

The 15th Symposium on ICT, Environment, Climate Change, and Circular Economy

Evaluating the Telecommunications Landscape in Africa

DATE

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AUTHOR

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Who are we, what do we do, and what do we do?

GSMA Intelligence is the definitive source of mobile industry insights, forecasts, and research, used around the world. Our insights cover every mobile operator, network, and MVNO in every country worldwide.

COMPREHENSIVE DATA PLATFORM

**INSIGHTFUL
RESEARCH**

EXPERT ANALYSIS

BESPOKE CONSULTING

EVENT SUPPORT

Who we work with



Mobile Network
Operators



Regulatory Bodies



Government
Departments

Financial
CorporationsCybersecurity
Firms

OEMs and
Manufacturers

Technology
Companies

Consulting Businesses



BY THE NUMBERS

7/10

of Forbes' Top digital
companies worldwide, rely on
our data and insights

50m+

individual datapoints covering everything from operational to economic

4,600+

networks tracked, spanning every country

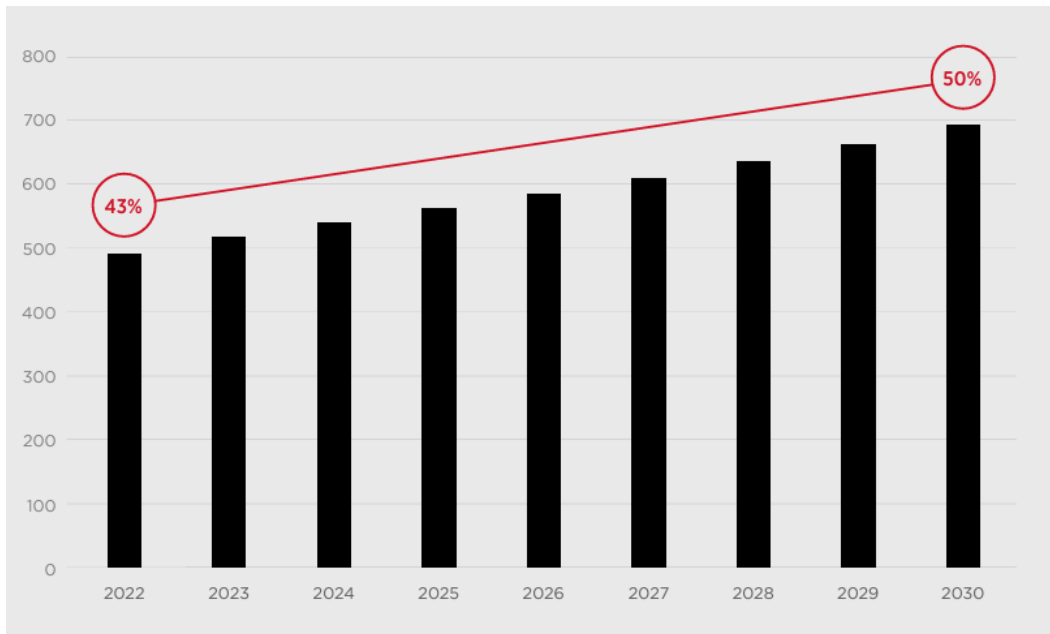
9/10

of the top Telecoms in the world
work with GSMA Intelligence

Mobile adoption is still growing in Sub-Saharan Africa

- 200 million additional unique mobile subscribers in Sub-Saharan Africa by 2030.
- Nigeria and Ethiopia will account for almost a third of total subscribers in 2030.
- Mobile penetration in Sub-Saharan Africa will reach 50% by 2030; however, this will be much lower than the global average of 73% by the same year.

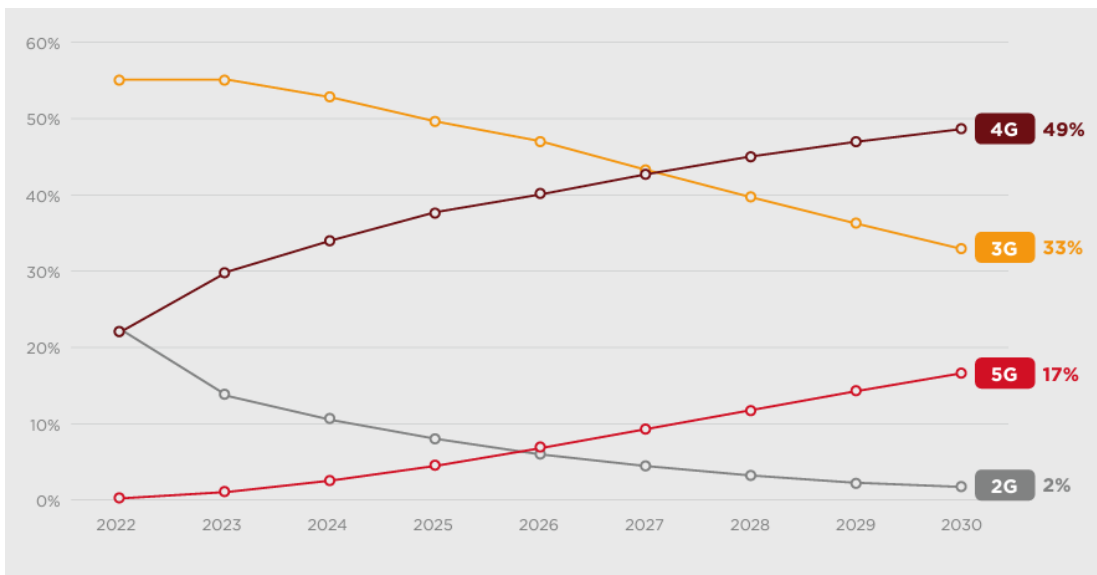
Sub-Saharan Africa: mobile subscribers and penetration
(Million, percentage of population)



Tech migration: 4G adoption begins to accelerate

- 4G connections in the region will almost double by 2030, reaching 49% of total connections.
- Sub-Saharan Africa will have 226 million 5G connections in 2030, equivalent to an adoption rate of 17%.
- Nigeria and South Africa will account for almost half of these connections.
- 5G growth in the region will be slow but steady, as a larger share of the customer base will continue to migrate to 4G.

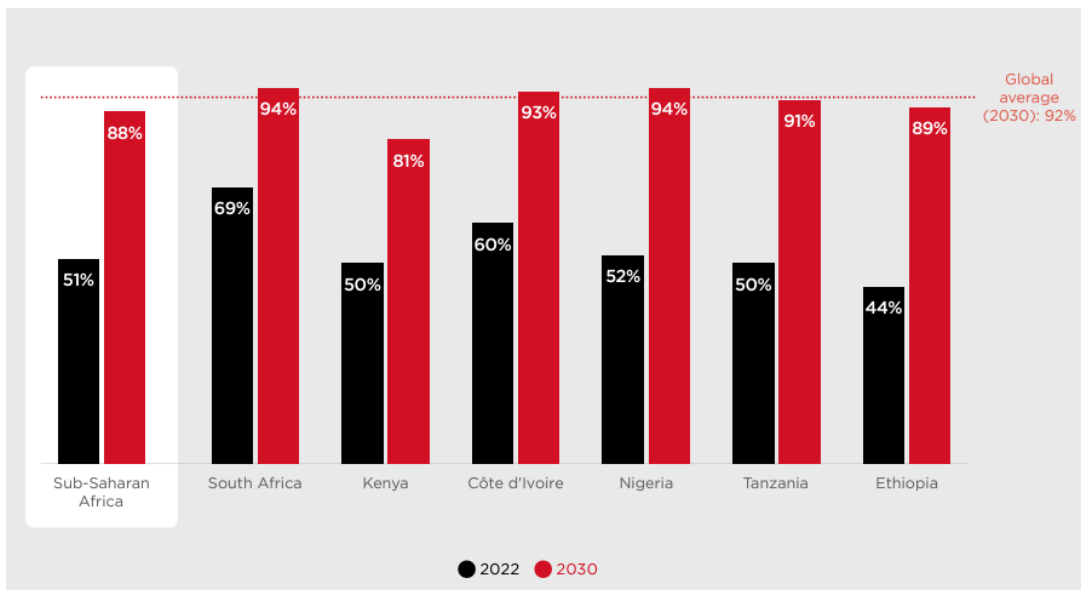
Sub-Saharan Africa: mobile adoption by technology
(Percentage of total connections)



Smartphone adoption is rising

- 1.2 billion smartphone connections in Sub-Saharan Africa by 2030, for 88% of total connections.
- Increase in the number of smartphone connections is partly due to increasing affordability.
- However, there is still a large opportunity for the smartphone market in the region, given the usage gap and rising 4G and 5G adoption.

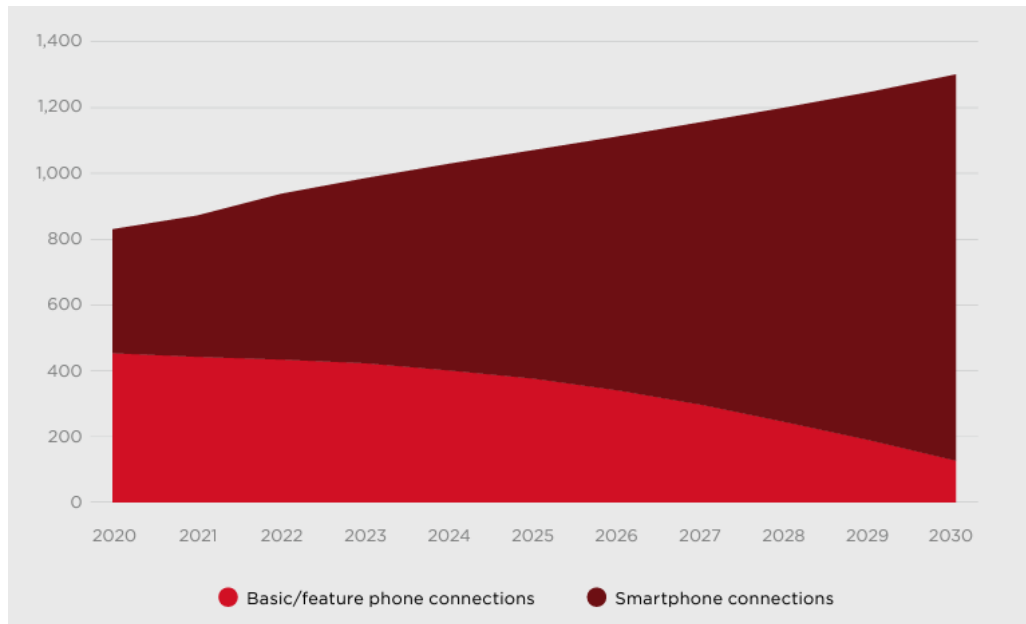
Sub-Saharan Africa: smartphone adoption
(Percentage of total connections, excluding cellular IoT)



Towards a circular life for mobile phones

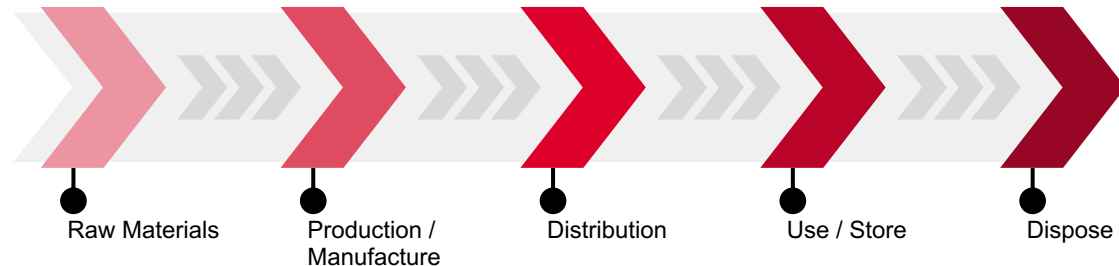
- Today, there are over 1 billion active feature phone and smartphone connections across Sub-Saharan Africa.
- The growing number of devices is a significant concern in terms of growing e-waste and the higher consumption of natural resources within the region.
- This underlines the need to leverage the concept of circularity in the device value chain.

Number of mobile connections in Sub-Saharan Africa
(Million)

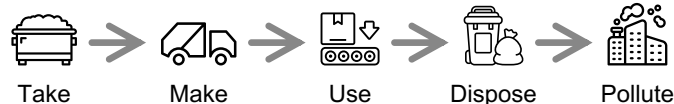


The Telecom sector will never reach net zero with linear supply chains

Linear



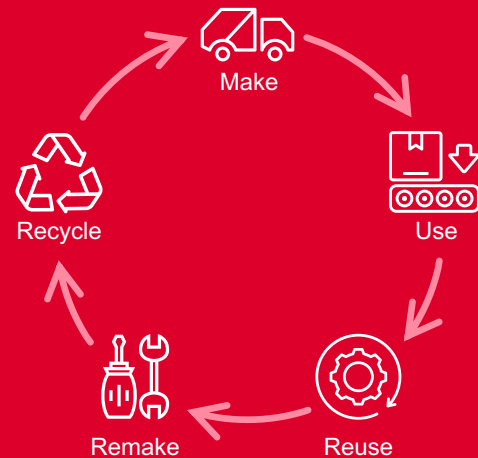
Linear economy



75%
of the telecom industry's
carbon emissions come from
its supply chain (Scope3)*

* Source: GSMA analysis based on CDP (2023) and corporate sustainability reports

Circular economy



Examples of mobile industry initiatives to tack e-waste

In June 2023, the GSMA teamed up with 12 mobile operators across the globe, including Safaricom, to take back and recycle or repair more than 5 billion unused mobile phones in an effort to tackle e-waste.

The initiative builds on efforts by the mobile industry to move away from the traditional 'take-make-dispose' approach to the materials used in mobile phones and highlights the importance of working collectively to accelerate the transition to greater circularity.

Vodafone recently announced a three-year programme to trade in, recycle, refurbish or repair smartphones across Europe and Africa while raising funds for the World Wide Fund for Nature (WWF).

A £1 donation (or local equivalent) will be made to the WWF for each phone collected through the programme. Vodafone stated that the One Million Phones for the Planet programme will support the operator's goal to reduce its carbon emissions to net zero by 2040.

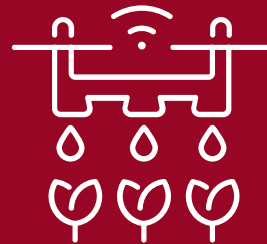
GSMA Equipment Marketplace

The first global digital platform to source, resell, reuse, and recycle pre-owned network equipment



Vision

Transition the telecom industry to a circular sustainable network economy, achieving net zero by 2050.



Mission

Use GSMA Equipment Marketplace to enable the industry to transition from a linear to a circular sustainable network economy faster.

GSMA Equipment Marketplace

The first global digital platform to source, resell, reuse, and recycle pre-owned network equipment



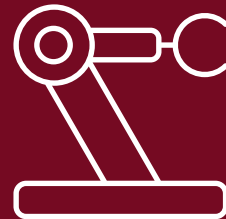
Planet ESG benefits

- Lower CO2 emissions by 90% vs manufacturing new equipment
- Reduce embodied carbon and Scope3 emissions
- Divert e-waste from landfills with our zero-landfill policy
- Recycle what you cannot reuse
- Reduce demand for critical minerals



Seller benefits

- Monetise redundant or unused assets
- Clear your warehouses to reduce equipment depreciation, aged stock and liabilities
- Gain a global view of your inventory in real time across group companies



Buyer benefits

- Shorter procurement lead times for network equipment assets
- All equipment comes with 2-year warranty
- All stock fully tested and refurbished
- Save 61% on OEM Catalogue price when buying from marketplace

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