

Sudan - Telecoms, Mobile and Broadband - Statistics and Analyses

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Abstracts

The Sudan - Telecoms, Mobile and Broadband - Statistics and Analyses report includes all BuddeComm research data and analysis on this country. Covering trends and developments in telecommunications, mobile, internet, broadband, infrastructure and regulation.

EXECUTIVE SUMMARY

Sudan government encouraging digital payments

Sudan makes up the northern part of a country which in 2011 was separated to form the new state of South Sudan. Three quarters of the former population live in the north, where mobile market penetration is far higher. The country has a relatively well-equipped telecommunications infrastructure by regional standards, including a national fibre optic backbone and international fibre connections. In common with a few countries in Africa, including neighbouring Ethiopia, Sudan is developing space technologies in a bid to support economic growth and improve the capabilities of its military and agricultural sectors. A Chinese built satellite was launched (from China) in November 2019.

The economy has performed poorly in recent years, with hyperinflation resulting from the effects of having lost much of its oil reserves to South Sudan and to domestic volatility and social unrest. The country remains subject to United Nations Security Council (UNSC) sanctions which include (inter alia) an arms embargo, travel bans, and a freeze on certain assets.

Politically, the country remains in a transitional period initiated in August 2019 following

protests against authoritarian rule, including media and internet censorship.

The poor economic climate has made it difficult for operators to develop revenue from services and sufficiently invest in infrastructure upgrades. Nevertheless, Sudatel has invested in rural tower infrastructure to improve connectivity and has also contracted Nokia to upgrade mobile infrastructure and Liquid Telecom to build a fibre broadband network across the country.

BuddeComm notes that the outbreak of the Coronavirus in 2020 is having a significant impact on production and supply chains globally. During the coming year, the telecoms sector to various degrees is likely to experience a downturn in mobile device production, while it may also be difficult for network operators to manage workflows when maintaining and upgrading existing infrastructure. Overall progress towards 5G may be postponed or slowed down in some countries.

On the consumer side, spending on telecoms services and devices is under pressure from the financial effect of large-scale job losses and the consequent restriction on disposable incomes. However, the crucial nature of telecom services, both for general communication as well as a tool for home-working, will offset such pressures. In many markets the net effect should be a steady though reduced increased in subscriber growth.

Although it is challenging to predict and interpret the long-term impacts of the crisis as it develops, these have been acknowledged in the industry forecasts contained in this report.

The report also covers the responses of the telecom operators as well as government agencies and regulators as they react to the crisis to ensure that citizens can continue to make optimum use of telecom services. This can be reflected in subsidy schemes and the promotion of tele-health and tele-education, among other solutions.

Key developments:

Sudatel launches 'Gorooshi' m-money service;

Government promotes transition from cash to digital payments;

Hyperinflation causing dollar revenue decline for telcos;

Sudatel partners with Nokia to trial mobile broadband technologies, joins Liquid Telecom to build FttP networks across Sudan;

Regulator awards 2.5GHz spectrum licence to Canar Telecom for LTE services;

Sudatel announces \$267 million investment plan, contracts to build mobile towers in rural areas, launches LTA-A in Khartoum;

Zain Sudan expands LTE services under five-year investment program;

Report update includes operator data to Q2 2020, regulator's market data to Q3 2019, Telecom Maturity Index charts and analyses, assessment of the global impact of COVID-19 on the telecoms sector, recent market developments.

Companies mentioned in this report:

Zain Sudan, MTN Sudan, Sudatel, Sudani, Canar Telecom (Canartel), SudaNet, ZinaNet, Thuraya

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About

Following a referendum, in mid-2011 oil-rich South Sudan became the world's youngest independent state. Having been beyond the central government's control and deprived of development, it is establishing its own independent telecommunications sector, creating new opportunities for service providers and equipment suppliers.

Three quarters of the population are in the North where mobile market penetration is far higher. The North has a large, relatively well-equipped telecommunications system by regional standards, including a national fibre optic backbone and international fibre connections. The chronically poor performing economy has hindered the ability of operators to improve revenue from services and sufficiently invest in infrastructure upgrades, while social unrest in South Sudan continues to impose practical difficulties for telecom operators.

The national telco, Sudatel was privatised more than a decade ago, with major shares and management control now held by Etisalat of the UAE and by Qatar Telecom. It is also listed on several regional stock exchanges. The company presided over the world's fastest growing fixed-line market until it started substituting traditional copper lines with CDMA2000 fixed-wireless access in 2005.

Competition in the fixed-line market comes from Canartel, which is also majority-owned by Etisalat. The operator also opted for CDMA2000 technology to cost effectively roll out fixed services and, like Sudatel, offers wireless broadband services through this network, having upgraded to the EV-DO standard. The company is lobbying for a licence to offer mobile services as well but is meeting resistance from the other operators.

The market for mobile internet services is flourishing, and traffic for services such as SMS more than tripled in the year to June 2013.

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