

Ghana




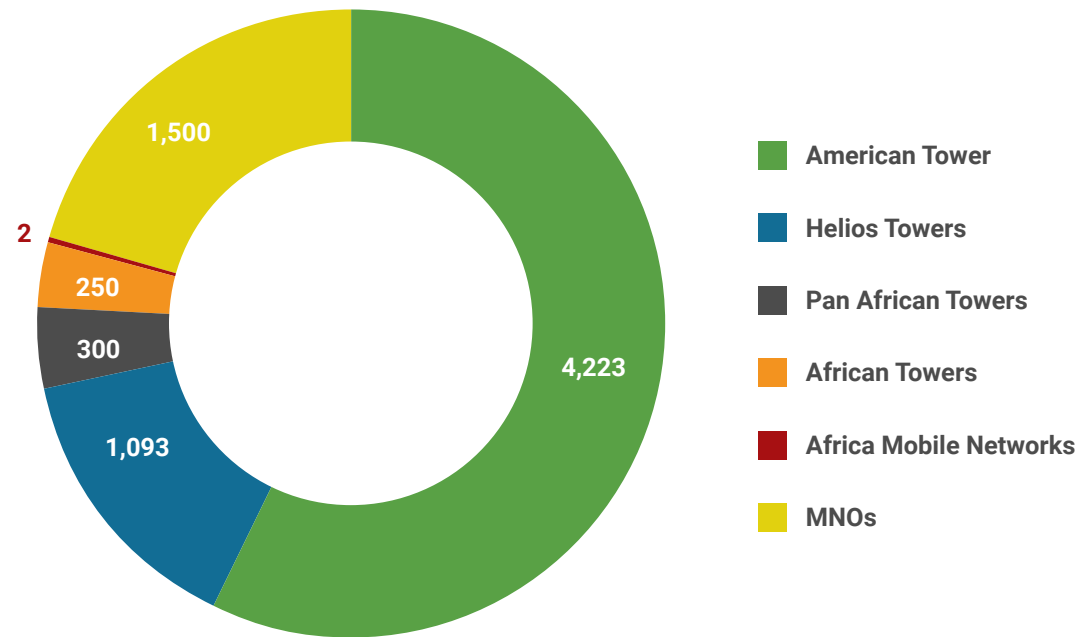
 <p>Towers: 7,368</p>	 <p>Population: (World Bank, 2020): 31,072,000</p>	 <p>Subscribers: (World Bank, 2020): 40,461,000</p>
<p>SIMs per tower: 5,546 SIM penetration: 130%</p>		
<p>MNOs: AirtelTigo, MTN, Glo, Surflin, Vodafone, plus data-only suppliers Surflin, Telesol, Broadband Home</p>		
<p>Towercos: American Tower, Helios Towers, African Towers, Africa Mobile Networks, Pan African Towers</p>		
<p>ESCOs: None</p>		

Figure 17: Ghana – estimated tower count



Ghana now has four MNOs after Expresso’s exit from the market. MTN leads the market with over 60% market share, followed by Vodafone with 20%, AirtelTigo with 19% and Glo with just 3%. The MNOs are joined by three LTE only players – Surflin, Telesol and Broadband Home. After both Airtel and Millicom indicated they

wished to exit the Ghanaian market, the government has taken over AirtelTigo. Ghana’s relatively high SIMs per tower ratio indicates both the requirement for new sites and the high tenancy ratio in the market.

MTN Ghana has committed US\$1bn investment by

2025 to address network challenges with a focus on rural communities having deployed 400 new rural sites. This is part of the operators’ plans to support Ghana’s digital transformation by ensuring new rural sites and network extensions are deployed. However, MTN Ghana cancelled plans to pilot 5G services as the authorities are



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not yet ready to award the required permits. The MNO has affirmed to deployed 5G soon under its Ambition 2025 strategy and has already upgraded over 1,322 sites in preparation for 5G rollout.

Vodafone has been struggling to exit the Ghanaian market after struggling to compete with MTN. Telecel was named as a buyer but the Ghanaian regulatory body NCA denied the application as the deal did not meet the standards required for approval. Telecel have re-engaged the government to approve a deal and plan to spend around \$500mn in expanding Vodafone's network. The Group have stated they don't plan to sell Vodafone Ghana's towers as part of the deal funding.

In 2010, Helios Towers set up a joint venture with Tigo as minority partners into which 831 towers were transferred. Shortly afterward Eaton Towers closed their deal with Vodafone Ghana, then American Tower set up another joint venture with MTN to which 1,856 towers were transferred. In 2015 Airtel sold its towers to Eaton. There are now two major towercos active in Ghana after a series of five tower transactions, including the acquisition of Eaton Towers by American Tower in 2020.

In addition to the three large towercos, African Towers has also built a portfolio of slightly over 200 macro and IBS sites. Parallel Wireless is part of a consortium in the country which has been awarded a project to build

2,000 OpenRAN sites by the Ghanaian Universal Service Fund, as has Huawei. Africa Mobile Networks, the rural specialist, is working with MTN in the country and has 2 sites now live. Pan African Towers launched in Nigeria in 2017 and have since entered the Ghanaian market with 300 sites.

Whilst grid coverage and availability is good by African standards (with one towerco reporting over 95% of sites to be on-grid and availability trending towards above 20 hours a day), electricity prices increased in the past year meaning that the business case for solar and hybrid is strengthened and the use of deep cycle batteries is growing.



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