

# Egypt Telecommunications Report Q4 2015

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## Abstracts

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**BMI View:** An elusive agreement between Egypt's three mobile operators and the government has delayed the implementation of a unified licensing framework, which would enable Telecom Egypt to launch MVNO services and allow the mobile operators to expand into the wireline market. BMI believes the government must achieve an agreement over licences in order to encourage mobile operators to invest in the wireline infrastructure needed to respond to rapidly rising demand for data amongst Egyptian consumers and businesses. Without such an agreement, the three mobile operators will continue to concentrate their investments in improving their mobile data networks, in anticipation of the planned 2016 4G spectrum auction. Meanwhile, leaving Telecom Egypt to bear the cost of expanding wireline networks on its own, combined with the MCIT forcing down ADSL access prices, risks harming the country's prospect of emerging as a communications and IT hub between the Middle East, North Africa and Europe on the back of a stabilising political and economic environment.

## Key Data

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.

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