

THE EFFECTS OF PRIVATISATION AND DEREGULATION POLICIES ON NIGERIAN TELECOMMUNICATION INDUSTRY

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Abstract

This research work examined the impact of privatisation and deregulation policies on Telecommunication Industry in Nigeria. It discussed the effect of government policies on some selected industrial performance indicators between 1999 and 2004. Its objectives were to determine the impact of privatisation and deregulation policies on such indicators as market penetration, subscriber growth, and size of private investment in the industry, number of operators and cost of service. These indicators measure the total industrial performance for the years reviewed. They were selected after careful review of similar works in other countries and consideration of Nigerian peculiar circumstances. The methodology adopted was descriptive in nature. Techniques such as percentages and tables were used to describe the trends in the indicators. Descriptive statistics are amenable to data involving time series. The data were secondary in nature and were obtained mostly from the National Communication Commission (NCC). Findings reveal that subscriber growth has increased 16 times what it was in 1999 leading to an improved market penetration. Private investment and number of operators increased significantly while cost of service dropped over the period. These were positive and favourable. Based on the findings, the study therefore concluded that privatization and deregulation policies have positively affected the telecommunication sector in Nigeria.

Introduction

As at early 1990s, the communication industry was virtually at stand still. It became obvious that the Nigerian Telecommunication (NITEL) could not meet high demand of telephone lines and quality of service needed by the public. Like its electric power utility (NEPA) counterpart, NITEL is as notorious for its unreliability as it is for the nepotism of its officials (Cadwalader et al 2002). Of 32 years of national existence since independence, about 500,000 lines were available for the population of 80 million people. On the international level, Nigeria was lagging behind in the standards of International Telephone Union (ITU).

The search to revamp the sector and keep pace with rapid global development led to government policy of privatisation and deregulation in the Telecommunication (telecomm) Industry. The telecomm sector reforms commenced when Nigeria identified with global trend that liberalization of telecommunication was essential for rapid network growth and that private sector participation was essential for attracting financial resources, innovations and new technology.(Ndukwe:2004). Thus, Nigeria Communication Decree 75 of 1992 was promulgated to liberalize the telecom industry and open gate for private sector participation as well as establishing National Communication Commission (NCC) as the regulatory authority. This ushered in what is now the “New Era”.

By July 1993 the NCC was inaugurated and swung into action. In 1994, the NCC announced a plan to license the second national carrier within four years. It also disclosed plans to expand telecomm services by providing 1.2 million new lines by 1997. As part of this plan, the NCC intended to license several new cellular operators in order to reach a goal of 100,000 cellular lines in the year 2000. There was also the adoption of digital technology in the network to improve services and meet new demands. Meanwhile, NITEL continued to hold a monopoly over basic services. The then Babangida administration lacks the will to implement fully the liberalization policy. More so, there was low private participation as policy and regulatory climate is unpredictable and investment risk rated high due to the presence of military in power. Thus, less was accomplished in this regard before 1999.

The Privatisation and Deregulation Policy took a new dimension under the civil rule in 1999. Though a year earlier, the 1992 Privatisation Decree was amended by Decree 30 of 1998 which deleted those provisions in the first Decree which inhibited competition and further enhance the efficiency of NCC. Since then, there have been myriads of policies and guidelines to strengthen the thrust of liberalization. The National Telecomm Policy (NTP) was released in October 1999 to set the pace for telecommunication growth and strengthen the regulatory body (NCC). This was also followed by NTP 2000, which made provision for Universal Service Provision to extend communication services to rural areas. In January 2001, there was a Digital Mobile License Auction, which resulted in licensing of three GSM operators - MTN, Econet (Now VMobile) and Globacom, and the second National Carrier. To give incentive to the private telephone operators, the import duty on telecomm equipment was reduced from 25% to 5%. The list (policies above) is not exhaustive.

The question now is: How far has the industry fared with all these policies? And to what extent has the pursuit of privatization and deregulation positively affected the telecommunications industry?

Statement of the Problem

A lot of policies have been envisioned, formulated and implemented since the adoption of privatisation and deregulation policy in 1992. Of note is the current administration's strong commitment to open up the telecomm industry to private sector participation.

However, there have been fears of foreign dominance of the economy; pricing services beyond the reach of the masses, equitable distribution and access to telephone services. Some have even observed that the deregulation policy is a colossal failure. In this light, there is need to determine the efficiency and effectiveness of government policies on the telecomm sector so far. An attempt is made to answer the following questions:

1. What is the effect of privatisation and deregulation policy on subscriber growth?
2. How far has government's privatisation and deregulation policy affected private sector investment in telecomm industry?
3. Has the cost of service improved in telecomm industry since deregulation?
4. Does government policies affect telecomm sector employment generation and number of operators in the industry?

Objectives of the Study

The study generally investigates the impact of privatisation and deregulation policies on the telecommunication industry. It focuses specifically on the following:

1. To examine the effect of privatisation and deregulation policies on subscriber growth and market penetration of telecom industry.
2. To determine the impact of deregulation on private sector investment in telecommunication industry.
3. To examine the impact of deregulation and privatisation policies on number of players and participants in the telecommunication industry.
4. To ascertain the effect of privatisation and deregulation on cost of service.

Methodology

This section is concerned with, and highlights the research methodology used in this study. **Area**

of Study

The research focus is on the telecommunication industry in Nigeria. It reviews the government policy in the sector and measures its effect on the key industrial indicators. The telecommunication industry covers electronic transmission, emission or reception of information by wire, radio and optical or other electromagnetic system between specific places. It excludes nonelectronic transmission such as postal service and mass media services such as radio and television broadcasting. The information transmitted may be sound, images or bits of data. The industry is made up of different categories of operators, which offers varied services. In addition to the Internet and lata service provider, there are three broad categories of telecom operators in Nigeria, namely:

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1. The fixed wire/wireless service providers such as the government-owned Nigeria Telecommunication Limited (NITEL), the newly licensed second national operator (Globacom), a number of fixed wireless operators (otherwise known as private telecommunication operators (PTO), and those operating the fixed wireless technology.
2. The cellular operators such as MTN communications and Econet Wireless, the two dominant GSM operators. NITEL and Globacom also hold high digital Mobile licenses to provide cellular services based on the GSM technology.
3. The Long Distance operators such as Nepskom Communication Ltd and Mobile Telecom Service Ltd.

The period covered by the study is between 1999 and 2004. Although deregulation and privatisation policy actually began in 1992, the years preceding 1999 were excluded because what we have then was partial liberalization, and available data for the period is insufficient to make meaningful analysis and conclusion.

Sources of Information

The study investigated the impact of privatisation and deregulation policies on the telecommunications industry in Nigeria between 1999 and 2004. Data available for earlier years were insufficient to make any meaningful analysis. Data required were obtained from:

1. The National Communication Commission.
2. Industrial statistics.
3. Reports generated by the government.

Which are secondary in nature. They provide fact and trend on the industrial indicators selected over the period covered.

Measurement of variable

To measure the effect of privatisation and deregulation policies on the telecommunication industry, the variables selected are key industrial indicators in the industry. They include, market penetration or teledensity, private investment, subscriber growth, number of players and operators and cost of service.

Market penetration is measured by number of telephone lines available to hundred inhabitants residing in Nigeria measured over the period of 1999 to 2004.

Private investment represents gross expenditure on creation and development of infrastructural facilities, which flow from sources other than the government, measured over the period, covered by the study.

Subscriber growth is indicated by number of lines connected to the network operated by all the telephone service providers including fixed and mobile operators.

The number of service providers offering varied services in the industry including telephone, Internet and data transmission gives the number of operators.

The cost of service is the cost of connecting to the network and the charges for airtime. The indicators are selected as a means of measuring changes in the telecom sector to ascertain the effect of government policy in the sector. The choice of the indicators is informed by the review of recent research works conducted in similar industry in Nigeria and other countries; the indicators were common to almost all the studies reviewed and are also appropriate for Nigerian context.

Data analysis techniques

Due to the nature of the data and the objectives to be achieved, data were analysed using descriptive statistics such as percentages and tables.

Results

Government Deregulation and Liberalisation Policies

The period between 1999 till date is commonly referred to as years of full liberalisation for telecom industry. The period was characterized by policy measures aimed at total deregulation of the industry and privatisation of all government interest. In pursuit of an aggressive market liberalisation policy, the government formulated and released a National Telecommunication Policy in 2000, with

an overriding objective “to achieve the modernization and rapid expansion of telecommunications networks and services.”

Another National Telecommunication Policy, (NTP), was passed by the National Assembly in 2003. The highlight and salient areas in the policies are discussed below:

- (a) Opening up, to competition, all market segments previously held under the monopoly of the incumbent operator. The market segment include national and international long distance services, mobile services and similar others.
- (b) Erasing or eliminating barriers to cross border movement of capital and equipment vis:
 - (i) Removal of restrictions on level of foreign equity participation.
 - (ii) Reduction in level of import duties on telecommunication equipment from 25% to 5%.
 - (in) Simplification of procedures for importation of telecommunication equipment and development of related software.
 - (iv) Granting of pioneer status to qualified investors.
 - (v) Fiscal incentives to encourage local manufacture of telephone equipment.
- (c) Creation of level playing field. In this regard, the following were initiated:
 - (i) The incumbent operator, NITEL, was brought under the regulatory oversight of the NCC.
 - (li) NITEL was licensed in 2001 and a management contractor, Pentascope International was appointed to ensure more efficiency in the organization.
 - (iii) Management of frequency spectrum by NCC.
- .(d) Strengthening the regulator and increasing its independence. The NTP 2003 specifically increased the power and independence of NCC, the industrial regulator. The law empowers NCC to make regulations and guidelines for the industry.
- (e) Auctioning of 2G Digital Mobile Licenses in January 2001 and licensing of a second national carrier in 2002.
- (f) Preparation of incumbent operator, NITEL for privatisation.

Effect of Privatisation And Deregulation Policies On Market Penetration

The market penetration of telecom industry is measured by the teledensity within a territory. Teledensity is the number of lines available to 100 inhabitants (ITU definition). Table 1 below shows the growth in teledensity in Nigeria between 1999 and 2004. From 0.4 lines per 100 inhabitants in 1999, the market penetration reached 8.5% in 2004, an increase factor of 21.25 times.

This phenomenal growth is attributed to the cumulative effect of the increase in the number of connected fixed telephones and the number of mobile subscribers.

Table 1: Teledensity Data in Nigeria (1999 - 2004)

| Year | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-------------|------|------|------|------|------|------|
| Teledensity | 0.42 | 0.49 | 0.72 | 1.89 | 3.36 | 8.5 |

Source: NCC

As at 2004, the teledensity in Nigeria was twice the recommended standard of International Telephone Union (4 lines per 100 inhabitants)

Effect of Deregulation and Privatisation Policy on Subscriber Growth

The telecom industry has witnessed an explosive subscriber growth between the period 1999 and 2004. Based on industrial trend summarized in Table 2 below, about 9,613,354 additional lines had been added representing a percentage increase of 1633.88%. The added lines are 16 times more than the total available lines as at 1999, which stood at 508,316, bringing the total lines in 2004 to 10,201,728. The annual growth rate for the period under study is 91.88%.

The Effects of Privatisation and Deregulation Policies on Nigerian Telecommunication Industry Table 2:

Subscriber Data: 1999 - 2004

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-------------|---------|---------|---------|-----------|-----------|------------|
| Fixed lines | 473,316 | 553,374 | 600,321 | 702,000 | 88,534 | 1,027,519 |
| Mobile | 35,000 | 35,000 | 266,461 | 1,569,050 | 3,149,472 | 9,174,209 |
| Total | 508,316 | 588,374 | 866,782 | 2,271,050 | 4,038,006 | 10,201,728 |
| Growth % | | 15.7% | 47.3% | 162.0% | 77.8% | 152.6% |

Source: NCC

The explosive increase is not unconnected with the entry of Global System for Mobile Communication (GSM) operators in the sector. The highest of all the annual growth, 162.0% was in 2002 when mobile operators commenced their operations fully. The total number of mobile lines as at 2004 stood at 9,174 million from only 35,000 in 1999, and account for about 90% of the total subscribers as at 2004. The net additions alone in 2003 exceeded that of South Africa, the continental leader in mobile telecom for the first time. The surge in the mobile lines is due to intensive competitive market structure and the financial capability of the mobile operators to respond to new demands which has been suppressed and pent up before the introduction of mobile telephony.

The fixed line subscribers increased by 554,203 from 473,316 lines in 1999 to 1,027,519 lines in 2004 representing 117% increment. Though it accounted for 10% of the total lines as at 2004, the fixed mobile telephony has also shown considerable improvement. The increase noticed in total lines can be partly explained by lines provided by the private telephone operators and the second national carriers, Globacom.

In all, the geometric increase in the subscriber growth is attributed to virile competition among the competitors/operators through transparent, fair and firm policy and regulatory actions. It is so significant that Nigeria was officially named the largest growing market for telecom in Africa and The Middle East and most vibrant in 2004.

Impact of Deregulation and Privatisation Policies on Private Sector Investment

There has been a significant increase in the level of private investment in the Nigerian telecommunication industry, especially since 1999. From a mere US\$50 million at the end of 1999, total private investment in the sector rose to about US\$6 billion in 2004, 120 times more than the figure for 1999.

The improvement in private investment can be partly explained by increase in Foreign Direct Investment (FDI). In 2004 alone, two leading private equities in the world, ACTIS and Emerging Market Partnership, invested US\$43.2 million into Starcomms, one of the private telephone operators. This is one of the notable FDI in the sector. The growth in FDI is underscored by government removal of restrictions on level of Foreign Equity Participation.

Also the reduction in the level of import duties on telecommunication equipment from 25% to 5%, an 80% downward review, had led to inflow of capital equipments. It should be noted, however, that more than half of the investment represents mobile network.

Impact of Privatisation and Deregulation on Number of Operators and Participants

The liberalisation policy thrust of the government has positively affected the number of operators and participants in telecom industry. The sector has witnessed considerable increase in this regard. In every area or segment of the industry, there has been an addition to available operators and service providers since 1999. Table.3 below indicates the number of operators and service providers.

Table 3: Growths in the Number of Operators in Nigeria

| Service category | Number of Operators | | | | | |
|------------------------|---------------------|------|------|------|------|------|
| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
| National carriers | 1 | 1 | 1 | 2 | 2 | 2 |
| Mobile (GSM) telephony | 1 | 1 | 3 | 3 | 4 | 4 |
| fixed telephony | 9 | 16 | 16 | 17 | 20 | 22 |

Source: NCC

As at 1999, N1TEL was the only national carrier. In 2002, Globacom, an 100% owned indigenous company was named the second national carrier with license to provide national and international long distance services and mobile services.

The mobile telephony operator increased to 3 in 2001 from 1 in 1999. This was due to the licenses granted to MTN and Econet Wireless, which pioneered private mobile operation. In August 2003, a license was issued to Glomobile (the mobile arm of Globacom) to commence GSM telephony.

In fixed telephony, additional 13 operators have commenced operation since 1999. This represents 1.4 times the number of fixed operators available in 1999, 7 years after deregulation. Since 2001, the NCC has issued 523 licenses but most of the companies are yet to commence operation.

The growth in number of operators has translated to more employment opportunities. In mobile telephony alone, about 4500 direct job has been created and 45,000 indirect employment covering such areas as distributorship and dealership, recharge card hawkers and airtime retailers. More operators also mean increased range of and quality of services.

The increase in number of operators is due to government favourable and fair policy such as creation of a level playing field and removal of bottleneck hitherto created by the monopoly operator.

The entrance of multiple operators in the telecom sector, particularly the mobile segment coupled with intensifying competitive rivalry, has had resounding success in the industry in terms of growing subscriber base, decreasing tariff, widening coverage area, improving quality of service levels, expanding product range and innovativeness.

Effect of Deregulation and Privatisation on Cost Of Service

Trends in prices and cost of service in telecom sector have shown a continuous decrease since 1999 to 2004. Both cost of connection and airtime charge for both fixed and mobile telephone has significantly reduced. The cost of acquiring new fixed lines has dropped from N100, 000 to an average of N20, 000, a reduction of 80%. For mobile telephony since the inception of private operators in 2001, the cost of pre-paid SIM packs has dropped from N20, 000 to between N1,000 and N2, 500. At times, during the period of promotion, the starter pack sells for as low as N1. This is because the cost charge for the SIM would have been credited in the airtime allowance. Table 4 below shows the trend in GSM prepaid SIM pack prices from 2002 to 2004 for the mobile operators.

Table 4: Gsm Pricing Trend (Sim Packs)

| | Dec 2002 | June 2003 | Dec 2003 | June 2004 | Dec 2004 |
|-----------------|---------------|---------------|--------------|--------------|----------|
| MTN | 13,000 | 13,000 | 6,500 | 5,999 | 1,000 |
| VMobile | 4,000 | 12,900 | 6,000 | 5,500 | 1,000 |
| MTel | 10,000 | 9,000 | 9,000 | 6,500 | 2,500 |
| Globacom | - | - | 10,999 | 3,300 | 1 |
| Average | 9,000 | 11,633 | 8,125 | 5,325 | 1,125 |
| % Charge | | 29 | -30 | -34 | -373 |

Source: NCC

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The real cost of acquiring analogue mobile phones has reduced by 650% from N60,000 in 1999 to N7,999 in 2003. The cost of airtime charges has also decreased over time since 1999. For instance, the fixed voice prices fell by an average of 24% over the years under study. Table 5 below shows the average price per minute (Naira) between the period of 2002 and 2004.

Table 5: Average Price Per Minute (Naira)

| | Dec 2002 | Dec 2003 | June 2004 | Dec 2004 |
|-------------------|----------|----------|-----------|----------|
| Local | 4.6 | 3.48 | 4.2 | 4.82 |
| National | 24 | 15.6 | 15.6 | 12 |
| GSM | 30.2 | 7 | 27 | 27 |
| International | 99.5 | 40 | 39.4 | 37.4 |
| Average | 40 | 22 | 22 | 20 |
| % Charge (annual) | | -46 | | -6 |

Source: NCC

From the table the general overall price for airtime has fell by 50% between Dec 2002 and Dec 2004. The decrease in cost of service is attributed to high level of competition and rapid changes in technology. Increase in competition is stimulating call price reduction, most obviously through the launch of NITEL's new tariff structure in May 2004 and through the bullish marketing of Globacom and of late, VMobile.

However, the Average Revenue per User (ARPU) is high in Nigeria compared to other African countries. This is attributable to high cost of doing business in Nigeria.

Recommendations and Conclusion

The policies of deregulation and privatisation in telecommunication sector have brought encouraging results.

The policies resulted in subscriber growth, greater market penetration, greater productivity resulting from increased operator and decrease in the cost of telephone. These are consequences of government liberalisation policies. There is free entry for new participants in virtually all the undertakings of the sector. Market potential is huge and growing, while investment hurdles are minimal and business risks not unconventional. The auctioning of digital mobile licenses in 2001 and the private commencement of mobile telephony in Nigeria marked a crucial point in the explosive growth of subscribers. Nigeria market is estimated between 25 to 30 million suppressed and pent up before 1999. With the entry of private mobile operators, with adequate financial and technical capability to respond to the pent up demand, the unprecedented increase is not unexpected. This is followed by an increased market penetration.

The initial success recorded attracts more investment into the telecom industry. Removal of barriers against cross-border movement of capital and creation of conducive environment dominate the policy thrust of the government in the industry. Thus the increased investment is not unconnected to favourable policy framework. As at 2004, the investment in telecom is second only to that of oil and gas industry. More operators flood the market to exploit the mouth-watering opportunities perceived in the sector. Government resolve to open all the market segments previously held under the monopoly of the incumbent operators (NfTEL) underscore the entrance of the new participants. The strengthening of the regulator, NCC, to increase its independence has helped to reduce the fear of persistent government interference, a major factor, which had hitherto prevented investment in the industry.

As participants increase, the market becomes more competitive. To attract more customers, the operator scaled down their prices. For instance in mobile telephony, prices for prepaid SIM packs dropped to near zero and there have been no increase in tariffs since 2001. Government policies of deregulation and privatisation have positively impacted the telecom sector. The government has achieved within 5 years from 1999, what had remained impossible for 40 years of independence.

Recommendations

Based on the findings of this study, below is recommended to further enhance the benefit of government policies in the telecom sector. Customer dissatisfaction still exists with respect to cost, technical capacity and reliability, which need to be minimized for a vibrant and virile telecom sector. The following should be carefully considered:

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[^] The explosive increase in the growth of subscribers has resulted in massive congestions in the available network. The available capacity is already exhausted and cannot cope with teeming demand of Nigerian market. This is noted especially in mobile telephony where consumer satisfaction is still unfortunately low. The government is therefore advised to license more operators especially in the mobile to reduce the congestion.

S Though tariffs charges has been dropping since 1999, these charges are still relatively expensive compared to other countries in Africa. The Average Revenue per User (ARPU) in Nigeria is the highest in Africa. The reasons given by the operator are: high cost of operation especially the license cost and cost of power generation. Government is thus advised to review downwards the cost of licensing and provide adequate infrastructural facilities, especially constant power supply so that costs of doing business in Nigeria would reduce in relation to other countries. This would even attract more investors and investment.

C The growing prospects in telecom would require a commensurate high-skilled manpower and personnel if this growth is to be sustained. The NCC is commended for establishing the Digital Bridge Institute, which presently trains manpower to meet the demand of the industry. However, the institute turnout is still very low. Thus, the NCC is advised to collaborate with NUC, Nigeria University Commission to introduce curriculum, which covers telecom engineering, similar to petroleum engineering. The universities can therefore complement the Digital Bridge Institute in producing the required and adequate manpower needed for telecom development.

C Government is advised to take as priority the Rural Telephony project. It is observed that major operators focus on the urban and the cities alone. The NCC like CBN can stipulate the minimum area of coverage of the rural areas expected from the existing and potential operators.

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