

South Africa Telecoms, Mobile and Broadband Market Opportunities, Growth & Challenges 2019 - 2023

WiseGuyReports.com "South Africa - Telecoms, Mobile and Broadband - Statistics and Analyses" report has been added to its Research Database.

PUNE, MAHARASTRA, INDIA,
September 10, 2019 /
EINPresswire.com/ --

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Scope of the Report:

South Africa - Telecoms

South Africa's MNOs anticipating spectrum auction in 2019. South Africa's telecom sector boasts one of the most advanced infrastructures on the continent. There is has been considerable investment from Telkom, Liquid Telecom South Africa, Broadband InfraCo and municipal providers as well as from mobile network operators all aimed at improving network capabilities. The focus in recent years has been on backhaul capacity and on fibre and LTE networks to extend and improve internet service connectivity.

The poor historic availability and level of service of fixed-line networks encouraged the growth of the mobile sector for both voice and data services and this segment continues to command most investment and effort among telcos. Under a converged regulatory regime many alternative service providers have been able to enter the market to offer a range of services.

This regime also encouraged the major mobile network operators Vodacom, MTN and Cell C to move into the fixed-line and fibre sector. Proposed amendments to the Communications Act are intended to improve the ability of new entrants to access networks and further develop a competitive market landscape.

Other key regulatory matters aimed at shaping the market include the licensing of LTE spectrum in several bands. A multi-spectrum auction, delayed since late 2016 and which has caused some difficulties for mobile network operators desperately short of spectrum and which have had to rely on spectrum refarming and other measures to increase network capacity, is scheduled for mid-2019.

The broadband market is emerging from many years of slow growth exacerbated by an expensive operating environment created by Telkom's market dominance and its control of access to international bandwidth. Although wireless broadband services have carved out market share from existing DSL offerings, the sector is dominated by mobile networks and



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despite a growing fixed-line footprint the government's plan to provide national broadband coverage is largely based on mobile technologies.

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The mature mobile market has seen rapid growth since competition was introduced to the sector in the 1990s. SIM card penetration is high though is driven partly by the popularity of multiple card use as also by the take-up of mobile broadband services. The major mobile operators have branched into providing mobile banking and mobile entertainment services, while the market entry of a growing number of MVNOs has added to the competitive mix.

Key developments:

Telkom signs roaming and facilities leasing agreement with MTN;

Delayed spectrum auction rescheduled for April 2019;

Telkom completes Massive MIMO technology trials, aims to decommission 2G infrastructure;

Liquid Telecom South Africa to build a 4G network;

Comsol starts 5G fixed-wireless trials using spectrum in the 28MHz band;

Regulator sets MTRs through to October 2020;

Telkom FttC infrastructure passing close to three million premises;

Cell C extends wholesale fibre partnerships;

MTN acquires Smart Village, expands fibre network reach;

Telkom converts public payphones into Wi-Fi hotspots;

Vumatel extends open-access network offering 1Gb/s services;

South Africa to deploy nine nanosatellites;

Microsoft to build two data centres during 2019;

Telkom reports strong regulator growth in fiscal H1 2019, continues work on the Modderfontein Smart City development;

Vodacom contracts Alcatel-Lucent to build a GPON FttP converged network;

Report update includes the regulator's the regulator's March 2018 report on the ICT sector, operator data to September 2018.

Companies mentioned in this report:

Vodacom, MTN (MTN Network Solutions), Cell C, Telkom (Heita, 8ta), Virgin Mobile, Neotel, Atlantic Internet Services, Business Connexion, Internet Solutions, Verizon Business, MWEB, Vox Telecom (DataPro), Sentech, iBurst (WBS, Blue Label), Liquid Telecom South Africa (Neotel, Tata), Virgin Mobile, Broadband InfraCo, Transtel, Eskom, SEACOM, Transtel, Eskom, SITA, Sentech, Dark Fibre Africa (DFA), FibreCo, eFive, WASACE.

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