South Africa Country Intelligence Report 2018

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Abstracts

'South Africa: Country Intelligence Report', a new Country Intelligence Report by GlobalData, provides an executive-level overview of the telecommunications market in South Africa today, with detailed forecasts of key indicators up to 2022. The report provides detailed analysis of the near-term opportunities, competitive dynamics and evolution of demand by service type and technology/platform across the fixed telephony, broadband, mobile and pay-TV segments, as well as a review of key regulatory trends.

In 2017, South Africa will generate total telecom service revenue of $10.2bn. Going forward, we expect the telecom service revenue in South Africa to decline at a CAGR of -3.6% in USD during 2016-2022. However, in local currency, the revenue will expand by 4.6%, reflecting currency depreciation. This growth will come from a steady rise in adoption of mobile and fixed broadband services. Mobile voice will remain the largest revenue-contributing segment in 2017. Mobile data will grow at a CAGR of 0.7% during 2017-2022, driven by rapid growth of smartphones and growing adopton of LTE/LTE-A services. Going forward, operators will focus on investments in LTE and fiber-optic network expansions to increase broadband penetration in the country.

The Country Intelligence Report provides in-depth analysis of the following -

Demographic and macroeconomic context in South Africa.

The regulatory environment and trends: a review of the regulatory setting and agenda for the next 18-24 months as well as relevant developments pertaining to spectrum licensing, national broadband plans, tariff regulation and more.

Telecom services market outlook: analysis as well as historical figures and forecasts of service revenue from the fixed telephony, broadband, mobile voice, mobile data and

pay-TV markets.

The competitive landscape: an examination of the positioning of leading players in terms of revenue market shares across segments in the telecom services market.

Company snapshots: analysis of the financial position of leading service providers in the telecommunications markets.

Underlying assumptions behind our published base-case forecasts, as well as potential market developments that would alter, either positively or negatively, our base-case outlook.

Scope

The overall telecom service revenue in South Africa will decline at a CAGR of 3.6% during 2017-2022.

Mobile revenue will account for 76.6% of the total telecom revenue in 2022, driven by a projected rise in adoption of LTE/LTE-A services.

3G will be the leading mobile technology segment by subscriptions over 2018-2022. Increasing demand for faster data services and LTE network expansion will drive 4G subscriber growth over the forecast period.

The top three mobile operators, Vodacom South Africa, MTN South Africa and CELL C, will account for 94.2% share of overall mobile subscriptions in 2017. Operators will continue to focus on network investments and coverage expansion, fiber deployments and appealing prepaid and postpaid plus value-added services offerings to acquire customers and drive telecom market revenue.

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