

Kenya Telecommunications Report Q1 2016

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Abstracts

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BMI View: We continue to hold a positive and favourable outlook for the Kenyan mobile telecommunications market. The Kenya mobile market grew significantly faster in H1 2015 and we have positively revised our forecasts for the mobile market in our Q1 2016 update. The mobile penetration rate remains low and there is significant room for growth. Recent consolidation in the market is driving operators to focus more on high quality networks, product and service innovation. Mobile financial services will be a key driver of subscriptions and revenue growth, with Equitel's entry into the market bringing consumers and businesses a wider range of payments, savings and loans services. In the wireline sector, strong competition from well funded players is also supporting continued investment in next generation networks and the launch of converged services. Meanwhile, Kenya's completion of digital migration will free up new spectrum for mobile data networks, enabling operators to cater to the rapidly growing mobile data market.

Key Data

Kenya's mobile market grew by 3.8% quarter-on-quarter (q-o-q) in Q2 2015 and 12% year-on-year (y-oy) to 36.11mn.

Mobile ARPU appreciation continued, with Safaricom recording a 5.3% y-o-y increase in mobile average revenue per user (ARPU) in the year to March 2015.

Contents

BMI Industry View

SWOT

Mobile

Industry Forecast

Mobile

Table: Telecoms Sector - Historical Data & Forecasts (Kenya 2012-2019)

Industry Risk Reward Ratings

Industry Risk Reward Index

Table: Sub-saharan Africa Telecoms RRI - Q116

Market Overview

Telecoms

Table: Regional Comparison

Mobile Growth

Networks

Mobile Financial Services

Table: National Payment System Framework - Key Points

Wireline Voice & Broadband

Table: Internet Subscriptions By Technology

Table: Fixed/Fixed Wireless Broadband Market

Regulatory Development

Table: Kenya: Regulatory Bodies And Their Responsibilities

Table: National Payment System Framework - Key Points

Competitive Landscape

Table: Key Players - Kenya Telecoms Sector

Table: Kenya Mobile Market Overview 2013-2015

Table: Safaricom

Table: Orange

Table: Airtel

Company Profile

Telkom Kenya

Safaricom

Demographic Forecast

Table: Population Headline Indicators (Kenya 1990-2025)

Table: Key Population Ratios (Kenya 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Kenya 1990-2025)

Table: Population By Age Group (Kenya 1990-2025)

Table: Population By Age Group % (Kenya 1990-2025)

Glossary

Table: Glossary Of Terms

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Risk/Reward Index Indicators

Table: Weighting Of Indicators

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