

South Sudan

Despite the challenging circumstances, South Sudan, the world's newest nation, is beginning to register uptake of mobile services and satellite communication albeit from a low base.

Mobile services: There is a significant level of competition, with three operators who were in operation before independence, but have since separated their operations from the North. These are: ZAIN, 100 per cent owned by the Kuwaiti mobile group; MTN, 100 per cent owned by the South African mobile group; and VIVACELL, owned by a Lebanese group. SUDATEL, the Sudanese operator, and GEMTEL, owned by the Libyan Government's investment arm, have both withdrawn from the market. Penetration remains low due to limited incomes and the troublesome security situation, which has inhibited coverage extension. Nevertheless, all operators have launched 3G, and mobile-broadband use is growing.

Fixed services: Fixed-telephone services are virtually non-existent due to under-deployment before independence and theft of the few copper lines post-independence. GEMTEL had inherited the network but has since ceased operations. Most Internet access is via mobile phones, although there are some fixed wireless and VSAT operators. There is no national fibre backbone, with long distance transmission mainly via microwave, including cross-border to Uganda for access to international bandwidth in Kenya. A project was planned to deploy 400 km of fibre-optic cable next to a highway being constructed from the capital Juba to the Kenyan border, from where Internet traffic will traverse Kenya's backbone to undersea cables in Mombasa. This has been placed on hold due to the political situation. Meanwhile, South Sudan largely relies on high-speed, low-Earth orbiting satellites, such as O3b, for the bulk of its international Internet bandwidth.

Government policy: The Ministry of Telecommunications and Postal Services is responsible for the sector. A new Communications Act was adopted in 2012, but strategies and plans to guide the sector have been put on hold due to the political situation. Plans to create a sector regulator, the National Communications Authority, have also been delayed.

Key indicators for South Sudan (2017)	Africa	World	
Fixed-telephone sub. per 100 inhab.	0.0	0.9	13.0
Mobile-cellular sub. per 100 inhab.	12.0	74.4	103.6
Active mobile-broadband sub. per 100 inhab.	1.1	24.8	61.9
3G coverage (% of population)	15.0	62.7	87.9
LTE/WiMAX coverage (% of population)	10.0	28.4	76.3
Individuals using the Internet (%)	8.0	22.1	48.6
Households with a computer (%)	4.7	8.9	47.1
Households with Internet access (%)	3.6	19.4	54.7
International bandwidth per Internet user (kbit/s)	0.4	11.2	76.6
Fixed-broadband sub. per 100 inhab.	0.002	0.6	13.6
Fixed-broadband sub. by speed tiers, % distribution			
<i>-256 kbit/s to 2 Mbit/s</i>	-	38.7	4.2
<i>-2 to 10 Mbit/s</i>	95.3	37.2	13.2
<i>-equal to or above 10 Mbit/s</i>	4.7	24.1	82.6

Note: Data in italics are ITU estimates. Source: ITU (as of June 2018).

Conclusion: Despite the challenging economic and security situation, mobile and Internet networks continue to operate, mainly in urban areas. Before the outbreak of civil war, the telecommunication sector was vibrant, with plans for deeper sector reform, expansion of mobile coverage and major national backbone deployment. This has all been placed on hold, but if the security situation can be resolved, there is significant potential for the ICT market.