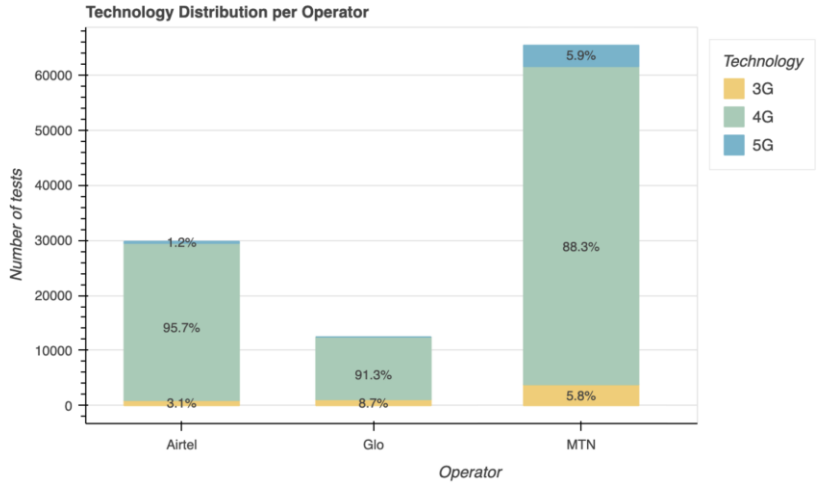
The Technology Driving Your Connection

Unpacking the Distribution of 3G, 4G, and 5G Services

Agenda

1. The National Connection Mix: 4G Dominates User Activity
2. Why Technology Matters: Fast Speeds Are Linked to 4G and 5G Access
3. Performance Disparity: High-Tech Cities vs. Underserved Regions
4. The Cost of Legacy: Over-reliance on 3G is Slowing Down Progress
5. The Foundation: How Spectrum Bands Deliver Your Connection
6. Key Takeaways and Guiding Nigeria's Digital Future

The National Connection Mix: 4G Dominates User Activity



- **4G is the core** network for most Nigerians.
- **5G shows promising performance** but its **limited deployment** results in a significantly lower number of user tests.
- **3G remains prevalent in rural and underserved areas**, accounting for a substantial portion of activity, yet consistently **underperforms**. This highlights a persistent reliance on legacy infrastructure that constrains overall network quality.

Why Technology Matters: Fast Speeds Are Linked to 4G and 5G Access

4G Insight: 4G provides the **balance of speed and stability** experienced by the majority of users.

5G Insight: While tests are low, 5G offers **promising performance** with multi-Gigabit download potential, leading to better video, gaming, and business performance.

3G Warning: 3G consistently **underperforms**, with slower **Download Throughput (Mbps)** and **Upload Throughput (Mbps)**, severely constraining overall network quality.

Key Consumer Takeaway: Consumers relying on 3G are currently experiencing the most significant compromise in quality of experience (QoE).

Performance Disparity: High-Tech Cities vs. Underserved Regions

High Performance Hubs: States like **FCT** and **Lagos** high number of tests and generally lead in performance metrics.

Underserved Areas: Some regions show **reduced throughput**, recording speeds up to **40-50% below** top-performing areas.

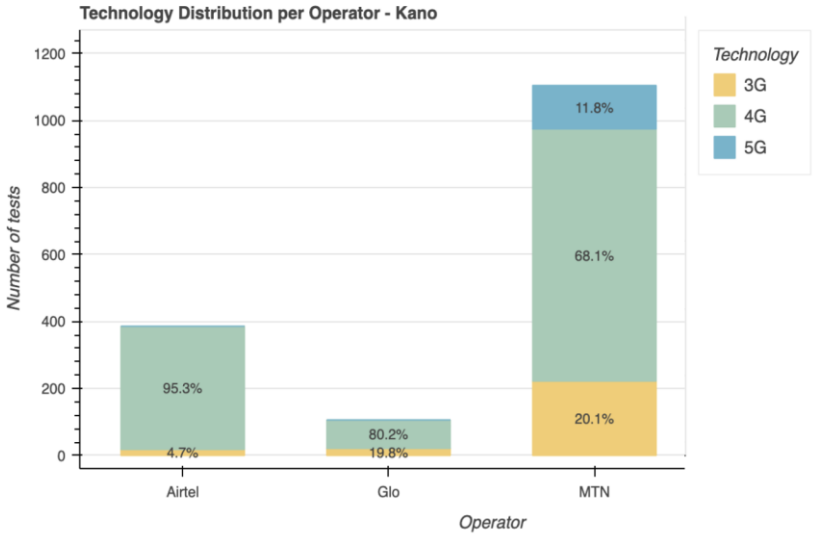
Human Impact: This divide means a student in a top-performing state may get fast e-learning access, while a professional in an underserved area struggles with basic payments or video calls.

T2 had limited market presence and no recorded DL limitations in this analysis

The Cost of Legacy: Over-reliance on 3G is Slowing Down Progress

Nationally, **Glo** and **MTN** show a percentage of 3G tests of 8.7% and 5.8% respectively.

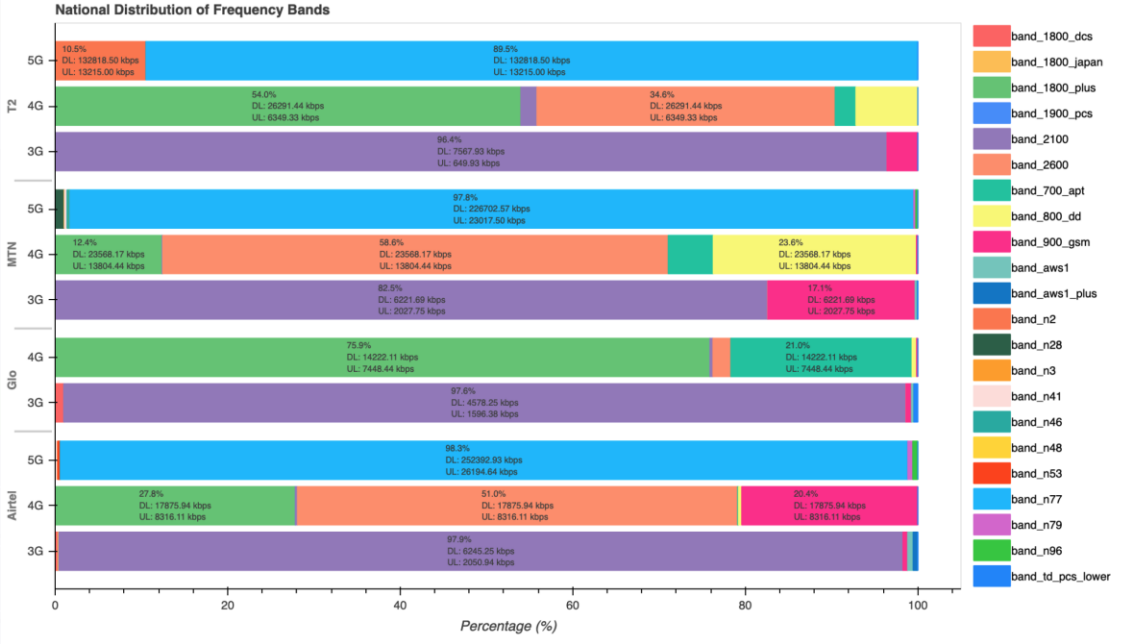
Regional Examples: Some states showing a particularly high 3G dependency. A clear picture of this is shown in **Kano State**, where the reliance on 3G is indicating a major segment of users face significantly compromised quality of experience (QoE).



Consumers in areas relying heavily on 3G cannot access the digital economy effectively

The Foundation: How Spectrum Bands Deliver Your Connection

The analysis covers segmentation by 3G, 4G, and 5G to track how operators use frequency bands to deliver service. Different bands offer different capabilities (e.g., some travel farther for rural coverage; others offer higher capacity in cities). NCC monitors this to ensure fairness.



Key Takeaways and Guiding Nigeria's Digital Future

4G is the Standard: 4G is the foundation of the current experience, demanding continued coverage expansion.

5G Rollout is Critical: Accelerating the deployment of 5G is necessary to improve speed and overall capacity in cities.

End the 3G Era: Reducing consumer reliance on older, underperforming 3G networks is a priority to ensure equitable quality of experience (QoE) nationwide

> ***NCC Commitment***
> The NCC is committed to ensuring that infrastructure investments are equitably distributed and that operators transition to modern technology to support sustainable, high-quality connectivity nationwide

Thank You