

ACF Research Projects

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African Competition Forum (ACF)



LAUNCH

2011



MEMBERS

32 national &
4 regional competition
agencies



OBJECTIVES

To promote the
adoption of
competition principles
in the implementation
of national and
regional economic
policies of African
countries.

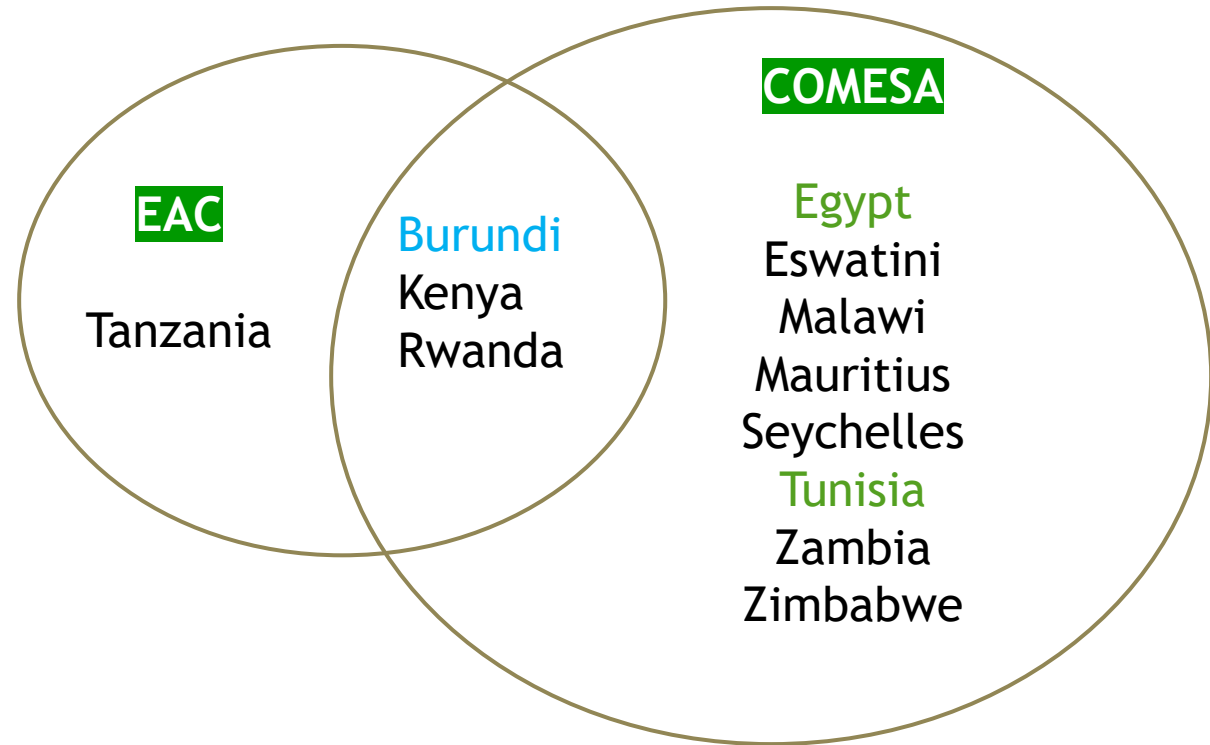
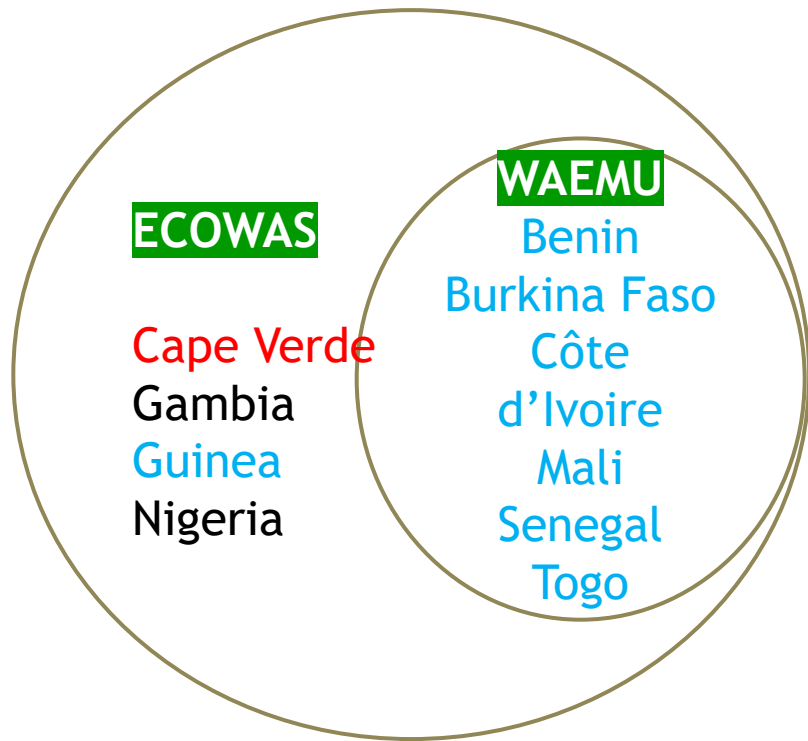


ACTIVITIES

Encouraging and
assisting African
countries that do
not have a
competition law to
adopt one.

Helping to build the
capacity of existing and
future African competition
agencies and increasing the
awareness of the benefits
of implementing
competition laws among
governments, the general
public and stakeholders.

ACF Member Agencies



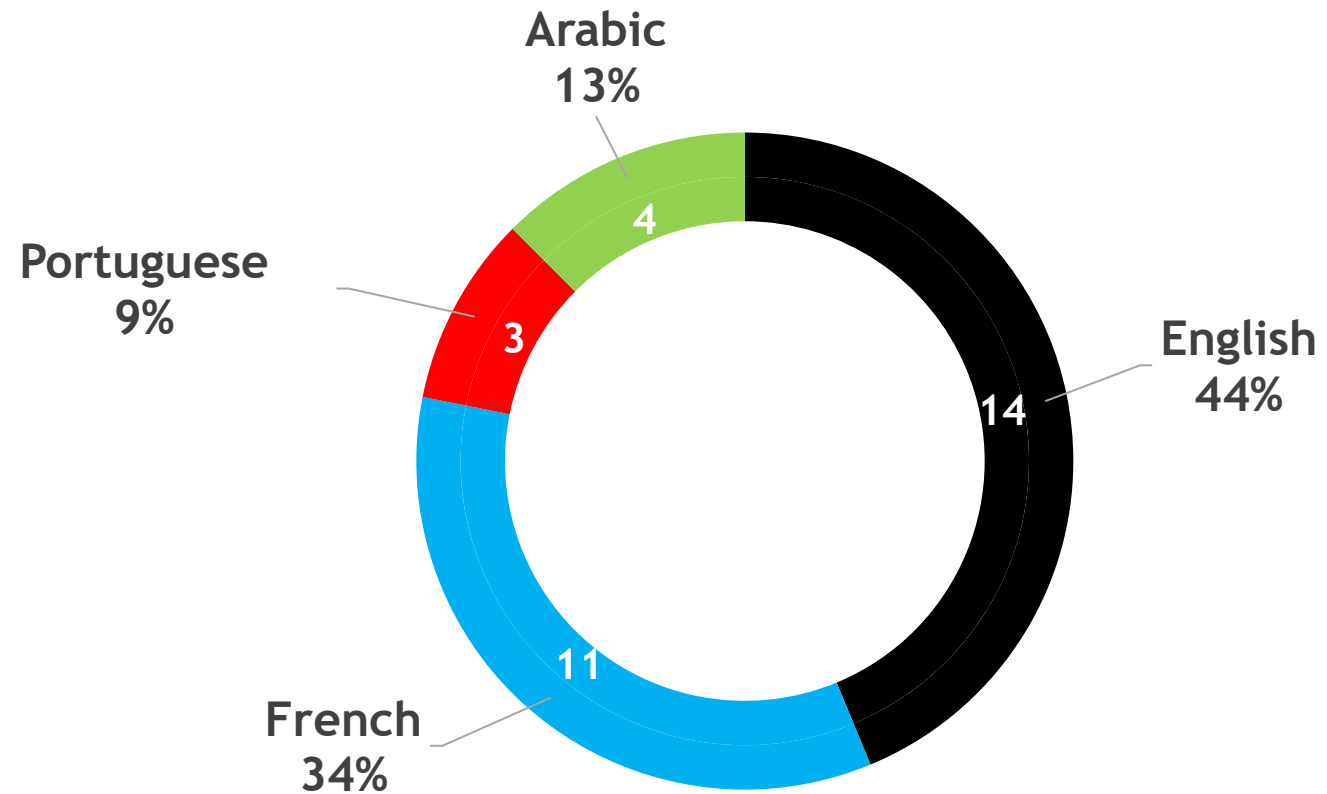
Algeria
Angola
Botswana

Cameroon
Congo (Brazzaville)
Gabon

Morocco
Mozambique
Namibia
South Africa

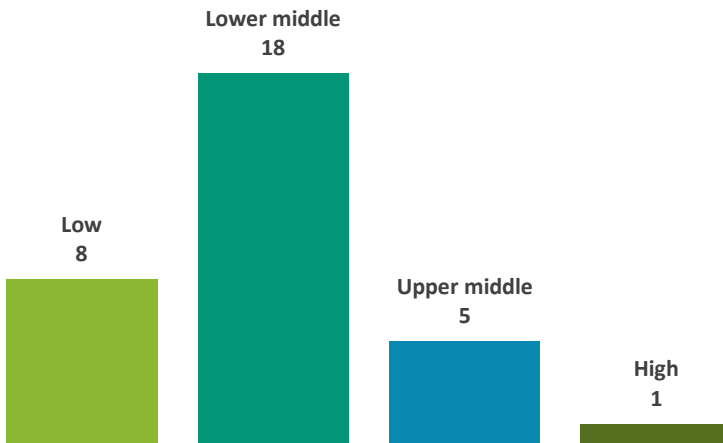
French speaking countries
Arabic Speaking Countries
Portuguese Speaking
Countries
English Speaking Countries

ACF Member Agencies



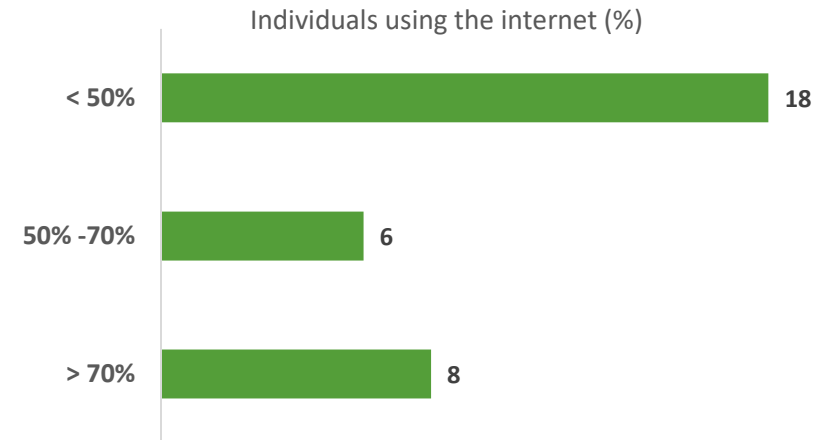
ACF Member Agencies

Income level



Based on 2022 GDP per capita, Word Bank

Level of digitalisation



ITU Database, year 2021 (except for Congo (Brazzaville, 2017))

Some activities/events of ACF

- Capacity building for enforcement
 - ACF Cartel Workshop , in collaboration with SADC
 - ACF Merger Workshop, in collaboration with CCC & US FTC amongst other agencies
- Collaborative research
 - Construction, pharmaceutical, airlines, telecommunications
- Biennial conference
 - 2014 South Africa, 2016 Mauritius, 2018 Morocco, 2020 South Africa (Virtual), 2023 The Gambia
- Institutional benchmarking
 - 2019 Study with World Bank with the participation of 20 ACF members.

Completed Studies

Market Study	Participation
Competition challenges in African construction markets	Eswatini, Kenya, Malawi, Mauritius, Namibia, South Africa
Competition in the Generic Pharmaceutical Industry	Angola, Eswatini, Gambia, Kenya, South Africa, Zambia, Zimbabwe
Cross Country Study on International Roaming Studies	Angola, Botswana, Comesa, Kenya, Mauritius, South Africa, Zambia, Zimbabwe
Cross-Country Study on Airlines	Angola, Comesa, Kenya, Gambia, Mauritius, Nigeria, South Africa, Zambia

Ongoing Studies



ACF Digital Market Survey



ACF Regional Trade Flows



ACF research on Abuse of Dominance and Merger
thresholds for AfCFTA Competition Protocol

Digital Market Survey



Objectives

Scope the current landscape of digital markets and gauge the levels of digital adoption in each country with a view to:

- identify potential areas of concerns; and
- devise appropriate tools for proactive regulation of digital markets.

Essentially the research will, for each participating country:

- Identify key emerging digital markets and the firms within those markets,
- Identify current trends of growth and tendency for domestic dominance, and
- Outline consumer adoption trends in digital markets and online services.

Digital Market Survey

Design, coverage and administration

The Survey questionnaire (in English) was mainly designed by the CCSA (prior experience in conducting digital market studies



Platform Categories

Search engines

E-commerce

Travel and accommodation

Food delivery

Online classifieds

Social media and advertising

Software applications



Launch
Oct 23



Initial Submissions
11 /32 agencies



Recall
Jan 24



Submissions
as at date
15 countries

Issues for consideration in the digital market survey

- **Language consideration**

- The survey questionnaire was drafted in English and sent out to all the national competition agencies, whereas 18 out 32 (or 66%) agencies do not use English as primary language.
- It is therefore important to address the language barrier to encourage more participation.
- It is to be highlighted that participation in previous ACF market studies was by member agencies which primarily use the English medium (the exception being Angola)

Issues for consideration in the digital market survey

- **Unavailability of data**

- The response rate in the survey is around 44%.
- While the responses are yet to be assessed, preliminary review tend to indicate that several parts could be completed due unavailability of data.
- Some members, which have not responded, have also indicated that their agencies do not the information and requesting same from sector regulators.

Issues for consideration in the digital market survey

- **Prioritisation and internal capacity to collect and analyse data**

- Digital markets may not be priority focus, consideration level of digitalization ACF member countries (18/32, the percentage of individual using internet was less than 50%).
- Interactions with some agencies tend to indicate that they are unable to response due capacity constraints.
- The timeline for gathering and reporting the data may also be an issue. Some agencies, like the CCSA, have already done in-depth analysis of the online platforms in South Africa while other agencies are yet to do preliminary landscaping or scoping.
- There is also a need to better engage with stakeholders, including sector regulators for data.

Considerations for ACF studies

- Prioritising sectors of common interest and addressing language barrier.
- Ensuring data availability and internal capacity to conduct the study
- Proper scoping and planning with realistic timeline and adequate resources devoted to the project.
- Onboarding stakeholder at the very beginning of the study, including sector regulators.

THANK YOU