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REGIONAL FORECAST REPORT

SUB-SAHARAN AFRICA TELECOMS MARKET: TRENDS AND FORECASTS 2017–2022

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About this report

This report provides:

- **a 5-year forecast of more than 180 mobile and fixed KPIs for Sub-Saharan Africa**, as a whole and 11 key countries
- **an in-depth analysis of the trends, drivers and forecast assumptions** for each type of mobile and fixed service, and for key countries
- **an overview of operator strategies and country-specific topics**, in order to highlight similarities and differences by means of a cross-country comparison
- **a summary of results, key implications and recommendations** for mobile and fixed operators.

Our forecasts are informed by on-the-ground regional market experts from our topic-led research programmes and our consulting division, as well as external interviews.

In addition to our robust set of historical data, our forecasts draw on a unique and in-house modelling tool, which applies a rigorous methodology (reconciliation of different sources, standard definitions, top-down and bottom-up modelling).

For the complete data set, see the accompanying Excel file at www.analysysmason.com/SSA-telecoms-forecast2017-RDRK0.

REPORT COVERAGE

Geographical

Regions modelled:

- Sub-Saharan Africa (SSA)

Countries modelled individually

- Cameroon
- Côte d'Ivoire
- Ghana
- Kenya
- Nigeria
- Rwanda
- South Africa
- Sudan
- Tanzania
- Uganda
- Zambia

Key performance indicators

Connections

Mobile

- Handset, mobile broadband,[1] M2M[2]
- Prepaid, contract
- 2G, 3G, 4G,5G
- Smartphone, non-smartphone

Fixed

- Voice, broadband, IPTV, dial-up
- Narrowband voice, VoBB
- DSL, FTTP/B, cable, BFWA, 5G, other

Voice traffic

Fixed and mobile

- Outgoing minutes, MoU

Revenue

Mobile

- Service,[3] retail
- Prepaid, contract
- Handset, mobile broadband,[1] M2M[2]
- Handset voice, messaging, data

Fixed

- Service,[3] retail
- Voice, broadband, IPTV, dial-up, business services
- DSL, FTTP/B, cable, BFWA, other

ARPU

Mobile:

- SIMs, handset
- Prepaid, contract
- Handset voice, data

[1] Includes USB modem, and mid- and large-screen, but not handset-based data.

[2] M2M connections and revenue figures include mobile services only.

[3] Service revenue is the sum of retail and wholesale revenue.

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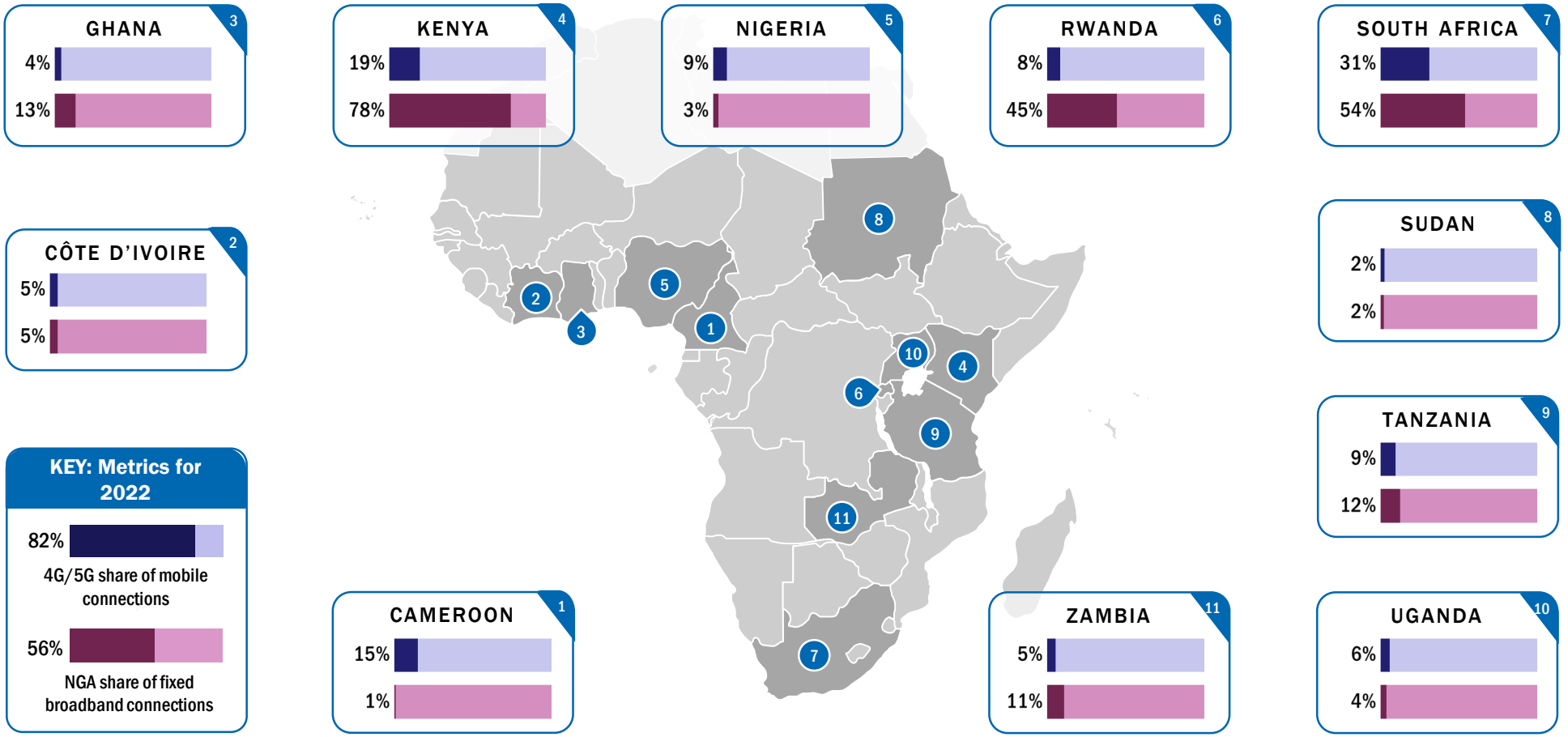

Source: Analysys Mason

[1] For a full list of countries modelled as part of the Sub-Saharan Africa region, please see the accompanying data annex. Mobile connections exclude M2M connections. NGA share of fixed broadband connections is calculated as cable, VDSL and FTTH connections (that provide access speeds of 30Mbps or more) divided by the total number of fixed broadband connections.

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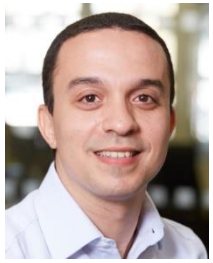

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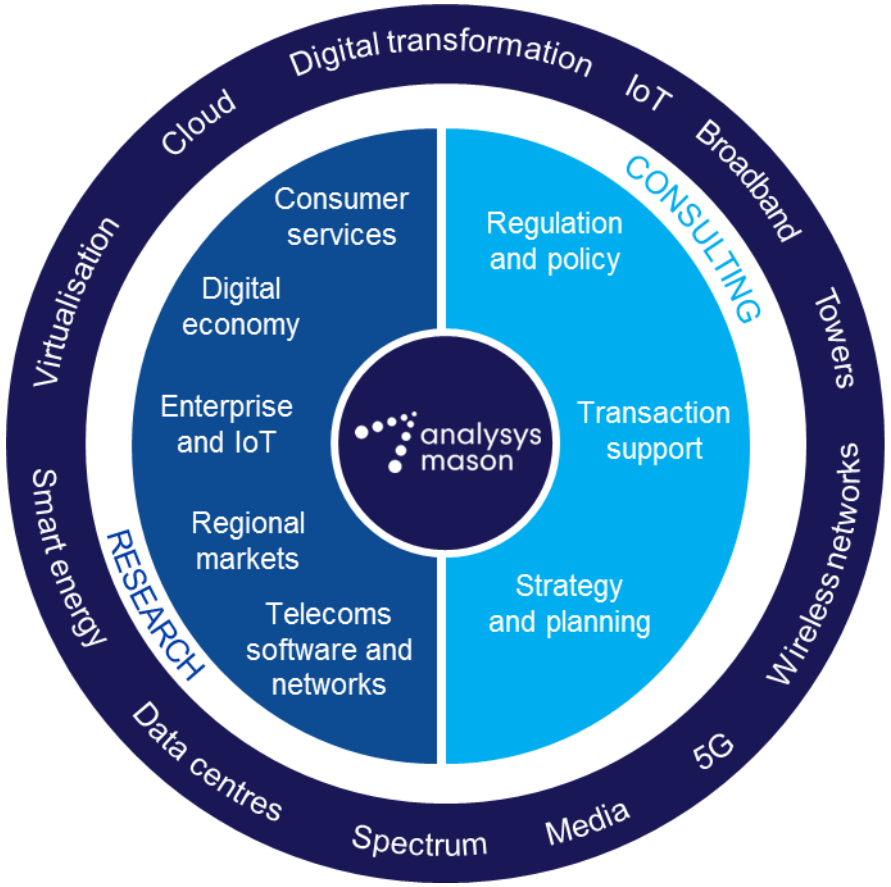

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- Radio spectrum auction support
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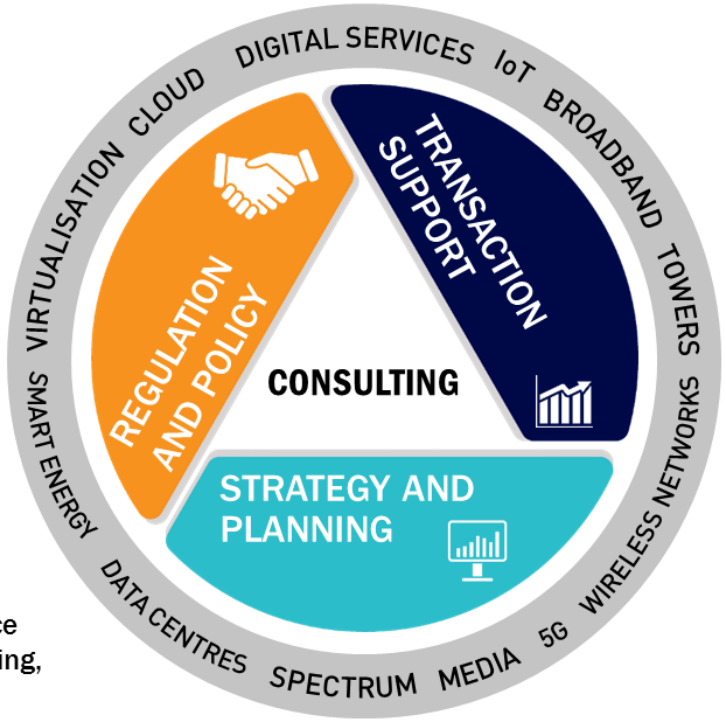

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