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Abstracts

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BMI View: The long delay of Telecom Egypt (TE)'s entry into the mobile market as a mobile virtual network operator (MVNO) is due to its inability to reach an agreement with the three existing mobile players, Vodafone, Mobinil and Etisalat. This is not surprising given that additional mobile competition would drive ARPUs down further, when they are already as low as EGP25 (USD3.11) as of June 2015. TE's high wholesale access fees have also prevented mobile operators from competing effectively in the wireline sector. Meanwhile, the Egyptian government stipulated that as a condition of its unified licence, TE would have to sell its 45% stake in Vodafone by December 2015. The operator still refused to comply with this condition in November 2015. This distortion of the competitive environment enables TE to benefit from a dominant position in the mobile and wireline sectors, ultimately stifling service innovation and the growth prospects of the telecoms market.

Latest Updates & Industry Developments

> The mobile market contracted by 0.9% q-o-q in Q215 to 94.87mn subscriptions, marking the fourth quarter of decline out of the last five.
>
> The ADSL market grew by 22.3% y-o-y in June 2015 to 3.51mn subscriptions, with Telecom Egypt's falling prices driving uptake. USB dongle subscriptions contracted q-o-q in Q215, indicating consumer preference for more reliable wireline options.
>
> Mobile internet subscriptions grew even faster than ASDL - by 25.1% y-o-y in June 2015 to 24.1mn, supported by an ever wider selection of affordable smartphones.

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