

South Africa Telecommunications Report Q3 2016

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Abstracts

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BMI View: This quarter sees some slight revisions to our forecasts for South Africa's mobile and broadband subscriber markets. The mobile market outperformed our expectations in 2015, adding over 8mn subscribers in the 12 months to December. 3G and 4G services continue to experience strong uptake and are having a positive impact on non-voice service revenues. In January 2016, all three carriers showcased their LTE-Advanced technology and we believe that they will roll-out LTE-Advanced services commercially over the course of 2016. Further market consolidation is expected, despite the collapse of mobile market leader Vodacom's attempt to acquire fixed-line network operator Neotel, and the decision by market incumbent, Telekom South Africa, to call off its attempt to acquire the country's third largest operator, Cell C. However, with downwards pressure on traditional voice ARPUs and with a renewed focus on data, Telekom will continue to look for a way of strengthening its position in the mobile market. Meanwhile, Vodacom remains committed to strengthen its position in the wireline market and Tata Communications, the parent company of Neotel, is reportedly already looking for a new buyer for its South African subsidiary.

Latest Updates & Industry Developments

The South African mobile market grew higher than forecast in 2015 as the market added an impressive 8.14mn subscribers. Our revised forecast now envisages a market with over 97mn subscribers in 2020.

The main source of future growth in the mobile market will be the development of 3G and 4G services. We currently anticipate 47.7mn 3G and 4G subscriptions by the end of our forecast period in 2020. The latest investments in developing and preparing the commercial launch of LTE-Advanced services by all major

operators are a clear signal that the operators are preparing for intense competition based on the delivery of data services.

Our revised forecast for South Africa's broadband sector envisages the number of broadband subscriptions increasing from 8.15mn in 2015 to over 9.4mn in 2020, equivalent to a penetration rate of 16.6%. Increasing competition and investment pose an upside risk to this forecast.

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