

Opportunities in the African Mobile Sector

Understanding the key markets and players in the fastest growing mobile market in the world.

Key features of this exciting new market study:

- ◆ In-depth country profiles for 6 key African markets
- ◆ Subscriber growth and penetration forecasts to 2011
- ◆ Analyze detailed profiles of the 6 leading operators on the African continent
- ◆ 3G growth forecasts
- ◆ Study operator KPI's and competitive positioning
- ◆ Understand the market opportunities and growth drivers and inhibitors
- ◆ Country level subscriber forecasts for key markets
- ◆ Analyze operator market share



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2004 and 2005 have been remarkable years in the mobile industry and worldwide growth has been immense. The total number of mobile subscribers worldwide has grown from 1.38 billion at the start of 2004 to over 2.12 billion at the end of 2005. **During this period, Africa boasted the fastest growth rate of any region of the world except Eastern Europe, soaring from only a little over 60 million subscribers at the end of 2003 to break the 100 million barrier in 2005 and close out the year at approximately 113.5 million mobile subscribers, almost doubling the total size of the market in just 2 years.**

During the same time frame the only other region in the world to match that growth rate was Central & Eastern Europe, but there is one very big difference between these two regions; Eastern Europe is now approaching saturation and the region is forecast to grow by only 79 million further net additions in the next 6 years, while Africa represents a vast continent of almost a billion people, and barely 14% of them currently have a mobile phone. We forecast another 265 million subscriptions across Africa in the coming 6 years, the period covered by this study.

Many of the mobile markets in Africa have gone through immense changes in recent years, evolving from state-run monopolies to competitive growth markets. Much of the rapid growth in the last 2 or 3 years has been spurred by this liberalization and now these markets are evolving from this explosive growth phase into a more controlled, more mature phase, and with this phase comes a change of focus for many operators in these markets.

As subscriber numbers grow, so operators need to start focusing on ARPU, churn and the growth of non-voice value added services, and the inevitable consolidation activity that is associated with any large, fast growing, maturing market. In the "land grab" for Africa's hundreds of millions of mobile subscribers, key regional players such as MTN Group, Celtel (now part of MTC) and Vodacom are spreading their wings and building their portfolios across the continent. For example, MTN acquired operations in Cote d'Ivoire and Zambia during the second half of 2005, and Celtel acquired a controlling stake in Madacom in Madagascar at the end of the year. However, so far Orange is the only one of the big global brands to make their mark on multiple African markets.

This report offers you a snapshot of the African mobile market during the second half of 2005 and offers forecasts for growth across the continent.

The report includes detailed country profiles for some of the key markets in Africa, namely:

- ◆ South Africa
- ◆ Nigeria
- ◆ Morocco
- ◆ Egypt
- ◆ Kenya
- ◆ Tunisia



This report also includes company profiles of some of those key players:

- ◆ Celtel
- ◆ France Telecom
- ◆ Millicom
- ◆ MTN
- ◆ Orascom Telecom
- ◆ Vodacom

Read about all this and much more in this in-depth new 100-page market study...



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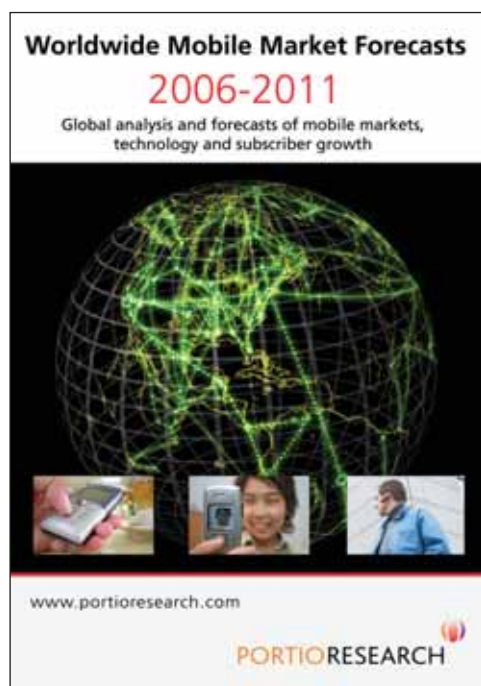
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Worldwide Mobile Market Forecasts 2006-2011

In 2005 the total number of mobile subscribers worldwide passed the all important 2 billion number. In our new market study we look closely at the worlds key growth markets and forecast growth from end-2005 to end-2011, as we see that total number of mobile subscribers worldwide double to almost 4 billion. This report covers the Top 25 Mobile Growth Markets worldwide and offers detailed country profiles for 55 countries in total.



Mobile Messaging Futures 2005-2010

This report offers full global and regional market summary and 5 year forecasting of worldwide mobile messaging markets. It looks closely at the seemingly endless success of SMS and the slow start of MMS and forecasts how these critical markets will develop from now until the end of this decade. Includes market analysis of mobile Instant Messaging, mobile email and much more.

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