

# Contents

<b>Opportunities For Mobile Broadband &amp; Wireless Broadband Access In Africa .....</b>	<b>6</b>
<b>The Options .....</b>	<b>6</b>
<b>Who Will Be The Winners? .....</b>	<b>7</b>
<b>TABLE: TABLE: WIRELESS BROADBAND ACCESS GROWTH BY COUNTRY (USERS) .....</b>	<b>7</b>
<i>PERIOD 2008-2012, SOUTH AFRICA, NIGERIA, KENYA, GHANA, CONGO DR, REST, TOTAL</i>	
<b>The Bottom Line .....</b>	<b>8</b>
<b>TABLE: WIRELESS BROADBAND ACCESS GROWTH BY TECHNOLOGY (USERS).....</b>	<b>8</b>
<i>PERIOD 2008-2012, HSPA, WIMAX, PROPRIETARY BWA, SATELLITE, LTE, TOTAL</i>	
<b>Case study 1 .....</b>	<b>9</b>
<b>South Africa .....</b>	<b>9</b>
<b>Case study 2 .....</b>	<b>10</b>
<b>MTN .....</b>	<b>10</b>
<b>TABLE: MTN SUBSCRIBER NUMBERS.....</b>	<b>11</b>
<i>PERIOD JUN 07-SEP 07, SEA: SOUTH AFRICA, UGANDA, MASCOM-BOTSWANA, RWANDA, SWAZILAND, ZAMBIA, SUB TOTAL, WECA: NIGERIA, GHANA, CAMEROON, IVORY COAST, BENIN, CONGO-BRAZZAVILLE, CONAKRY, LIBERIA, BISSAU, SUB TOTAL, MENA: SYRIA, IRAN, YEMEN, SUDAN, AFGHANISTAN, CYPRUS, SUB TOTAL, GRAND TOTAL</i>	
<b>Mobile Market Data Analysis.....</b>	<b>12</b>
<b>North Africa .....</b>	<b>12</b>
<b>TABLE: ALGERIA MOBILE MARKET Q307.....</b>	<b>12</b>
<i>OPERATOR: DJEZZY, MOBILIS, NEDJMA, TOTAL</i>	
<b>TABLE: ALGERIA MOBILE ARPUS Q106 – Q207 (US\$/USER/MONTH) .....</b>	<b>12</b>
<i>OPERATOR: NEDJMA, DJEZZY</i>	
<b>TABLE: MOROCCO MOBILE MARKET Q307.....</b>	<b>13</b>
<i>OPERATOR: MAROC TELECOM, MEDITEL, TOTAL</i>	
<b>TABLE: TUNISIA MOBILE MARKET Q307.....</b>	<b>14</b>
<i>OPERATOR: TUNISIE TELECOM, TUNISIANA, TOTAL</i>	
<b>West &amp; Central Africa .....</b>	<b>14</b>
<b>TABLE: CAMEROON MOBILE MARKET Q207 .....</b>	<b>15</b>
<i>OPERATOR: MTN, ORANGE, TOTAL</i>	
<b>TABLE: COTE D'IVOIRE MOBILE MARKET Q207 .....</b>	<b>16</b>
<i>OPERATOR: MTN, ORANGE, MOOV, TOTAL</i>	
<b>TABLE: GABON MOBILE MARKET Q207 .....</b>	<b>16</b>
<i>OPERATOR: CELTEL, LIBERTIS, MOOV GABON, TOTAL</i>	
<b>TABLE: GHANA MOBILE MARKET Q207 .....</b>	<b>17</b>
<i>OPERATOR: MTN, TIGO, ONETOUCH, KASAPA, TOTAL</i>	
<b>TABLE: MALI MOBILE MARKET Q207 .....</b>	<b>18</b>
<i>OPERATOR: IKATEL, SOTELMA, TOTAL</i>	
<b>East &amp; Southern Africa .....</b>	<b>19</b>
<b>TABLE: MAURITANIA MOBILE MARKET Q207 .....</b>	<b>19</b>
<i>OPERATOR: MAURITEL MOBILES, MATTEL, TOTAL</i>	
<b>TABLE: SENEGAL MOBILE MARKET Q207 .....</b>	<b>19</b>
<i>OPERATOR: ORANGE, TIGO, TOTAL</i>	
<b>TABLE: MOBILE SUBSCRIBERS/100 INHABITANTS 2000-06 .....</b>	<b>20</b>
<i>PERIOD 2000-2006, ANGOLA, BOTSWANA, KENYA, MAURITIUS, MOZAMBIQUE, SUDAN, TANZANIA, UGANDA</i>	
<b>TABLE: ANGOLA MOBILE MARKET Q207 .....</b>	<b>20</b>
<i>OPERATOR: UNITEL, MOVICEL, TOTAL</i>	
<b>TABLE: BOTSWANA MOBILE MARKET Q307 .....</b>	<b>21</b>
<i>OPERATOR: MASCOM, ORANGE, TOTAL</i>	
<b>TABLE: KENYA MOBILE MARKET Q207 .....</b>	<b>22</b>
<i>OPERATOR: SAFARICOM, CELTEL KENYA, TOTAL</i>	
<b>TABLE: MAURITIUS MOBILE MARKET Q207 .....</b>	<b>23</b>

<b>OPERATOR: CELLPLUS, EMTel, TOTAL</b>	
<b>TABLE: MOZAMBIQUE MOBILE MARKET Q207</b>	<b>24</b>
<b>OPERATOR: MCEL, VODACOM, TOTAL</b>	
<b>TABLE: SUDAN MOBILE MARKET Q207</b>	<b>25</b>
<b>OPERATOR: MOBITEL, MTN, SUDANI, CANAR, TOTAL</b>	
<b>TABLE: TANZANIA MOBILE MARKET Q207</b>	<b>26</b>
<b>OPERATOR: VODACOM, CELTEL, TIGO, ZANTEL, TOTAL</b>	
<b>TABLE: UGANDA MOBILE MARKET Q207</b>	<b>27</b>
<b>OPERATOR: MTN UGANDA, CELTEL UGANDA, UTL TELECOM</b>	
<b>South Africa</b>	<b>28</b>
<b>TABLE: SOUTH AFRICA WIRELESS MARKET SEPTEMBER 2007</b>	<b>29</b>
<b>OPERATOR: VODACOM, MTN, CELL C, VIRGIN MOBILE, TOTAL</b>	
<b>TABLE: VODACOM*</b>	<b>30</b>
<i>PERIOD MAR 05-JUN 07, SUBSCRIBER NUMBERS (MN): TOTAL NUMBER, TYPE (PREPAID), TYPE (POSTPAID), TECH (GSM 2G), TECH (W-CDMA 3G), MARKET SHARE (%), MARKET PENETRATION (%), NO OF NET ADDITIONS ('000), MARKET SHARE OF NET ADDITIONS (%), SUBSCRIBER USAGE: MINUTES OF TOTAL USE (BN), BLENDED ARPU (ZAR), ARPU (PREPAID, ZAR), ARPU (CONTRACT, ZAR), NON-VOICE REVENUES (ZARMN), FINANCIAL/STRUCTURE: REVENUE (ZARMN), OPERATING PROFIT (ZARMN), EBITDA (ZARMN), EBITDA MARGIN (%), CAPITAL EXPENDITURE (ZARMN), CAPITAL EXPENDITURE AS % REVENUE, CAPITAL EXPENDITURE/SUBSCRIBER (ZAR)</i>	
<b>TABLE: CELL C</b>	<b>30</b>
<i>SUBSCRIBER NUMBERS (MN): TOTAL NUMBER, MARKET SHARE (%), MARKET PENETRATION (%), NO OF NET ADDITIONS ('000), MARKET SHARE OF NET ADDITIONS (%)</i>	
<b>TABLE: VIRGIN MOBILE</b>	<b>30</b>
<i>SUBSCRIBER NUMBERS (MN): TOTAL NUMBER, MARKET SHARE (%), MARKET PENETRATION (%), NO OF NET ADDITIONS ('000), MARKET SHARE OF NET ADDITIONS (%)</i>	
<b>TABLE: MTN*</b>	<b>31</b>
<i>PERIOD MAR 05-JUN 07, SUBSCRIBER NUMBERS (MN): TOTAL NUMBER, TYPE (PREPAID), TYPE (POSTPAID), MARKET SHARE (%), MARKET PENETRATION (%), NO OF NET ADDITIONS ('000), MARKET SHARE OF NET ADDITIONS (%), SUBSCRIBER USAGE: MINUTES OF USE/SUBSCRIBER, BLENDED ARPU (ZAR), ARPU (PREPAID, ZAR), ARPU (CONTRACT, ZAR), NON-VOICE REVENUES (ZARMN), % OF NON-VOICE SERVICE REVENUES, FINANCIAL/STRUCTURE: REVENUE (ZARMN), PROFIT AFTER TAX (ZARMN), EBITDA (ZARMN), CAPITAL EXPENDITURE (ZARMN), CAPITAL EXPENDITURE AS % REVENUE</i>	
<b>Nigeria</b>	<b>31</b>
<b>TABLE: NIGERIA MOBILE MARKET (Q307)</b>	<b>32</b>
<b>OPERATOR: MTN, GLOBACOM, CELTEL, M-TEL, TOTAL</b>	
<b>TABLE: MTN</b>	<b>33</b>
<i>PERIOD MAR 05-JUN 07, SUBSCRIBER NUMBERS (MN): TOTAL NUMBER, TYPE (PREPAID), TYPE (POSTPAID), TECH (GSM 2G), TECH (W-CDMA 3G), MARKET SHARE (%), MARKET PENETRATION (%), NO OF NET ADDITIONS ('000), MARKET SHARE OF NET ADDITIONS (%), SUBSCRIBER USAGE: MINUTES OF TOTAL USE (BN), BLENDED ARPU (US\$), FINANCIAL/STRUCTURE: REVENUE (ZARMN), NET PROFIT (ZARMN), EBITDA (ZARMN), EBITDA MARGIN (%)</i>	
<b>TABLE: CELTEL*</b>	<b>34</b>
<i>PERIOD MAR 05-JUN 07, SUBSCRIBER NUMBERS (MN): TOTAL NUMBER, TYPE (PREPAID), TYPE (POSTPAID), TECH (GSM 2G), TECH (W-CDMA 3G), MARKET SHARE (%), MARKET PENETRATION (%), NO OF NET ADDITIONS ('000), MARKET SHARE OF NET ADDITIONS (%), SUBSCRIBER USAGE: BLENDED ARPU (US\$), FINANCIAL/STRUCTURE: REVENUE (US\$MN), NET PROFIT (US\$MN), EBITDA (US\$MN), EBITDA MARGIN (%), CAPITAL EXPENDITURE (US\$MN)</i>	
<b>TABLE: GLOBACOM</b>	<b>34</b>
<i>PERIOD MAR 05-JUN 07, SUBSCRIBER NUMBERS (MN): TOTAL NUMBER, TECH (GSM 2G), TECH (W-CDMA 3G), MARKET SHARE (%), MARKET PENETRATION (%), NO OF NET ADDITIONS, MARKET SHARE OF NET ADDITIONS (%)</i>	
<b>TABLE: M-TEL</b>	<b>34</b>
<i>PERIOD MAR 05-JUN 07, SUBSCRIBER NUMBERS (MN): TOTAL NUMBER, TECH (GSM 2G), TECH (W-CDMA 3G), MARKET SHARE (%), MARKET PENETRATION (%), NO OF NET ADDITIONS</i>	

<b>Mobile Forecasts.....</b>	<b>35</b>
<b>North Africa.....</b>	<b>35</b>
<b>TABLE: NORTH AFRICA TELECOMS SECTOR – HISTORICAL DATA &amp; FORECASTS.....</b>	<b>35</b>
<i>PERIOD 2005-2012, ALGERIA: CELLULAR MOBILE PHONE SUBSCRIBERS (MN), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, MOROCCO: CELLULAR MOBILE PHONE SUBSCRIBERS (MN), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, TUNISIA: CELLULAR MOBILE PHONE SUBSCRIBERS (MN), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS</i>	
<b>West &amp; Central Africa .....</b>	<b>36</b>
<b>TABLE: WEST &amp; CENTRAL AFRICA MOBILE SECTOR–HISTORICAL DATA &amp; FORECASTS.....</b>	<b>37</b>
<i>PERIOD 2005-2012, CAMEROON: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, COTE D'IVOIRE: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, GABON: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, GHANA: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, MALI: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, MAURITANIA: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, SENEGAL: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS</i>	
<b>East &amp; Southern Africa .....</b>	<b>38</b>
<b>TABLE: EAST &amp; SOUTHERN AFRICA MOBILE SECTOR–HISTORICAL DATA &amp; FORECASTS .....</b>	<b>39</b>
<i>PERIOD 2005-2012, ANGOLA: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, BOTSWANA: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, KENYA: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, MAURITIUS: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, MOZAMBIQUE: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, SUDAN: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, TANZANIA: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, UGANDA: CELLULAR MOBILE PHONE SUBSCRIBERS ('000), MOBILE PHONE SUBSCRIBERS/100 INHABITANTS</i>	
<b>South Africa .....</b>	<b>40</b>
<b>TABLE: SOUTH AFRICA TELECOMS SECTOR – MOBILE – HISTORICAL DATA &amp; FORECASTS .....</b>	<b>40</b>
<i>PERIOD 2005-2012, NO OF MOBILE PHONE SUBSCRIBERS ('000), NO OF MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, NO OF MOBILE PHONE SUBSCRIBERS/100 FIXED LINE SUBSCRIBERS, NO OF 3G PHONE SUBSCRIBERS ('000), 3G MARKET AS % OF ENTIRE MOBILE MARKET</i>	
<b>Nigeria .....</b>	<b>41</b>
<b>TABLE: NIGERIA TELECOMS SECTOR – MOBILE – HISTORICAL DATA &amp; FORECASTS.....</b>	<b>41</b>
<i>PERIOD 2004-2012, NO OF MOBILE PHONE SUBSCRIBERS ('000), NO OF MOBILE PHONE SUBSCRIBERS/100 INHABITANTS, NO OF MOBILE PHONE SUBSCRIBERS/100 FIXED LINE SUBSCRIBERS, NO OF 3G PHONE SUBSCRIBERS ('000), 3G MARKET AS % OF ENTIRE MOBILE MARKET</i>	
<b>Internet Market Data Analysis.....</b>	<b>42</b>
<b>North Africa.....</b>	<b>42</b>
<b>East &amp; Southern Africa .....</b>	<b>42</b>
<b>South Africa .....</b>	<b>43</b>
<b>TABLE: SOUTH AFRICA – TELKOM INTERNET CUSTOMERS ('000) .....</b>	<b>43</b>
<i>PERIOD MAR 06-SEP 07, INTERNET SUBSCRIBERS, ADSL SUBSCRIBERS, MANAGED DATA SITES</i>	
<b>Nigeria .....</b>	<b>44</b>
<b>TABLE: NIGERIA TELECOMS SECTOR – INTERNET – HISTORICAL DATA &amp; FORECASTS .....</b>	<b>44</b>
<i>PERIOD 2004-2012, NO OF INTERNET USERS ('000), NO OF INTERNET USERS/100 INHABITANTS, NO OF BROADBAND INTERNET SUBSCRIBERS ('000), NO OF BROADBAND INTERNET SUBSCRIBERS/100 INHABITANTS</i>	
<b>Business Environment Ratings .....</b>	<b>45</b>
<b>TABLE: AFRICA BUSINESS ENVIRONMENT RANKINGS .....</b>	<b>46</b>
<i>COUNTRY: NIGERIA, SOUTH AFRICA, TANZANIA, UGANDA, BOTSWANA, GABON, SUDAN, GHANA, ALGERIA, MOROCCO, EGYPT, SENEGAL, COTE D'IVOIRE, CAMEROON, MAURITANIA, MAURITIUS, MALI, TUNISIA, KENYA, ANGOLA, MOZAMBIQUE</i>	
<b>Glossary Of Terms .....</b>	<b>47</b>