

International Telecommunication Union



AFRICAN TELECOMMUNICATION INDICATORS 2004





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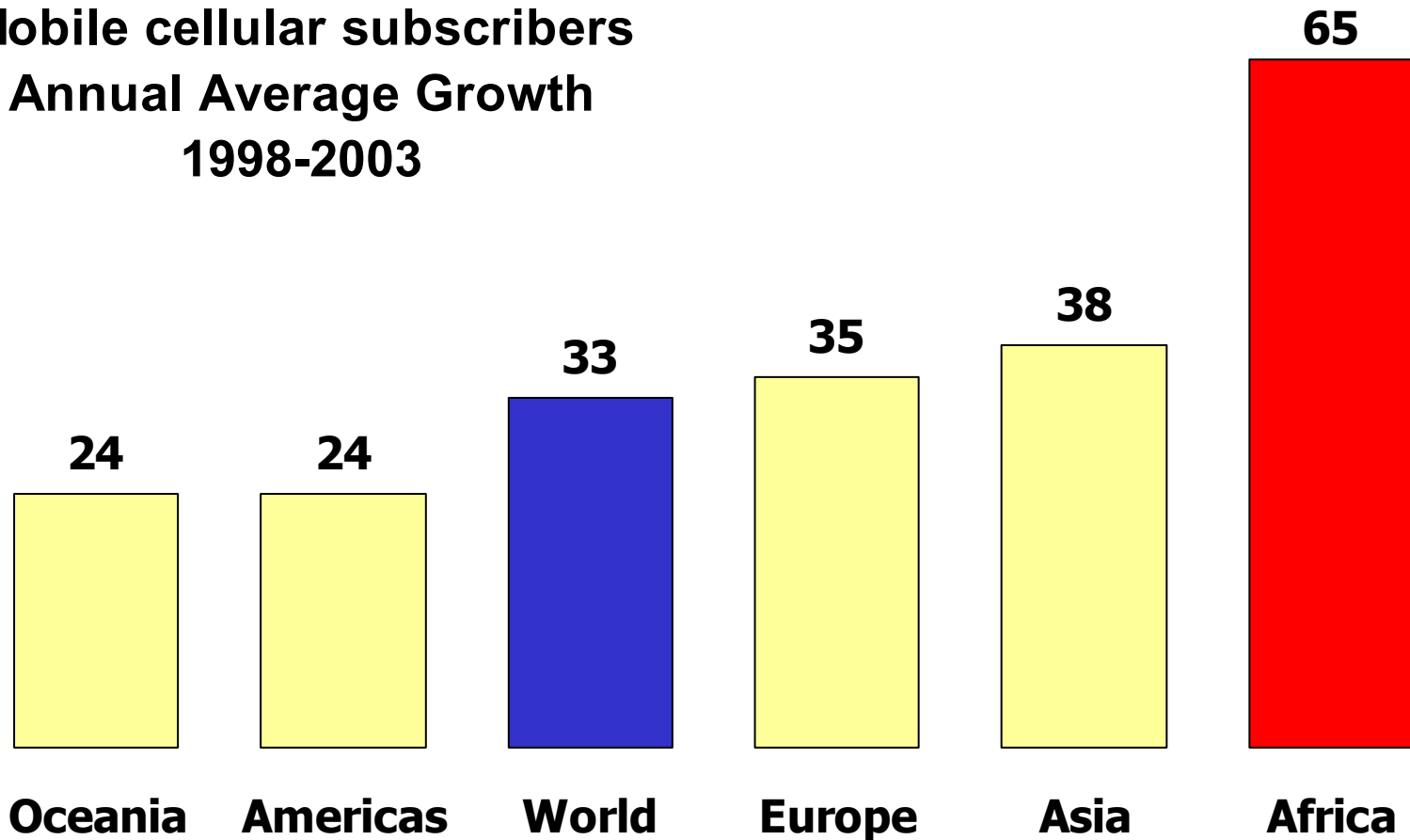
- Mobile sector overview
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 - Mobile policy
 - Wireless Internet
 - Mobile future
- 22 Topical Tables
- 55 Country Pages
- Directory of ministries, regulators & operators



MOBILE AFRICA:

World's fastest growing mobile market

Mobile cellular subscribers
Annual Average Growth
1998-2003

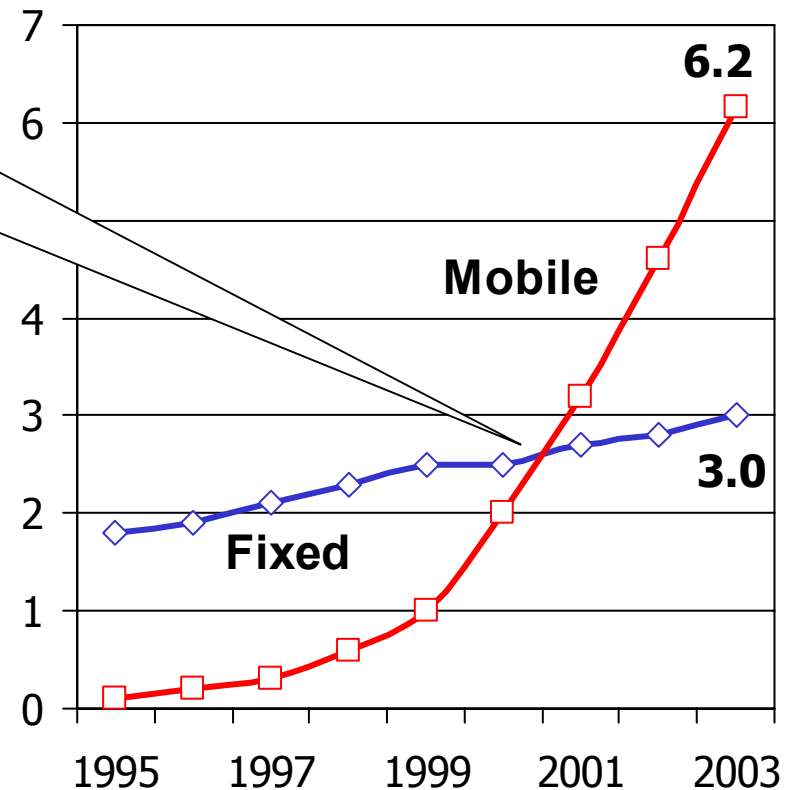




Mobile predominant method of telecommunications in Africa

- Mobile passed fixed in 2001
- 43 African countries (78%) have more mobile than fixed telephone subscribers
- Almost 70% of African telephone subscribers use mobile

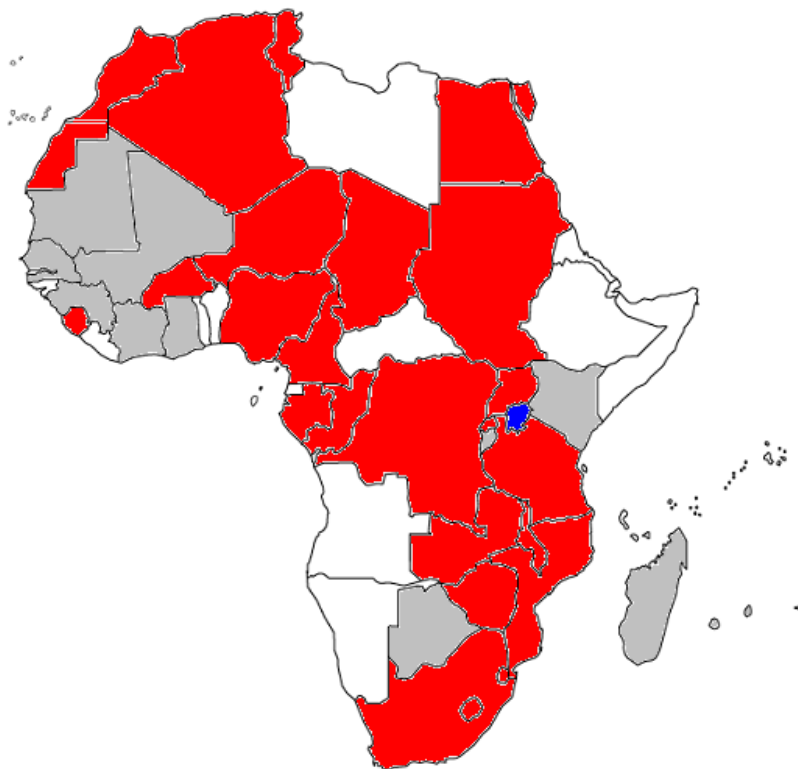
Subscribers per 100 inhabitants





MOBILE BUSINESS

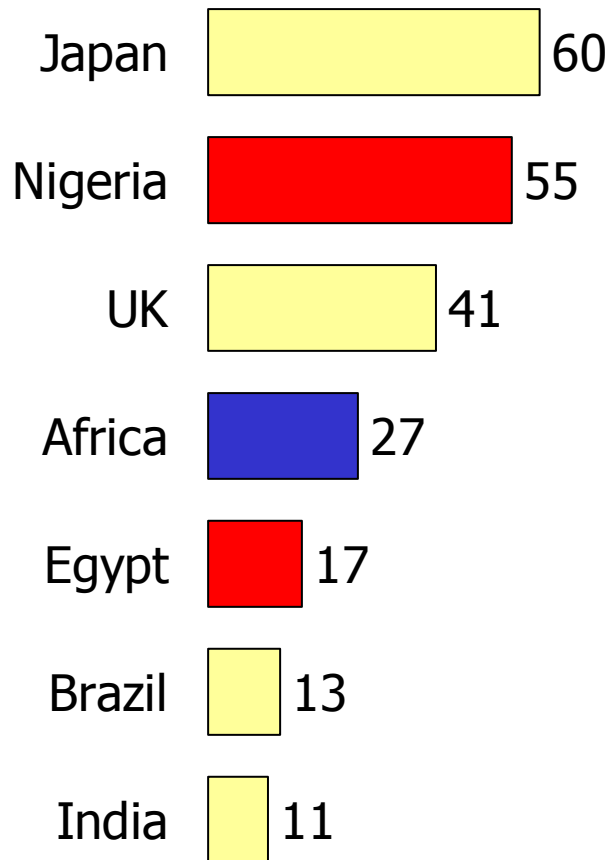
Strategic investors in Africa, 2003



CelTel, MTN, Orascom, Vodacom

Other strategic investors
(> 1 country)

Average Revenue Per User (ARPU) Per month, 2003, US\$

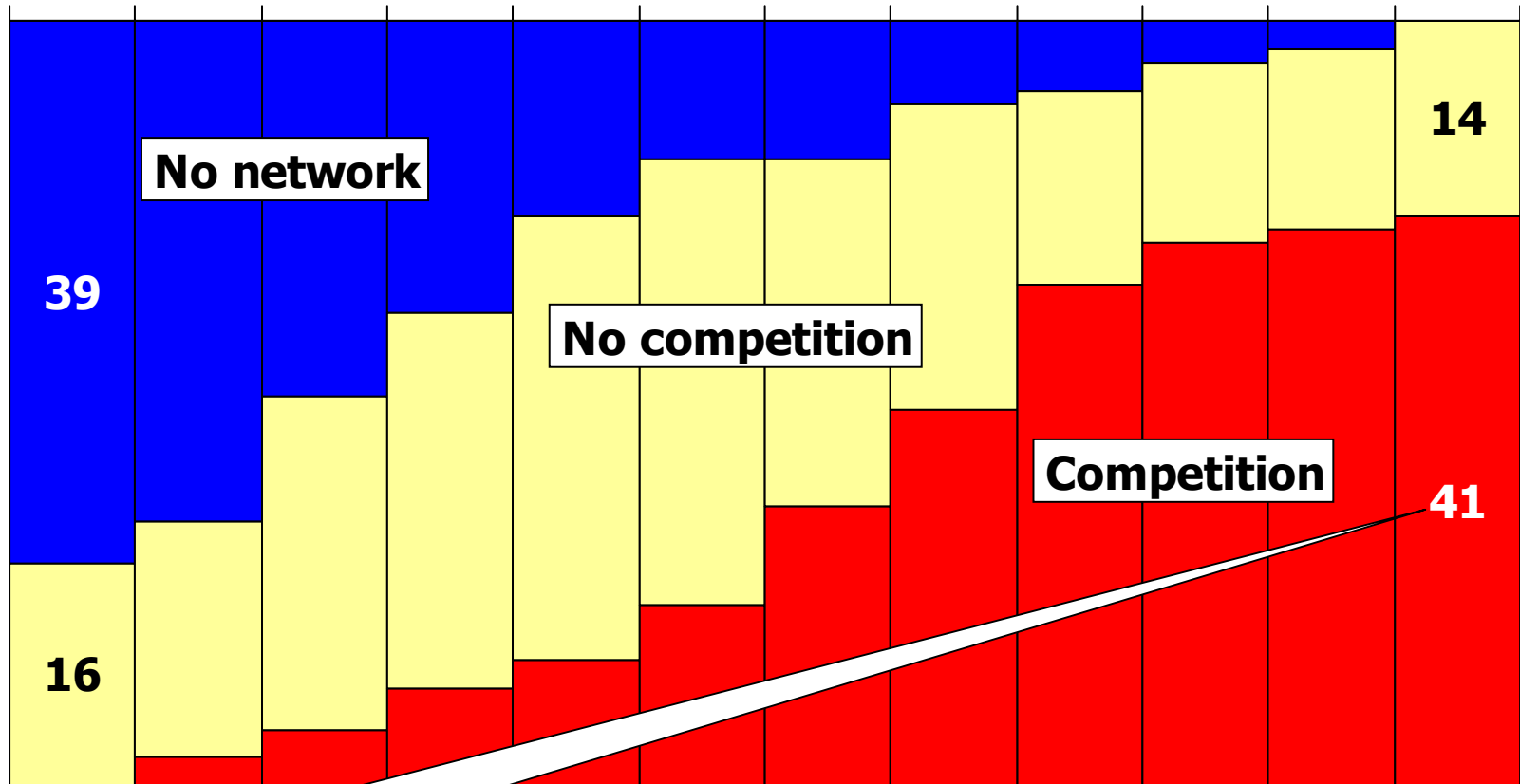




MOBILE POLICY

Mobile market structure in Africa, number of countries

93 94 95 96 97 98 99 00 01 02 03 04



No network

No competition

Competition

39

16

14

41

• Majority allow competition

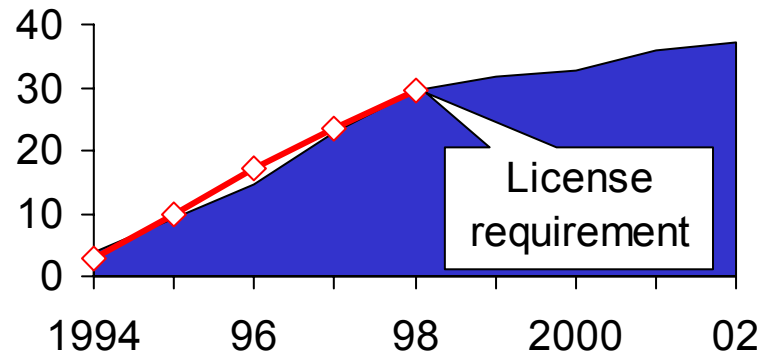
- Enhancing competition
- Universal access



Universal service

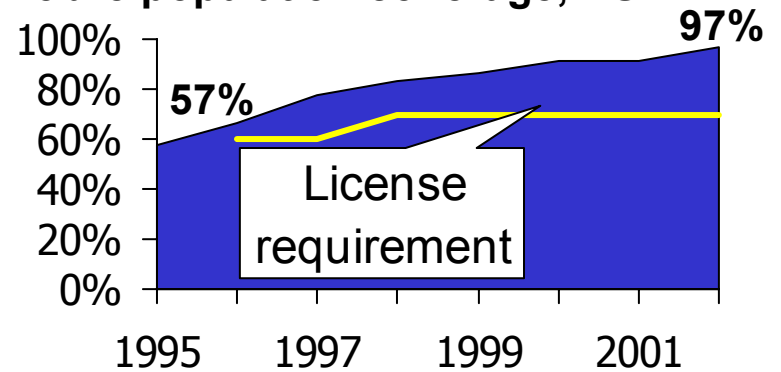
- Community access centres

Community access centres, 000s, RSA



- Coverage

Mobile population coverage, RSA



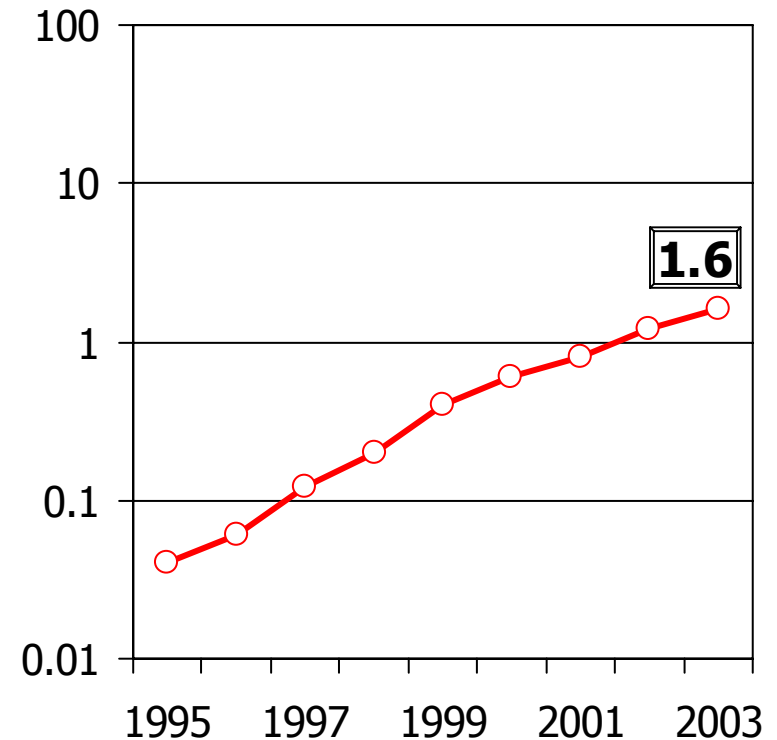
- Subsidizing low income users



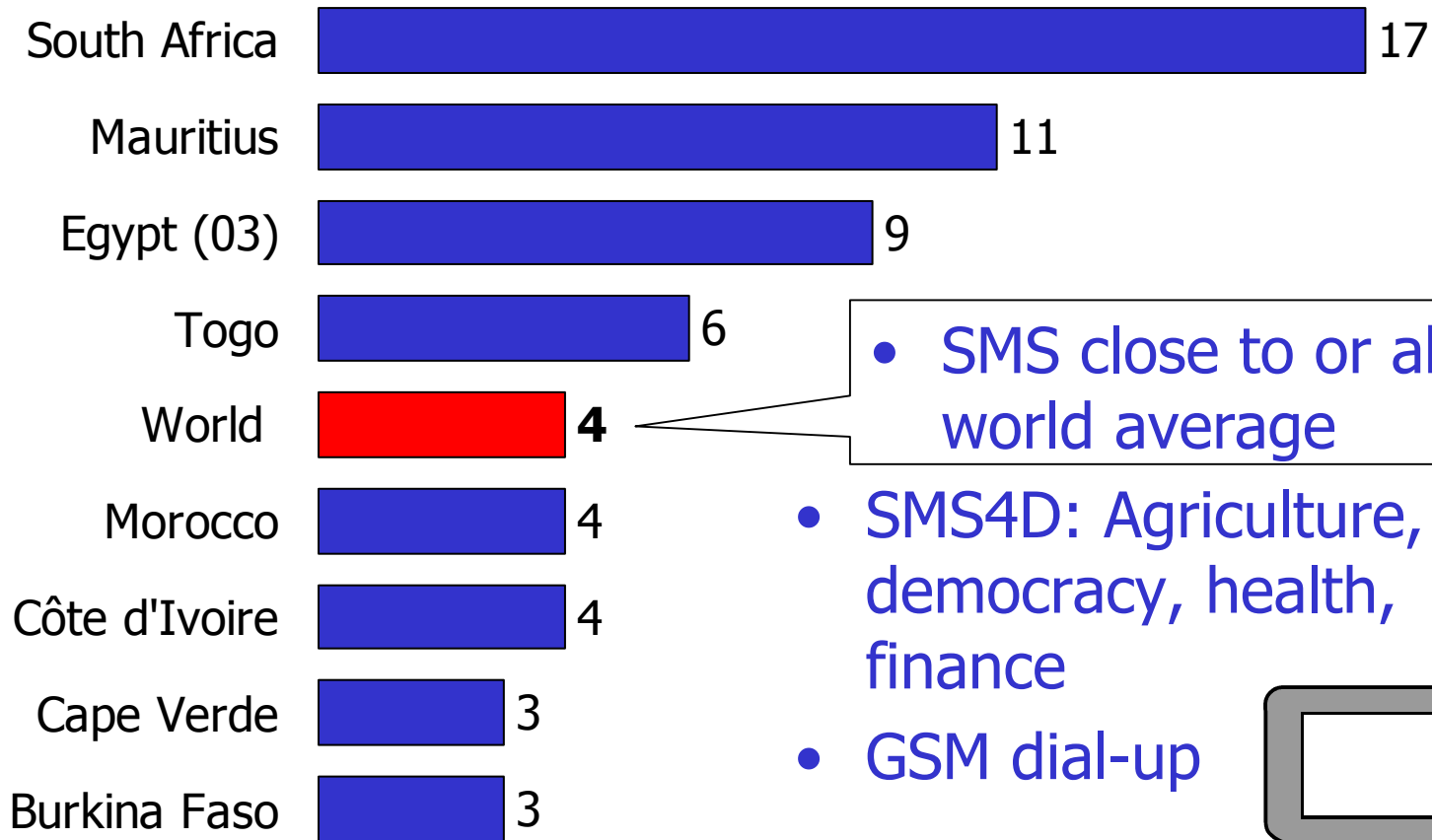
WIRELESS INTERNET

1. Second Generation (2G)
2. Second and a half (2.5G)
3. Third Generation (3G)
4. Fixed wireless

**Internet users
per 100 inhabitants, Africa**



SMS per subscriber per month, 2002



• SMS close to or above world average

• SMS4D: Agriculture, democracy, health, finance

• GSM dial-up





2.5G

Commercial GPRS networks in Africa, Dec. 2003

Country	Operator	Launch	Name	Subscribers		
				Total	Date	% total subs.
South Africa	MTN	Jul.02	dataLIVE	30'000	Jun.03	0.6%
South Africa	Vodacom	Oct-02	MyLife	36'000	Sep.03	0.4%
Egypt	Vodafone	Apr.03	live!	25'000	Dec.03	0.9%
Egypt	Mobinil	Sep.03	Life	70'000	Dec.03	2.3%



3G

- No “formal” launches or licensing procedures
- Fixed wireless 3G using CDMA2000 1x
- First mobile 3G network in Angola

CHALLENGES OF MIGRATION FROM 2G TO 3G IN UGANDA

- Mobile market predominantly voice based
- No relevant local content on the Internet
- Lack of Internet Applications (Airline Ticketing, Banking, Restaurant Reservation etc)
- High Cost of Evolution Path: (2G – GPRS – EDGE - W-CDMA)
- Availability and affordability of Handsets
- Market dominated by pre-paid customers

Source: Uganda Communications Commission.



Fixed wireless

Nigerian Fixed Wireless Access operators deploying CDMA2000 1x, 2003

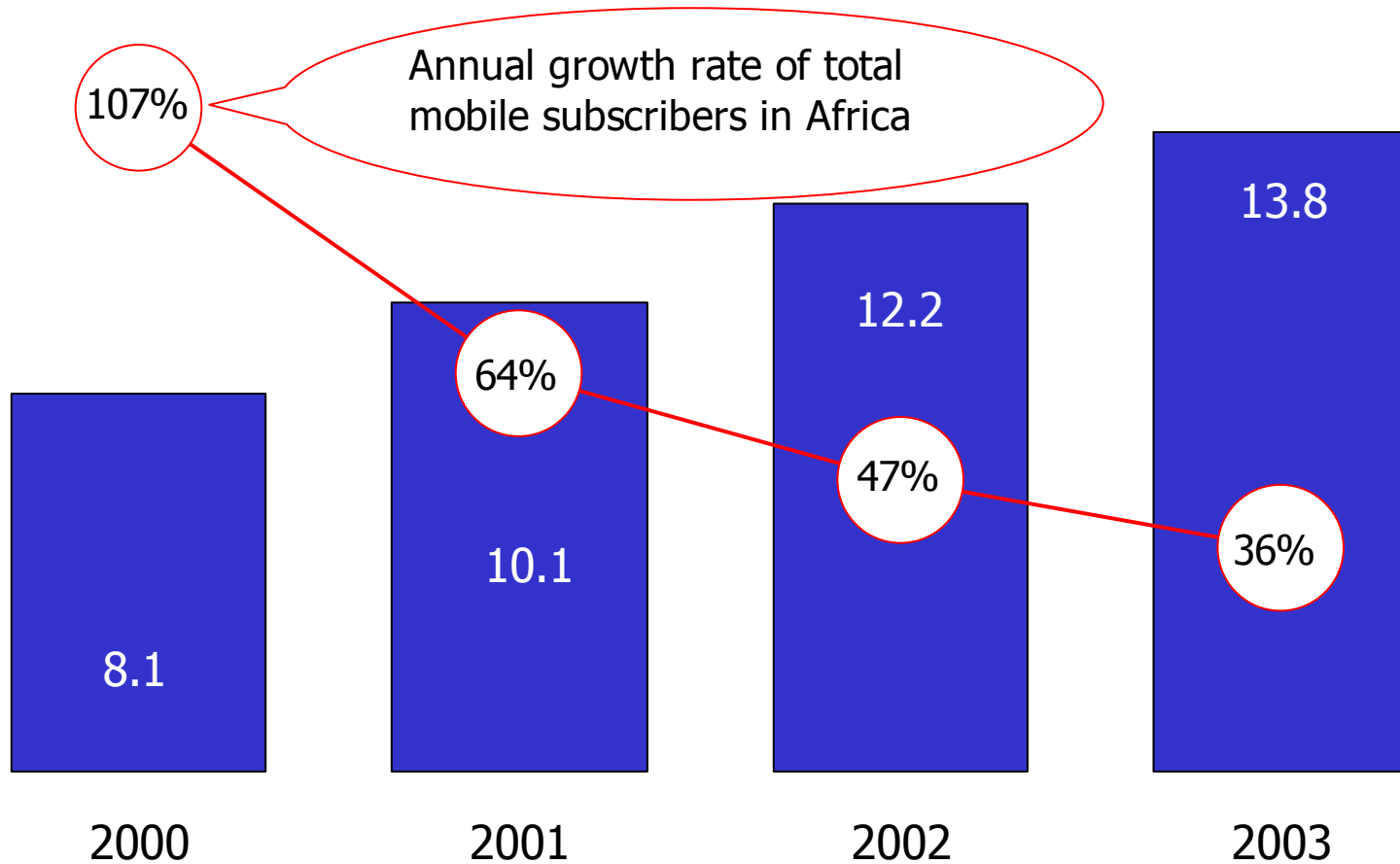
Operator	Frequency	Infra- structure Vendor	Date announced	Coverage
InterCellular	800 MHz	Motorola	July-03	Lagos
Multi-Links	1900 MHz	Nortel Networks	March-03	Lagos
Reliance	1900 MHz	Ericsson	April-03	Nationwide
Starcomms	1900 MHz	Ericsson	March-03	Lagos
Starcomms	1900 MHz	Huawei	August-03	Kano, Lagos



MOBILE FUTURE

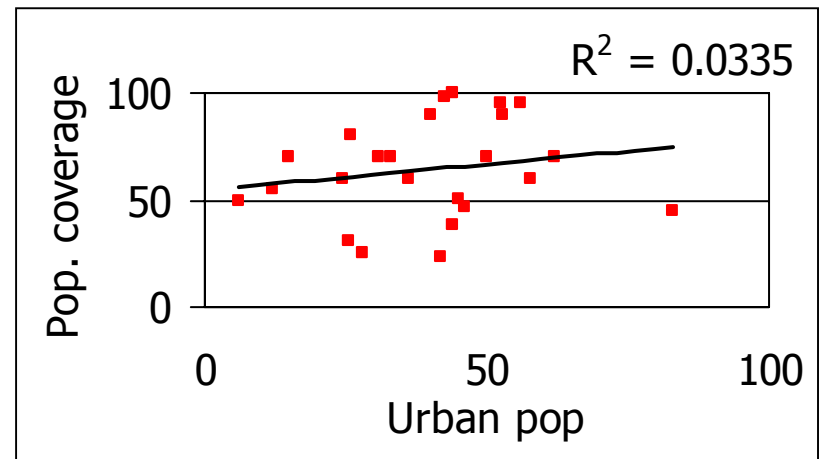
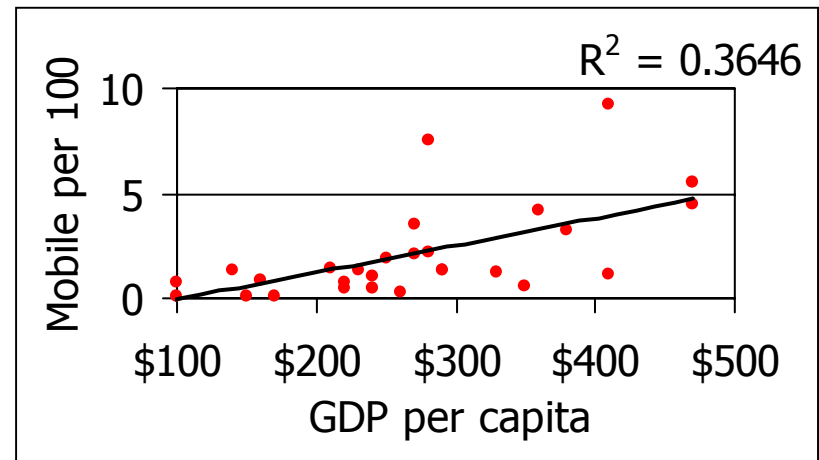
Can growth be sustained?

New mobile subscribers in Africa, millions



Barriers?

- Little relation between mobile penetration and low levels of income
- Little relation between mobile coverage and urban population

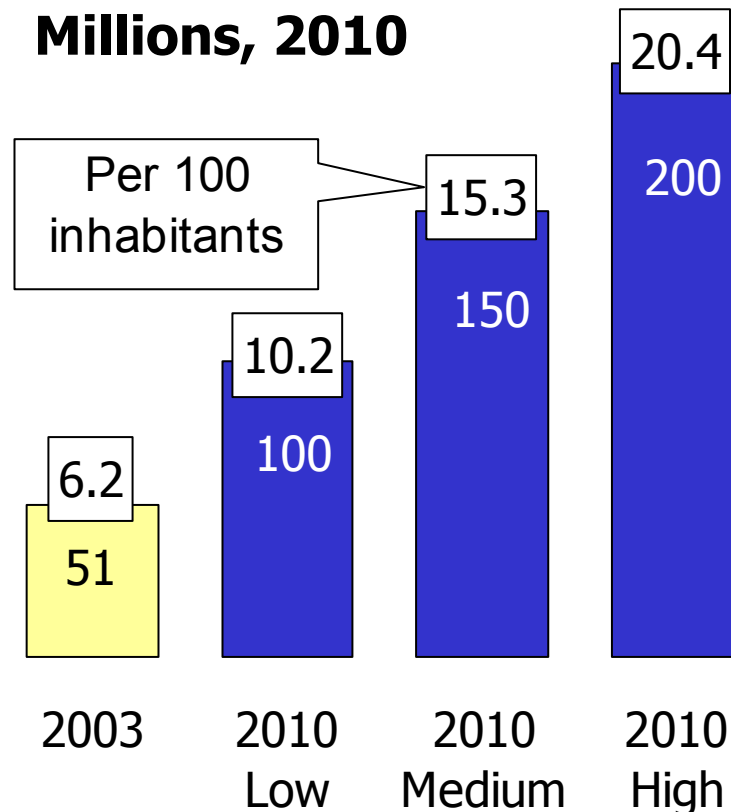




Expanding mobile

- Government
 - Minimizing / eliminating taxes/fees
 - Promote infrastructure sharing
 - Full service licenses
 - Interconnect
 - Minimize inefficiencies
 - Universal access policies
 - Market information
- Operators
 - Lower interconnect rates
 - Expand coverage
 - Roaming/data services
- Manufacturers
 - Cheaper & appropriate equipment
 - Poverty reduction
- Donors
 - Capacity building
 - Recycle handsets
 - Backbones

Forecast mobile subscribers in Africa under different scenarios. Millions, 2010



Low: annual growth 10%
Medium: annual growth 16%
High: annual growth 21%

Report available here:

<http://www.itu.int/ITU-D/ict/publications/africa/2004/>

The screenshot shows a Microsoft Internet Explorer browser window. The address bar contains the URL <http://www.itu.int/ITU-D/ict/publications/africa/2004/>. The page title is "African Telecommunication Indicators 2004". The page content includes a navigation menu on the left with items like "Publications", "Free Statistics", "Internet Case Studies", "Presentations", "Industry Sites and Links", and "Events". The main content area features a yellow and orange cover image for the "African Telecommunication Indicators 2004" report, 7th edition. The text describes the report as a reference book prepared for Africa TELECOM 2004, containing 20 regional tables, 55 country pages, and a directory of telecommunication ministries, regulators, and operators. A table at the bottom provides purchase options for electronic and printed versions, all available on 3 May.

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African Telecommunication Indicators 2004

African Telecommunication Indicators 2004
7th edition 2004

Prepared for Africa TELECOM 2004 (Cairo, Egypt, 4 to 8 May 2004), this report is an indispensable reference book of telecommunication facts and figures for the region. The publication provides a brief overview of market trends. The report includes some 20 regional tables covering key telecommunication indicators, 55 individual country pages with a five year profile from 1998-2002, and a directory with names of telecommunication ministries, regulators and operators in the region.

Number of pages: approx 140

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Internet users per 100 inhabitants

Top African countries, 2003

