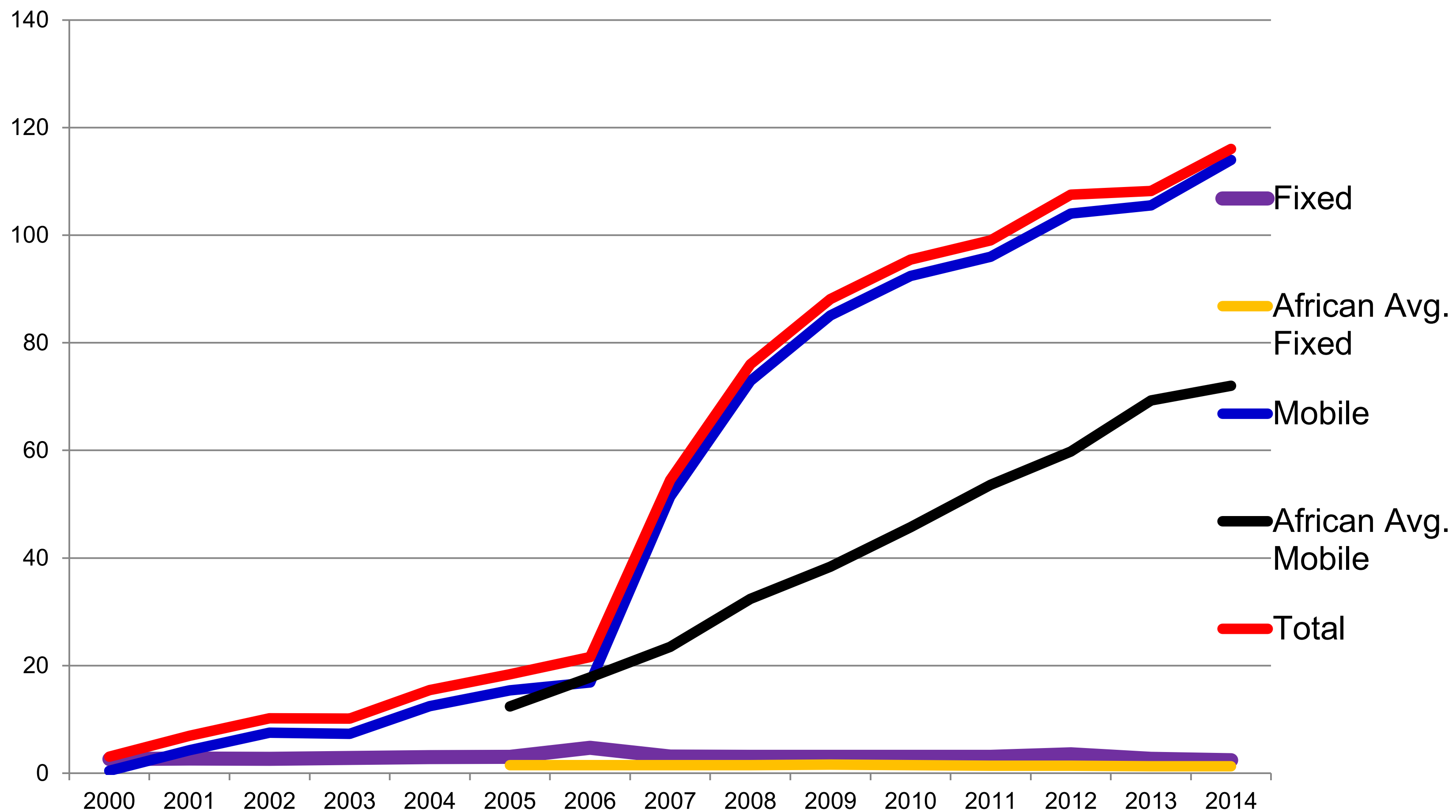
2014 Prepaid and Postpaid Subscriptions



Operator Growth



Mobile Penetration



2G & 3G Mobile Services

- Population Coverage (Very High) 96%
- Connections over 2.5m
- **Market Penetration**
  - 120%
  - African Avg -72%

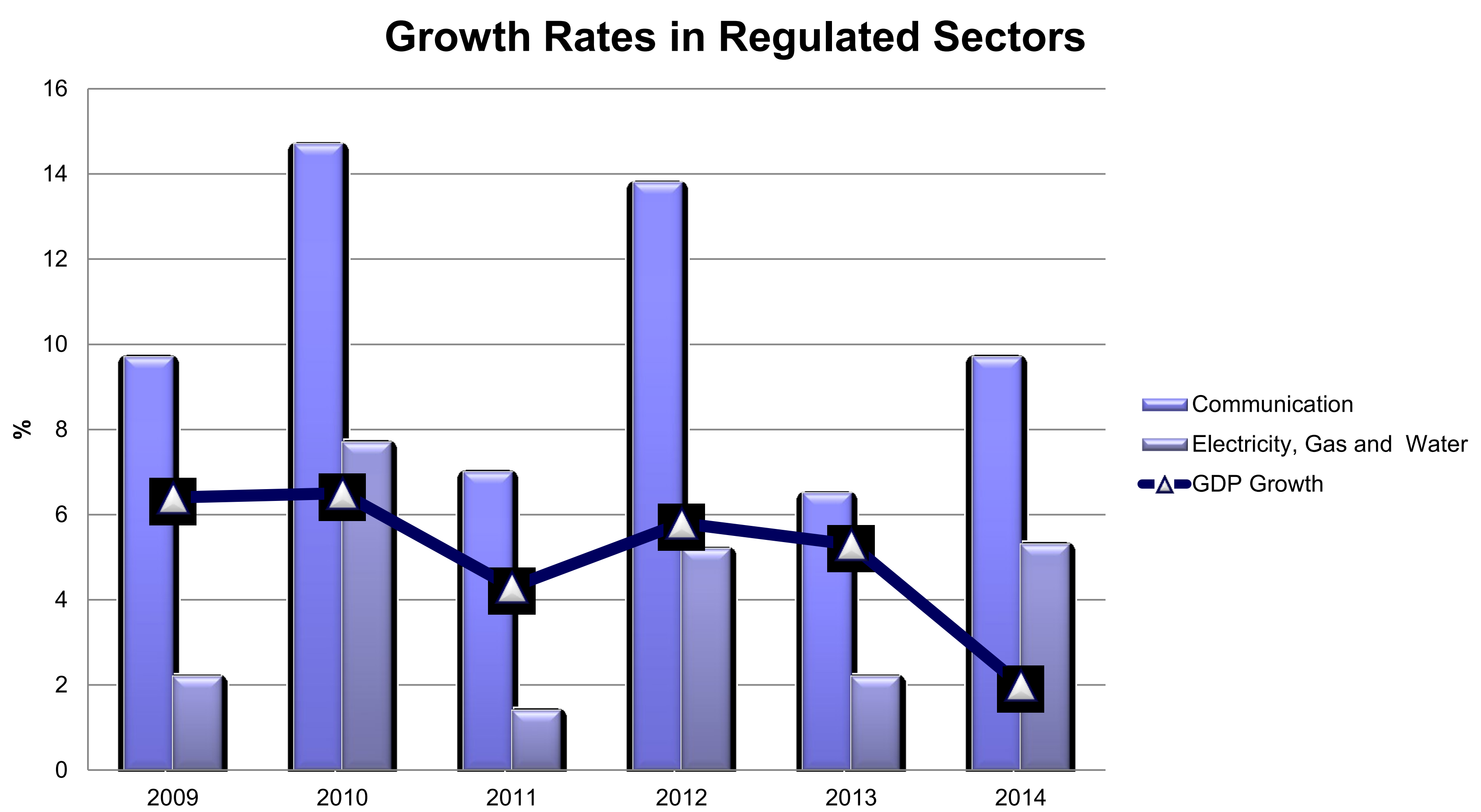
- **3G Penetration**
  - 8-10%
  - Annual Growth Rate >22%

- **Tariffs & Revenue per minute**
  - 83% O/G = On-Net
  - Voice tariff = GMD 3 per minute (7.5 cents US$)
  - Revenue per minute = GMD 1-1.5 / minute (i.e., Discounts 50%)
- **ARPU**
  - US$ (2.00 - 2.50)

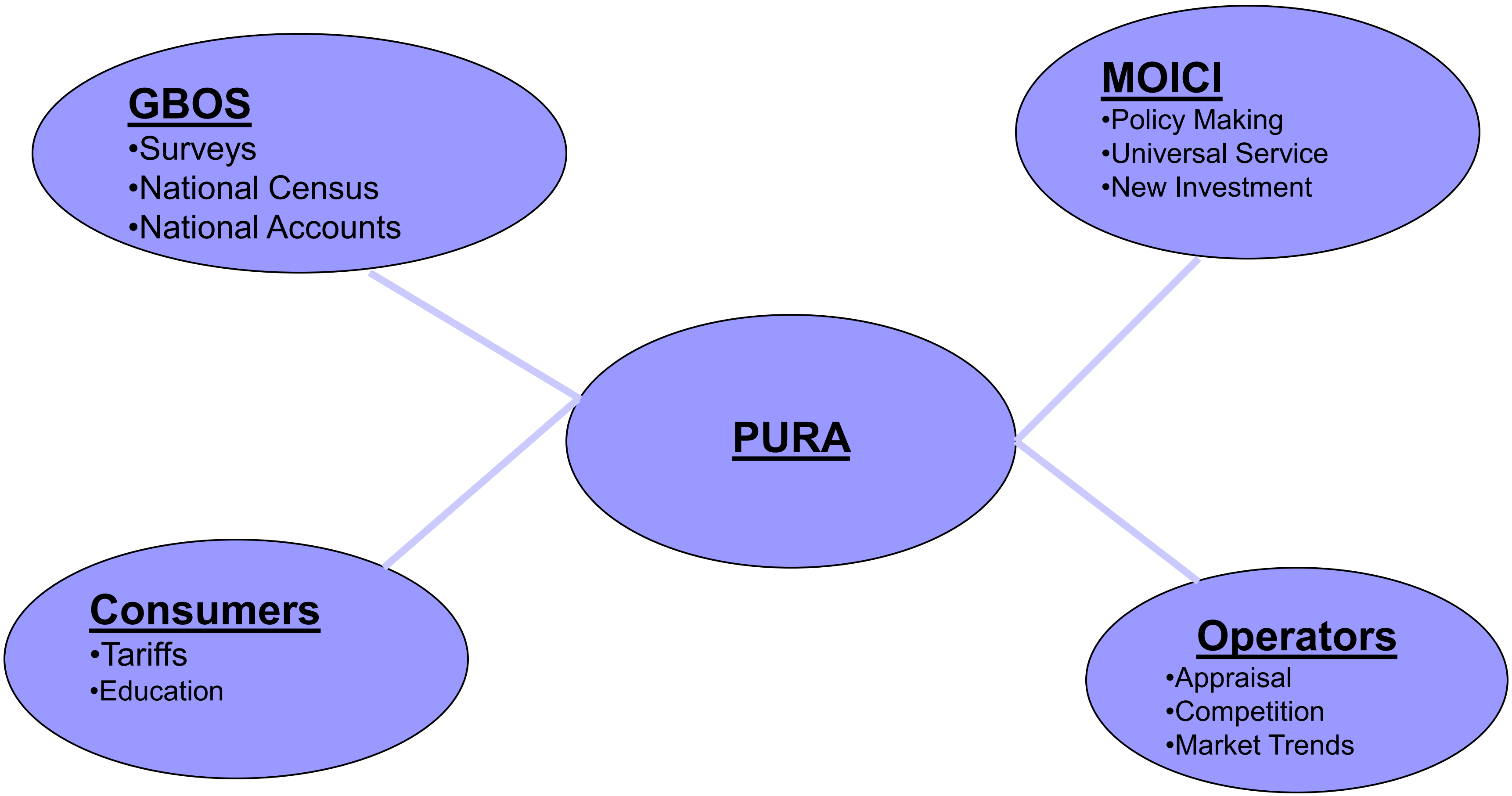
Rationale for Data Collection

- Market Assessment
  - Fastest growing sector
  - Market Comparisons
  - Competition Considerations
- Need for Reliable Statistics
  - Evidenced Based Policy Making
  - Targeted Interventions

ICT Sector Growth



ICT Data Collection in The Gambia



Data Collection

- E-mail based platform with focal points
  - Quarterly Submissions
- Data submitted to Economics Department
  - Data submission only by recognized focal person
- Responsible for Data Validation
  - Identified Gaps
  - Correlations with previous periods
- Flexible mechanism to allow for Data correction
  - e.g Active Subscribers

Market Surveys

- Prohibitive due to Financial Constraints
- Relies on Census Data for Internet Usage etc.
  - GBOS
  - Infrequent Time Period (10 Years)
  - Dynamic Sector
- PURA initiatives
  - Quality of Experience Survey
  - Growth Centers
  - Actual Customer Perception
  - Deviates from QOS

Challenges

- Challenges to be expected in most Data Collection exercises
  - Two Public Sector Operators (GAMTEL & GAMCEL)
  - Timeliness & Accuracy of Submissions by both
  - Frequent Back & Forth delaying updating of Statistics
  - Operators Understanding of Some Indicators
  - Private Operators understand the importance of the Collection
  - Indicator Definitions especially for Mobile Broadband. (GPRS vs 3G, Dedicated Mobile Data Subs)

Data Collection – Way Forward

- Develop Online Data Collection Tool
  - Hosted on www.pura.gm
- Log-in Credentials provided to Operators
  - Electronically signed after submission
  - Identified focal Persons
  - Data may-be modified before deadlines
- Immediate Back-end Comparisons between services
- Develop accompanying Android & iOS Apps
  - ICT Indicators Portal
  - Public Consumption
- Conducting First Market Assessment Study

THANK YOU

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