

Senegal market overview 2010¹

Mobile market

In June 2010, there were three mobile network operators in Senegal:

1. **Sonatel Mobiles**, which holds 63 per cent of the market share. Sonatel Mobiles operates under the brand name of **Orange**, and its strategic partner France Telecom owns 42.3% of Sonatel.
2. **Sentel**, which holds 32.7 per cent of the market share. Sentel is part of the Millicom International Cellular (MIC) group, and since 2005 operates under the brand name of **Tigo**.
3. **Expresso**, which holds 4.3 per cent of the market share. Expresso is part of **Sudatel Telecom Group**.

The percentage of the population covered by a mobile cellular signal has been relatively high, at around 85 per cent, since 2003. It reached 87 per cent in early 2010.

Senegal, which is a UN-designated Least Developed Country (LDC), has witnessed strong growth in terms of mobile cellular penetration rates. Mobile cellular penetration has increased from about ten per cent in early 2005, to over 60 per cent by mid-2010. The country's end-2009 penetration level of 55 per cent placed the country just below the developing country average of 57.9 per cent, but well above the African average of 37.5 per cent. Senegal's mobile penetration rate is more than twice as high as the LDC average mobile penetration rate (which stood at 25 per cent at end 2009).

¹ The information provided in this overview is based on ITU's World Telecommunication/ ICT Indicators database, and information provided and published by the regulatory authority of Senegal, ARTP. In particular, 2010 data refer to the ARTP's *observatories* (see: www.artp-senegal.org/page_inter.php?idmenu=7&id=10126) and the household data refer to the "Enquête Nationale sur les Technologies de l'Information et de la Communication au Sénégal (ENTICS, 2009). Rapport de Synthèse des Résultats. Présenté par L'Agence Nationale de la Statistique et de la Démographie (ANSD). Janvier 2010."

The roughly 7.5 million mobile cellular subscriptions in Senegal are almost exclusively pre-paid, with post-paid subscriptions accounting for less than one per cent.

A 2009 household survey carried out by Senegal's national statistical office (l'Agence Nationale de la Statistique et de la Démographie (ANSD)), showed that by the third quarter of 2009, over 80 per cent of all households had a mobile cellular telephone.

Internet and broadband market

Senegal's fixed broadband market has grown steadily over the past five years, from fewer than 10'000 fixed broadband subscriptions to almost 75'000 subscriptions by June 2010. In 2009, the country's penetration level stood at some 0.5 per cent, compared to 0.1 per cent for Africa overall. Ninety-eight per cent of all of Senegal's fixed Internet subscriptions are broadband, based almost exclusively on DSL technology. Of those households with Internet access, 90 per cent have a Sonatel subscription.

Although one of the mobile cellular operators (Expresso) has been granted a 3G license, services were not commercially available until end 2009, so users have relied on fixed broadband access for high-speed Internet access. The wireless broadband market is expected to develop in the near future, with Expresso recently announcing the launch of the country's first 3G+ service.

In Senegal, international Internet bandwidth – an important indicator for determining the quantity and quality of Internet services – more than doubled between 2007 and 2009, from 1.7 gigabyte per second (GBps), to 4.7 GBps. In Africa, Senegal ranks third in terms of the amount of International Internet bandwidth available per inhabitant.

The number of Internet users in Senegal reached around 7.4 per cent by end 2009, compared with 8.8 per cent for Africa and 18 per cent in developing countries. The ANSD's household survey showed that 4 per cent of Senegal's households have Internet access at home, and that some 80 per cent of Internet users access the Internet outside the home.

Fixed line market

Two operators, Sonatel and Expresso, have been licensed to offer fixed-line services but the market is dominated by Sonatel, which held over 90 per cent of the market by end 2009.

Fixed telephone line penetration in Senegal has hovered steady at around two per cent over the past ten years. Out of the 280'000 fixed telephone lines, 77.1 are residential lines, 21.8 are business lines and 1.2 per cent are used to provide public telephone access.