Early Warning System

EBRD-22522

Market assessment and entry strategy in the TMT sector for EBRD in Sub-Saharan Africa

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Quick Facts

Countries	Benin, Ghana, Ivory Coast, Kenya, Nigeria, Senegal
Financial Institutions	European Bank for Reconstruction and Development (EBRD)
Status	Approved
Bank Risk Rating	U
Borrower	Regional
Sectors	Communications, Law and Government, Technical Cooperation
Investment Type(s)	Advisory Services

Project Description

According to the bank-provided information, the European Bank for Reconstruction and Development (EBRD) is launching a Technical Cooperation (TC) project to assess the telecommunications, media, and technology (TMT) sector in its six newly approved Sub-Saharan African (SSA) Countries of Operations (COOs): Kenya, Nigeria, Senegal, Cote d'Ivoire, and Benin (and Ghana when approved).

The EBRD's expansion into these six SSA economies is creating a significant opportunity for the Bank to support one of the world's fastest-growing regions, where digital connectivity, infrastructure and innovation are central to economic transformation. Despite rapid growth in mobile usage, entrepreneurship and digital services, the region continues to face persistent structural challenges. Internet penetration in Africa remains only 38%, far below the global average of 68%, while fixed broadband access is limited, costly, and unevenly distributed between urban and rural areas. Data-centre infrastructure remains nascent, 4G coverage is inconsistent, and regulatory and policy frameworks are often fragmented or underdeveloped.

At the same time, the momentum for digital development is accelerating. The African internet economy is estimated to reach 5% of continental GDP by 2025, driven by expanding connectivity, fast-growing fintech ecosystems, regional infrastructure investments, and a rising demand for digital public and private services. Yet investment decisions - both public and private - remain constrained by insufficient market intelligence, gaps in policy coherence, and a lack of coordinated sector reforms.

Against this backdrop, the EBRD requires a comprehensive, evidence-based understanding of the TMT landscape in its new SSA markets to calibrate its strategic approach, identify investment and policy-dialogue entry points, and engage credibly with national authorities, regulators, private investors and development partners. This TC project will therefore deliver a structured assessment of market conditions, infrastructure gaps, policy constraints, and emerging opportunities across telecoms, broadband, data infrastructure and digital services.

The Bank will engage a consultant to conduct an in-depth, cross-country study that will:

- Analyse regional and national TMT markets, covering mobile networks, fixed broadband, fibre infrastructure, data centres and cloud services, and emerging digital platforms.
- Assess policy, regulatory and institutional frameworks, identifying gaps that affect affordability, competition, quality of service and private-sector participation.
- Map key market players, including mobile network operators, internet service providers (ISPs), data-centre operators, infrastructure providers, tech innovators, and development actors.
- Identify investment bottlenecks, structural constraints, and areas requiring reform or regulatory strengthening.
- Recommend priority areas for EBRD investment, advisory and policy dialogue to support competitive, inclusive and well-governed digital markets across SSA.

Investment Description

- European Bank for Reconstruction and Development (EBRD)

Investment amount not available at the time of disclosure.

Contact Information

Contact information not provided at the time of disclosure

ACCESS TO INFORMATION

You can request information by emailing: accessinfo@ebrd.com or by using this electronic form: https://www.ebrd.com/eform/information-request

ACCOUNTABILITY MECHANISM OF EBRD

The Project Complaint Mechanism (PCM) is the independent complaint mechanism and fact-finding body for people who have been or are likely to be adversely affected by an European Bank for Reconstruction and Development (EBRD)-financed project. If you submit a complaint to the PCM, it may assess compliance with EBRD's own policies and procedures to prevent harm to the environment or communities or it may assist you in resolving the problem that led to the complaint through a dialogue with those implementing the project. Additionally, the PCM has the authority to recommend a project be suspended in the event that harm is imminent.

You can contact the PCM at: pcm@ebrd.com or you can submit a complaint online using an online form at: http://www.ebrd.com/eform/pcm/complaint_form?language=en

You can learn more about the PCM and how to file a complaint at: http://www.ebrd.com/work-with-us/project-finance/project-complaint-mechanism.html