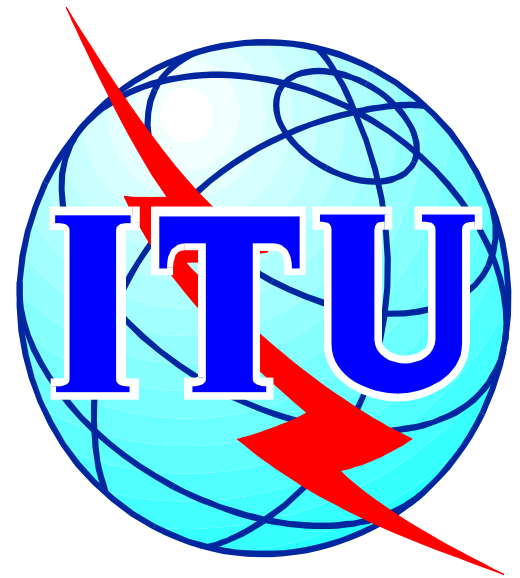


Mobile Africa

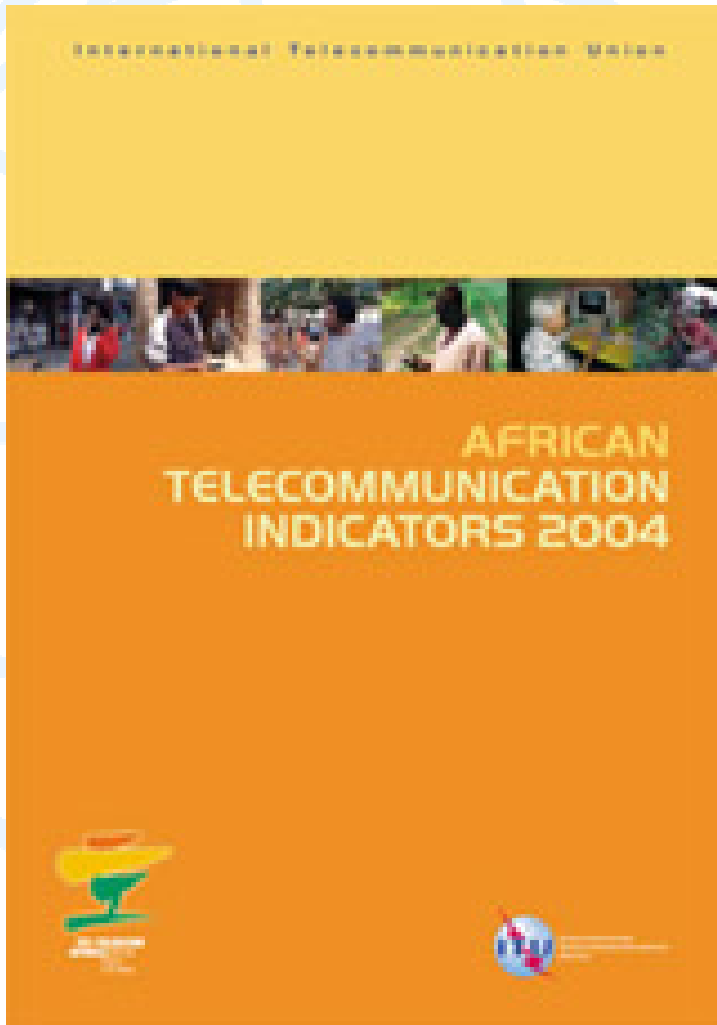
**Dr Tim Kelly, Head, Strategy
and Policy Unit**

**International
Telecommunication Union
(ITU)**

5 July 2005



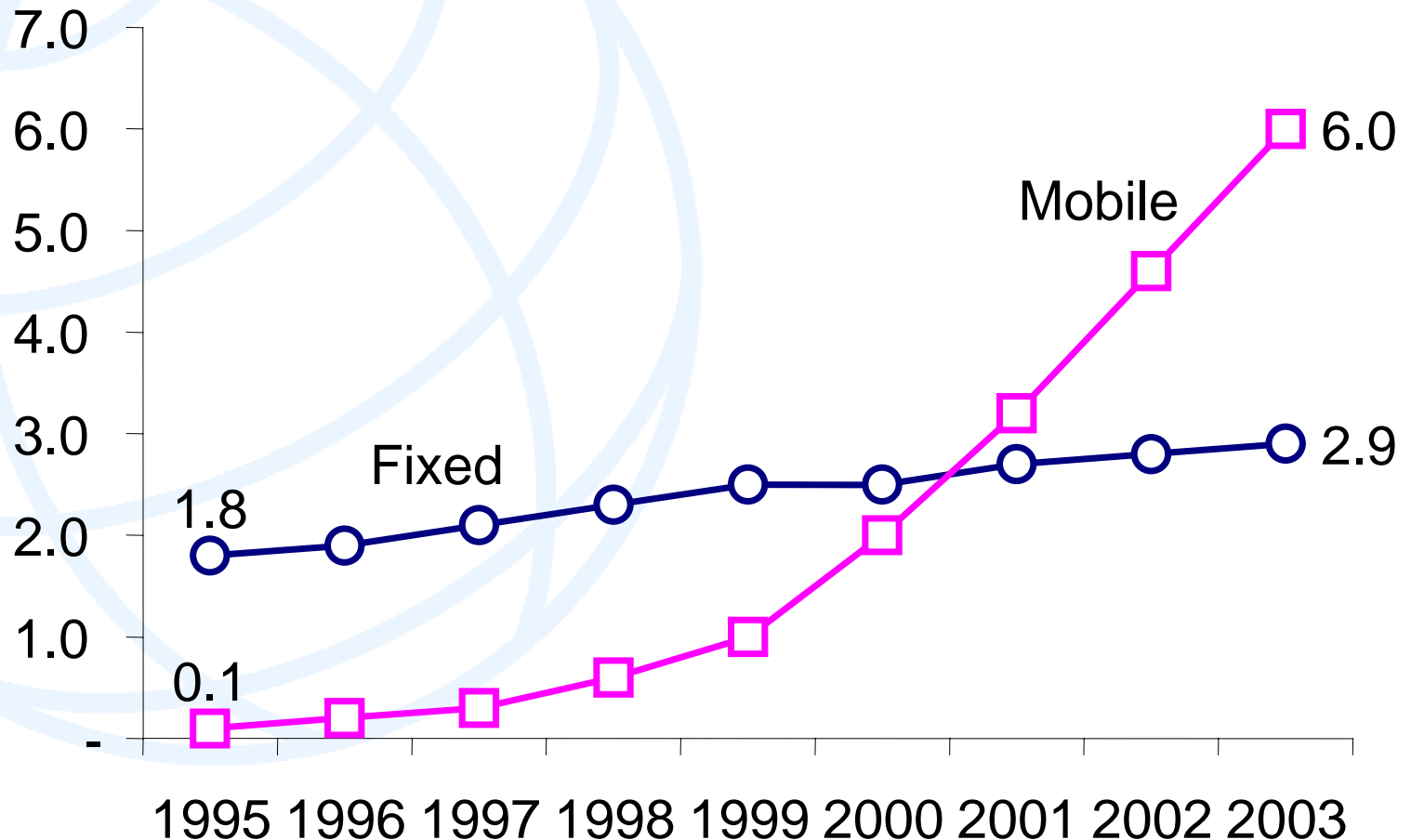
New report, released May 2004



- 1. Mobile Africa**
 - 2. Mobile Business**
 - 3. Wireless Internet**
 - 4. Mobile Policy**
 - 5. Mobile future**
- **African Telecom Indicators (statistics to year-end 2002/03)**
 - **Country Pages**
 - **Directory of Telecom Organisations**
- 136 pages**

Africa now has twice as many mobile users as fixed lines

Telephone users per 100 inhabitants, 1995-2003

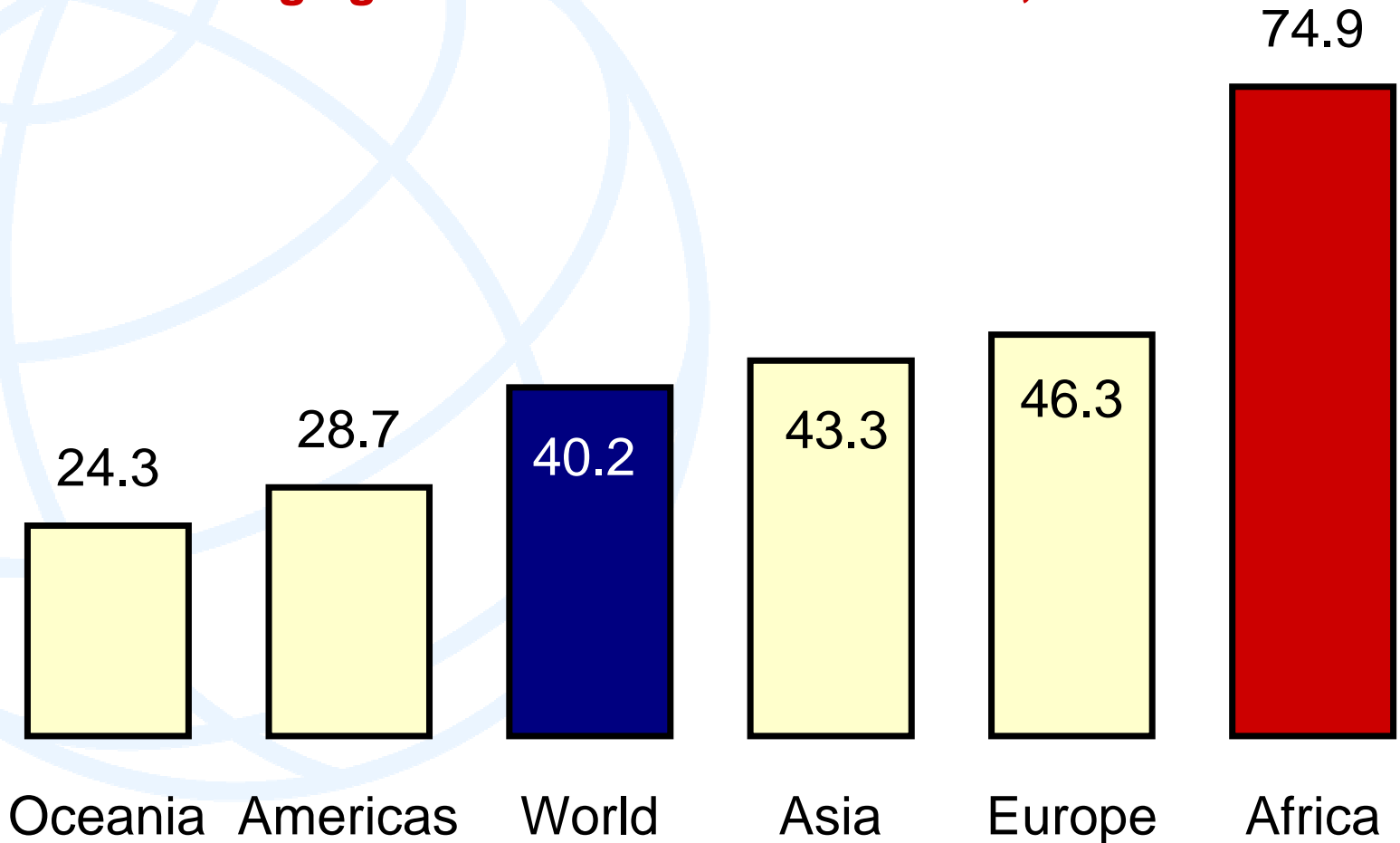


Source: ITU African Telecommunication Indicators, 2004



Africa has the world's fastest growing mobile network

Annual average growth in mobile subscribers, 1997-2002



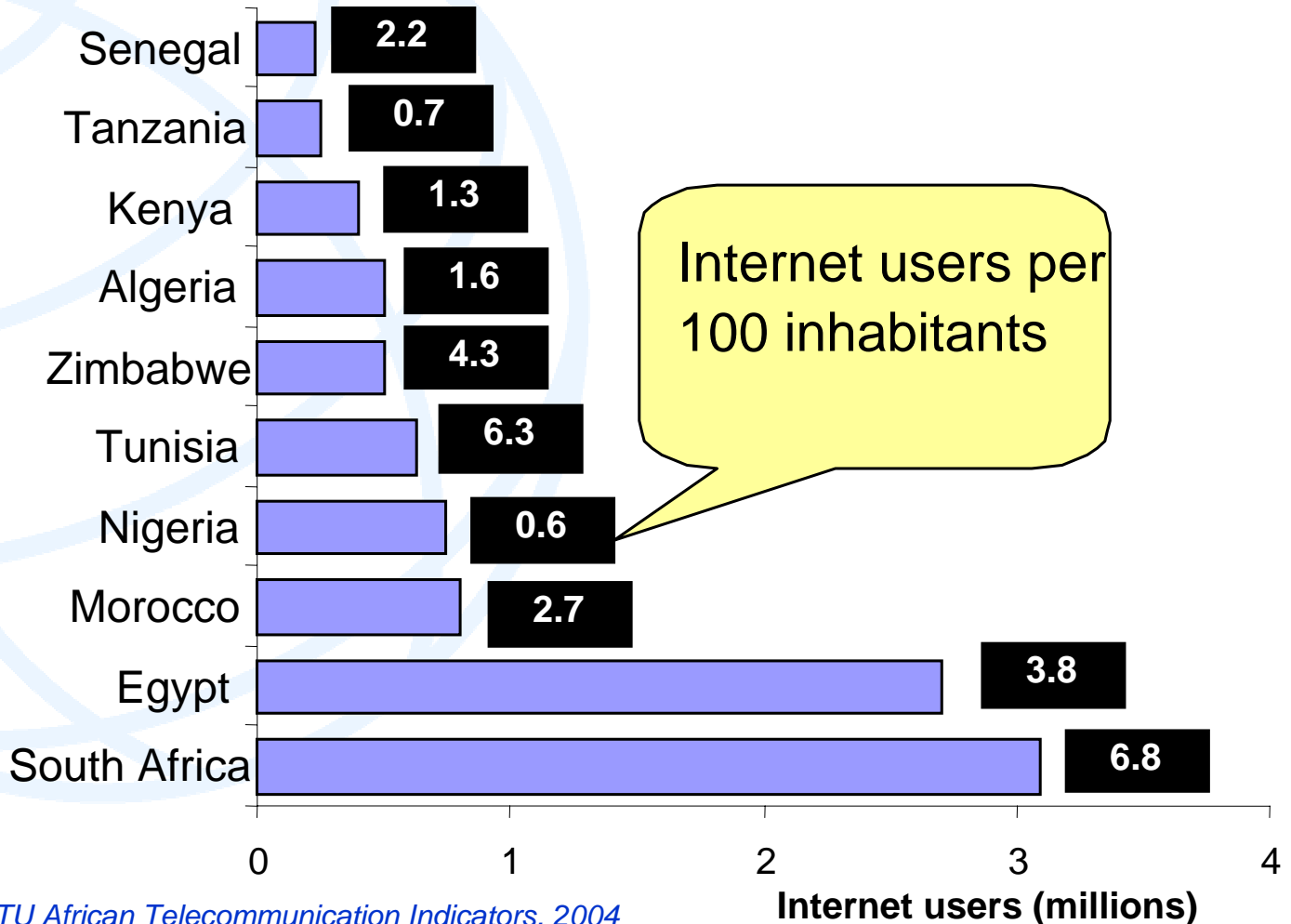
Emerging regional powerhouses

Africa's Top 10 Mobile Operators

| Operator | Mobile subscribers | |
|--------------------------|--------------------|----------------|
| | (000s) 2003 | Δ % 2002-03 |
| 1 Vodacom (South Africa) | 8'910 | 13% |
| 2 MTN (South Africa) | 6'050 | 28% |
| 3 Maroc Telecom | 5'214 | 13% |
| 4 MobiNil (Egypt) | 2'991 | 31% |
| 5 Vodafone Egypt | 2'740 | 29% |
| 6 Méditel (Morocco) | 2'060 | 29% |
| 7 MTN Nigeria | 1'650 | 82% |
| 8 Safaricom (Kenya) | 1'376 | 112% |
| 9 Cell C (South Africa) | 1'300 | 94% |
| 10 Djezzy (Algeria) | 1'268 | 302% |
| Top 10 | 33'559 | 30% |

Africa now has more than 12 million Internet Users

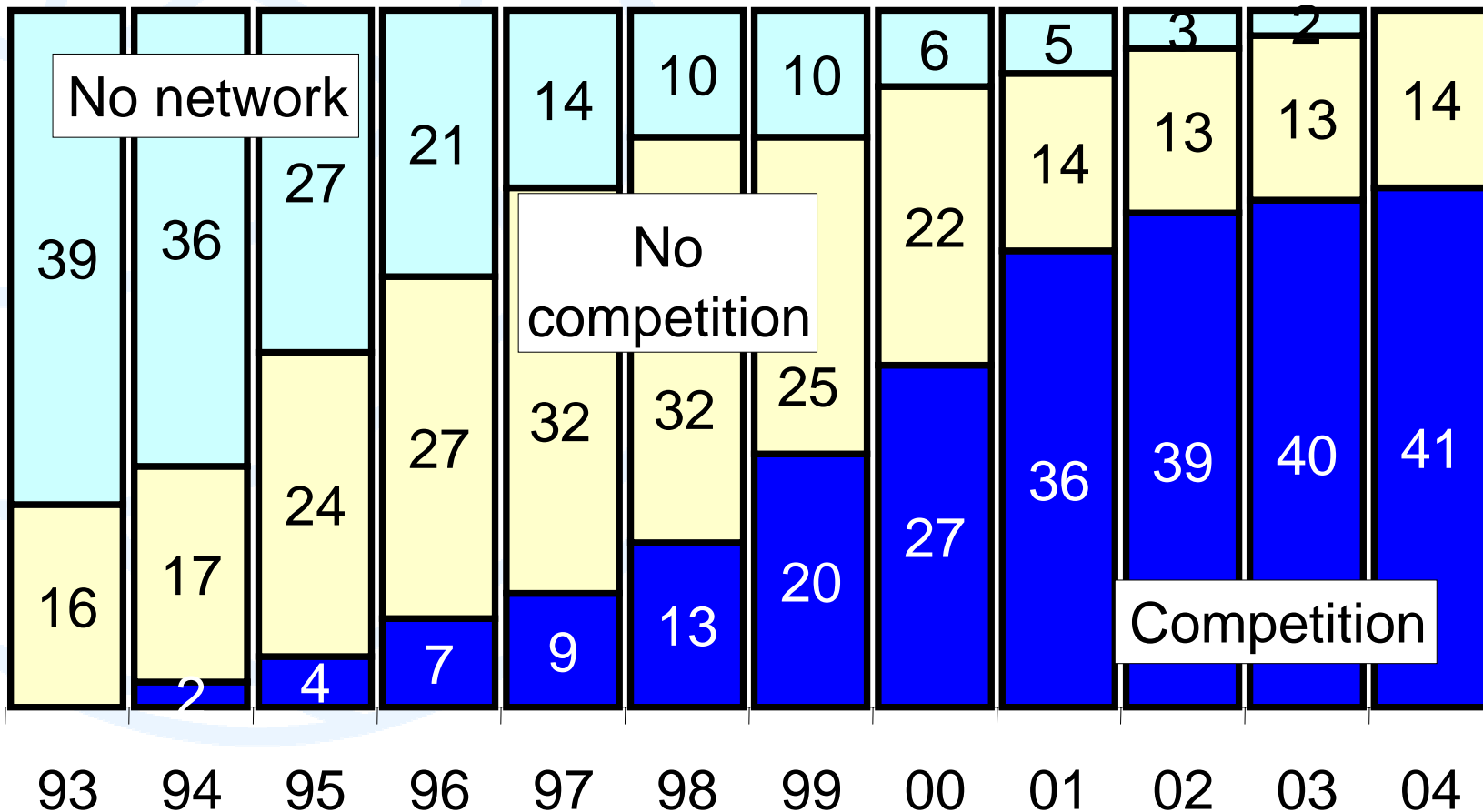
Top 10 African economies by number of Internet Users, 2003



Source: ITU African Telecommunication Indicators, 2004

Africa's markets are increasingly competitive

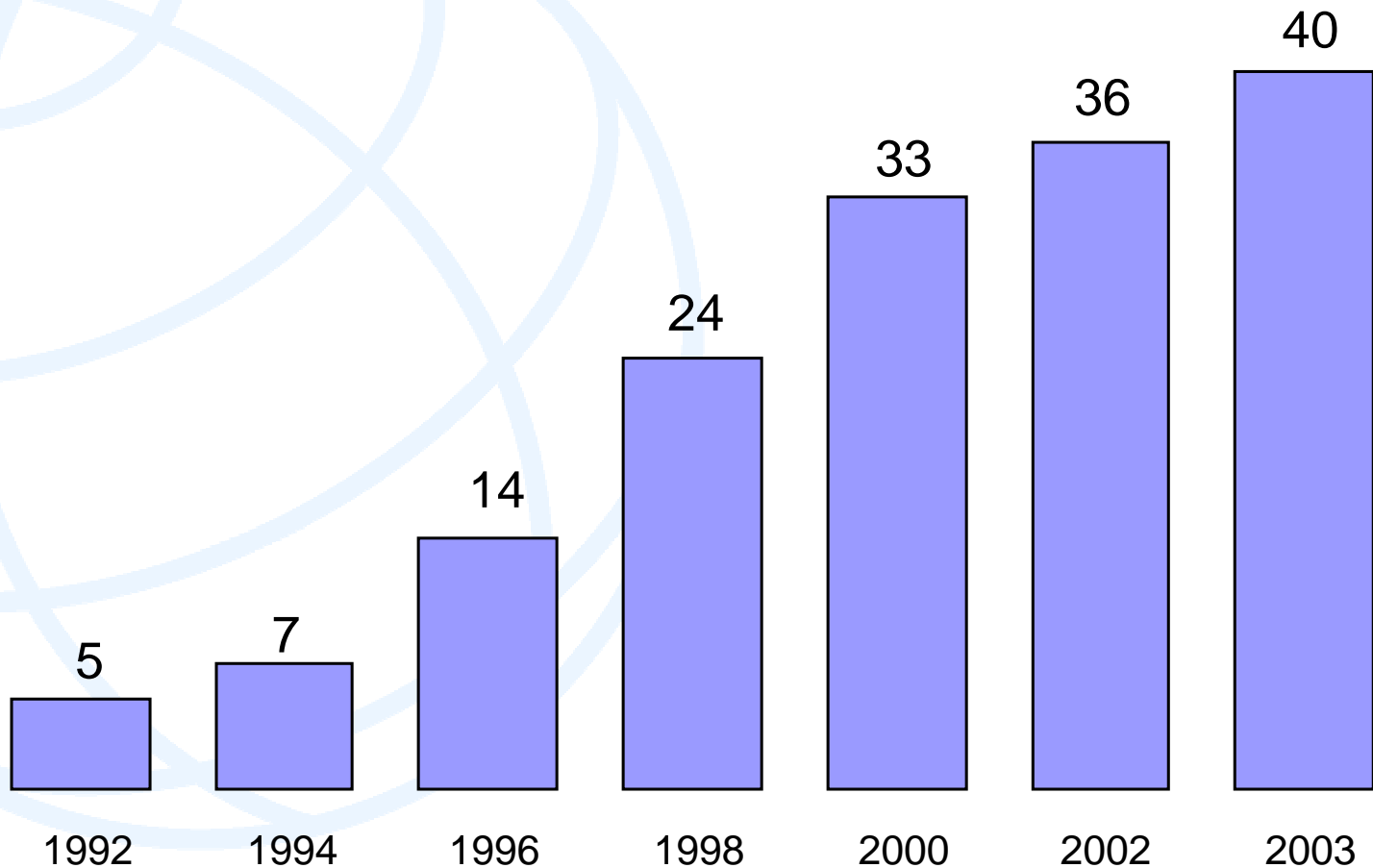
Africa's mobile market structure, by number of countries



Source: ITU African Telecommunication Indicators, 2004

The rise of independent regulators

Cumulative number of telecom regulatory agencies, by year of creation



A brighter outlook for Africa

- **ICT market has doubled in size since 2000**
 - **More users added in the first few years of the new century than in the previous 100 years**
- **World's fastest growing mobile economy**
 - **Passing 50 million mobile users in 2003**
- **World's fastest growing regional Internet**
 - **Passing 12 million Internet users in 2003**
- **Competitive markets**
 - **75% of African economies have more than one mobile operator**
- **Effective, independent regulators**
 - **Half of them established within last five years**