

Egypt Telecom Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

Egypt Telecom Market revenue is expected to register a CAGR of 3.65% over the next five years. The major telecom firms with offices in Egypt, including Telecom Egypt, Vodafone, Orange, Etisalat Egypt, and Ericsson, promote innovation by making significant R&D investments consistently.

Key Highlights

The country's transition from 4G to 5G is still rising. Key telecom players collaborate with the government to deploy 5G networks nationwide. For Instance, Orange Egypt has been allocated more spectrum by the country's National Telecommunications Regulatory Authority (NTRA), which can be used for both 4G and 5G deployments.

The growing demand for high-speed connectivity services by customers and increasing spending on the deployment of 5G infrastructure positively influence the growth of the Egypt telecom market. For instance, Vodafone is working with the National Telecom Regulatory Authority (NTRA) regarding the possibility of undertaking 5G trials in the New Administrative Capital.

The Government authorities are working with private telecom service providers to expand their network capabilities. For instance, The National Telecom Regulatory Authority (NTRA) approved 749 new mobile stations during the third quarter of 2022. Such initiatives from the government will further support the growth of the telecom market.

Egypt's telecom industry has made further strides in expanding its services that support the 4G network. For instance, Telecom Egypt has secured a medium-term loan of USD 167 million from the European Investment Bank (EIB), which it will use to expand its 4G network. The loan will be used to improve Telecom Egypt's mobile network coverage by deploying around 2,000 new mobile sites and installing additional capacity layers to its existing portfolio of towers. Such initiatives will increase the demand for reliable and high-speed Internet connectivity services.

During the COVID-19 scenario, most people preferred work-from-home mode, thus increasing broadband subscribers. Wireless and wired broadband services can provide high-speed Internet services. Key players in the market focused on expanding their

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broadband services that support 4G and 5G networks.

Egypt Telecom Market Trends

Rising demand for Fixed Broadband Services

Fixed broadband penetration will increase during the forecast period, driven by ongoing efforts by the government to expand fixed broadband coverage and services across the country, particularly in rural areas.

Government authorities are working with private telecom service providers to expand their broadband services. For instance, Egypt's National Telecom Regulatory Authority (NTRA) signed a Memorandum of Understanding (MoU) with the Egyptian Competition Authority (ECA) to form a permanent joint committee that will develop a system for regulating free competition in the Egyptian telecom market. Such a government's timely initiative will further support the growth of the telecom market.

Key players in the telecom market are expanding their broadband networks. For instance, Telecom Egypt has announced it will roll out a new subsea cable system around Africa by next year called Hybrid African Ring Path (HARP). HARP routes will connect the landing points within South Africa, Europe, and Egypt.

Further key players in the market are planning to shift from copper-based broadband services to fixed fiber-based broadband services. According to Ookla Speedtest Global Index, Egypt ranked 92nd with a median fixed broadband download speed of 43.31 Mbps in October this year.

Rising demand for OTT and PayTV Services

Pay-TV services revenue will drop over the next five years because of a steady decline in direct-to-home (DTH) subscriptions and emerging competition from over-the-top (OTT) service providers.

Increasing mobile subscribers will significantly increase the demand for OTT services because of low subscription prices in Egypt compared to other African countries. OTT service providers such as Netflix, OSN Streaming, Starzplay, and Amazon Prime offer on-demand videos for customers, thus creating new growth opportunities for the telecom market.

According to Ookla Speedtest Global Index, Egypt ranked 84th with a median mobile download speed of 22.7 Mbps in October this year. Customers are migrating to mobile-based OTT services, thus creating new growth opportunities for the telecom market.

According to GSMA, smartphone adoption is expected to reach 91 million in 2025. Adults in the country are increasingly using smartphones. The smartphone penetration will further increase the demand for OTT services.

During the COVID-19 outbreak, people adopted work-from-home practices and spent more time watching TV and online media usage, especially online streaming and other forms of entertainment at home. OTT service providers offering on-demand videos will further drive the growth of the Egypt telecom market.

Egypt Telecom Market Competitor Analysis

Egypt's telecom market is moderately fragmented due to ongoing partnerships and recent advancements in the market. Some major players in the market studied include Telecom Egypt, Vodafone, Orange, Etisalat Egypt, and Ericsson.

In March 2022, Telecom Egypt signed an agreement with the European Investment Bank (EIB) for a loan of USD150 million. The funding would be used to expand the company's 4G network and add 2,000 additional mobile sites to support its mobile network coverage.

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In April 2022, Telecom Egypt announced that EG-IX, which it claims to be the first Open Access Internet Exchange in Egypt, is now live and available for customers, is intended to enhance the digital experience of internet users in Egypt, Africa, and the Middle East.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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