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Abstracts

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BMI's Q211 update on the Sudanese telecoms market contains updated operational and financial data published by the leading network operators for the end of September 2010. Since our last update, new data has been published by mobile operators Zain and MTN although Sudanese fixed-line incumbent operator Sudatel offers data for Q210, for both fixed-line and mobile services, through its mobile unit Sudani. The data helped us ascertain the size of Sudan's mobile subscriber market at the end Q310. Based on the most recent data published by Zain and MTN, we estimate Sudan had 18.113mn mobile telephony customers at the end of September 2010. This figure represented an increase of 2.9% in Q310 revealing an improvement from the previous quarter, which was down by 0.8% q-o-q. During Q110 the number of mobile subscribers increased by 4.2%. We had noted in Q210 that the overall decline in mobile subscribers had been the result of negative customer growth was reported by MTN in the same quarter. The operator revealed further declines in Q310. However, stronger growth from its rival managed to offset the operator's negative performance.

MTN has not provided an explanation behind the second consecutive loss in subscriber figures ended Q310, although BMI suspects this relates to the deduction of inactive prepaid customers from the operator's reported total. As we have noted in previous reports, Sudan's mobile subscriber market is heavily dominated by prepaid subscribers. As a result, it is possible this encouraged strong growth in the number of inactive customers across the mobile market. It is also understood that a number of MTN's rivals also have strong prepaid bases, which contributed to inflated penetration rates although they have not provided a breakdown of their subscriber mixes.

Considering the dominance of the prepaid market, the development of the value-added services market remained low level with most services confined to SMS and MMS.

However, this has not stopped the development of new services for the market based on SMS. With the Sudan referendum on January 9 2011, to decide whether South Sudan becomes an independent country or not, Sudan Institute for Research and Policy, a non-profit research organisation, came up with the country's first SMS-based voting monitor (SVM). Fareed Zein, who works at the institute and developed the service, says the service allows other various international bodies to track the development of the referendum as it progresses. Voters could send an SMS with a simple message such as violence, intimidation or other select words, which is then verified by the SVM team and published on their website in English and Arabic.

Meanwhile, 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.

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