



 SPEEDTEST

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Nigeria Network Performance & 5G Opportunity Analysis Highlights

Advanced Analytics Services

Agenda

1. Executive Summary
2. National Network Performance Snapshot
3. The Digital Divide: Regional and Urban vs. Rural
4. Deep Dive: The 5G Coverage Gap
5. Path Forward: Driving Modernization and Equitable Access

Executive Summary

National Performance Profile

One operator exhibits a strong national performance profile, excelling across key metrics like speed, latency, and jitter

Persistent Performance Gaps

A **stark divide persists in network quality between urban centers and rural regions**, with data showing speeds in underserved areas are **up to 50% lower**.

Major 5G Deployment Opportunity

A substantial gap exists between the number of 5G-capable devices and actual 5G network access across all operators. In Lagos, the average 5G coverage gap is 70.9%; in Abuja, it is 65.6%

Competitive Landscape and Opportunity

The competition for the best network performance, particularly in the **5G segment**, is limited. Data reveals major **5G performance deficits** among some large operators, with issues ranging from near-zero service presence to results below market expectations.

National Network Performance Snapshot

MTN

Data shows a strong national performance, consistently delivering high download/upload throughput and good latency and jitter values.

Airtel

Holds a competitive profile, particularly in download speeds, latency still shows gap for improvement. Data shows strong performance within urban areas thanks to robust 4G, but this advantage diminishes as the sector shifts to 5G

T2

Analysis shows variable performance, with occasional high-speed peaks with challenges across regions. Data indicates gap for improvements in the overall national QoS in this assessment.

Glo

Data indicates **performance challenges**, primarily due to **latency and jitter** that negatively impact user experience.

The Digital Divide: Regional and Urban vs. Rural Gaps

Highlighting the significant disparities in network experience across the country.

- **Top Performing Regions:** FCT and Lagos lead the nation with network performance 40-50% better than the national average.

- **The Urban-Rural Gap:**

- **Urban Areas:** Benefit from strong 4G and emerging 5G coverage, leading to a superior user experience.
- **Rural Areas:** Reliant on 2G/3G, resulting in slower speeds, lower quality, and a degraded experience that hinders digital inclusion. This underscores the need to prioritize 4G/5G expansion in non-urban areas.

Deep Dive: The 5G Coverage Gap

Analysis reveals a critical failure to meet 5G demand in Nigeria's two largest markets

	Lagos	Abuja
Average 5G Gap	70,9%	65,6%
5G-Capable Devices	41057	16143

** The gap is measured by detecting 5G capable devices which are not connecting to any 5G network*

Path Forward: Driving Modernization and Equitable Access

The **NCC is committed to driving sector improvement** by enforcing fair competition and pushing for network modernization. The data clearly demonstrates that the adoption of newer technologies offers a significant boost to network performance, reinforcing this commitment.

Key opportunities for sector advancement include:

- **Closing the Digital Divide:** Expanding **4G/5G coverage** into underserved **rural regions** to ensure equitable access and performance for all Nigerians.
- **Accelerating 5G Deployment:** Addressing the significant **coverage gap in high-demand urban areas** (Lagos and Abuja) to serve the growing number of 5G-capable device users.
- **Enhancing Stability:** Focusing investment on **improving latency and reducing jitter** across all networks to ensure a high-quality experience for real-time applications.

Thank You