

North Africa Telecommunications Report Q1 2016

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Abstracts

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BMI View: North African telecommunications markets are rapidly evolving from voice-centric markets towards ones driven by data consumption, with mobile broadband being one of the core drivers in all markets. 3G services have been launched with success in Morocco, Algeria and Tunisia, and the licensing and rollout of 4G services is on track. Success is dependent on the overall macroeconomic situation, with higher purchasing power helping with the development of the telecoms market, while the security situation is always at the forefront in the region. All markets have a mix of public and private operators, though liberalisation is not present in all sectors, and the competition has always driven greater uptake in the region.

Latest Updates & Industry Developments

The ADSL market grew above 1mn in Morocco, with total 3G subscriptions growing above 10mn

Currency depreciations had a negative impact for international operators present in Algeria and Tunisia, as USD-denominated ARPU declined

The Moroccan market posted strong growth in Q3 2015 and the Tunisian market posted modest gains in Q2 2015.

Contents

BMI Industry View

Latest Updates & Industry Developments

SWOT

Telecoms

Industry Forecast

Algeria

Table: Telecoms Sector - Historical Data & Forecasts (Algeria 2013-2020)

Libya

Table: Telecoms Sector - Historical Data & Forecasts (Libya 2013-2020)

Morocco

Table: Telecoms Sector - Historical Data & Forecasts (Morocco 2013-2020)

Tunisia

Table: Telecoms Sector - Historical Data & Forecasts (Tunisia 2013-2020)

Industry Risk Reward Ratings

MENA Risk/Reward Index

Table: Key Trends In Industry Risks And Rewards, Q116

Table: MENA Telecoms Risk/Reward Index, Q1 2016

Market Overview

Algeria

Market Drivers & Trends

Mobile

Table: 3G Market Data, November 2014

Fixed Line

Table: Growth Of Fixed Lines By Technology, 2005-2013 ('000)

Broadband

Libya

Mobile

Table: Libya Mobile Market, Q414

A Third Operator

Wireline Voice & Broadband

Morocco

Mobile

Wireline Voice & Broadband

Table: Fixed-Line Market, 2013-2015

Tunisia

Mobile

Wireline Voice & Broadband

Table: Fixed Line Market, 2014-2015

Table: Tunisian Internet Market, 2013-2015

Regulatory Development

Table: North African Regulatory Environment

Algeria

Table: Key Developments

Libya

Morocco

Table: Key Developments

Tunisia

Competitive Landscape

Table: Key Players - North Africa Telecoms Sector

Algeria

Table: Algeria Market Overview

Table: Mobilis

Table: Djezzy

Table: Nedjma

Libya

Table: Mobile Market Subscribers

Table: Libyana

Table: Al-Madar

Morocco

Table: Market Overview

Table: Maroc Telecom

Table: Meditel

Table: Wana

Tunisia

Table: Tunisia Market Overview

Table: Tunisia Telecom

Table: Tunisiana (Ooredoo)

Table: Orange Tunisia

Company Profile

Algérie Télécom

Maroc Télécom

Tunisie Télécom

Orascom Telecom

Ooredoo (Tunisiana)

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Algeria 1990-2025)

Table: Key Population Ratios (Algeria 1990-2025)

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

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

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

Demographic Forecast

Table: Population Headline Indicators (Libya 1990-2025)

Table: Key Population Ratios (Libya 1990-2025)

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

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

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

Demographic Outlook

Table: Population Headline Indicators (Morocco 1990-2025)

Table: Key Population Ratios (Morocco 1990-2025)

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

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

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

Demographic Forecast

Table: Population Headline Indicators (Tunisia 1990-2025)

Table: Key Population Ratios (Tunisia 1990-2025)

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

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

Table: Population By Age Group % (Tunisia 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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