

West and Central Africa Telecommunications Report Q1 2013

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Abstracts

Includes 3 FREE quarterly updates

BMI's Q113 West and Central Africa report analyses latest industry, regulatory and macroeconomic developments in the telecoms markets of seven countries: Cameroon, Côte d'Ivoire, the Democratic Republic of Congo (DRC), Gabon, Mali, Mauritania and Senegal. In addition to analysis of the latest market data to the end of Q312, the report contains updated five-year forecasts, through to 2017, for the mobile, fixed-line and internet sectors.

KEY DATA

Average mobile penetration rate for the seven countries in our West & Central Africa coverage rose to 90.3% at the end of Q312 from 68.1% at the end of 2011.

The average mobile growth for the seven countries in our coverage for 9M12 was 18.3%.

Gabon and Mauritania are the only two countries with more than 100% mobile penetration rate at the end of September 2012. The DRC had the lowest penetration rate at just 24.1%.

Senegal's 3G subscriber base grew by 600% y-o-y to the end of H112.

KEY TRENDS & DEVELOPMENTS

Cameroon has signed a memorandum of understanding (MoU) with international submarine cable operator Main One to build a landing station in the country. Increasing international bandwidth will have strong positive effects on the Cameroon telecoms market, particularly the provision of broadband and data services, in BMI's opinion. We believe adding capacity will enable mobile operators to launch more advanced mobile services, as well as support government plans to invest in broadband infrastructure.

Vodacom's new CEO, Shameel Joosub, says the company plans to work out disputes with its local partner in the Democratic Republic of Congo and remain in the country. The disputes relate to financing and capital restructuring, leading Vodacom to say it would exit its partnership with Congo Wireless Networks (CWN). Meanwhile, little known telecoms equipment vendor Netherland British Company (NBC) challenged the validity of 3G licences issued to mobile operators Airtel DRC, Oasis Telecom, Vodacom Congo and Africell. The commercial court of Kinshasa ruled NBC alone has the right to utilise the 2100MHz band, following its 2004 receipt of a 10-year operating concession. It is understood the company has not yet taken steps to utilise the spectrum.

In Gabon, IG Telecoms signed a deal with Hughes HN broadband satellite to deploy a Network Operations Centre and up to 2,000 HN9260 routers to extend high-speed satellite internet and VoIP service to homes and SMEs in underserved areas of Gabon.

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