

Senegal Telecom, Mobile and Broadband Market Prediction By Technology, Top Key Player, Sonatel Senegal, Trends, Analysis

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Senegal – Telecoms Market 2019-2025

Scope of the Report:

Senegal approves LLU to stimulate DSL market competition. Senegal's economic growth has improved steadily in recent years, with GDP having grown at about 7% in 2017 and 2018. This has translated into

consistent growth in the telecom market, with the number of mobile subscribers having increased 4.5% in the year to June 2018. Orange Group's local subsidiary Orange Senegal (Sonatel) is the dominant player in both the fixed-line and mobile sectors, though there is effective competition in the mobile sector from Tigo Senegal (now owned by Saga Africa Holdings) and Sudatel's local unit Expresso, which have a 24% and 22% market share, respectively.

Competition in the fixed-line sector was introduced when Expresso launched services as the second national operator (SNO) in 2009. The new entrant initially chose CDMA2000 technology to serve both market segments but switched to GSM technology in 2010, including 3G/HSPA mobile broadband. Despite its market entry, Sonatel commands a near monopoly on fixed lines.

The mobile market has prospered, helped in part by poor fixed-line infrastructure in some rural areas. Mobile penetration reached about 106% by mid-2018. A range of value-added services is available to subscribers, including mobile broadband access, which has become by far the dominant internet platform, accounting for about 99% of all internet accesses as of mid-2018. Recent licensing developments will help propel the LTE sector.

In June 2016 sonatel senegal secured a 17-year LTE license (reduced from 20 years), as well as an extension to its fixed-line, 2G and 3G operating concessions (which had been due to expire in 2017) for no additional cost. The LTE license includes the use of 10MHz of spectrum in the 1800MHz band and 10MHz in the 800MHz band. Sonatel must provide 70% population coverage



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within five years and 90% coverage within ten years.

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Development of the internet market until 2007 was hampered by Sonatel's monopolistic pricing of bandwidth on the only high-capacity international submarine fiber optic cable serving the country. Competition in the DSL sector was also hindered by the lack of local loop unbundling regulations. Shortly after this facility finally became available in July 2018 three ISPs were granted licenses, each with coverage obligations in five regions of the country.

Key developments:

Sale of Tigo Senegal to Saga Africa Holdings approved;
Tax on telecom services increased to 5%;
Expresso launches E-Money platform;
Sonatel delivers LTE to 50% of the population;
Senegal Internet Exchange Point (SENIX) is opened;
Tigo and Sonatel inaugurate Tier III data centers;
Regulator awards more MVNOs licenses, deactivates some five million unregistered SIM cards;
Digital Senegal 2016-2025 programs to cost XOF1,346 billion;
ATOS Senegal replaces the State IT Agency (ADIE) to manage the 3,000km fibre network;
Report update includes the regulator's market data to June 2018, operator data to Q3 2018, recent market developments.

Companies mentioned in this report:

Sonatel (Orange Senegal), Millicom (Sentel, Tigo Senegal), Saga Africa Holdings, Sudatel (Expresso), Arc Informatique, Globacom, Mainstreet Technologies, Lycamobile Senegal

For Detailed Reading >>

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