

F R O S T & S U L L I V A N

South African Broadband Market Information Communication Technology

M160-72

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Background to Study

Background:

The issue of broadband access in South Africa is a very topical one. While there is recognition that more needs to be done to increase access to the internet, there is still a large unmet demand in the country. This Research Service highlights the extent of broadband present in the country and profiles those companies involved in its provision.

The study forms part of Frost & Sullivan's "Information Communication Technology" annual "Growth Partnership Service"



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Research Aims and Objectives

- Questions that remained unanswered and which form the prime objectives of this research service include:
- This information should form the basis of an industry player’s decision to enter or develop the South African Open Source market



A What is the value of the South African broadband market?



B What drivers, restraints and challenges exist in the South African broadband market?



C Who are the main players in this space?

D What access technologies are currently used in South Africa?

E Will the country be ready for the FIFA 2010 World Cup?

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Research and Respondent Scope

For Market Engineering research, Frost & Sullivan utilises tried and tested marketing techniques to provide structure to the research and an easy format to compare results across different countries, markets and over time.

This project was carried out using primary research (telephone or face-to-face interviews) and secondary (published and online material) as the principle methods of data gathering. The focus of the interviews for this project were primarily the respondent types outlined in the figure below.

Organisation Type	Target Designations	Type of Information
Access Providers	Chief Technology Officers, Chief Executive Officers, Chief Information Officers	Technologies utilised, Competitive Environment, Growth Factors
ISPs	Chief Executive Officers, Owners, Chief Operational Officers	Market Drives and Restraints, Main User Groups, Technology Trends, Development Issues
Regulators	Policy makers	Licensing policies, spectrum allocation

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Research Deliverables

Through this Research Service Frost & Sullivan has delivered the following:

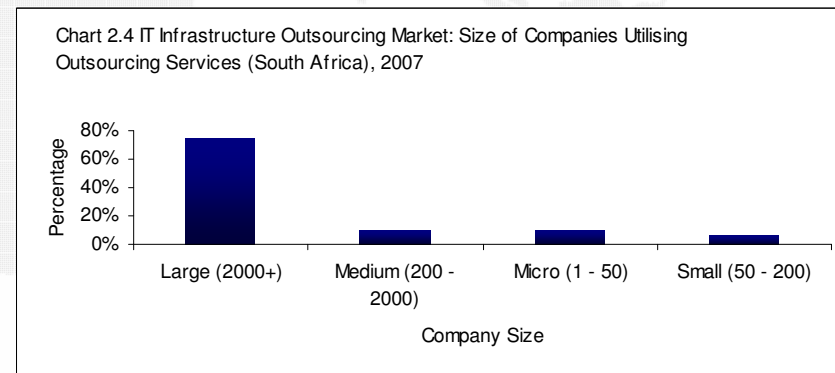
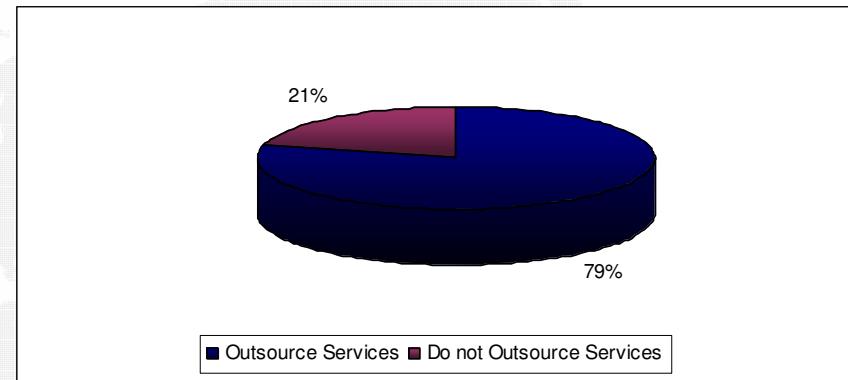
1) Industry Challenges and Market Forces

- Top Market Challenges
- Market Drivers
- Market Restraints
- Critical Success Factors

2) South African Broadband Market

- Market Size
- Market Forecast
- Technology Analysis
- Competitor Analysis
- Main User Groups
- Regulatory Environment
- Strategic Recommendations

Example Deliverables



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Methodology Followed

This Research Service provides a strategic overview of the South African Open Source Software market and follows the principle of Frost & Sullivan's Market Engineering research methodology. This measurement-based methodology focuses on analysis, strategy development and monitoring.

It utilises these methods to identify key trends of growth and challenges within the market.



Frost & Sullivan's
Market Engineering Research Methodology

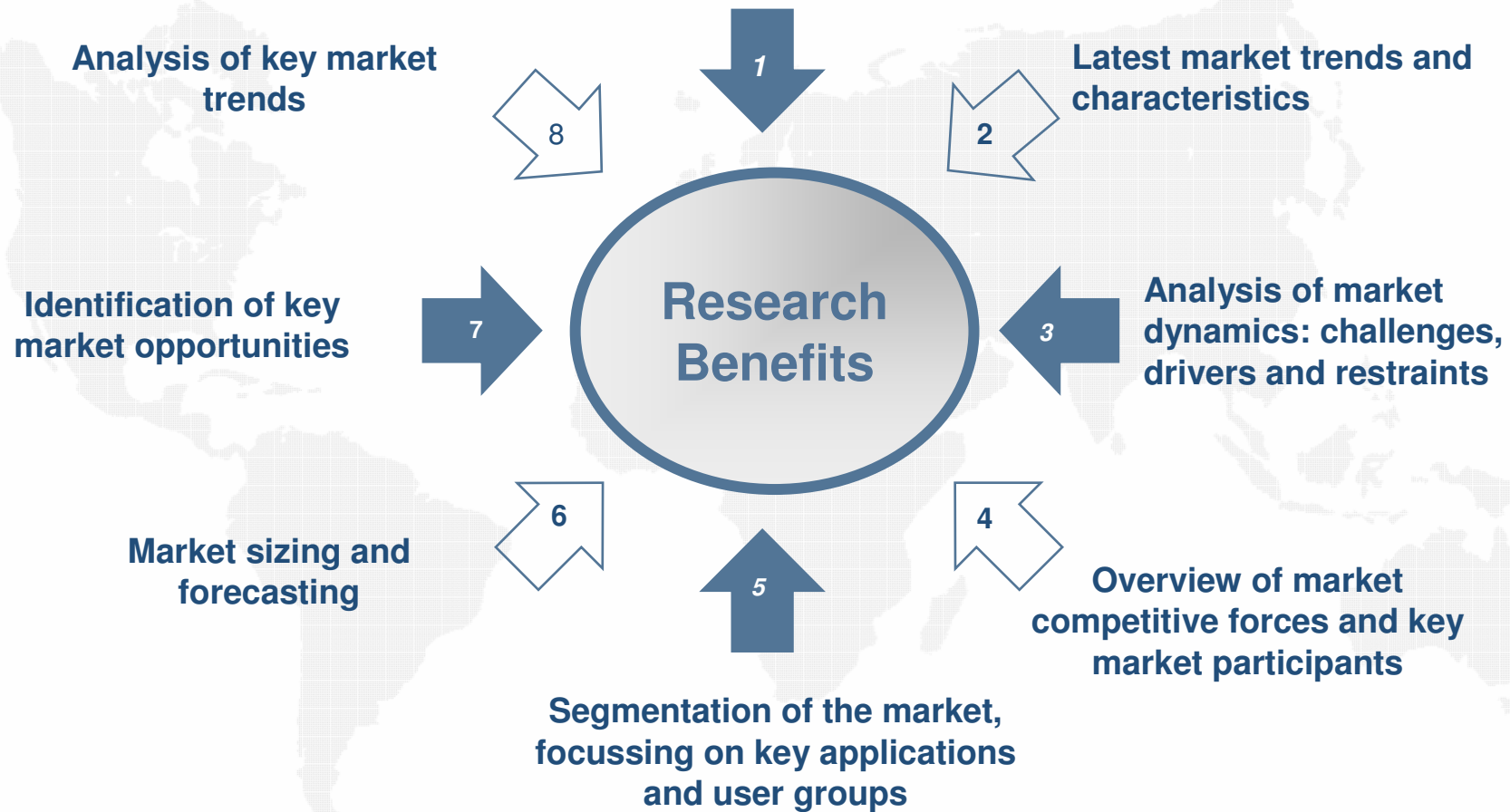
This study is based on thorough secondary and primary research principles. Extensive interviews were conducted with key industry players and policy makers in terms of the South African Broadband Market. Data were also collated through key end-user interviews.

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Benefits of Research

Provides unique and succinct overview of South African Open Source Software market



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