

North Africa Telecommunications Report Q4 2015

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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.

Key Data

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

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