

Tanzania Telecommunications Report Q4 2015

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Abstracts

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BMI View: The Tanzanian mobile market rebounded in 2015, as its 2013 performance was negatively impacted by sim registration and removal of inactive accounts. Given that penetration is relatively low, there is still room for significant growth. Viettel's entry into the market scheduled for October 2015, with a focus on rural areas will drive growth and competition further. Current operators scramble to match the new entrant, they look to differentiate themselves with better services. MFS (mobile financial services) will be one of these, as Tanzania becomes the first fully interoperable country. Mobile data will continue to grow through 3G and 4G networks. The fixed broadband market will see growth, especially as the TTCL long-term investments begin to bear fruit and the country benefits from TTCL's advanced nation-wide fibre optic network supported by data centres, three active satellites and two soon to be commissioned satellites.

Key Data

The mobile sector grew 16.1% in 2014, compared to growth of 0.8% in 2013 following the discounting of inactive subscriptions and a 1.1% growth in Q313.

Despite increased usage, both in terms of voice and data, ARPU continues to decline through strong competition, which will be exacerbated by Viettel's market entry

MFS users have continued to rise Tanzania has become the first country to offer interoperability across all MFS platforms

The fixed-line market continues to contract, declining by 8.3% y-o-y because of a lack of investment and fixed-to-mobile substitution

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