

Nigeria Telecommunications Report Q4 2015

<https://marketpublishers.com/r/NBF99390F48EN.html>

Date: September 2015

Pages: 91

Price: US\$ 1,295.00 (Single User License)

ID: NBF99390F48EN

Abstracts

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BMI View: BMI forecast strong growth in Nigeria's telecoms sector, where mobile penetration just above 80% and broadband penetration below 10% mean there is considerable untapped demand for traditional voice and data services. A rapidly maturing tower market will enable operators to extend networks into rural areas more cost effectively, while allocation of wholesale Infraco licences will ensure investment into next generation broadband networks. However there are important industry and external risks to smooth growth. Nigeria's government has twice postponed 4G spectrum auctions and has requested a report investigating the sale of incumbent telecoms operator NITEL, which will delay investment into wireline and mobile data networks. Meanwhile, power shortages, a weaker economic outlook amid lower oil prices and ongoing terrorist attacks all pose additional operational challenges and downside risk to our growth outlook.

Key Data

Mobile subscriptions grew by 3.4% q-o-q in Q215, bringing total growth in 2014 to 9.4%.

Mobile ARPU dropped by 5.1% in Q215 as price competition in the voice market intensified.

The fixed-line sector contracted by 1.3% in Q215, but remained stable y-o-y.

The number of mobile data users grew by nearly 38% y-o-y in June 2015, to account for 62.4% of total mobile subscriptions.

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