Kenya - Mobile Infrastructure, Operators and Broadband - Statistics and Analyses

Description: Kenya's mobile market has continued to grow steadily, supported by a mobile subscriber base of about 39.8 million by early 2017. Some market consolidation occurred following the acquisition by Airtel and Safaricom of Essar Telecom's yuMobile business. While all network operators have invested in mobile technologies and infrastructure upgrades to support mobile data services, competition has nevertheless presented challenges to their profitability, with uneven revenue growth reported in recent years. While Orange Group was the principal casualty of competition, leading it to sell its stake in Telkom Kenya, Safaricom has seen very strong growth on the back of its popular M-PESA payment platform. This market dominance, however, has encouraged the government to consider recommendations from a report commissioned by the regulator in late 2016 that Safaricom split off its M-PESA business.

To encourage the development of LTE services the government has pursued an open-access approach. Disputes centered on licence fees delayed the launch of LTE services by MNOs, though they continued to invest in infrastructure and technology upgrades using trial licences.

A number of MVNO licences awarded since 2014 have added to the competitive mix, with Equitel establishing a market share of about 3.8% by early 2017.

Key Developments:

Vodacom takes a large stake in Safaricom; Airtel begins trialling LTE; Treasury launches its M-Akiba platform to buy and sell government bonds; M-Tiba mobile health payment platform launched; regulator proposes limit of ten SIM cards per subscriber; Orange Money platform to be revamped and relaunched by end-2017; Safaricom contracts Nokia Networks to develop LTE-A network, shares capacity on its LTE infrastructure, launches Hello Doctor m-medicine service; One Network Area initiative expands to include mobile data and mobile money services; regulator reviews framework for QoS surveys; report update includes the regulator's market data to December 2016, telcos' operating and financial data to Q4 2016, recent market developments.

Companies mentioned in this report:

Safaricom (Vodafone), Bharti Airtel (formerly Zain, Celtel), Essar Telecom Kenya (yuMobile, formerly Econet), Telkom Kenya (Orange Kenya), Huawei Technologies, ZTE, Alcatel-Lucent, Nokia Networks.
3.7 Quality of Service (QoS) control
3.8 SIM card registration
3.9 Taxes
3.10 Tariff regulation

4. Mobile infrastructure
4.1 Analogue networks
4.2 Digital networks
4.2.1 Global System for Mobiles (GSM)
4.2.2 UMTS (3G)
4.2.3 Long-term Evolution (LTE)
4.3 Other infrastructure developments
4.3.1 Code Division Multiple Access (CDMA)
4.3.2 GPRS, EDGE, HSPA
4.4 Satellite mobile

5. Major mobile operators
5.1 Mobile market shares
5.2 Safaricom
5.2.1 Privatisation and IPO
5.2.2 Network development and operations
5.3 Bharti Airtel Kenya (formerly Zain, Celtel, KenCell)
5.3.1 Equity transactions 2004-2010
5.3.2 Network development and operations
5.4 Essar Telecom Kenya (yuMobile, formerly Econet)
5.4.1 Six years of licence disputes
5.4.2 Network development and operations
5.4.3 Shutdown and sale
5.5 Telkom Kenya (Orange Kenya)
5.6 Mobile Virtual Network Operators (MVNOs)

6. Mobile content and applications
6.1 Mobile money transfer, m-banking
6.1.1 M-PESA (Safaricom)
6.1.2 Airtel Money (ZAP)
6.1.3 yuCash (Essar)
6.1.4 Orange Money
6.2 PesaLink
6.2.1 Other services
6.3 Mobile TV
6.4 M-medicine
6.5 Satellite mobile

7. Handsets

8. Related reports

List of Tables
Table 1 Prepaid and contract mobile subscribers 2014-2016
Table 2 Mobile services revenue and investments 2008-2015
Table 3 Mobile traffic share by operator 2014-2016
Table 4 Mobile subscriber market share by operator 2012-2016
Table 5 Historic - Mobile subscribers and penetration rate in Kenya 1999-2009
Table 6 Mobile subscribers and penetration rate in Kenya 2010-2018
Table 7 SMS traffic 2012-2016
Table 8 MMS traffic 2012-2015
Table 9 Mobile internet subscribers by provider 2013-2015
Table 10 Mobile internet market share by provider 2014-2016
Table 11 Active mobile broadband subscribers 2010-2015
Table 12 Mobile data subscribers 2015-2016
Table 13 Forecast mobile subscribers 2018; 2020; 2022
Table 14 Mobile number portings 2013-2016
Table 15 2G Mobile base stations by operator 2012-2016
List of Charts
Chart 1 - Mobile subscribers and penetration rate in Kenya 2005-2018
Chart 2 Market share of subscribers by operator 2010-2016

List of Exhibits
Exhibit 1 Texting elephants
Exhibit 2 Job offers by SMS

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