Sudan Telecommunications Report Q4 2011

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Abstracts

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BMI's Q411 update on the Sudanese telecoms market contains updated operational and financial data published by the leading network operators for the end of March 2011. The Industry Forecast and Data Analysis sections of our report therefore continue to provide a combined picture of both North and South Sudan, prior to the secession of South Sudan on July 9 2011. As might be expected, there is currently a lack of reliable data for South Sudan. This may change, however, once the operators begin publishing data for the second and third quarters of 2011.

Following the independence of South Sudan in July, mobile market leader Zain Sudan reported that it was in talks with the South Sudanese government to obtain a licence to operate in the newly independent country. Although the company will continue operating in the South as usual until a new licence is agreed, it is understood that Zain plans to split its Sudanese operations once it obtains the go-ahead from South Sudan. Other operators such as MTN Sudan and Sudani, the mobile arm of Sudanese incumbent telecoms company Sudatel, are expected to pursue a similar model.

Prior to South Sudan's independence, all three of Sudan's national operators stepped up their investment levels in anticipation of continuing to provide commercial services post-separation. With telecoms penetration levels that are well below the pre-secession average for Sudan, the South undoubtedly offers network operators with considerable growth opportunities. However, despite having an estimated population of 10mn, the South's infrastructure is extremely limited after years of civil war and underinvestment, posing distribution and network maintenance challenges to operators. Nevertheless, the expansion of competition in South Sudan should benefit from the presence of two regional network operators, Vivacell and Gemtel. Vivacell has declared that it intends to invest in expanding its network in South Sudan, in support of its plan to increase its

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subscriber base to 1mn by the end of 2011 and 3mn by the end of 2014.

Based on the most recent data published by Kuwait-based Zain Group, South Africa’s MTN Group and incumbent operator Sudatel, we calculate that Sudan had 21.382mn mobile telephony customers at the end of March 2011; this gave the country a mobile penetration of 48.5% and reflected quarterly growth of 5.1%. Based on the relatively strong performance reported by Sudan’s three national network operators in Q111, we have increased our growth expectations for 2011 and subsequent years. Our newly revised forecast for Sudan’s mobile market envisages an 18.5% increase in users in 2011, followed by growth of 12.8% in 2012. In the five years to 2015, we anticipate an average annual growth rate of 11.2%. By the end of our forecast, we predict the mobile market will have a penetration rate of 91%.

This quarter sees some further changes to our growth forecasts for Sudan’s fixed-line telephony internet user and broadband subscriber markets. The most significant change has occurred to our broadband subscriber forecast, which now envisages around 165,000 broadband subscriptions at the end of 2010; this was equivalent to a penetration rate of 0.4%. In recent months, Sudan’s broadband internet sector has benefited from an increase in the number of mobile broadband subscribers. A moderate amount of growth in 2011 should see the broadband penetration rate rise to 0.5%. Growth will benefit from the recent introduction by MTN of a new mobile broadband service. However, although we expect broadband costs to fall during the next five years, we do not expect costs to fall enough to make broadband access services a mass market commodity.

Sudan has risen by three places in BMI’s Telecoms Business Environment Ratings for Sub-Saharan Africa. The country’s new location in 15th position in our table reflects both a stronger Industry Rewards score and changes of position elsewhere in the table.

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