ICT INFRASTRUCTURE:

Status of Access Gaps & Proposed Remedies

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COMMUNICATIONS AUTHORITY OF KENYA

Approach

STUDY

- ICT ACCESS GAP STUDY

ASSESSMENT

- ACCESS GAP AS AT 2011 – 11%
- ACCESS GAP AS AT 2015 – 5.6%

REMEDIES

- DESIGN & ROLL OUT PROPOSED INTERVENTIONS

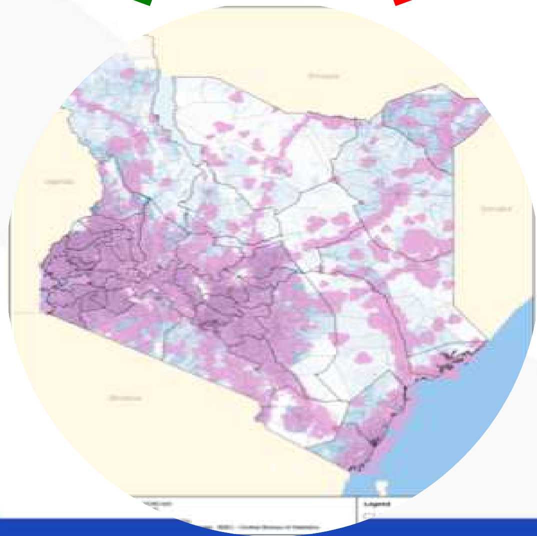
ICT Statistics as at Dec 2015

Broadband – 16.8%

Mobile – 88%

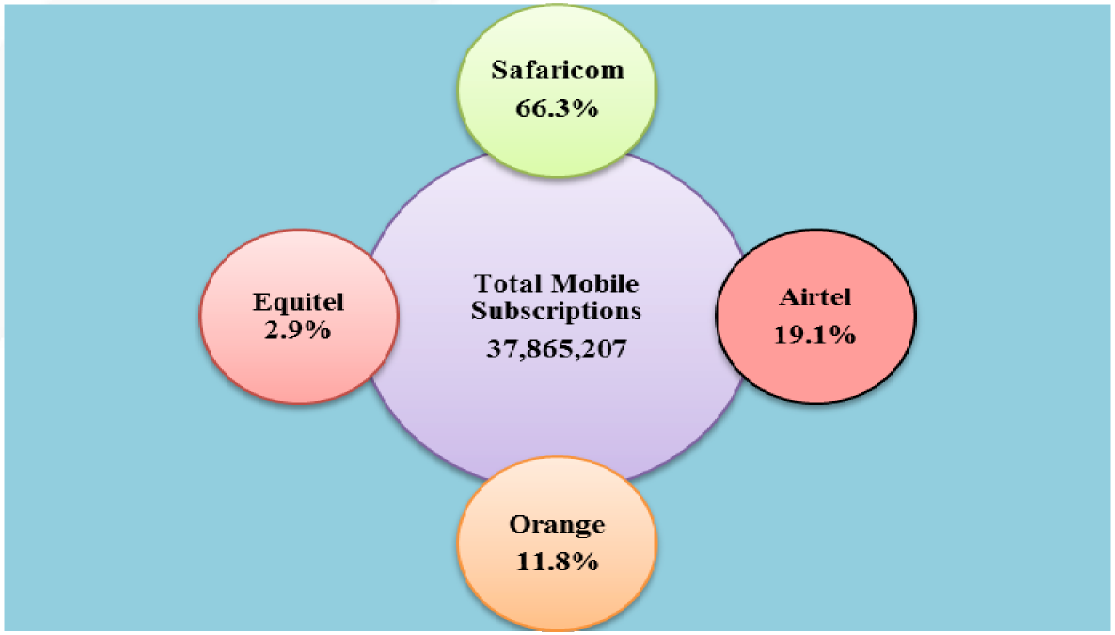
Internet – 82.6%

Broadcast coverage – 60%



The telecom market context

- Traditional fixed services in decline
  - CDMA turned down
- Fixed broadband now dominated by fibre as ADSL is reduced
  - Fibre services provided by several operators
- Internet / data subscriptions dominated by the mobile operators



Subscriptions	Dec 2015
Internet Subscriptions	23,929,657
Mobile Subscriptions	37,715,944
Broadband Subscription	7,238,665

Internet/Data Usage

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Internet/Data Subscriptions	**Sept 2015**
Internet Subscriptions	21,628,271
Mobile Data Subscriptions	21,511,638
Terrestr. Wireless Data Subscriptions	13,221
Satellite Data Subscriptions	720
Fixed DSL Data Subscriptions	2,500
Fixed Fibre Data Subscriptions	100,192
Fixed Cable Modem Subscriptions	25
Total Internet Users	**31,985,048**

The voice and data service gaps

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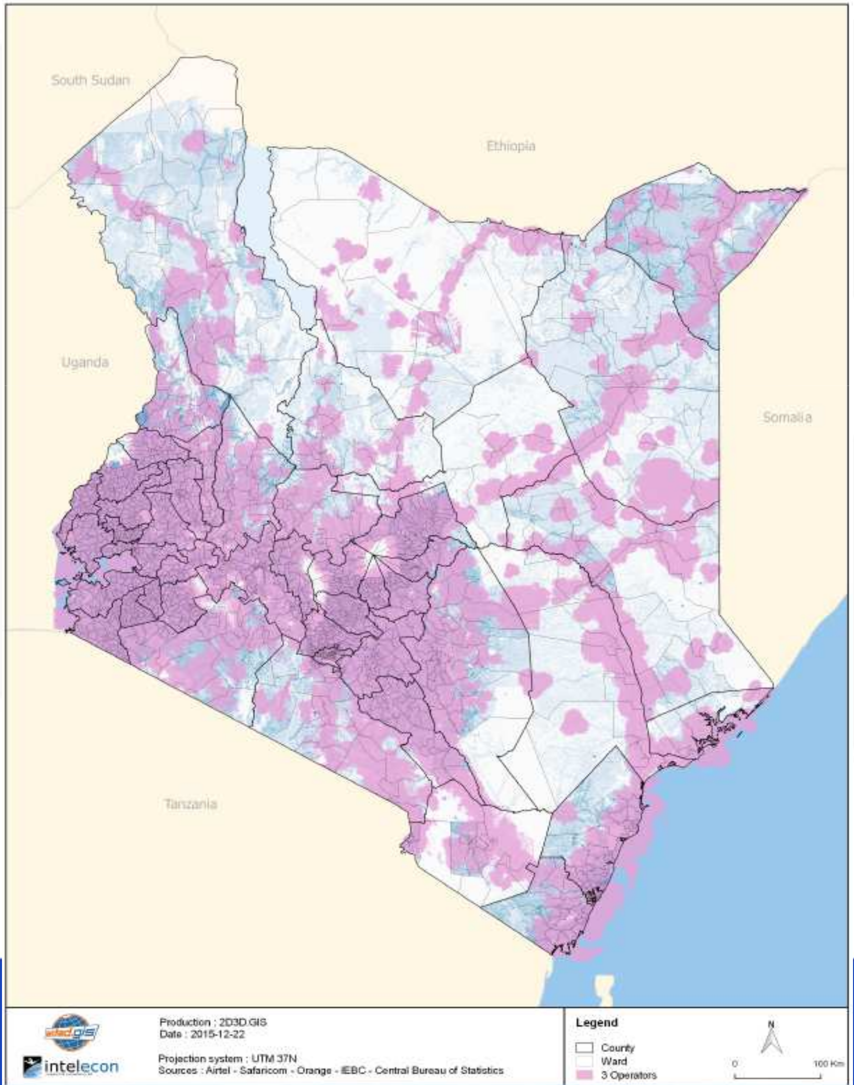
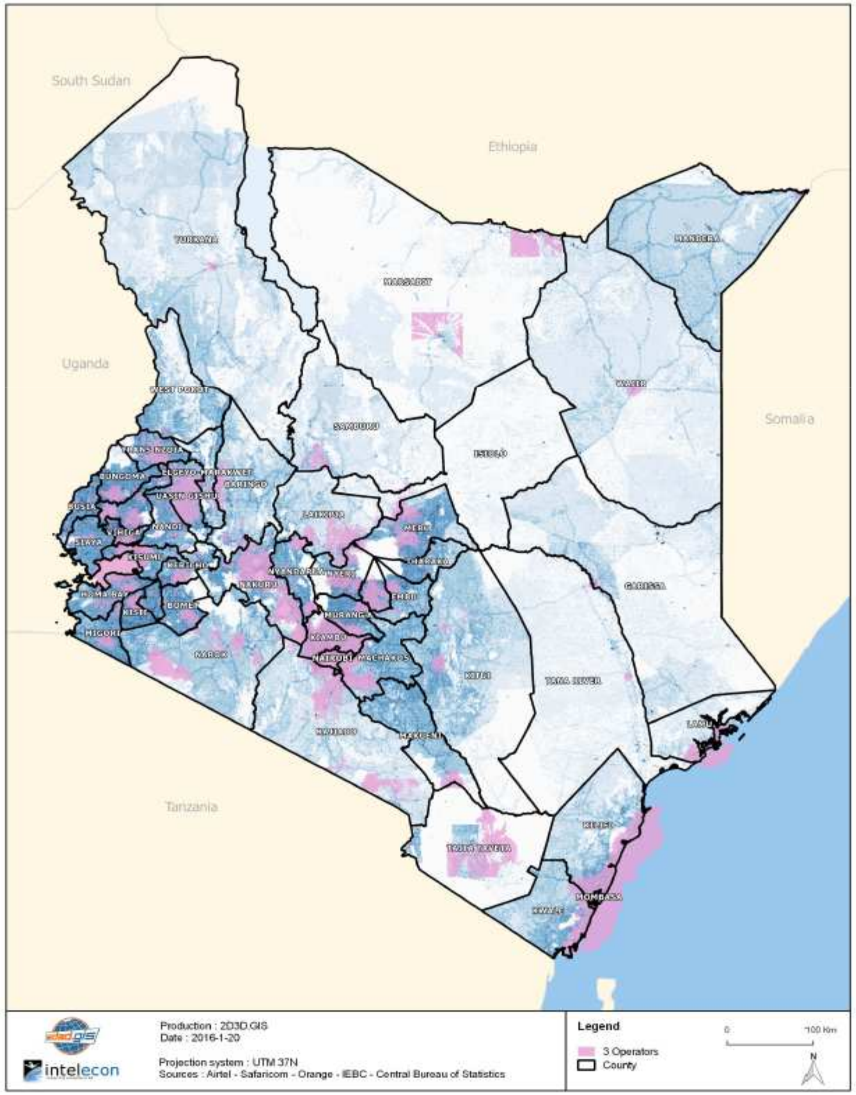
2G mobile coverage (all operators) has reached 45% area and 94.4% of the population is covered



3G coverage at 60%+ is still lagging even in many populous areas



Current Summary of the 2G Access Gap

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94.4% of population covered

5.6% unserved (2.66 Million @ 2017 projection)

166 sub-locations with zero (0%) coverage

418 sub-locations with less than 50% population coverage

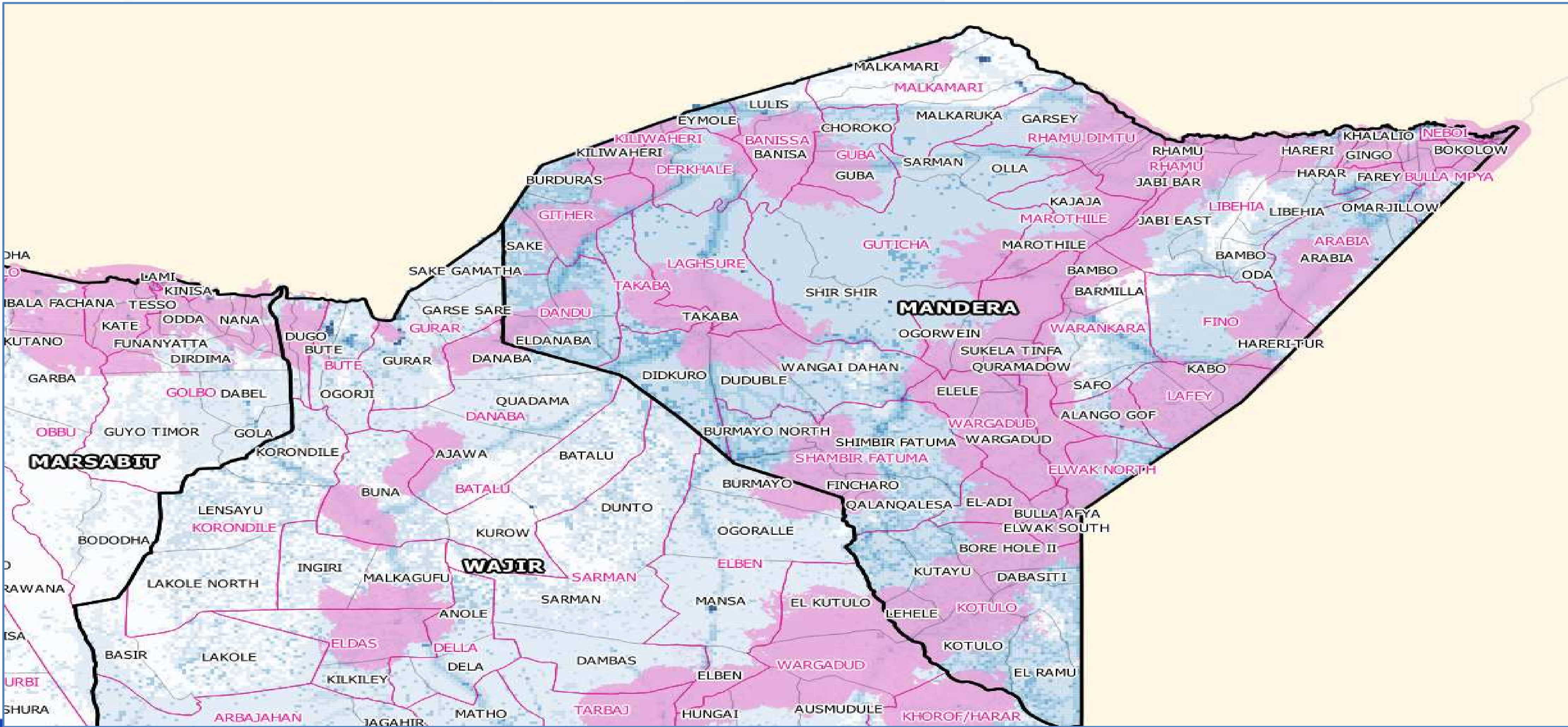
5,655 sub-locations 100% covered

Sub-location population coverage (no. of sub-locations with % covered)				
7,149 total sub-locations				
100%	>90%	>50%	<50%	0%
5,655	485	425	418	166

Populations in uncovered sub-locations (at given percentages)			
2,661,549 total unserved population (projected to 2017)			
>90%	50-90%	< 50%	0%
91,126	523,471	1,347,643	699,310

Access Gap: Most affected locations

calculated by the GIS individually for each sub-location



Ongoing Interventions

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Dev. Of Pro-competitive Regulations:

-Infrastructure sharing

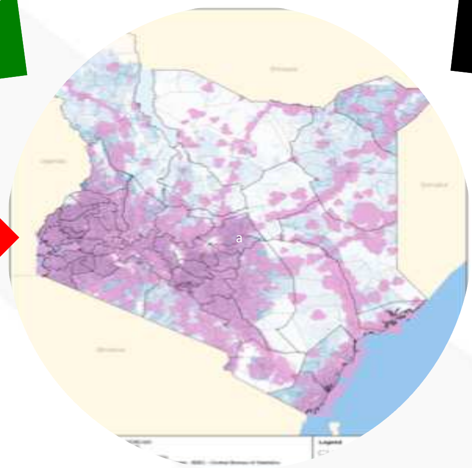
-Competition & Equal treatment

Enforcement of Licence Conditions:

Renewal of MNOs Licenses

Universal Service Fund (USF):

-Approx. KES 3.9B by June 2016



Spectrum Planning & Allocation:

-4G Spectrum (800MHz)

-450MHz for rural access

ICT Market Studies:

-Implement 2015 Access Gap Study recommendations

-Telecom Market Study

THANK YOU