DOWNLOAD PDF UGANDA TELECOMMUNICATION INDUSTRY BUSINESS OPPORTUNITIES HANDBOOK

Chapter 1 : The Industry Handbook: The Telecommunications Industry

Target business opportunities and risks in Uganda's telecoms sector through our reviews of latest industry trends, regulatory changes and major deals, projects and investments in Uganda. Assess the activities, strategy and market position of your competitors, partners and clients via our Company Profiles (inc. SWOTs, KPIs and latest activity).

Strung together by complex networks, telephones, mobile phones and internet-linked PCs, the global system touches nearly all of us. It allows us to speak, share thoughts and do business with nearly anyone, regardless of where in the world they might be. Telecom operating companies make all this happen. Not long ago, the telecommunications industry was comprised of a club of big national and regional operators. Over the past decade, the industry has been swept up in rapid deregulation and innovation. In many countries around the world, government monopolies are now privatized and they face a plethora of new competitors. Traditional markets have been turned upside down, as the growth in mobile services out paces the fixed line and the internet starts to replace voice as the staple business. For more on this process, read State-Run Economies: From Public To Private. Telecom is less about voice and increasingly about text and images. High-speed internet access, which delivers computer-based data applications such as broadband information services and interactive entertainment, is rapidly making its way into homes and businesses around the world. The fastest growth comes from services delivered over mobile networks. Of all the customer markets, residential and small business markets are arguably the toughest. Big corporate customers - concerned mostly about the quality and reliability of their telephone calls and data delivery - are less price-sensitive than residential customers. Large multinationals , for instance, spend heavily on telecom infrastructure to support far-flung operations. They are also happy to pay for premium services like high-security private networks and videoconferencing. Telecom operators also make money by providing network connectivity to other telecom companies that need it, and by wholesaling circuits to heavy network users like internet service providers and large corporations. Interconnected and wholesale markets favor those players with far-reaching networks. The rate at which customers leave for a competitor. Largely due to fierce competition, the telecom industry boasts - or, rather, suffers - the highest customer churn rate of any industry. Strong brand name marketing and service quality tends to mitigate churn. ARPU levels get tougher to sustain competition, and increased churn exerts a downward pressure. ARPU for data services have been slowly increasing. High-speed internet access technology. Enacted by the U. Analyst Insight It is hard to avoid the conclusion that size matters in telecom. It is an expensive business; contenders need to be large enough and produce sufficient cash flow to absorb the costs of expanding networks and services that become obsolete seemingly overnight. Transmission systems need to be replaced as frequently as every two years. By contrast, smaller players must pay for interconnection more often in order to finish the job. For little operators hoping to grow big some day, the financial challenges of keeping up with rapid technological change and depreciation can be monumental. Earnings can be a tricky issue when analyzing telecom companies. Many companies have little or no earnings to speak of. No estimates are involved. The lower the ratio, the better. EBITDA provides a way for investors to gauge the profit performance and operating results of telecom companies with large capital expenses. Companies that have spent heavily on infrastructure will generally report large losses in their earnings statements. EBITDA helps determine whether that new multimillion dollar fiberoptic network, for instance, is making money each month, or losing even more. By stripping away interest, taxes and capital expenses, it allows investors to analyze whether the baseline business is profitable on a regular basis. Investors should be mindful of cash flow. EBITDA gives an indication of profitability, whereas cash flow measures how much money is actually flowing through the telecom operator at any given period of time. Is the company making enough to repay its loans and cover working capital? A telecom company can be recording rising profits year-by-year while its cash flow is ebbing away. Cash flow is the sum of new borrowings plus money from any share issues, plus trading profit, plus any depreciation. Keep an eye on the balance sheet and borrowing. Telecom operators frequently have to ring up substantial debt to finance capital expenditure. Again, the lower the ratio, the more comfortably the operator can handle its debt obligations. It comes as no surprise that in the capital-intensive telecom industry the biggest barrier to entry is access to finance. To cover high fixed costs, serious contenders typically require a lot of cash. When capital markets are generous, the threat of competitive entrants escalates. When financing opportunities are less readily available, the pace of entry slows. Meanwhile, ownership of a telecom license can represent a huge barrier to entry. There is also a finite amount of "good" radio spectrum that lends itself to mobile voice and data applications. In addition, it is important to remember that solid operating skills and management experience is fairly scarce, making entry even more difficult. At first glance, it might look like telecom equipment suppliers have considerable bargaining power over telecom operators. Indeed, without high-tech broadband switching equipment, fiber-optic cables, mobile handsets and billing software, telecom operators would not be able to do the job of transmitting voice and data from place to place. But there are actually a number of large equipment makers around. There are enough vendors, arguably, to dilute bargaining power. The limited pool of talented managers and engineers, especially those well versed in the latest technologies, places companies in a weak position in terms of hiring and salaries. With increased choice of telecom products and services, the bargaining power of buyers is rising. For the most part, basic services are treated as a commodity. This translates into customers seeking low prices from companies that offer reliable service. At the same time, buyer power can vary somewhat between market segments. While switching costs are relatively low for residential telecom customers, they can get higher for larger business customers, especially those that rely more on customized products and services. Products and services from non-traditional telecom industries pose serious substitution threats. Cable TV and satellite operators now compete for buyers. The cable guys, with their own direct lines into homes, offer broadband internet services, and satellite links can substitute for high-speed business networking needs. Railways and energy utility companies are laying miles of high-capacity telecom network alongside their own track and pipeline assets. Just as worrying for telecom operators is the internet: Competition is "cut throat". The wave of industry deregulation together with the receptive capital markets of the late s paved the way for a rush of new entrants. New technology is prompting a raft of substitute services. Nearly everybody already pays for phone services, so all competitors now must lure customers with lower prices and more exciting services. This tends to drive industry profitability down. In addition to low profits, the telecom industry suffers from high exit barriers, mainly due to its specialized equipment. Networks and billing systems cannot really be used for much else, and their swift obsolescence makes liquidation pretty difficult.

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