

South Africa - Telecommunication Services: Opportunities for growth mellowed by risks and low rewards (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

In South Africa mobile subscriptions rose from 68.9 million in 2012 to 92.9 million in 2016, at a review-period (2012-2016) CAGR of 7.8%. Subscriptions will reach 110.5 million in 2021, at a forecast-period (2016-2021) CAGR of 3.5%, as is evident from penetration increasing from 74.3% users as a percentage of the population in 2012 to 83.6% in 2016. As mobile phones get cheaper and new technologies are introduced, penetration will reach 89.6% in 2021.

KEY HIGHLIGHTS

Network expansion and modernization to create opportunities for operators

In 2016, UMTS accounted for 38% of all mobile subscriptions. Its share will increase to 57.3% by 2021. However, the combined share of subscriptions on the HSPA and Long Term Evolution (LTE) platforms will also rise, from 15.7% in 2016 to 32.9% by 2021. Operators have the opportunity to invest in developing their M2M/IoT service portfolios based on faster LTE technology which will allow many to broaden their service offerings and tap into new revenue streams. Neotel is collaborating with the Western Cape government to launch 384 Wi-Fi hotspots across the province by 2019.

Fiber optic technology to grow

Fixed technology such as FTTH will enhance network quality and help operators to meet the demand for faster internet speeds that will ultimately drive subscriptions.

Telkom SA SOC Limited announced the launch of FreeMe Family, which brings the data-led convenience of FreeMe to families, who will then be able to share a data allocation across 10 SIM cards. It is also investing in the roll out FTTH and plans to pass one million FTTH connections by 2018, in addition to its plan to migrate its ADSL subscribers onto fibre optic networks.

Government initiatives driving broadband connections

The government's National Broadband Plan (NBA) will create opportunities for investors to fund the development of a national broadband network. South Africa will require funding to build a viable and long-term broadband plan in order to achieve its goal of universal broadband access by 2030. With the right funding and investments, broadband penetration can be increased.

SCOPE

Risk/Reward Index - enables you to assess the risks and potential rewards of investing in the South African Telecommunications market in comparison with other Middle East and African countries.

Industry Snapshot and Industry View - Key Telecommunications Industry Statistics including fixed/mobile revenue, subscriptions, churn, market share, and ARPS are analyzed to reveal the key issues and trends driving market performance in the South African Telecommunications market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the South African Telecommunications market.

Industry Benchmarking - Benchmark how the South African telecommunications market is performing compared to regional and global markets in terms of fixed or mobile revenue, subscriptions, ARPS, penetration, and usage to gauge potential for growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading

players in the South African Telecommunications market by business segment on metrics such as such as churn, ARPU, and subscriber and revenue growth.

REASONS TO BUY

What are the Saudi Arabian Telecommunications industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

How is the market performing in terms of: Revenues, Subscribers, ARPU, and Customer Churn?

What will Saudi Arabia's mobile market look like in 2021?

How has the financial deals landscape changed in 2015 and 2016?

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