

Tanzania - Telecoms, Mobile and Broadband - Statistics and Analyses

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Abstracts

Tanzania gaining further mobile market consolidation

Tanzania's telecom sector enjoys effective competition, particularly in the mobile segment. There remains considerable movement within it, with Smart having stopped services in late 2019 and Tigo having completed its merger with Zantel.

The government has encouraged foreign participation to promote economic growth and social development, and policy reforms have led to the country having one of the most liberal telecom sectors in Africa.

Tanzania only has one fixed-line operator, the incumbent TTC, after the second provider stopped offering fixed services. There are also several mobile service providers, with four additional players licensed under a new converged regulatory regime. Mobile penetration reached 85% by early 2020, and growth in the number of subscribers remains strong. In recent years a price war among these players has adversely affected the smaller operators (including Smart), which have suffered from customer churn.

Following the launch of mobile broadband services, the mobile network operators have become the leading ISPs. Operators are hoping for revenue growth in the mobile data services market, given that the voice market is almost entirely prepaid and voice ARPU continues to fall. To this end they have invested in network upgrades. A fast-developing source of revenue is from mobile money transfer and m-banking services.

The landing of the first fibre optic international submarine cables in the country some years ago revolutionised the market which up to that point had entirely depended on

expensive satellite connections. In parallel, the government is working on the later phases of a national fibre backbone network aimed at connecting population centres around the country.

The government has become more determined to manage the telecom sector more effectively. It has cracked down on counterfeit smartphones, which were thought to account for up to 30% of devices in circulation, and has introduced a biometric SIM card registration scheme.

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

Tigo completes merger with Zantel;

New MTRs agreed to 2022;

Tigo Pesa receives the GSMA Mobile Money Certification;

Halotel Tanzania launches HaloPesa m-banking service;

TTC extends LTE-A service, launches investment program for its FttP project;

Regulator completes biometric SIM card registration scheme;

TTC seeks TZS1.77 trillion over five years to upgrade networks and gain market share;

Government allocates TZS17.5 billion to improve rural telecom infrastructure;

Report update includes regulator's market data to December 2019, operator data to Q4 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

Tanzania Telecommunications Corporation (TTC); Zanzibar Telecommunications Corporation (Zantel); Vodacom Tanzania; Bharti Airtel (Zain); Millicom (Tigo); Benson Informatics Limited (BOL); Sasatel (Dovetel); Africa Online; Raha.com; Tele2; Alink; SatCom Networks; SimbaNet; Afsat; Cats-Net

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