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South Africa Telecommunications Report Q4 2016

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Abstracts

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BMI View: We maintain a positive outlook for South Africa's mobile market and the country's telecoms sector. Subscription growth in the mobile market is driven by factors including operators' promotional activities, multiple SIM ownership and launch of advanced services. 3G and 4G services have strong uptake as well as a positive impact on non-voice service revenues, with all four carriers launching LTE-Advanced technology offerings. Further market consolidation is expected, with Liquid Telecoms' attempt to acquire fixed-line network operator Neotel likely to be approved.

Latest Updates & Industry Developments

The South African mobile subscriptions reached 90.17mn in Q116, up 8.6% y-o-y, with penetration reaching 164%. Vodacom and Cell C encountered positive customer growth in the first quarter of 2016. However, MTN experienced a decline of 511,000 customers.

The main source of future growth in the mobile market will be the development of 3G and 4G services, with the launch of LTE a clear signal that operators are preparing for intense competition based on the delivery of data services. We currently expect the number of 3G and 4G customers to rise to 47.7mn by the end of 2016, equivalent to 49.49% of the mobile subscriber base by the end of 2020. We forecast broadband subscriptions to increase from 8.44mn in 2016 to 9.08mn in 2020, equivalent to a penetration rate of 16.03%. Increasing competition and investment pose an upside risk to this forecast with more focused contribution to the broadband market by open access players to result in a medium-term surge of growth in the number of retail broadband subscriptions.

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