

# East Africa Telecommunications Report Q2 2015

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## Abstracts

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**BMI View:** Our Q215 East Africa report analyses latest industry, regulatory and macroeconomic developments in the telecoms markets of Burundi, Ethiopia, Malawi, Rwanda, South Sudan and Sudan. The five markets present challenging business environments, including low spending power of majority of consumers, high cost of network deployment in rural areas and political instability in some countries.

However, the relatively low voice and data penetration rates assures long-term subscriptions growth and, potentially, value growth should the economic situation in these markets improve in the coming years.

### Key Data

Average mobile market growth in the six countries in FY14 was 9.2%. Malawi recorded the highest growth rate, estimated at 17.6%, while Sudan recorded the largest contraction of 1.7%.

Average mobile penetration among the six countries was 41.8% at the end of December 2014. Sudan had the highest penetration rate at 71.5% and Ethiopia the lowest, at 24%.

Average monthly ARPU remained below USD3 in 2014. Only South Sudan recorded ARPU of more than USD5, while Burundi, Malawi and Rwanda reported sub-USD3.5 ARPUs.

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