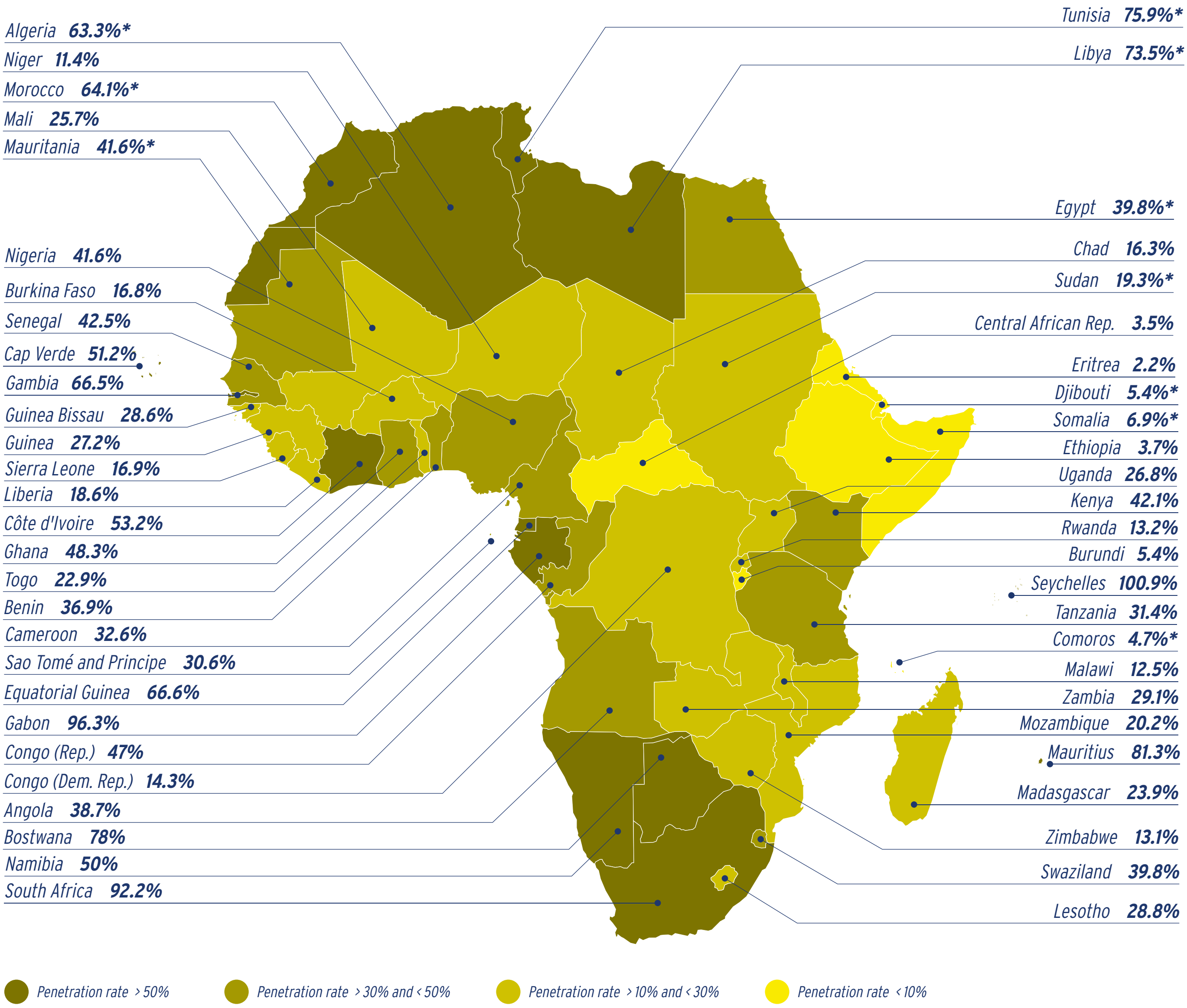
Private Sector & Development
PROPARCO'S MAGAZINE

Access to the mobile phone market has been booming in developing countries since the late 1990s. In Africa in particular, coverage rates have risen rapidly, while prices have dropped sharply in recent years. However, these countries still enjoy a considerable potential that remains unexploited with wide inequalities both between the different countries and within the countries themselves. Operators still have a lot of progress to make in order to increase access to these services for the poorest layers of the population, especially in rural areas. These statistics provide a snapshot of the mobile phone sector in developing countries, particularly in Africa.

Mobile phone penetration rate in Africa (2008)

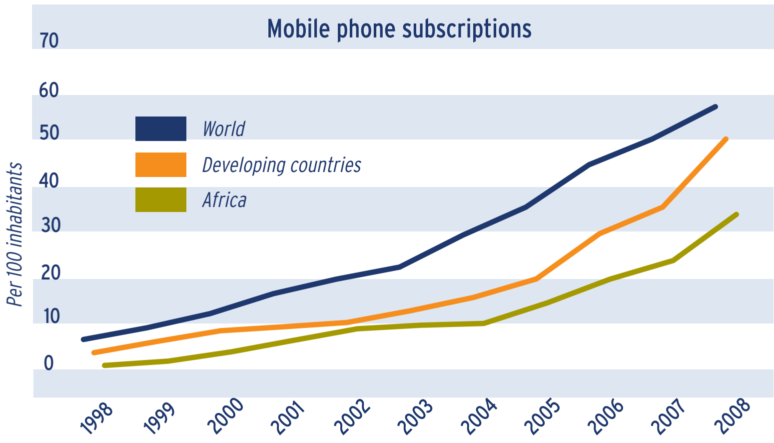


*Data for these eight countries are for 2007 and come from the International Telecommunication Union website (www.itu.int).
Source: International Telecommunication Union, 2009. Information Society Statistical Profiles 2009 – Africa, Working Paper (in preparation for the 2010 World Telecommunication Development Conference).

"Mobile phone operators invested an average of some USD 11 billion per annum in Africa between 2006 and 2008. These investment levels are expected to be maintained over the five coming years (USD 10.4 billion), but should account for a lower percentage of operators' turnovers (18% against 30% in the past)"

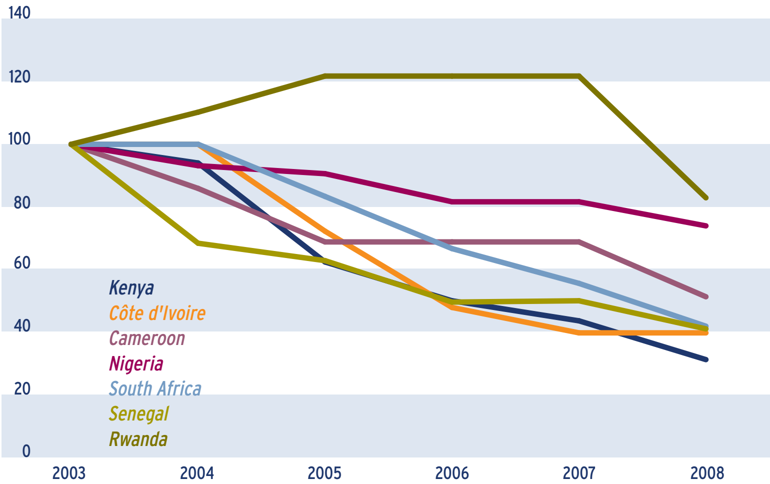
Source: AfricaNext, 2009. The Future of African Mobile Profitability: Stupendous Value, Mobile Darwinism & The Next Phase of Growth, AfricaNext, report AFN2223025.

Mobile phone penetration rate by region



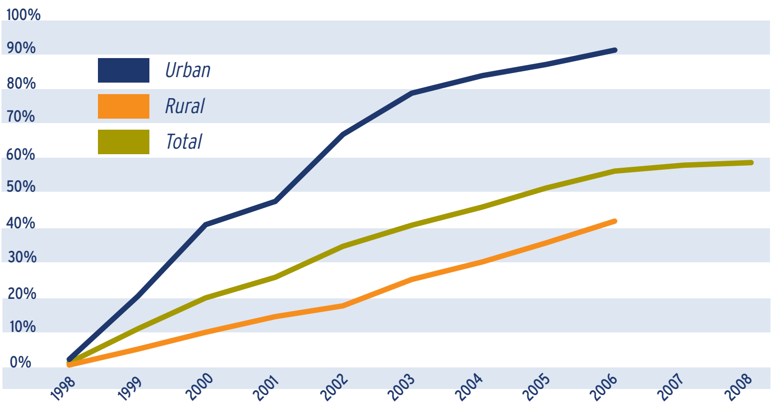
Source: International Telecommunication Union, 2009. Information Society Statistical Profiles 2009 - Africa, Working Paper (in preparation for the 2010 World Telecommunication Development Conference).

Evolution of price per minute in several African countries



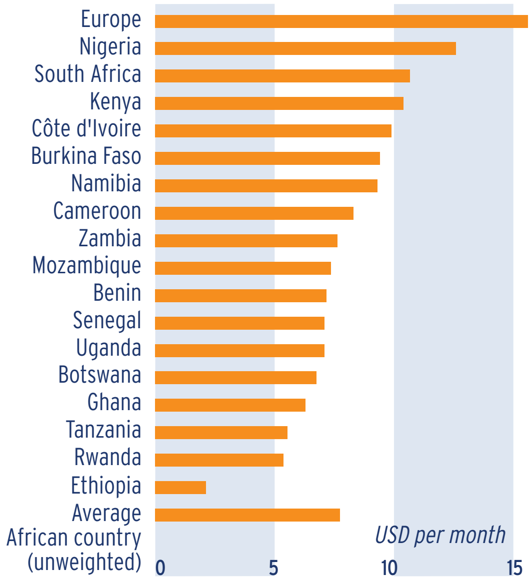
Source : AfricaNext.

Population covered by a mobile network in Africa



Source: International Telecommunication Union, 2009. Information Society Statistical Profiles 2009 - Africa, Working Paper (in preparation for the 2010 World Telecommunication Development Conference).
Minges, M., Briceño-Garmendia C., Williams, M., Ampah, M., Camos, D., Shkratan, M., 2008. Africa Infrastructure Country Diagnostic - Information and Communications Technology in Sub-Saharan Africa: A Sector Review, World Bank, Background Paper 10.

Price of an average mobile service consumer basket by country (2006)



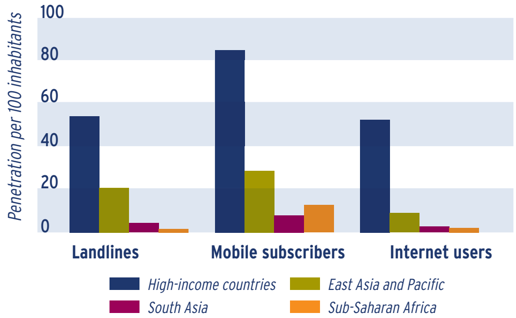
Prices correspond to an identical basket of mobile phone services for all the countries compared.
Source: Esselaar, S., Gillwald, A., Stork, C., 2007. Towards an Africa e-Index: Telecommunications Sector Performance in 16 African Countries, Research ICT Africa, Working Paper.

Strategic mobile investors in Africa (2008)

	Number of countries	Subscriptions (in millions)	Average market share in Sub-Saharan Africa*
MTN Group	16	67	38%
Zain	16	46	30%
Vodafone/Vodacom	8	68	33%
France Telecom	15	38	32%
Millicom	6	9	22%
Etisalat	10	13	6%
Portugal Telecom	5	14	75%
Orascom/Telecel Globe	7	39	-
Vivendi/Maroc Telecom	5	17	38%
Total Africa		390	

** Average market share in the countries where the operator is present. Source: Operators and AfricaNext.*

Access to telecommunications services: comparison between different regions



Source: Agence française de développement, World Bank, 2009. Africa's infrastructure - A time for transformation, The World Bank Press, Washington.