# Digital Competition Policy and Regulation in Africa

Short Course

2026

## 1. Course Outline And Approach

### 1.1 Course information

| | |
|---|---|
| Course title | Digital competition policy and regulation in Africa |
| Presenting unit | Centre for Competition Law and Economics (CCLE), Department of Economics, Stellenbosch University, South Africa |
| NQF level | Level 8 |
| Notional credits | 12 credits (120 notional hours) |
| Duration | 2 September 2026 to 11 December 2026; ten online teaching sessions |
| Delivery mode | Online synchronous sessions, supplemented by readings, quizzes and written assessment |

### 1.2 Lecture team

| Team member | Role | E-mail address |
|---|---|---|
| Prof Willem Boshoff | Course Leader and Presenter | wimpie2@sun.ac.za |
| Prof Rachel Jafta | Presenter | rccj@sun.ac.za |
| Prof Nicola Theron | Presenter | nicolatheron@sun.ac.za |
| Helanya Fourie | Presenter | helanya@sun.ac.za |
| Vera Smit | Technology and administrative support | verasmit@sun.ac.za |

### 1.3 Aim

The aim of the course is to equip participants with specialised economics-based knowledge and applied analytical tools to understand, assess and advise on digital competition policy and regulation in African markets. The course develops the capacity to interpret digital-market evidence, analyse competition and regulatory problems, evaluate policy options and formulate recommendations within African contexts.

## 1.4 Objectives

- O1. Provide a specialised economics-based introduction to digital competition policy and regulation, with emphasis on platforms, ecosystems, data, AI, digital infrastructure, digital media and online intermediation.
- O2. Develop professional capacity in African digital-market analysis by equipping participants to interpret market evidence, identify competition and regulatory problems, and formulate appropriate analytical questions.
- O3. Bridge economic theory and African policy practice by combining industrial organisation, innovation economics and regulatory-policy frameworks with African case studies, market inquiries and institutional materials.
- O4. Strengthen participants' ability to assess theories of harm and policy concerns in digital markets, including market power, exclusion, self-preferencing, data advantages, cloud lock-in, algorithmic conduct, platform dependence and ecosystem effects.
- O5. Build capacity for evidence-based policy advice by training participants to develop proportionate, context-sensitive and institutionally feasible recommendations for African competition authorities, regulators, policymakers, firms and professional advisers.
- O6. Promote awareness of developmental and public-interest dimensions of digital competition and regulation in Africa, including SME participation, media plurality, financial inclusion, infrastructure constraints, informality, local-language inclusion and digital capability-building.
- O7. Support professional communication and judgement through writing-based assessment, oral defence, reflective revision and public argumentation.

## 1.5 Learning outcomes

- C1. Demonstrate specialised knowledge of digital competition policy and regulation by explaining core concepts in digital economics, including platforms, ecosystems, data, AI, cloud infrastructure, digital finance and digital intermediation, and by applying these concepts to African market contexts.
- C2. Critically evaluate theories and evidence on digital competition by interrogating academic and policy sources, both African and international materials, and by distinguishing between competing explanations of competition or lack thereof.
- C3. Apply appropriate analytical methods to unfamiliar digital-market problems, including competition analysis drawing on industrial organisation and competition economics.
- C4. Assess the developmental dimensions of digital regulation by considering SME participation, media plurality, and algorithmic accountability.
- C5. Develop evidence-based policy and regulatory recommendations for African digital markets, taking account of policy frameworks and the economics of digital competition.
- C6. Communicate policy analysis to specialist and non-specialist audiences through written work and presentations.
- C7. Demonstrate reflective learning by engaging with current research and policy developments, identifying gaps in evidence, and adapting theoretical frameworks to African digital-market contexts.

## 1.6 Assessment

Assessment is writing-based and designed to reduce over-reliance on generative AI:

| Component | Purpose | Weight |
|---|---|---|
| Structured online class and/or post-class quizzes | Tests engagement with readings, key concepts and reflective learning. | 25% |
| Written case study of a competition or regulatory matter in a specific African digital market | Tests specialised knowledge, evidence use, problem definition, methods application and policy reasoning. | 25% |
| Oral defence of case study | Tests ownership of the written analysis, ability to justify evidence and method selection, and responsiveness to counterarguments. | 25% |
| Written reflective policy note | Tests reflective learning, revision of argument, recognition of limitations and translation of analysis into policy lessons. | 25% |

*Assessment criteria: conceptual accuracy; evidence quality; method selection; contextual judgement; policy reasoning; communication; reflective learning.*

# 2. Lecture Dates

Lectures are scheduled for Wednesdays 19:00-20:30 (South Africa Standard Time and Central Africa Time).

| Item | Topic | Date | Presenter |
|---|---|---|---|
| Part 1: Foundations | | | |
| Lecture 1 | Digital economics concepts and trends in Africa | Wed 2 Sep 2026 | Prof Willem Boshoff |
| Lecture 2 | Platform economics | Wed 9 Sep 2026 | Prof Willem Boshoff |
| Lecture 3 | Competition economics of digital markets and platforms | Wed 16 Sep 2026 | Prof Willem Boshoff |
| Part 2: African sector studies | | | |
| Lecture 4 | Digital intermediation markets (including e-commerce) in Africa | Wed 23 Sep 2026 | Prof Willem Boshoff |
| Lecture 5 | Digital innovation and ecosystems in Africa and beyond | Wed 30 Sep 2026 | Prof Rachel Jafta |
| Week break | | | |

| Item | Topic | Date | Presenter |
|---|---|---|---|
| Lecture 6 | Digital financial markets in Africa | Wed 14 Oct 2026 | Prof Willem Boshoff |
| Lecture 7 | Cloud computing and AI-related markets in Africa | Wed 21 Oct 2026 | Prof Willem Boshoff |
| Lecture 8 | Digital infrastructure markets in Africa | Wed 28 Oct 2026 | Prof Nicola Theron & Helanya Fourie |
| Part 3: Policy and regulation | | | |
| Lecture 9 | Competition policy towards digital markets in Africa | Wed 4 Nov 2026 | Prof Willem Boshoff |
| Lecture 10 | Regulatory policy towards digital markets in Africa | Wed 11 Nov 2026 | Prof Willem Boshoff |
| Case study brief due | | Mon 23 Nov 2026 | |
| Oral defences (15 minute individual sessions) | | Tue 24 Nov – Mon 30 Nov 2026 | |
| Reflective policy note due | | Mon 7 Dec 2026 | |

*Notes:*

*Lecture 9 (4 Nov) falls on a South African public holiday.*

*Oral defences are scheduled for the week directly following the case study submission and conclude on the following Monday.*

*Reflective policy notes are due no later than one week after the close of oral defences.*

## 3. Lecture Plan

Each lecture below links to the course objectives (O1–O7) and learning outcomes (C1–C7) set out above, and includes an indicative teaching outline.

### Part 1: Foundations

#### Lecture 1: Digital economics concepts and trends in Africa

**Linked objectives: O1, O2 I Linked outcomes: C1**

**Lecture outline:**

- Digitalisation, datafication and automation as economic phenomena: falling costs of search, replication, transportation, tracking and verification.
- Technical building blocks: cloud computing, APIs, algorithms, AI models, interoperability and latency.
- African digital adoption trends: connectivity, device access, informality and skills constraints.
- AI as a general-purpose technology: implications for productivity, market structure and policy.
- Discussion: how do African conditions change the standard digital-economics narrative?

#### Lecture 2: Digital platforms

**Linked objectives: O1, O3, O4 I Linked outcomes: C1, C2**

**Lecture outline:**

- Multi-sided platform theory: cross-side network effects, pricing structure and cross-subsidisation.
- Platform strategy tools: ranking, data policies, commissions and tipping dynamics.
- Multi-homing and contestability as competitive constraints on platform power.
- African case study: mobile money platform competition in Kenya, Tanzania and Uganda.
- Discussion: when does a platform market "tip", and what does this imply for entry and regulation?

#### Lecture 3: Competition economics of digital markets and platforms

**Linked objectives: O3, O4 I Linked outcomes: C2, C3**

**Lecture outline:**

- Market definition challenges in zero-price and multi-sided markets.
- Assessing market power and dominance in dynamic, innovation-driven markets.
- Entry, contestability and ecosystem effects in competition analysis.
- Comparative frameworks: the Furman Review, the Stigler Committee and OECD approaches.
- Discussion: how should competition analysis adapt standard tools for digital markets?

### Part 2: Perspectives on African digital sectors

#### Lecture 4: Digital intermediation markets, including e-commerce, in Africa

**Linked objectives: O1, O4, O6 I Linked outcomes: C2, C3, C5**

**Lecture outline:**

- Digital intermediation platforms and business-user dependence.
- Search, ranking and self-preferencing as theories of harm.
- E-commerce logistics and SME participation.

- Case study: South Africa's Online Intermediation Platforms Market Inquiry and competition law developments in Kenya — findings and remedies.

Discussion: what remedies proportionately address self-preferencing without undermining efficiency?

## Lecture 5: Innovation and digital ecosystems in Africa and beyond

**Linked objectives: O1, O3, O4 l Linked outcomes: C1, C2**

**Lecture outline:**

- Ecosystem analysis: complementors, control points, interfaces and standards.
- Data flows as a source of ecosystem power and vitality.
- Global versus African digital ecosystems: relation to and dependence on foreign platforms and infrastructure.
- Drivers of innovation in the digital era and its African context
- Discussion: how to shape a competitive and innovative African digital ecosystem(s)?

## Lecture 6: Digital financial markets in Africa

*Indicative content: Mobile money, digital credit, payment systems, interoperability, access to transaction data, algorithmic scoring and Kenya's digital credit market inquiry.*

**Linked objectives: O1, O4, O6 l Linked outcomes: C1, C3, C4, C5**

**Lecture outline:**

- Mobile money and digital credit business models.
- Payment systems interoperability.
- Algorithmic scoring and access to transaction data.
- Case study: Kenya's Digital Credit Market Inquiry — findings and remedies.
- Discussion: how should regulators balance financial inclusion against consumer-protection and competition concerns?

## Lecture 7: Cloud computing and AI markets in Africa

**Linked objectives: O1, O4, O6 l Linked outcomes: C1, C3, C4, C5**

**Lecture outline:**

- The cloud stack, switching costs and egress fees.
- AI compute demand and digital sovereignty concerns.
- Discussion: is cloud market power an emerging African competition-policy priority?

## Lecture 8: Digital infrastructure markets in Africa

**Linked objectives: O1, O4, O6 l Linked outcomes: C1, C3, C4**

**Lecture outline:**

- Connectivity infrastructure: fibre, spectrum, towers and data centres.
- African connectivity and infrastructure gaps, drawing on GSMA and World Bank evidence.
- Case study: Mergers in African fibre and telecommunications markets

## Part 3: Policy and regulation

### Lecture 9: Competition policy towards digital markets in Africa

**Linked objectives: O3, O4, O5 l Linked outcomes: C3, C5**

**Lecture outline:**

- Digital-market definition, abuse of dominance and merger control in African jurisdictions.
- Market inquiries as an African competition-policy tool.
- Remedies design and enforceability.
- Regional cooperation: the AfCFTA Competition Protocol, COMESA Competition Commission and SADC.
- Discussion: cross-border digital competition enforcement in Africa

### Lecture 10: Regulatory policy towards digital markets in Africa

**Linked objectives: O3, O5, O6 l Linked outcomes: C3, C5, C7**

**Lecture outline:**

- Competition law versus ex ante regulation: comparing the EU Digital Markets Act and the UK Digital Markets, Competition and Consumers Act.
- Data governance and privacy: the Malabo Convention and the AU Data Policy Framework.
- Data access and institutional coordination.
- Designing African regulatory institutions: capacity, sequencing and coordination.
- Discussion: cross-border ex-ante regulation in light of the AfCFTA Protocol and interaction with regional and national policies on the continent