

# North Africa Telecommunications Report Q2 2015

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## Abstracts

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BMI View: North Africa's telecommunications markets are on the cusp of change, with the licensing of 4G LTE services at the forefront of this change. 4G licences were auctioned and issued to the three existing players in Morocco in March 2015, while the authorities in Tunisia are fast-tracking the licensing of 4G with a view to seeing services launched commercially in 2016. LTE technology is already being deployed in Algeria, which is unexpected seeing as that country has historically lagged its neighbours. Increased state control over the three mobile operators in Algeria remains a concern, however. Libya is still left out of this development trend, with insecurity and political stability delaying a much-needed liberalisation process in the telecoms sector and weighing on investor sentiment.

## Key Data

Tunisia's fixed-line market fell below the 1mn subscriptions mark in 2014. The broadband market continued to contract, affected by falling demand for data-only 3G services as well as for ADSL connections.

Morocco's 3G subscriptions increased by 81.9% year-on-year (y-o-y) and 18.9% q-o-q in Q414, to 8.984mn. This was equal to 20.4% of the entire mobile market, up from 11.6% a year earlier.

Algeria's mobile market grew by 3.2% q-o-q and 14.0% y-o-y in Q414, driven by strong uptake of 3G network services.

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