

Africa - Mobile Network Operators and MVNOs

<https://marketpublishers.com/r/AED38986036FEN.html>

Date: May 2019

Pages: 550

Price: US\$ 3,000.00 (Single User License)

ID: AED38986036FEN

Abstracts

The report provides key information about the mobile operators in Africa. Topics covered include:

Brief company history and shareholder structure;

Licences and technology deployments;

Subscriber evolution;

Average Revenue per User (ARPU);

Market position.

The countries covered in this report include: Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Chad, Cote d'Ivoire, Democratic Republic of Congo, Djibouti, Egypt, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Senegal, Sierra Leone, South Africa, Sudan, South Sudan, Swaziland, Tanzania, Tunisia, Uganda, Zambia, Zimbabwe.

EXECUTIVE SUMMARY

Major MNOs in Africa seek to rationalise business markets

Africa is a region in which mobile telephony infrastructure is the mainstay for telecom services. In some markets up to 99% of voice and data connections are via mobile networks. This reflects the relative success of network deployments as much as the

very poor condition of fixed-line infrastructure, which has suffered from neglect, under investment or destruction resulting from intermittent wars and civil dislocations. In a number of countries which remain war-torn or politically unstable - particularly in the Horn of Africa and in areas of Libya, the DRC, Cameroon and Burkina Faso – there are few inducements to extend fixed line services. Additional difficulties are the absence of reliable electricity and the low use of computers.

The size and range of the diverse markets within Africa have contributed to varied market penetration rates between countries. By early 2019 the highest mobile penetration was found in countries including South Africa (169%), Botswana (160%), Gabon (159%), and Mauritius (147%). To some degree high penetration reflects the popularity of consumers having multiple SIM cards despite efforts among most regulators to enforce measures by which operators must register SIM card users. These efforts are partly geared to removing dormant SIM cards from operators' databases, and thereby providing a more accurate impression of market dynamics. There are also widely-held concerns among governments that crime, civil disturbances and terrorism can be facilitated or orchestrated via the use of mobile phones and that such activities can be curtailed by enforcing the registration of subscribers' identities.

At the other end of the scale there are a number of countries in which far greater government direction, market competition and regulatory oversight are required for the local mobile markets to develop further. Some of the lowest penetration rates on the continent are in Madagascar and Malawi (both at about 35%), Chad and Djibouti (both at 41%), and Niger (49%). A number of other countries are notable for having suffered from considerable civil and economic disruption, including South Sudan and Eritrea (both at 11%).

The mobile market in Africa is almost entirely prepaid. Commonly, about 99% of all subscribers are prepaid since this offer a far more economically manageable means to gain access to voice and data services than does a contract plan. In addition, year-on-year a greater proportion of the continent's population is able to afford mobile services, leading to a steady increase in the subscriber base. Affordability has been extended by the positive effects on pricing from market competition and by measures to reduce termination rates. In addition, many countries have signed up to regional agreements aimed at reducing international roaming charges. Regional roaming initiatives reduce charges for customers, increase regulated traffic, and curtail grey traffic (the re-origination of long-distance calls). The East Africa One Network Area has been in effect since April 2016, while the Economic Community of West African States (ECOWAS) came into play in December 2016. The Common Market for Eastern and Southern

Africa (COMESA) provides a similar agreement (signed in October 2017) among its 19-member bloc, stretching from Libya in the north to eSwatini (Swaziland) in the south.

While network operators have seen reduced revenue from roaming access, this has generally been recouped from a sharp increase in international traffic.

A few countries within Africa retain incumbent monopolies for the provision of services, while others have seen consolidation among players (largely due to operators such as Airtel and Tigo leaving certain markets, or the failure of some poorly managed enterprises). In sum, though, there is effective competition within the mobile sector across the region. This has also encouraged competition for services based on upgraded technologies, which in turn has encouraged investment. Africa remains the main region globally for m-money and m-banking services, for example, and while there is little focus on 5G deployments as yet there is considerable effort being undertaken to upgrade networks from 3G infrastructure to LTE. This process is uneven, since in many areas GSM remains the dominant technology. While MNOs are keen to invest in LTE and so capitalise on the revenue potential of mobile data services, they face difficulties related to the paucity of spectrum and delays in auctioning additional spectrum needed to extend services and upgrade network capacity.

The countries covered in this report include: Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Chad, Cote d'Ivoire, Democratic Republic of Congo, Djibouti, Egypt, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Senegal, Sierra Leone, South Africa, South Sudan, Sudan, Swaziland, Tanzania, Tunisia, Uganda, Zambia, Zimbabwe.

Contents

Regional mobile market overview
Leading mobile operators by country
Africa Telecoms Maturity Index
Africa Telecom Maturity Index by tier
Africa Telecom Maturity Index by region
TMI versus GDP
Mobile and mobile broadband penetration
Africa fixed and mobile broadband penetration
Algeria
Market analysis
Operator statistics
Algerie Telecom (Mobilis)
Optimum Telecom Algerie (Djezzy)
Wataniya Telecom (Nedjma, Ooredoo)
Angola
Market analysis
Movitel (Angola Telecom)
Unitel
Benin
Market analysis
Operator statistics
MTN (Spacetel-Benin, Areeba)
Moov
Libercom (Benin Telecoms)
BBCOM (Bell Benin)
Glo Mobile Benin (Globacom)
Botswana
Recent developments
Market analysis
Operator statistics
Mascom Wireless
Orange Botswana (formerly Vista Cellular)
BTC (beMobile)
MVNOs
Burkina Faso
Market analysis
Operator statistics

Orange Burkina Faso (formerly Airtel, Zain, Celtel)

Telmob (Onatel)

Moov (Telecel)

Cameroon

Market analysis

Operator statistics

MTN Cameroon

National backbone

Orange Cameroon

Nextell Cameroon (Viettel)

Camtel Mobile

Mobile Virtual Network Operators (MVNO)

Chad

Market analysis

Operator statistics

Airtel Chad

Tigo Chad

Salam Mobile

Tchad Mobile (defunct)

Cote d'Ivoire

Mobile market

Operator statistics

Mobile operators overview

MTN C?te d'Ivoire (formerly Loteny)

Orange CI

Comium (KoZ)

Moov (Etisalat)

Green Network (Oricel, Lap Green)

Warid Telecom

Globacom

Democratic Republic of Congo

Market analysis

Operator statistics

Major mobile operators

Vodacom Congo

Bharti Airtel (formerly Zain, Celtel)

Tigo (Millicom, Oasis)

Orange DRC (CCT)

Africell

Djibouti
Market Overview
Egypt
Market analysis
Operator statistics
Orange Egypt (Mobinil, ECMS)
Network development
ARPU and usage
Vodafone Egypt
Etisalat Misr
Telecom Egypt
Eritrea
Market overview
Privatisation of EriTel
Operator statistics - EriTel
Ethiopia
Market analysis
Operator statistics – Ethio Telecom
Gabon
Market analysis
Operator statistics
Airtel Gabon (formerly Zain, Celtel)
Libertis (Gabon Telecom)
Moov (Telecel Gabon)
Azur (USAN, BinTel)
Gambia
Market analysis
Gamcel
Africell
Comium
QCell
Ghana
Market analysis
Operator statistics
Vodafone Ghana (Ghana Telecom, OneTouch)
MTN Ghana (formerly ScanCom, Spacefon Areeba)
Tigo Ghana (Millicom Ghana, Mobitel)
Merger with Airtel Ghana
Expresso

Airtel Ghana (Zain/Celtel, Westel)
Glo Mobile
Mobile Virtual Network Operators (MVNOs)
Guinea
Market analysis
Operator statistics
MTN Guinea (Areeba)
Sotelgui (Lagui)
Orange Guinea (formerly Spacetel Guinee)
Intercel Guinea (formerly T?l?cel Guinea)
Cellcom Guinee
Kenya
Market analysis
Operator statistics
Safaricom
Privatisation and IPO
Airtel Kenya (formerly Zain, Celtel, KenCell)
Essar Telecom Kenya (yuMobile, formerly Econet)
Telkom Kenya
Mobile Virtual Network Operators (MVNOs)
Lesotho
Market analysis
Vodacom Lesotho
ETL
Liberia
Market analysis
MTN Liberia (LoneStar)
Orange Liberia (Cellcom)
Novafone GSM (Comium)
LiberCell
JamCell
Libya
Market analysis
Al-Madar
Libyana
LibyaPhone
Madagascar
Market analysis
Airtel Madagascar (formerly Madacom, Zain/Celtel)

Orange Madagascar (formerly SMM)
Telma Mobile (Telecom Malagasy)
Madamobil
Blueline
Malawi
Market analysis
TNM
Airtel Malawi (formerly Zain, Celtel)
G-Mobile (GAIN)
Celcom Malawi
Lacell Private (Smart Mobile)
Mali
Market analysis
Malitel
Orange Mali (formerly Ikatel)
Alpha Telecom Mali
Mobile Virtual Network Operators (MVNOs)
Mauritania
Market analysis
Mauritel Mobiles
Mattel
Chinguitel
Mauritius
Market analysis
My.t (Orange, MT, Cellplus)
Emtel
Mahanagar (MTML)
Morocco
Market analysis
Itissalatt Al-Maghrib (IAM, Maroc Telecom)
Orange Morocco (M?ditel)
Inwi (Wana)
Mozambique
Market analysis
mCel
Vodacom Mozambique
Movitel
Namibia
Market analysis

MTC

Telecom Namibia Mobile (Cell One, Leo)

Paratus Telecom

MVNOs

Niger

Market Analysis

Operator statistics

Airtel Niger (formerly Celtel/Zain)

Orange Niger

Moov Niger

Niger Telecom

Nigeria

Market analysis

Major GSM mobile operators

MTN Nigeria

Bharti Airtel (formerly Zain/Celtel Nigeria)

Globacom

9Mobile (Etisalat Nigeria, EMTS, Mubadala)

M-Tel

Major CDMA mobile operators

Multi-Links Telkom

Reliance Telecommunications (Reltel, Zoom)

Starcomms (Capcom)

InterC Network (Intercellular Nigeria)

Visafone

Rwanda

Market analysis

Operator statistics

MTN Rwanda

Rwandatel (formerly Terracom Mobile)

Tigo Rwanda

Airtel Rwanda

Senegal

Market analysis

Operator statistics

Orange Senegal (Sonatel Mobiles)

Tigo Senegal (Sentel GSM)

Expresso (Sudatel)

Hayo Telecom

Mobile Virtual Network Operators (MVNOs)

Sierra Leone

Market analysis

Mobile licensing

Orange Sierra Leone (formerly Zain, Celtel)

Comium

Africell (Lintel)

Sierratel

Cellcom

Ambitel/GreenN

Smart Mobile

QCell

South Africa

Market analysis

Vodacom South Africa

MTN South Africa

Cell C

Telkom Mobile

Mobile Virtual Network Enablers (MVNEs)

Mobile Virtual Network Operators (MVNOs)

South Sudan

Market analysis

VivaCell

Gemtel

Zain South Sudan

MTN South Sudan

Sudani (Sudatel)

Sudan

Market analysis

Operator statistics

Zain Sudan

MTN Sudan (Bashair Telecom, Investcom/Areeba)

Sudani (Sudatel)

Swaziland

Market analysis

Swazi MTN

SPTC

Swazi Mobile

Tanzania

Market analysis

Operator statistics

TTC Mobile

Vodacom Tanzania

Bharti Airtel (formerly Zain, Celtel)

Millicom Tanzania (Mobitel, Tigo)

Zanzibar Telecommunication (Zantel)

Halotel (Viettel Tanzania0

Mobile Virtual network Operators (MVNOs)

Tunisia

Market analysis

Operator statistics

Tunicell (Tunisie Telecom)

Ooredoo (Tunisian)

Shareholder structure and major equity transactions

Network infrastructure

Orange Tunisie

Mobile Virtual Network Operators (MVNOs)

Uganda

Market analysis

MTN Uganda

Infrastructure

Airtel Uganda (formerly Zain, Celtel)

Infrastructure

Warid Telecom

Uganda Telecom (UTL)

Africell (Orange Uganda)

Smile Communications

Smart Telecom, Sure Telecom

Vodafone Uganda

Mobile Virtual Network Operators (MVNOs)

K2 Telecom

Zambia

Market analysis

Airtel Zambia (formerly Zain/Celtel, Zamcell)

Network development

MTN Zambia (formerly Telecel)

Zamtel Mobile (formerly Cell Z)

Vodafone Zambia

UZI Zambia
Zimbabwe
Market analysis
Operator statistics
Econet Wireless Zimbabwe (EWZ)
NetOne
Telecel Zimbabwe
Company sale
Mobile Virtual Network operators (MVNOs)

LIST OF EXHIBITS

Exhibit 1 – Generalised Market Characteristics by Market Segment
Exhibit 2 – Swazi MTN licence conditions
Exhibit 3 – Tanzania - Emergency rescue scheme for Lake Victoria
Exhibit 4 – Vodacom – in and out and back in Zambia

List Of Tables

LIST OF TABLES

- Table 1 – Africa – leading MNOs – 2012 - 2018
- Table 2 – MTN mobile subscribers by country – 2013 – 2018
- Table 3 – Orange Group mobile subscribers by country – 2013 - 2018
- Table 4 – Etisalat mobile subscribers by country – 2012 – 2018
- Table 5 – Zain mobile subscribers by country – 2012 – 2018
- Table 6 – Vodacom mobile subscribers by country – 2012 – 2018
- Table 7 – Airtel mobile subscribers by country – 2012 – 2018
- Table 8 – Algeria - Mobile market share of subscribers by operator – 2009 – 2016
- Table 9 – Algeria - Mobilis subscribers – 2009 – 2017
- Table 10 – Algeria - Djezzy subscribers – 2002 – 2018
- Table 11 – Algeria - Djezzy financial data (DZD) – 2008 – 2018
- Table 12 – Algeria - Djezzy financial data (USD) – 2013 – 2018
- Table 13 – Algeria - Djezzy blended ARPU – 2012 – 2018
- Table 14 – Algeria - Ooredoo financial data (QAR) – 2009 – 2018
- Table 15 – Algeria - Ooredoo blended ARPU – 2009 – 2018
- Table 16 – Algeria - Ooredoo mobile subscribers – 2005 – 2018
- Table 17 – Algeria - Ooredoo wireless broadband subscribers – 2014 – 2018
- Table 18 – Angola - Movitel mobile subscribers – 2014 – 2018
- Table 19 – Angola - Unitel mobile subscribers – 2014 – 2017
- Table 20 – Benin - Mobile market share of subscribers by operator – 2012 – 2018
- Table 21 – MTN Benin subscribers and ARPU – 2003 – 2018
- Table 22 – MTN Benin revenue – 2011 – 2018
- Table 23 – Benin - Moov subscribers – 2011 – 2018
- Table 24 – Benin - Libercom subscribers – 2011 – 2018
- Table 25 – Benin - BBCom subscribers – 2011 – 2015
- Table 26 – Benin - Glo Mobile subscribers – 2011 – 2017
- Table 27 – Botswana - Mobile market share of subscribers by operator – 2010 – 2018
- Table 28 – Mascom Botswana ARPU – 2005 – 2018
- Table 29 – Mascom Botswana subscribers – 2011 – 2018
- Table 30 – Mascom Botswana revenue – 2015 – 2018
- Table 31 – Orange Botswana subscribers – 2007 – 2018
- Table 32 – Orange Botswana mobile revenue (historic) – 2008 – 2014
- Table 33 – Botswana - BTC subscribers – 2012 – 2018
- Table 34 – Botswana - BTC mobile revenue by service – 2015 – 2018
- Table 35 – Botswana - BTC mobile revenue by service – 2015 – 2018

- Table 36 – Burkina Faso - Mobile operator market share of subscribers – 2011 – 2017
- Table 37 – Orange Burkina Faso mobile subscribers – 2006 – 2018
- Table 38 – Orange Burkina Faso financial data – 2016 – 2018
- Table 39 – Burkina Faso - Onatel mobile subscribers – 2007 – 2018
- Table 40 – Burkina Faso - Onatel revenue – 2011 – 2014
- Table 41 – Burkina Faso - Historic - Onatel annualised ARPU – 2011 – 2015
- Table 42 – Burkina Faso - Historic – Telecel mobile subscribers – 2007 – 2010
- Table 43 – Cameroon - Mobile market share of subscribers by operator – 2015 – 2017
- Table 44 – Cameroon - Mobile market share of revenue by operator – 2014 – 2017
- Table 45 – MTN Cameroon ARPU (\$) – 2003 – 2018
- Table 46 – MTN Cameroon ARPU (CFA) – 2013 – 2018
- Table 47 – MTN Cameroon financial data – 2011 – 2018
- Table 48 – MTN Cameroon revenue by type – 2015 – 2018
- Table 49 – MTN Cameroon revenue (XAF) – 2016 – 2018
- Table 50 – MTN Cameroon subscribers – 2012 – 2018
- Table 51 – Orange Cameroon mobile subscribers – 2012 – 2018
- Table 52 – Orange Cameroon revenue – 2012 – 2018
- Table 53 – Orange Cameroon annualised ARPU – 2012 – 2017
- Table 54 – Nextell Cameroon mobile subscribers – 2014 – 2018
- Table 55 – Chad - Mobile base stations in service - 2000 – 2015
- Table 56 – Chad - Mobile market share of subscribers by operator – 2010 – 2015
- Table 57 – Chad - Mobile voice traffic by operator – 2011 – 2015
- Table 58 – Airtel Chad subscribers – 2005 - 2017
- Table 59 – Tigo Chad subscribers – 2008 – 2017
- Table 60 – Chad - Salam Mobile subscribers – 2012 – 2017
- Table 61 – Tchad Mobile (defunct) subscribers – 2001 – 2004
- Table 62 – Cote d'Ivoire - Mobile market share of subscribers by operator – 2012 – 2018
- Table 63 – MTN C?te d'Ivoire subscribers – 2002 – 2018
- Table 64 – MTN C?te d'Ivoire revenue – 2012 – 2018
- Table 65 – MTN C?te d'Ivoire ARPU – 2005 – 2018
- Table 66 – Orange C?te d'Ivoire subscribers – 2002 – 2018
- Table 67 – Orange C?te d'Ivoire revenue – 2011 – 2018
- Table 68 – Comium C?te d'Ivoire subscribers – 2007 – 2016
- Table 69 – Cote d'Ivoire - Moov subscribers – 2012 – 2018
- Table 70 – Cote d'Ivoire - Green mobile subscribers – 2012 – 2016
- Table 71 – Major mobile operator launch dates in the DRC
- Table 72 – Vodacom Congo subscribers – 2002 – 2018
- Table 73 – Vodacom Congo active data subscribers – 2013 – 2018

- Table 74 – Vodacom Congo ARPU – 2003 – 2018
- Table 75 – Vodacom Congo ARPU (ZAR) – 2012 – 2018
- Table 76 – Vodacom Congo mobile revenue – 2016 – 2018
- Table 77 – DRC - Airtel mobile subscribers – 2014 – 2018
- Table 78 – DRC - Historic - Tigo subscribers – 2010 – 2015
- Table 79 – Orange DRC subscribers – 2012 – 2018
- Table 80 – Orange DRC revenue – 2013 – 2018
- Table 81 – DRC - Africell mobile subscribers – 2014 – 2018
- Table 82 – Egypt - Mobile market share of subscribers – 2014 – 2018
- Table 83 – Orange Egypt subscribers – 2000 – 2018
- Table 84 – Orange Egypt consolidated financial results (EGP) – 2002 – 2018
- Table 85 – Orange Egypt financial results (€) – 2012 – 2018
- Table 86 – Orange Egypt blended monthly ARPU (€) – 2012 – 2017
- Table 87 – Vodafone Egypt financials (?) – 2013 – 2019
- Table 88 – Vodafone Egypt financials (EGP) – 2012 – 2018
- Table 89 – Vodafone Egypt mobile data traffic – 2013 – 2018
- Table 90 – Vodafone Egypt subscribers – 2000 – 2018
- Table 91 – Vodafone Egypt blended monthly ARPU – 2003 – 2018
- Table 92 – Egypt - Etisalat Misr financial data – 2011 – 2018
- Table 93 – Egypt - Etisalat Misr mobile subscribers – 2012 – 2018
- Table 94 – Telecom Egypt mobile subscribers – 2016 – 2018
- Table 95 – Eritrea - Telecom services revenue by platform – 2001 – 2015
- Table 96 – Eritrea - Telecom services investment – 2001 – 2015
- Table 97 – Mobile subscribers and penetration rate in Eritrea – 2004 – 2018
- Table 98 – Ethiopia - Historic - Mobile subscribers and penetration rate – 1999 – 2009
- Table 99 – Ethiopia - Mobile subscribers and penetration rate – 2010 - 2019
- Table 100 – Gabon - Mobile market share by operator – 2011 – 2018
- Table 101 – Gabon - Mobile market share by operator – 2011 – 2018
- Table 102 – Airtel Gabon subscribers – 2002 – 2018
- Table 103 – Gabon - Libertis subscribers – 2007 – 2018
- Table 104 – Gabon - Libertis mobile revenue – 2011 – 2014
- Table 105 – Gabon - Libertis annualised mobile ARPU – 2013 – 2015
- Table 106 – Gabon - Historic - Moov subscribers – 2010 – 2015
- Table 107 – Gabon - Historic - Moov mobile ARPU – 2014 – 2015
- Table 108 – Gabon - Azur subscribers – 2010 – 2017
- Table 109 – Gambia - Gamcel mobile subscribers – 2012 – 2018
- Table 110 – Gambia - Africell mobile subscribers – 2013 – 2018
- Table 111 – Gambia - Comium mobile subscribers – 2012 – 2018
- Table 112 – Gambia - QCell mobile subscribers – 2012 – 2018

- Table 113 – Ghana - Mobile voice subscribers by operator – 2011 – 2018
- Table 114 – Ghana - Mobile voice subscriber market share by operator – 2011 – 2018
- Table 115 – Ghana - Overview of mobile network launch dates
- Table 116 – Vodafone Ghana subscribers – 2008 – 2018
- Table 117 – MTN Ghana financial data – 2011 – 2018
- Table 118 – MTN Ghana revenue by type – 2015 – 2018
- Table 119 – MTN Ghana mobile subscribers – 2012 – 2018
- Table 120 – MTN Ghana ARPU – 2002 – 2018
- Table 121 – Tigo Ghana mobile subscribers (regulator data) – 2013 – 2017
- Table 122 – Tigo Ghana mobile subscribers (company data) – 2010 – 2017
- Table 123 – Espresso Ghana mobile subscribers – 2013 – 2017
- Table 124 – Airtel Ghana (Airtel Tigo) mobile subscribers – 2013 – 2018
- Table 125 – Glo Mobile subscribers – 2013 – 2018
- Table 126 – Guinea - Cumulative mobile market investment by operator – 2010 – 2017
- Table 127 – Guinea - Mobile market revenue by operator – 2012 – 2017
- Table 128 – Guinea - Mobile market share of revenue by operator – 2012 – 2018
- Table 129 – Guinea - Mobile market share of subscribers by operator – 2012 – 2018
- Table 130 – Guinea - Mobile coverage of main towns by operator – 2011 – 2018
- Table 131 – MTN Guinea financial data – 2011 – 2018
- Table 132 – MTN Guinea financial data (9GNF) – 2017 – 2018
- Table 133 – MTN Guinea subscribers and ARPU – 2006 – 2018
- Table 134 – Orange Guinea subscribers – 2007 – 2018
- Table 135 – Orange Guinea revenue – 2012 – 2018
- Table 136 – Guinea - Intercel mobile subscribers – 2013 – 2018
- Table 137 – Guinea - Cellcom mobile subscribers – 2013 – 2018
- Table 138 – Kenya - Mobile services revenue and investments – 2009- 2017
- Table 139 – Kenya - Mobile traffic share by operator – 2014 – 2018
- Table 140 – Kenya - Market share of subscribers by operator – 2010 – 2018
- Table 141 – Kenya - Safaricom revenue – 2011 – 2019
- Table 142 – Kenya - Safaricom revenue by sector – 2010 – 2019
- Table 143 – Kenya - Safaricom - proportion of service revenue by sector – 2014 – 2019
- Table 144 – Kenya - Safaricom subscribers – 2010 – 2018
- Table 145 – Kenya - Safaricom base stations by technology – 2013 – 2018
- Table 146 – Airtel Kenya subscribers – 2010 – 2018
- Table 147 – Kenya - Historic - Essar Telecom subscribers – 2010 – 2014
- Table 148 – Telkom Kenya revenue – 2010 – 2014
- Table 149 – Telkom Kenya mobile subscribers – 2011 – 2018
- Table 150 – Kenya - Finserve Africa mobile subscribers – 2014 – 2018
- Table 151 – Vodacom Lesotho subscribers and churn rate – 2002 – 2018

- Table 152 – Vodacom Lesotho active data subscribers – 2014 – 2018
- Table 153 – Vodacom Lesotho ARPU – 2011 – 2018
- Table 154 – Vodacom Lesotho revenue – 2017 – 2018
- Table 155 – Lesotho - ETL mobile subscribers – 2014 – 2016
- Table 156 – Liberia - LoneStar/MTN Liberia subscribers, ARPU and market share – 2003 – 2018
- Table 157 – Liberia - LoneStar/MTN Liberia revenue – 2013 – 2018
- Table 158 – Liberia - Cellcom mobile subscribers – 2012 - 2018
- Table 159 – Liberia - Novafone mobile subscribers – 2013 – 2016
- Table 160 – Libya - Al-Madar mobile subscribers – 2013 -
- Table 161 – Libyana mobile subscribers – 2013 - 2018
- Table 162 – Madagascar - Mobile network coverage by technology and operator – 2017
- Table 163 – Zain Madagascar financial data before takeover – 2006 – 2009
- Table 164 – Airtel Madagascar mobile subscribers – 2013 – 2018
- Table 165 – Orange Madagascar subscribers and ARPU – 2007 – 2018
- Table 166 – Orange Madagascar revenue – 2012 – 2014
- Table 167 – Madagascar - Telma Mobile mobile subscribers – 2013 – 2018
- Table 168 – Malawi - TNM financial results – 2009 – 2018
- Table 169 – Malawi - TNM ARPU (\$) – 2003 – 2013
- Table 170 – Malawi - TNM ARPU (MWK) – 2014 – 2016
- Table 171 – Malawi - TNM mobile subscribers – 2012 – 2017
- Table 172 – Malawi - TNM mobile bases stations in service – 2014 – 2016
- Table 173 – Airtel Malawi mobile subscribers – 2016 – 2017
- Table 174 – Malitel mobile subscribers – 2005 – 2018
- Table 175 – Malitel mobile revenue – 2012 – 2014
- Table 176 – Orange Mali mobile subscribers – 2007 – 2018
- Table 177 – Orange Mali revenue (€) – 2007 – 2018
- Table 178 – Orange Mali revenue (XOF) – 2005 – 2014
- Table 179 – Orange Mali ARPU (€) – 2014 – 2016
- Table 180 – Mauritel Mobiles mobile subscribers – 2013 – 2018
- Table 181 – Mauritania - Mattel mobile subscribers – 2013 – 2018
- Table 182 – Mauritania - Chinguitel mobile subscribers – 2013 – 2018
- Table 183 – Mauritius - my-t mobile revenue – 2015 – 2017
- Table 184 – Mauritius - my-t mobile subscribers – 2011 – 2017
- Table 185 – Mauritius - my-t mobile subscribers (Orange Group own share) – 2015 – 2017
- Table 186 – Mauritius - Emtel mobile subscribers – 2010 – 2014
- Table 187 – Morocco - Maroc Telecom mobile subscribers and market share – 2002 – 2018

- Table 188 – Morocco - Maroc Telecom mobile subscribers by platform – 2012 – 2018
- Table 189 – Morocco - Maroc Telecom ARPU, churn rate – 2003 – 2018
- Table 190 – Morocco - Maroc Telecom domestic mobile revenue – 2005 – 2018
- Table 191 – Orange Morocco mobile subscribers and market share – 2002 – 2017
- Table 192 – Orange Morocco mobile subscribers (company data) – 2016 – 2018
- Table 193 – Orange Morocco revenue – 2015 – 2018
- Table 194 – Morocco - Inwi mobile subscribers and market share – 2011 – 2017
- Table 195 – Mozambique - Mobile market revenue – 2012 – 2016
- Table 196 – Mozambique - mCel mobile subscribers – 2010 – 2017
- Table 197 – Historical - Vodacom Mozambique financial results (ZAR) – 2007 – 2010
- Table 198 – Vodacom Mozambique financial data (MZM) – 2016 – 2018
- Table 199 – Vodacom Mozambique subscribers – 2008 – 2018
- Table 200 – Vodacom Mozambique data subscribers – 2013 – 2018
- Table 201 – Vodacom Mozambique ARPU – 2008 – 2018
- Table 202 – Mozambique - Movitel mobile subscribers – 2012 – 2017
- Table 203 – Namibia - MTC mobile subscribers – 2005 – 2016
- Table 204 – Namibia - MTC mobile financial data – 2005 – 2017
- Table 205 – Telecom Namibia mobile subscribers – 2015 – 2017
- Table 206 – Niger - Mobile BTS in service by operator – 2012 – 2017
- Table 207 – Niger - Mobile market share of subscribers by operator – 2009 – 2018
- Table 208 – Niger - Mobile market share of subscribers by operator – 2009 – 2018
- Table 209 – Airtel Niger mobile subscribers – 2012 – 2018
- Table 210 – Orange Niger revenue – 2015 – 2018
- Table 211 – Orange Niger mobile subscribers – 2009 – 2018
- Table 212 – Moov Niger mobile subscribers – 2009 – 2018
- Table 213 – Niger Telecom mobile subscribers – 2009 – 2018
- Table 214 – Nigeria - MTN mobile subscribers – 2011 – 2018
- Table 215 – MTN Nigeria financial data – 2010 – 2018
- Table 216 – MTN Nigeria revenue by type – 2015 – 2018
- Table 217 – MTN Nigeria ARPU – 2002 – 2018
- Table 218 – Nigeria - Airtel mobile subscribers – 2011 – 2018
- Table 219 – Nigeria - Globacom mobile subscribers – 2011 – 2018
- Table 220 – Nigeria - Etisalat mobile subscribers – 2011 – 2018
- Table 221 – Nigeria - 9Mobile mobile revenue and capex – 2013 – 2017
- Table 222 – Nigeria - CDMA subscribers by operator – 2011 – 2017
- Table 223 – Nigeria - Historic - Starcomms mobile subscribers – 2005 – 2014
- Table 224 – Nigeria - Visafone mobile subscribers – 2009; 2013 – 2017
- Table 225 – Rwanda - Prepaid and contract mobile subscribers – 2016 – 2019
- Table 226 – Rwanda - Mobile call tariff – 2009 – 2017

- Table 227 – Rwanda - Mobile sector revenue – 2015 – 2018
- Table 228 – Rwanda - Mobile geographic coverage by operator –2018
- Table 229 – Rwanda - Mobile population coverage by operator – 2018
- Table 230 – Rwanda - Mobile subscribers by operator (regulator data) – 2009 – 2018
- Table 231 – Rwanda - Mobile market share of subscribers by operator – 2011- 2019
- Table 232 – MTN Rwanda ARPU – 2002 – 2018
- Table 233 – MTN Rwanda financial data – 2011 – 2018
- Table 234 – MTN Rwanda subscribers – 2012 – 2019
- Table 235 – Tigo Rwanda B2C subscribers – 2010 – 2017
- Table 236 – Tigo Rwanda mobile subscribers – 2015 – 2018
- Table 237 – Airtel Rwanda subscribers – 2010 – 2019
- Table 238 – Senegal - Market share of subscribers by operator – 2011 – 2018
- Table 239 –Orange Senegal mobile subscribers – 1999 – 2018
- Table 240 – Orange Senegal mobile revenue (€) – 2011 – 2018
- Table 241 – Orange Senegal prepaid mobile ARPU (XOF) – 2011 – 2018
- Table 242 – Orange Senegal blended mobile ARPU (€) – 2012 – 2016
- Table 243 – Orange Senegal prepaid ARPU (XOF) – 2016 – 2018
- Table 244 – Senegal - Tigo mobile subscribers – 2010 – 2018
- Table 245 – Senegal - Espresso mobile subscribers – 2011 – 2018
- Table 246 – Sierra Leone - GSM licence awards and operations in Sierra Leone
- Table 247 – Sierra Leone - Historic - Celtel/Zain SL subscribers and market share – 2003 – 2009
- Table 248 – Orange Sierra Leone mobile subscribers – 2016 – 2018
- Table 249 – Vodacom South Africa mobile revenue – 2010 – 2019
- Table 250 – Vodacom South Africa subscribers and market share – 2002 - 2018
- Table 251 – Vodacom South Africa mobile data subscribers – 2013 – 2018
- Table 252 – MTN South Africa subscribers and market share – 2002 – 2018
- Table 253 – MTN South Africa financial data – 2012 – 2018
- Table 254 – MTN South Africa mobile ARPU – 2013 – 2018
- Table 255 – South Africa - Cell C mobile subscribers – 2013 – 2018
- Table 256 – South Africa - Cell C mobile service revenue – 2013 – 2018
- Table 257 – South Africa - Cell C mobile data revenue – 2017 – 2018
- Table 258 – South Africa - Cell C financial data – 2016 – 2017
- Table 259 – South Africa - Telkom mobile subscribers – 2009 – 2018
- Table 260 – South Africa - Telkom prepaid and contract mobile subscribers – 2015 – 2018
- Table 261 – South Africa - Telkom mobile financial data – 2014 - 2019
- Table 262 – South Africa - Telkom mobile ARPU – 2014 – 2019
- Table 263 – South Africa - Telkom mobile data traffic – 2017 – 2019

- Table 264 – VivaCell South Sudan subscribers – 2013 – 2017
- Table 265 – Zain South Sudan subscribers and ARPU – 2012 – 2018
- Table 266 – Zain South Sudan financial data – 2012 – 2016
- Table 267 – MTN South Sudan revenue (ZAR) – 2015 – 2018
- Table 268 – MTN South Sudan subscribers – 2012 – 2018
- Table 269 – MTN South Sudan ARPU – 2014 – 2018
- Table 270 – Sudan - Mobile market share of subscribers by operator – 2011 – 2017
- Table 271 – Zain Sudan subscribers and ARPU – 2003 – 2018
- Table 272 – Zain Sudan financial data (\$) – 2013 – 2017
- Table 273 – Zain Sudan financial data (SDG) – 2015 – 2018
- Table 274 – MTN Sudan subscribers and ARPU – 2006 – 2018
- Table 275 – MTN Sudan financial data – 2013 – 2018
- Table 276 – Sudani mobile subscribers – 2011 – 2018
- Table 277 – Swazi MTN subscribers – 2012 – 2018
- Table 278 – Swazi MTN revenue – 2015 – 2018
- Table 279 – Swazi MTN ARPU – 2001 – 2018
- Table 280 – Swazi Mobile subscribers – 2017 – 2018
- Table 281 – Tanzania - Mobile voice subscriber market share by operator – 2011 – 2018
- Table 282 – Tanzania - TTC mobile subscribers – 2006 – 2018
- Table 283 – Vodacom Tanzania subscribers – 2000 – 2018
- Table 284 – Vodacom Tanzania data subscribers – 2013 – 2016
- Table 285 – Vodacom Tanzania ARPU (\$) – 2003 – 2014
- Table 286 – Vodacom Tanzania ARPU (TZS) – 2011 – 2016
- Table 287 – Tanzania - Airtel subscribers – 2002 – 2018
- Table 288 – Millicom Tanzania mobile subscribers – 2000 – 2018
- Table 289 – Tanzania - Zantel mobile subscribers – 2000 – 2018
- Table 290 – Tanzania - Halotel mobile subscribers – 2015 – 2018
- Table 291 – Tunisia - Mobile market share of subscribers by operator – 2009 - 2019
- Table 292 – Tunisie Telecom mobile subscribers – 2010 - 2019
- Table 293 – Ooredoo Tunisia blended monthly ARPU (QR) – 2010 - 2018
- Table 294 – Ooredoo Tunisia revenue and EBITDA – 2010 - 2018
- Table 295 – Ooredoo Tunisia mobile subscribers – 2002 - 2018
- Table 296 – Orange Tunisie mobile subscribers – 2010 - 2019
- Table 297 – Lycamobile Tunisie mobile subscribers – 2015 - 2019
- Table 298 – MTN Uganda subscribers – 2000 – 2018
- Table 299 – MTN Uganda financial data – 2013 – 2018
- Table 300 – MTN Uganda ARPU – 2002 – 2018
- Table 301 – Airtel Uganda subscribers – 2002 – 2017

- Table 302 – Uganda - Telecel mobile subscribers – 2013 – 2017
- Table 303 – Africell Uganda mobile subscribers – 2009 – 2017
- Table 304 – Smile Uganda mobile subscribers – 2015 – 2017
- Table 305 – Vodafone Uganda mobile subscribers – 2015 – 2017
- Table 306 – Zambia - Annualised mobile ARPU – 2012 – 2017
- Table 307 – Airtel Zambia subscribers – 2014 – 2017
- Table 308 – MTN Zambia financial data– 2012 – 2018
- Table 309 – MTN Zambia subscribers – 2012 – 2018
- Table 310 – MTN Zambia mobile ARPU – 2013 – 2018
- Table 311 – Zamtel mobile revenue – 2012 – 2013
- Table 312 – Zamtel mobile subscribers – 2015 – 2017
- Table 313 – Zimbabwe - Market share of 2G base stations by operator – 2015 – 2018
- Table 314 – Zimbabwe - Market share of 3G base stations by operator – 2015 – 2018
- Table 315 – Zimbabwe - Market share of 4G base stations by operator – 2015 – 2018
- Table 316 – Zimbabwe - Active mobile subscriptions by operator– 2014 – 2017
- Table 317 – Zimbabwe - Operator market share of active mobile subscriptions – 2013 – 2018
- Table 318 – Zimbabwe - Econet Wireless financial data – 2010 – 2019
- Table 319 – Zimbabwe - Econet Wireless data revenue – 2010 – 2019
- Table 320 – Zimbabwe - Econet Wireless active mobile subscribers – 2010 – 2018
- Table 321 – Zimbabwe - NetOne active mobile subscribers – 2011 – 2018
- Table 322 – Zimbabwe - Telecel active mobile subscribers – 2011 – 2018

List Of Charts

LIST OF CHARTS

- Chart 1 – Africa Telecoms Maturity Index – Market Leaders (top tier)
- Chart 2 – Africa Telecoms Maturity Index – Market Challengers (middle tier)
- Chart 3 – Africa Telecoms Maturity Index – Market Emergents (bottom tier)
- Chart 4 – North Africa –Telecoms Maturity Index by country
- Chart 5 – West Africa –Telecoms Maturity Index by country
- Chart 6 – Southern Africa –Telecoms Maturity Index by country
- Chart 7 – Central Africa –Telecoms Maturity Index by country
- Chart 8 – East Africa –Telecoms Maturity Index by country
- Chart 10 – North Africa –Telecoms Maturity Index vs GDP per capita
- Chart 11 – West Africa –Telecoms Maturity Index vs GDP per capita
- Chart 12 – Southern Africa –Telecoms Maturity Index vs GDP per capita
- Chart 13 – Central Africa –Telecoms Maturity Index vs GDP per capita
- Chart 14 – East Africa –Telecoms Maturity Index vs GDP per capita
- Chart 15 – North Africa mobile subscriber penetration vs mobile broadband penetration
- Chart 16 – West Africa mobile subscriber penetration vs mobile broadband penetration
- Chart 17 – Southern Africa mobile subscriber penetration vs mobile broadband penetration
- Chart 18 – Central Africa mobile subscriber penetration vs mobile broadband penetration
- Chart 19 – East Africa mobile subscriber penetration vs mobile broadband penetration
- Chart 20 – North Africa fixed and mobile penetration rates
- Chart 21 – West Africa fixed and mobile penetration rates
- Chart 22 – Southern Africa fixed and mobile penetration rates
- Chart 23 – Central Africa fixed and mobile penetration rates
- Chart 24 – East Africa fixed and mobile penetration rates
- Chart 25 – Algeria - Djazzy financial data – 2013 – 2018
- Chart 26 – Algeria - Ooredoo financial data (QAR) – 2009 – 2018
- Chart 27 – Benin - Mobile market share of subscribers by operator – 2012 – 2018
- Chart 28 – Botswana - Mobile market share of subscribers by operator – 2010 – 2018
- Chart 29 – Botswana - BTC mobile revenue by service – 2015 – 2018
- Chart 30 – Burkina Faso - Mobile operator market share of subscribers – 2011 – 2017
- Chart 31 – Cote d'Ivoire - Mobile market share of subscribers by operator – 2012 – 2018
- Chart 32 – Orange C?te d'Ivoire revenue – 2011 – 2018
- Chart 33 – Orange Egypt financial results (EGP) – 2002 – 2018

- Chart 34 – Vodafone Egypt financials (?) – 2013 – 2018
- Chart 35 – Vodafone Egypt financials (EGP) – 2012 – 2018
- Chart 36 – Mobile subscribers and penetration rate in Eritrea – 2004 – 2018
- Chart 37 – Ethiopia - Mobile subscribers and penetration rate – 2005 – 2019
- Chart 38 – Ghana - Mobile voice subscribers by operator – 2011 – 2018
- Chart 39 – MTN Ghana financial data – 2011 – 2018
- Chart 40 – MTN Ghana revenue by type – 2015 – 2018
- Chart 41 – Guinea - Mobile market share of subscribers by operator – 2012 – 2018
- Chart 42 – Kenya - Market share of subscribers by operator – 2010 – 2018
- Chart 43 – Kenya - Safaricom revenue – 2011 – 2019
- Chart 44 – Kenya - Safaricom revenue by sector – 2010 – 2019
- Chart 45 – Kenya - Safaricom - proportion of service revenue by sector – 2014 – 2019
- Chart 46 – Malawi - TNM financial results – 2009 – 2018
- Chart 47 – Namibia - MTC mobile financial data – 2005 – 2017
- Chart 48 – MTN Nigeria financial data – 2010 – 2018
- Chart 49 – MTN Rwanda financial data – 2011 – 2018
- Chart 50 – Senegal - Market share of subscribers by operator – 2011 – 2018
- Chart 51 – Vodacom South Africa mobile revenue – 2010 – 2019
- Chart 52 – South Africa - Telkom mobile ARPU – 2014 – 2019
- Chart 53 – Swazi MTN revenue – 2015 – 2018
- Chart 54 – Tunisia - Mobile market share of subscribers by operator – 2009 – 2019
- Chart 55 – Ooredoo Tunisia financial data – 2010 – 2018
- Chart 56 – Ooredoo Tunisia mobile subscribers – 2002 - 2018
- Chart 57 – MTN Uganda financial data – 2013 – 2018
- Chart 58 – MTN Zambia financial data– 2012 – 2018
- Chart 59 – Zimbabwe - Active mobile subscriptions by operator– 2014 – 2018
- Chart 60 – Zimbabwe - Operator market share of active mobile subscriptions – 2013 – 2018
- Chart 61 – Zimbabwe - Econet Wireless financial data – 2010 – 2019

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