

Sudan Telecommunications Report Q3 2011

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Abstracts

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BMI's Q311 update on the Sudanese telecoms market contains updated operational and financial data published by the leading network operators for the end of December 2010. It also contains our maiden five-year ARPU forecast for Sudan's mobile market and an update to our mobile, fixed-line and internet forecast-based data released by the operators and other macroeconomic trends in Sudan.

Based on the most recent data published by Zain Sudan, owned by Kuwait-based Zain Group, and MTN Sudan, part of South Africa-based MTN Group, we estimate Sudan had 20.341mn mobile telephony customers at the end of December 2010, reflecting mobile penetration of 47%. This figure represented an annual growth of 19.4% in 2010, driven mainly by a 12.3% q-o-q growth in Q410. BMI believes the surge in mobile subscriptions in Q410 is related to the run-up to the January 2011 referendum on the secession of South Sudan. It is likely that a considerable number of new phone users signed up to mobile services before the referendum to improve communications with friends and relations during the entire process. Meanwhile, 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. The three major operators – Zain, Sudatel and MTN – reported positive net additions in Q410.

BMI expects the secession of South Sudan to impact negatively on Sudan's total mobile subscriber base. The Government of South Sudan intends to publish new

telecoms guidelines to govern telecoms operators in the country. Although details of the guidelines are not yet certain, we would not be surprised if they involve a separation of the operations of mobile networks in South Sudan from their operations in the rest of Sudan. This will lead to the discounting of subscribers in the South Sudan and, by implication, the shrinkage of operators' subscriber bases. Meanwhile, the discounting of subscriber figures from regional operators, such as Viva, which operates only in the South, will lead to a drop in the number of mobile subscribers in Sudan.

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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