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Sudan Telecommunications Report Q1 2011

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Abstracts

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BMI's Q1 2011 update on the Sudanese telecoms market contains updated operational and financial data published by the leading network operators for the end of June 2010. Since our last update, new data have been published by mobile operators Zain and MTN, and by Sudanese fixed-line incumbent operator Sudatel. The data helped us ascertain the size of Sudan's mobile subscriber market at the end of H110. It has also resulted in us revising our five-year mobile market growth forecast.

Based on the most recent data published by these three operators, we estimate Sudan had more than 17.6mn mobile telephony customers at the end of June. Although this figure was down 0.8% compared with the previous quarter, it was up 24.1% year-on-year (y-o-y). The negative growth experienced in Q210 is a reflection of the negative customer growth reported by MTN. Sudan's third-largest mobile operator reported a loss of 728,000 customers in Q210. Although MTN has not provided an explanation for this, BMI suspects it relates to the deduction of inactive prepaid customers from MTN's reported total. Sudan's mobile subscriber market remains heavily skewered towards prepaid users. One consequence of this phenomenon is understood to be the presence of a large number of registered but inactive customers. Although MTN deducted a substantial number of inactive customers from its reported total, BMI believes there is potential for Sudan's other operators to do the same. If our analysis is correct, the loss of MTN customers should not be regardedas a negative development, but instead as a clearing-up exercise. In addition to lowering Sudan's mobile penetration rate, the deduction of inactive customers from the sector unveils the potential for further market growth.

In contrast to MTN's negative customer growth in Q210, rival operator Zain reported quarterly growth of 4.7%. Meanwhile, incumbent operator Sudatel reported a 13%

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increase in customers in the 12 months to June 30 2010. Quarterly growth for the operator was about 3.2%. BMI continues to estimate a combined figure Vivacell's and Gemtel's mobile subscribers. Both firms are regional operators in the semiautonomous south of Sudan. As noted in our previous update, Libyan African Investments Portfolio (LAP), an investment vehicle for the Libyan government, acquired an 80% stake in Gemtel through its telecoms arm, LAP Green Networks.

There are no further changes this quarter to our growth forecasts for Sudan's fixed-line telephony and internet user markets. Over the next five years, we forecast Sudan's internet-user base will expand at an annual average growth rate of 9.5%. By contrast, we continue to predict steady fixed-line growth over the next few years. Growth will be underpinned by ongoing infrastructure investments.

Sudan has risen from 15th to 14th position in BMI's latest set of Telecoms Business Environment Ratings for Sub-Saharan Africa. Although Sudan received a weaker score in the Country Risks category, its Industry Rewards score has experienced a slight rise. Sudan's Country Risks score is negatively affected by concerns about the country's long-term political stability.

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