

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

Africa's Demand for Mobile Internet Access

Information and Communications
Technology

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Background to Study

Background:

Mobile internet access has emerged as the solution to Africa's last mile connectivity problem. Given that mobile internet allows people access to the Internet anytime, anywhere and is available as a prepaid service it is set to experience significant growth across the continent. Frost & Sullivan has embarked on this study to try and understand the current status of the mobile internet market in Africa as well as identify its future growth prospects.

This study provides insight to factors driving and limiting demand for mobile internet access. It highlights growth potential markets on the continent and the trends in technology being utilised to deliver mobile internet services.



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Research Aims and Objectives

- This study identifies markets where there are opportunities for a growth in the demand for mobile internet access
- The answers to these questions should provide a basis for policy development by the regulators as well as provide guidelines for growth strategy for existing and new mobile internet services providers.

- A Who currently exists to fulfill the mobile internet needs of Africa?
- B What is the nature of regulatory environments in Africa?
- C What is driving the use of the mobile internet in different parts of Africa
- D What are the main factors inhibiting the growth of the Internet services market in Africa?
- E What are the current levels of Internet usage and demand in Africa?
- F Which markets are set to show the highest levels of growth and thus what growth opportunities exist for mobile internet service providers ?

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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 below.

Organisation Type	Target Designations	Type of Information
Telecommunications Regulatory Authorities	Licensing Managers, Consumer Affairs Officers	Industry data, regulatory information, public sector ICT initiatives
Mobile operators	Sales Managers, Marketing Managers, Product Development Managers	Market drivers restraints and challenges, market segments data, subscriber data, infrastructure suppliers, infrastructure challenges, market trends e.t.c.
Internet Service Providers	Sales Managers, Marketing Managers, Product Development Managers	Industry data, expected market developments, regulatory environment, market challenges and restraints, market developments

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Research Deliverables

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

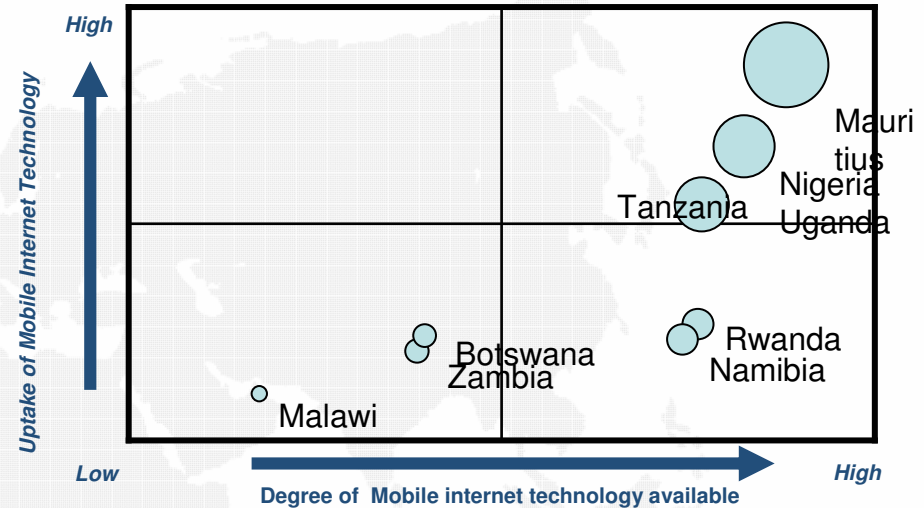
1) Industry Challenges and Market Forces

- Top Market Challenges
- Market Drivers
- Market Restraints

2) Selected African Telecommunications Markets

- Regulatory Environment
- Market Overview
- Key Trends in Technology Utilised
- Demand Analysis
- End User Analysis
- Key Market Players
- Technology Trends
- Future Market Trends
- Opportunity Analysis

Example Deliverables



Countries	Browsing	Email	Downloadin g e.g. music	Online chatting & Instant messaging	Research and Information gathering
Angola	2	1	3	4	
Botswana	3	2	4	1	

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Methodology Followed

This research follows the principles of Frost & Sullivan's Market Engineering research methodology.. This methodology focuses on market measurement, analysis, forecasting and monitoring. The base year for the study is 2006 and the forecast period is for seven years from 2007 to 2013. This study is based on thorough secondary and primary research.

The countries discussed in the study were selected based on their display of a combination of the following criteria:

- Offering internet survives through mobile technologies such as 2G and 3G technology
- Increasing investment into mobile technologies with emphasis on offering internet services on the mobile networks
- High growth potential



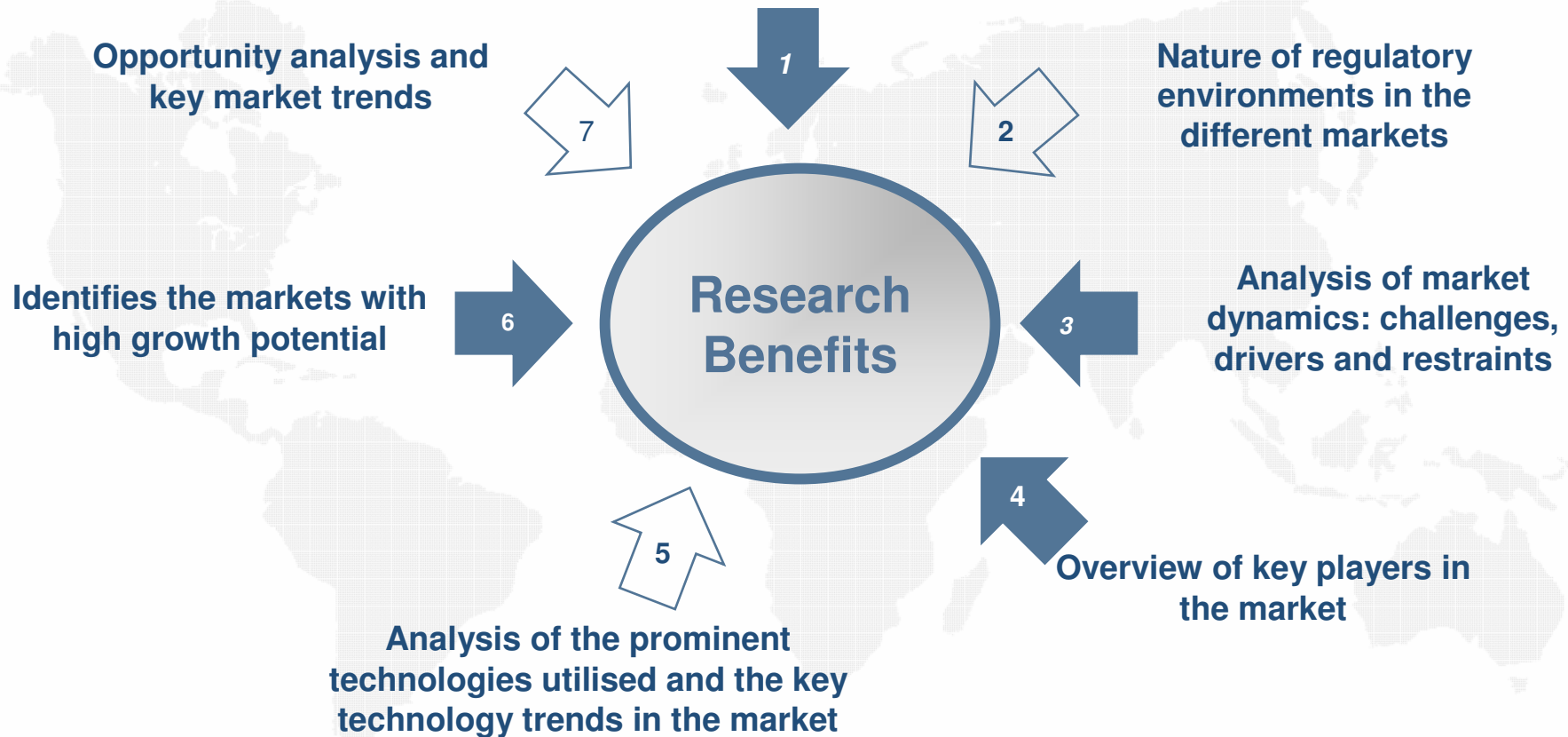
Frost & Sullivan's
Market Engineering Research Methodology

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Benefits of Research

Provides a succinct overview of African mobile internet services market



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