

East Africa Telecommunications Report Q1 2016

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Abstracts

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BMI View: The Q1 2016 East Africa report analyses the latest industry, regulatory and macroeconomic developments within the telecommunications markets in Burundi, Ethiopia, Malawi, Rwanda, South Sudan and Sudan. These six markets are characterised by several challenging business dynamics, including low consumer spending power, high infrastructure costs, large rural populations with poor access and, some cases, politically volatile environments. Limited competition in several of these markets, along with unfavourable fiscal regimes, creates considerable downside risks to market growth. 3G and 4G subscriber penetration rates, as well as their share of total mobile subscriber bases, are expected to remain among the lowest in the world for the foreseeable future.

Latest Updates & Industry Developments

Average mobile market growth in the six countries in FY15 was 9.3%. Burundi recorded the highest mobile subscriber growth rate, which was largely due to the launch of services and strong growth reputed by Vietnam's Viettel. Full year growth for Burundi was estimated at almost 67%. However, it is thought that large numbers of Viettel's customers may not be active. Average mobile penetration among the six countries was 46.9% at the end of December 2015. Rwanda had the highest penetration rate at 75.7% and Ethiopia the lowest at 26.4%.

3G and 4G customers represented 15.9% of total mobile subscribers at the end of 2015. This figure is predicted to rise to 23% in 2019.

Average monthly ARPU remained below USD3 in 2015. Only South Sudan

recorded ARPU of more than USD5, while Burundi, Malawi and Rwanda reported sub-USD3.5 ARPUs.

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