

SAMENA TRENDS

EXCLUSIVELY TO SAMENA TELECOMMUNICATIONS COUNCIL'S MEMBERS

BUILDING DIGITAL ECONOMIES

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Digital Content Foray and the need for a Sustainable Internet Business Model



Ross Cormack
Chief Executive Officer
Nawras

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EDITORIAL

Having come back from the Beyond Connectivity 2012 meeting held in Muscat, Oman, one could not hesitate to think regarding how discussions held in Muscat helped drive or support impetus for further transformation of effective new policies going forward. BYC was instrumental in bringing forward additional new thoughts and debate on the topics in the Policy realm which will bring forth the communications environment of the future. One of the hottest topics was the ITRs (International Telecommunications Regulations). These are instrumental toward the evolution of the telecoms environment that all of the key stakeholders (Policy Makers, Regulators, Operators, Service Providers, Vendors, Professional Service Providers) must co-exist within.

The current version has existed since 1988 and are now under review by the ITU. They are effectively a Government to Government Treaty which will be formally agreed to under negotiations at the WCIT meeting to be held in Dubai in December of this year. This is an opportunity for all the stakeholders to bring together the items of interest most important to their facets of the industry. The ITRs Treaty is highly relevant to the ICT ecosystem to which all stakeholders participate. As to SAMENA, we believe the ITRs are highly fundamental to all areas of its mandate, which include supporting an open, vibrant and transparent Broadband policy environment which supports investment, creates new value chains for the new Digitization operating business models of today, along with the further development of an open and highly coordinated dialogue and cooperative environment for all stakeholders to vest their ideas and inputs in the environment to which all will be vested partners.

SAMENA's Beyond Connectivity brought this discussion to a higher level and with this, helped promulgate additional participation and discussion in other forums such as the ITU's Arab Region WCIT Preparatory meeting recently held in Cairo, Egypt, along with other WCIT CWG meetings, either regional or centralized. The ITU has a very central role to facilitate discussion and bring together its member parties to create the textual benefits of the soon to be created new ITRs Treaty, which will be the foundation of the ICT environment for years to come. It is paramount of SAMENA to support the ITU where possible, bringing ideas which foster innovation, development and investment in the ICT sector. The ITU, having an excellent means of leadership, from Dr. Toure, the Secretary General, to others key to the discussion such as Richard Hill and Malcolm Johnson, who are themselves bringing the ITRs issues directly to the regional meetings, allowing for instrumental comments and suggestions in the creation of the new ITRs. Other very key institutions to this process of course are the Policy makers and regulators, who are endeavoring so much to bring a fair and equitable value for all stakeholders through the new revisions of the ITRs.

In conclusion, it must be said that it takes all of the energy and spirit of all stakeholders involved, to build a better future and environment for our global ICT future. Any methodology or means that forums such as SAMENA or global platforms such as the ITU or others can assist to support and facilitate that dialogue and discussion, is always a move in the right direction.

Truly Yours,

Thomas Wilson
CEO & Managing Director
SAMENA Telecommunications Council



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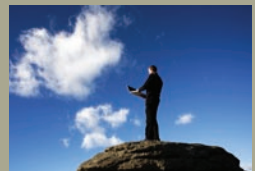
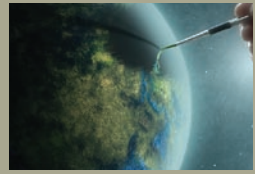
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EDITORIAL





TOP REGIONAL & MEMBER NEWS

STC Signs a Contract with Nokia Siemens to Expand 4G Network

In continuance of STC Group leadership as the first operator to launch 4G TD-LTE in the Middle East and North Africa, with introducing the services to both Kuwait and Bahrain and to assert STC leadership, it announced choosing equipment from Nokia Siemens Networks to expand its GSM, 3G and 4G in the Kingdom. STC Group CEO for Technical Operations said that adding user experience with 4G is much more enhanced and satisfactory as compared to traditional mobile broadband technologies; as it put at avail of an end user to get enjoy new multimedia applications and services. The Head of Middle East Region at Nokia Siemens Networks said that "The contract comes as an extension and reiteration of our commitment to 4G in the world, and as we consider STC as our long-standing partner and we are delighted to bring 4G services to STC customers".

ZTE Demonstrates Next-Generation Optical Network at 1.7Tbps

ZTE has conducted a field demonstration of optical networking equipment capable of transporting data at 1.7Tbps. According to ZTE, The WDM-based system transported the data using eight channels, each with a capacity of 216.4Gbps. ZTE confirmed that the distance during ZTE's demonstration was 1,750 kilometers (1,087 miles), and the company used a standard single mode fiber optic cable. WDM (Wavelength Division Multiplexing), which is mainly used by operators in their core networks,

sends large amount of data using a number of different wavelengths or channels over a single optical fiber. ZTE is not the only vendor that has conducted demonstrations to show its prowess when it comes to next-generation WDM systems. A week ago, ZTE's Chinese competitor Huawei showed a prototype system that can handle 400Gbps per channel and offer a total capacity of 20Tbps.

Nokia Siemens Networks Wins LTE and GSM Upgrade Contract in Singapore

Nokia Siemens Networks says that it has won a LTE rollout contract from Singapore's StarHub, which will be refarming its 1800MHz GSM band to carry LTE services. The first phase of StarHub's LTE network is expected to go live by the end of 2012, covering key business areas. As part of the contract, Nokia Siemens Networks will also modernize StarHub's GSM network. Nokia Siemens Networks will provide StarHub its Single RAN platform which will enable StarHub to run GSM and LTE concurrently on the 1800 MHz band. The company will also provide its Evolved Packet Core platform including Flexi NS (Network Server) and Flexi NG (Network Gateway). In addition, Nokia Siemens Networks will provide software for personalized customer experience management, including Policy and Charging Rules Function (PCRF) and One-NDS subscriber data management (SDM). Nokia Siemens Networks will also upgrade its NetAct network management system to enable a consolidated and effective monitoring, management and optimization of StarHub's LTE and GSM networks.

Omantel Mobile Announces Significant Reduction on the Prices of BlackBerry Devices

Omantel Mobile has announced a number of exciting discounts on BlackBerry devices that aims to enable more subscribers than ever to enjoy the benefits of this popular service. Omantel Mobile has always been committed to offer the best services for BlackBerry subscribers and this new reduction comes in addition to Muscat Festival offers that are valid until end of April. Omantel Mobile was the first operator in the Sultanate to launch BlackBerry for postpaid customers more than four years ago and for prepaid customers in 2010. The service has seen great demand as it offers customers unlimited benefits and connects them with family and friends through the worldwide recognized BlackBerry chat service "BBM". The service also allows the subscribers to send and receive emails on their devices and configure upto 10 email addresses.

Etisalat the First to Introduce 3G Services in the History of Afghanistan

Etisalat has launched the first 3G services in the history of Afghanistan. This achievement comes only after four years of the launch of "Etisalat Afghanistan". The company offers mobile services and ranked number one in building the best networks in Afghanistan. It acquires a customer's base of more than 3.5 million active subscribers in less than three years since launch. Etisalat's Afghanistan CEO said that the launch of the 3G by Etisalat marks an evolution in mobile communications and significant progress can only be made possible through a strong public-private partnership. He further added that through the launch of 3G services in Afghanistan, we bring a rich understanding of technology, business and culture of communities in these environments. We do not profit on community expense. We partner with communities so they can build their own future.

Nawras Adds Eight New Countries to International Credit Transfer Service

Responding to great customer feedback and the popularity of the Nawras Mousbak International Credit Transfer service, Oman's communications provider has added eight new countries to its list of operator partners. This allows customers to conveniently transfer credit to friends and family abroad in Indonesia, Sri Lanka, Jordan, Syria, Morocco, Tanzania, Turkey and Iraq in addition to India, Pakistan, Philippines, Bangladesh and Egypt. Nawras Payment Services Manager said that the success of Nawras Mousbak International Credit Transfer service is due to our pleasingly different approach as we strive to continuously grow our innovative range of services to help and delight our customers. He further added that Nawras Mousbak customers can now get closer to more friends and family abroad by transferring airtime to prepaid customers of over 25 different operators in 13 countries. International Credit Transfers of up to US\$ 50 (19 Omani Rials) per month can be sent in a safe, fast, convenient, reliable and cost effective manner.

Batelco Wins Four Awards at the MENA Cristal Awards

Batelco was presented with four awards at the MENA Cristal Awards. Batelco took home one silver and three bronze awards for its innovative and successful advertising campaigns of 2011, implemented by Bahrain's FP7. The MENA Cristal Festival was established in 2005 with the aim of introducing a new competition for advertising in North African and Middle Eastern countries. The awards ceremony rewards the best advertising creations with the coveted Cristal Trophy. The festival attracts a wide field of communication companies, advertising agencies, producers, directors, media survey companies and TV representatives who participate in a series of rich and convivial exchanges over the event's three-day annual gathering.

du's Mobile Broadband Network Classified as the Best in the Middle East and Africa

du is proud to announce that it has been ranked the best overall mobile broadband network of the Africa and Middle East Region carriers. This is according to results of a recent study done by ARC chart, an independent research and consulting firm focusing on all aspects of the wireless communications sector. The study used a carrier performance matrix to determine the best overall performance across four metrics. Of all AME carriers examined, du has the best overall mobile broadband network based on data speed and latency measurements, taken using a specialized Smartphone application. Since its launch in 2007, du has invested more than US\$ 2.45 billion (AED7 billion) in its network infrastructure. Its many advances over the years have led to its customers being the first in the UAE – and in some cases, amongst the first in the world – to enjoy new network technologies. With the launch of the UAE's first (and sixth globally) 42Mbps mobile broadband network, du proved that it always put the customers' desire for ever-faster speeds first. du was also the first telecom service provider in the UAE to launch HSPA+ (4G) network.

Huawei IPT and Contact Center Shipments Achieve No 1 Rank in 2011: Gartner

Huawei's IP telephony and contact center shipments registered record growth in 2011, as the shipments achieved No 1 rank, according to a market share report by Gartner. Gartner's Contact Center market share report disclosed that the rankings of Huawei Contact Center shipments upgraded to No 4 position in the year 2011 from an earlier No 8 position for the year 2010, thereby registering record increment rank No 1. Furthermore, Gartner's IPT market share report revealed that Huawei's PBX license shipments became first to enter the global Top 10 space, and the growth rate of Huawei's IPBX shipments/ PBX revenue ranked No 1. Recently, Huawei overtook Nokia Siemens Networks to grab second place in the wireless equipment market in Q4 2011. Ericsson is the market leader, with approximately US\$3.5 billion in wireless network equipment sales during fourth quarter of 2011.



April 2009 Ross Cormack has been CEO of Nawras, the newest GSM operator in the Sultanate of Oman, since June 2004. Following an extremely fast build out, Nawras launched to great acclaim in March 2005, achieving 47% market share with 1.5 million customers, by April 2009. Highly praised for its pleasingly different customer service, Nawras has redefined and simplified the whole customer experience including what is bought and where, as well as how to get help and how to pay. Nawras was named 'Middle East Mobile Operator of the Year' by CommsMEA in September 2007 and in November of the same year, received the 'Middle East Business Achievement Award for Corporate Social Responsibility' from Leaders. The company's first global recognition came in June 2008 with the Judges' Award 'Above and Beyond the Call of Duty' at the World BSS Awards. Nawras was delighted to be named 'Best Telecom Brand Oman 2008' by Business Today magazine. In November 2008, the Nawras consortium won the second fixed license in the Sultanate after a highly competitive bidding process and will now build the latest generation fibre optic backbone and WiMAX wireless access networks across the Sultanate to deliver Broadband telecommunications and Internet access, offering innovative, cutting edge IP based media and communication services. It will also build its own international gateway to offer international voice and data services. Ross was seconded to Nawras from Qtel which he joined in May 2003 as Executive Director Wireless Services, bringing over 20 years of international telecommunications experience including mobile start-ups and operations. Earlier he was CEO and founder of Singapore based Virgin Mobile Asia, a US billion dollar start-up joint venture between Singtel and Richard Branson's Virgin Group, which was Asia's first international MVNO. Previously, he was Managing Director of Hong Kong CSL, the market leader in one of the world's most competitive and crowded mobile markets with six operators and was a member of the Chief Executive Committee of Hongkong Telecom. Other roles have included Managing Director of AirTouch in Italy, Managing Director Asia of Cable & Wireless Mobile based in Singapore and Regional Director for Cable & Wireless Mobile in Europe based in London. In his time Ross has shareholder managed 16 mobile operators, been on the board of six and taken the CEO/MD role for four operators across Europe, Middle East and South East Asia.



Ross Cormack
Chief Executive Officer
Nawras

Q. How do you look at Internet's neutrality causing an obstruction to operator's business plans?

A. Net neutrality supports competition which is good for customers and we feel that this debate is healthy for our industry and will help us serve our customers in a more efficient way. Net neutrality contributes to protecting the rights of customers by enabling them to use innovative technology in a lawful way. We are keen to see an enhancement of the customer experience at every touch point and actively encourage any positive steps towards this end.

The region is going through major growth opportunities in broadband and having this debate at this stage will make sure that all stakeholders have their concerns addressed. In fact, this represents an opportunity where access network providers can start innovating in products and services and these new products will be optimized to deliver specific content and cater for specific applications. For example, the network can be optimized to deliver video streams or to deliver file transfers over messaging applications. We might even start to see specialised networks that cater to specific types of content delivery and application use.

Q. What would you say about the situation of Internet governance in the regional markets? What steps should be taken in order to address the issues?

A. While respecting the political and cultural sensitivities of our region there is a need for internet governance to be constructive and to positively impact growth. In the long term though it needs to be the customers that are the focus and it is Nawras' general position that intervention should only be used where absolutely necessary. If governments, operators and content providers all work towards providing what is best for customers, all partners will reap the rewards with customers being the main beneficiaries.

Q. What are your thoughts on Digital Dividend in overcoming the digital divide, particularly in terms of broadband?

A. This is an area where the telecom operators and the Government can work together to enhance the customer experience which is at the very heart of everything we do at Nawras. In Oman we see great efforts by the Government to enhance broadband coverage and accessibility. One example is the scheme to distribute laptops to those with lower incomes as well as to students and teachers in the educational sector. Nawras was proud to participate in this move designed to help bridge the digital divide.

We welcomed the recent Government move to start a process of releasing additional spectrum which operators can use to enhance mobile broadband services. There is also an ongoing FTTH trial project in which Nawras is participating together with the Telecommunications Regulatory Authority and an infrastructure provider. Fibre is being laid in the same trenches being dug for a water reuse project and customers are enjoying trialling a free, superfast broadband service.

The Government is also using Universal Service Obligation (USO) funds to finance deployment of telecom services in non-economical rural areas, for telecom operators to cover and serve customers in these less populated places.

Nawras is proud to be contributing to the expansion of broadband in Oman and by 2011 we were delivering broadband to 87% of Omani households, bringing the service to many customers for the very first time and reaching this target way ahead of our licence commitment.

Q. How do you foresee the content industry in light of present day Internet governance?

A. It is important that internet governance supports growth in the market and does not hinder development of new services that benefit customers. We want to be able to stimulate content by finding new ways to pay for it and by offering different products and services to stimulate the value chain. The expansion of Arabic content availability will be an important step forward to meet the needs of many in the region including customers in Oman.

As broadband penetration in the region rises, we will see the content industry thrive. The majority of content is going to be in the video space with sites like YouTube and Vimeo growing. We are going to see the rise of internet personalities and the era of innovation. We will also see global content providers entering the region and starting to look for distributions channels.

App development will also become a major driver of broadband usage, as developers start to create localised applications that are data hungry. Now the Google marketplace and the Apple AppStore are gaining more access to devices and people in the region.

Q. With the advancement of broadband, ongoing growth of the content industry, and the emergence of mobile apps, what are your thoughts about digitization being a key driver of sustainable economic growth across the SAMENA region?

A. All these factors provide an important opportunity to allow entrepreneurs to create and grow new businesses. In particular, this will open up opportunities for the young generation who are tech savvy and very much in tune with worldwide developments. As most of this development is currently happening in the Western world and Asia, the lack of content and apps for the Arabic speaking region provides exciting opportunities and we expect the introduction of Arabic content to be embraced by the vast majority of our customers in Oman.

Q. How are alternative technologies such as illegal internet telephony negatively affecting the revenues of telecom operators and what steps should be taken to prevent this situation?

A. While it is true to say that traditional revenues of

core voice and SMS services are decreasing, the development of IP based services is something which cannot be reversed and we view this shift in a positive light. Nawras welcomes the OTT players who are catering to the fast changing needs of customers using the services we provide. It is our role to focus on developing business models which enhance the customer experience while monetizing data to fund the continued rollout of data based networks. The competence telecom operators have in interconnect and billing should be explored in order to find ways of charging OTT players so there is a situation where all parties gain and customers enjoy the exciting results.

Q. Do you think there is a need for a harmonized regulatory framework to effectively address content related issues in the region?

A. The creation of a similar regulatory framework across the region would be beneficial for all concerned. It is the generally accepted view that a level playing field would simplify processes and enable faster growth to create a win-win-win situation for customers, regulators and operators.

Q. What do you think about content pricing; is it justified? Are people willing to pay for the content? If so, what variety of content?

A. The content industry probably needs to review how content is charged. The music industry has changed its models with the introduction of services such as iTunes. By enabling customers to personalise their content purchasing, the content industry would be able to charge differently as customers would be deciding how they want content delivered while telecom operators would be in a better position to decide how the transfer should be charged. If more customers are able to easily access and easily pay for content, this would see an increase in choice for customers which we encourage and a growth in the market reflecting positively on revenues.

Q. Being the Gold sponsor of SAMENA's "Beyond Connectivity 2012", please share your thoughts about the event. How do you see that telecom players have benefited from this knowledge sharing event?

A. It was fantastic to see so many industry professionals from across the region gathered in Muscat for Beyond Connectivity 2012. The event saw some enlightening presentations and stimulated lively debate both on the stage and informally as members networked in-between sessions. Our industry is going through some very exciting changes and benchmarking across the region is helpful for operators, regulators and vendors as well as benefitting customers, our number one concern at Nawras.



Q. How do you look at the SAMENA Council's role in fostering consensus-building, collaborations and empowering sustainable policies in the region?

A. The SAMENA council provides operators with a platform to discuss and drive development which is important for this rapidly changing region. It is vital to have a body which is working to influence policies that are being made across the region so they are compatible and foster faster growth.

I admire the work of SAMENA in promoting a fair, competitive framework through which thoughtful discussions and insightful exchanges stimulate progress for all involved parties. Most importantly, advances in our industry lead to a positive impact on the customer experience and that should always be our focus.

Beyond Connectivity 2012

03rd & 04th April, 2012, Al Bustan Palace, Ritz Carlton Hotel, Muscat - Oman

“HARMONIZED POLICY” An Enabler For Digital Economy Growth?

SAMENA's annual conference Beyond Connectivity 2012 was held at AlBustan Palace Ritz Carlton Hotel, Muscat Oman on April 3rd and 4th and discussed the governing dynamics for better ICT policies and friendly regulations. To date the overall development in ICT has been impressive; however, there are still many countries where ICT availability and accessibility need to be more developed. With the emergence of next generation technologies and new ICT policies the need for harmonized national and regional ICT policies are gaining new heights and becoming major issues especially in the SAMENA region. The progression of telecoms and ICT is a major factor that directly affects the overall national socio economic development and the economic integration. Over the past years the need for collaborative approach on different issues like spectrum harmonization, infrastructure sharing and local loop unbundling (LLU), public private partnership and international roaming rates have gained a substantial momentum in the SAMENA region. So there is a need for region wide harmonized ICT policies to be devised and implemented for boosting the growth of the industry further.

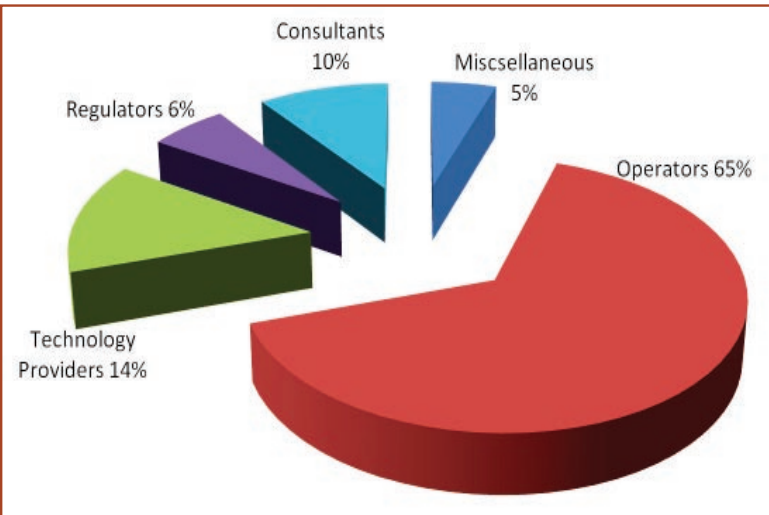
and others. CEOs and Industry leaders from around the region and beyond shared vital business insights, policies & regulations knowledge, market experiences, and SAMENA region's potential.



The two day event was held with support from OmanTel, Nawras, Teralight, GBI, Squire Sanders, Telecom Review

The first day of the conference discussed the International Telecommunication Regulations (ITRs) and the need for harmonized ICT policy. Speakers from SAMENA Telecommunications Council, Nawras, TRA-Oman, OmanTel, VIVA and other valued participants led a comprehensive discussion covering the significant role of SAMENA Council on reviewing the ITRs proposed amendments and the need for harmonized policies and the ITRs key role for strengthening the efforts towards the harmonized development of ICT policy. They emphasized on the importance of creating a new open environment for the market that could facilitate the market growth beyond nation borders and benefiting from the economic range. It was analyzed that the most influencing aspects for the policy and regulation are demands for increased attention by the industrial stakeholders. Dr. Mustafa Aykut of Turk Telecom Group and SAMENA Council Policy Board Chairman said that “Mandated application of ITU-T recommendations, which could create operational issues if not compatible

with Internet standards; Counter measures against spam and related issues such as phishing, malware, malicious code, etc.; Dispute settlement; Peering arrangements and the impact on costs of international Internet traffic; Misuse of numbering, naming and addressing resources and subscriber identification; Quality of service; Cyber security (security of data, of signaling and traffic information, and of billing information etc.); Appropriate use of billing and payment models (inc. Taxes, Tariffs); Personal data protection; "New technologies" regulation; On-line child protection; and Internet addresses allocation/distribution are issues that the member states propose to include in a revised ITRs".



Panel 2 of the conference discussed the policy and regulation as a major tool to boost broadband proliferation. Speakers from KPMG, STC, Arthur D. Little, Squire Sanders and Omantel discussed in details that broadband presents a strong opportunity for the SAMENA region for closing the development and transformation of innovation for generation which will help in creating more revenues. They emphasized on the importance of policy & regulation and highlighted that wireless access technologies are considered to be a cost effective option for connecting remote areas to the global information super highway. They agreed that one of the biggest issues that policy makers and regulators need to consider is infrastructure sharing, unfilled licensing and local loop unbundling.

Panel 3 of the conference discussed the future of content industry complimented the demand for local content. Speakers from Partner Peppers & Rogers Group, EK partners & Al Enezee, Booz & Co and PCCW Global highlighted the fact that the content segment is still under served as far as local content in the SAMENA region. They said that there is a multitude of technologies such as WiMAX, 3G, EvDO available to deliver content service.

The second day event the 4th April started with the CEO live session along with the participation of Omantel, Booz & Co, Orange Jordan, Nawras, Kalimat Telecom and FRIENDimobile Oman in which they proposed that regulators shall set up policy frameworks in a transparent manner. It was discussed that the development of strong competition are increasing and becoming more service grounded and the infrastructure sharing has a big impact on the reduction of the cost of network elements development.



Panel 1 discussed the Open Access LTE scheme and the future of 4G. Speakers from Huawei, Ericsson and OmanTel discussed number of value added services which are anticipated for adding to the operators' revenue growth. It was discussed that the spectrum allocation for mobile broadband services are planned in various markets and mobile operators are investing in the development of 4G LTE. Mr. Ahmed Al Abri of Nawras highlighted that "Regulators need to facilitate spectrum availability; Operators and Regulators need to work collaboratively together to achieve a harmonized spectrum strategy across the region which will create a suitable Ecosystem and facilitate the Open Access LTE deployment".

Panel 2 discussed the digital dividend and its value for telcos. Speakers from NSN, Qtel Group and others highlighted that the digital dividend represents a unique vision for the advancements of the broadband segment. It was emphasized that the internet users in the SAMENA region particularly are expected to get more choices on the way they are connecting to the Internet.

Panel 3 discussed the prospects of Net Neutrality in the region. Mr. Sohail Qadir, VP - Wholesale Business Unit -Omantel said that "The dramatic rise of Broadband Traffic -Revenues are lagging behind traffic growth, creating profitability issues and causing operators to focus on



expansion “Mr. Thomas Kuruvilla, Managing Director MESA -Arthur D Little said that “Regulators worldwide are coming up with their own stands on the topic, however, the debate is more frequent in countries where public funding is used for infrastructure deployment”.

Mr. Thomas Wilson, CEO & Executive Managing Director of SAMENA Telecommunications Council presented the roadmap for the Council for the next three years. He said: “Harmonized national ICT Policies are becoming a major issue in the SAMENA region, and will be a major component in its continued development and growth. A delicate balance is needed between such policies and the changing trends in the convergent world, which we hope will enable a competitive business environment among operators and service providers.”

Bocar A. Ba, President of SAMENA Telecommunications Council said: “We strongly believe that there is a need for a collaborative approach on numerous issues such

as Spectrum Harmonization, DD (Digital Dividends), Infrastructure Sharing, Local Loop Unbundling (LLU), Public Private Partnership (PPP) and International Roaming Rates, which advocate that region-wide harmonized ICT policies and ITRs be devised and implemented to help further boost industry growth.”

With the development and growth of the telecommunications and ICT industry, the emergence of next generation technologies and new ICT policies has resulted in a number of discussions revolving around the need for harmonized national ICT policies in the SAMENA region.

Syed Kashif Ali
Research Executive

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SAMENA: Average Calling Rate Per 100 Minutes (US\$)



Research Note: Ranking done by SAMENA based on data from the prepaid tariffs of local operators of all the countries in the region. The criterion for comparison was the average cost of 100 minutes of off net calls.

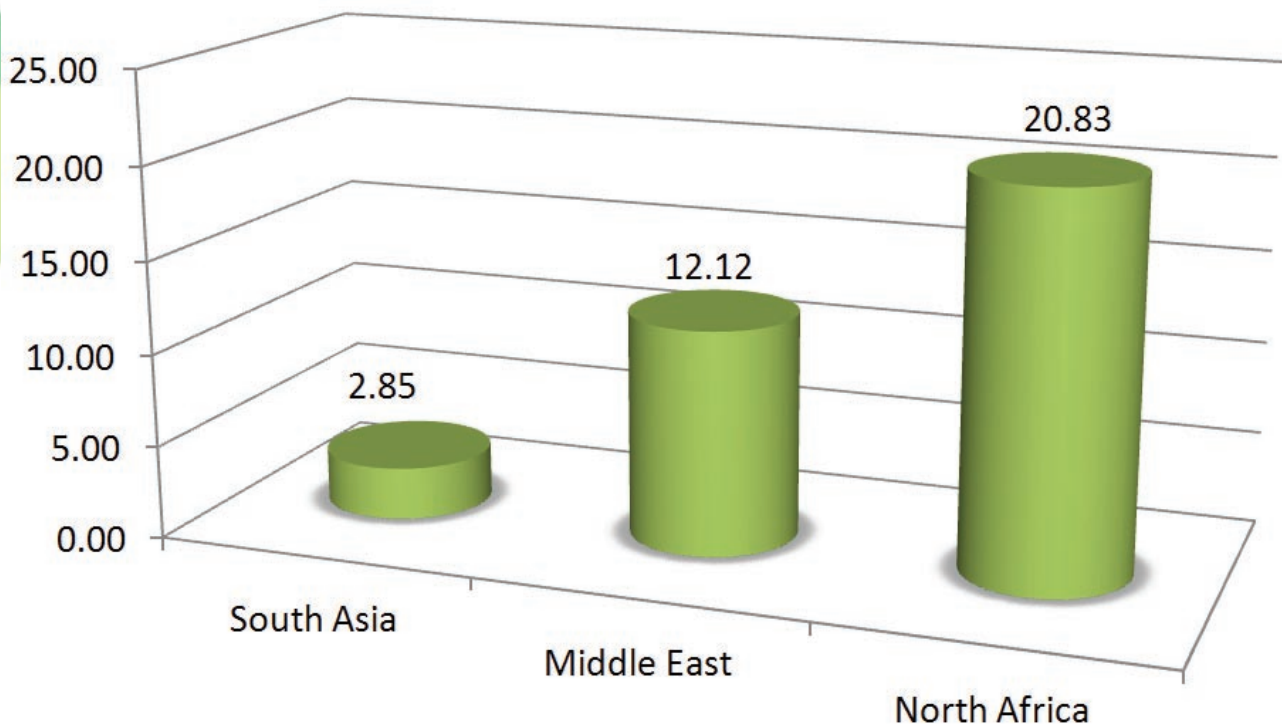
Within the SAMENA region, the lowest call rates were observed in Bangladesh followed by Sri Lanka and Pakistan. The most expensive call rates were observed in Libya which was followed by Lebanon and Morocco. In South Asia, Bangladesh appears to have the cheapest call rates whereas Afghanistan has the highest call rates. Meanwhile, Turkey has the cheapest call rates in the Middle East while Lebanon is the most expensive market in terms of off net call rates. Correspondingly, Tunisia has the lowest and Libya the highest call rates in North Africa.

Image Source: SAMENA Telecommunications Council

Data Source: Regional Mobile Operators



Regionwise Average Calling Rates (US\$)



■ Average call rate/100 minutes in Region

Research Note: The average calling rates within different parts of the SAMENA regions was done with the help of data acquired from prepaid tariffs of the MNOs.

Within the SAMENA region, South Asia has the lowest average calling rate followed by the Middle East and North Africa. This can be attributed to the highly competitive markets in the South Asia compared to the Middle East and North Africa.

Image Source: SAMENA Telecommunications Council

Data Source: Regional Mobile Operators





REGULATORY NEWS

IctQatar Issues Country's First Radio Spectrum Policy

IctQatar has issued Qatar's first comprehensive Radio Spectrum Policy, which is aimed at managing the country's valuable spectrum resources, while encouraging innovative uses of spectrum for economic and societal benefits. The policy balances the allocation of spectrum between the public and private sectors, and includes radio spectrum allocation and national frequency allocation. IctQatar has worked with stakeholders in both the public and private sector to ensure the country is well-positioned to utilize its spectrum for critical communications needs, such as air-traffic control and emergency services, but also allows for innovative new uses of spectrum, including advanced mobile services such as 4G and beyond. In addition to radio spectrum and frequency allocation component, the policy also details radio spectrum licensing requirements, spectrum fees and billing, and monitoring and policy enforcement stipulations. To assist with managing the allocation of spectrum, the policy also proposes the creation of a Qatar National Spectrum Coordination Committee to allow for regular feedback from current and potential spectrum users. IctQatar is mandated to regulate and manage Qatar's spectrum under Decree Law 34 of 2006 and the Telecommunications Law.

SPA Welcomes New Spectrum License Fees

The Internet Service Providers' Association of South Africa has welcomed the implementation of the new regulatory framework governing license fees for radio spectrum, set to come into force on 01 April. The new pricing model moves away from a fixed price of ZAR 770 per MHz per link per annum to one that takes into account different uses of spectrum and the need to ensure that licensees occupy appropriate spectrum for these uses. For example, spectrum below 3GHz is regarded as the most suitable for the provision of wireless access services, and using this spectrum for backhaul links prevents it from being used for access services at a cost to the South African economy. The license fees for a point-to-point (PtP) link in bands below 3GHz are therefore higher than for those in ranges such as 8 and 23GHz. Similarly, license fees payable for spectrum usage outside of Gauteng, Cape Town and EThekweni Metro will cost one-tenth of spectrum usage within those areas, incentivizing rural network roll-out. ISPA's regulatory advisor Dominic Cull said the new regulations are designed to provide an economic incentive to encourage license-holders to use spectrum efficiently and will dramatically lower the costs of frequency for point-to-point links, particularly in rural areas.

NTA Mulls over National Roaming Regulation

Nepal Telecommunications Authority (NTA) is preparing to formulate a separate national roaming regulation. The regulator had issued a consultation paper in November providing a month's time for telecom service providers to send their feedback, said deputy director NTA. The authority has received suggestions and comments on the issue of national roaming, he added. Currently, there is no provision for domestic roaming. A roaming agreement is an arrangement between two mobile carriers which allows one carrier to extend its coverage by utilizing the network infrastructure of the other mobile carrier, according to the consultation paper issued by NTA. However, experts say national roaming agreement among telecom service providers will create a lot of regulatory issues. NTA's consultation paper has stated that it will formulate the rules and regulations and develop an arbitration mechanism in case there is a dispute between operators.

Bahrain TRA Plans License for New Service

The Bahrain Telecommunications Regulatory Authority (TRA) plans to conduct a license award process later this year or early next year for paired spectrum in the 2.6 GHz band and other frequency bands used for mobile telecommunications. These could be used for post-3G mobile services to deliver ultra-high speed broadband communications over mobile networks. The 2.6 GHz frequency band is the preferred evolutionary path for most public mobile operators in the Middle East and North Africa, African and European regions and would become available in the kingdom in two tranches. The first tranche would be two paired sub-bands of 40 MHz which would be freed by the end of 2012. A further 30 MHz of paired 2.6 GHz spectrum would become available by the end of 2014. The review of spectrum will seek to determine the kingdom's public mobile spectrum requirements for 2020 and beyond.

New Zealand Networks Renew Radio Spectrum Licenses

New Zealand's Communications and Information Technology Minister Amy Adams announced the completion of cellular spectrum renewals that secure key rights for Telecom, 2degrees and Vodafone through to 2031. Telecom has completed settlement, enabling it to renew the 850MHz band rights that it uses for its XT network. 2degrees settled in January for the 900 MHz rights for its GSM network, while Vodafone choose to settle early, renewing its 900 MHz band rights in 2009. "The Government welcomes the commitment of the three operators to the New Zealand mobile market," Ms Adams says. "The companies' renewal of this spectrum through to 2031 means they can make long-term infrastructure investment decisions. Over time this will bring New Zealanders better mobile technology and services." The renewal of the cellular spectrum in the 850 MHz and 900 MHz bands will net the government NZ\$150 million.

BTRC Completes 3G Licensing Draft

The Bangladesh Telecommunication Regulatory Commission (BTRC) has finished the draft guidelines for 3G license allocations. The licenses can also be upgraded to 4G or LTE without any extra fees, bdnews24.com reports. The draft proposes four 3G licenses, including two existing operators and one new one. State-owned firm Teletalk will definitely be awarded a license. The draft will be forwarded to the telecommunications ministry shortly. The fee has been proposed at BDT 1.5 billion per 1 MHz of spectrum. The 3G technology will make mobile telephony much more efficient, with high-speed data transfer facilitating users to watch mobile TV, make video calls, using navigation equipment and access many other services.

Singapore Reveals 4G Auction Plans

The Infocomm Development Authority of Singapore (IDA) plans to auction the 1800MHz, 2.3GHz, and 2.5GHz spectrum bands in the upcoming 4G airwaves auction, with winning bidders expected to set up coverage as early as mid-2016. In a consultation paper IDA said that it has decided to open the three spectrum bands for bidding due to their suitability for urban deployment to provide mobile data capacity and are the most commonly used spectrum for 4G rollout currently. The regulator did not specify when the auction will take place, although an earlier ZDNet Asia report noted that bidding could take place as early as 2012. IDA plans to allocate 140MHz which comprises of two 70 MHz of paired spectrum for FDD (frequency division duplex) LTE. For the 2.3GHz band, IDA said 30 MHz will be allocated and will likely be for the deployment of TDD (time division duplex) LTE. With regard to the 2.5GHz spectrum, IDA plans to allocate 150MHz, including two 60MHz of paired spectrum and 30MHz of unpaired spectrum.

Ofcom Confirms Changes for Making Local Phone Calls

UK communications regulator Ofcom has confirmed that people living in Bournemouth, Poole and Christchurch will soon have to dial the 01202 area code to make a local call. Subject to consultation, this change will come into effect on 01 November. The move is designed to safeguard the future supply of landline numbers in the Bournemouth area and avoid the need to change existing phone numbers. The cost of calls will not be affected by dialing the code. Based on current forecasts, Ofcom expects that similar changes may also be required in Aberdeen (01224), Brighton and Hove (01273), Bradford (01274) and Middlesbrough (01642) by 2015. Ofcom is also proposing to launch a pilot scheme to charge communication providers GBP 0.10 per phone number per year in 30 areas (out of a total of 610 areas) with the fewest number blocks remaining available for allocation to encourage their efficient use. The aim of this is to encourage communications providers to consider their plans carefully before applying for new bulk allocations of phone numbers and to incentivize the return of unused numbers to Ofcom. Ofcom proposes to launch the pilot on 01 April 2013 and review it around two years after implementation.

A SNAPSHOT OF REGULATORY ACTIVITIES IN SAMENA REGION

Active Consultations & Invitations for Feedback

Bahrain

Telecommunications Regulatory Authority (TRA) has issued an invitation for expressions of interest in paired and non-paired radio spectrum within the band 1900MHz–2170MHz. Its purpose is to collect information to use in its analysis of the market demands for spectrum comprising 55MHz within the band. This spectrum amounts to a total of 55MHz comprising 15MHz of unpaired spectrum suitable for TDD applications and 40MHz of paired spectrum with a separation of 190MHz, suitable for FDD or TDD applications. It is intended that this spectrum will be included in a future tender for public mobile system licenses, which together with additional spectrum (yet to be announced) should be capable of facilitating advanced, post third generation mobile systems. Therefore the current planned release of un-assigned spectrum will be for a period of six months. The license may be renewed for further periods (currently of unspecified duration), expiring on the date that the future license award process commences, which will assign this spectrum to a successful bidder. (March 2, 2012) www.telegeography.com

Saudi Arabia

The Communication and Information Technology Commission (CITC) has launched a Public Consultation on the licensing process for Mobile Virtual Network Operators ("MVNO") and requested the stakeholders to participate in this process. Respondents are particularly invited to submit comments to the CITC on:

- The regulatory context and principles to be incorporated into the MVNO scheme in Saudi Arabia
- The proposed license for Mobile Virtual Network Operators ('MVNOs')
- The selection method proposed to select initial MVNO licensees; and
- The proposed Guidelines to assist the development of partnering agreements between MVNOs and mobile Facilities Based Host Providers ('Host FBPs').

The comments are to be submitted by April 2, 2012. (January 18, 2012) www.citc.gov.sa

RECENT POLICY & REGULATORY DEVELOPMENTS

SAMENA Country Updates

Afghanistan

Board Chairman: Mr. Abdul Wakil Shergul

[Afghanistan Telecommunication Regulatory Authority (ATRA)]

Ministry of Telecommunication announced to implement the service of 3G in Afghanistan within the next one month. The 3G service will enable participants of telecom companies to have access to high speed internet in their mobile phones besides having access to multimedia services including visual and audio services. Afghan telecommunications ministry signed an agreement with a private company in Kabul to provide 3G services in the country. Afghanistan will earn around US\$100 million annually through 3G services. Afghanistan witnessed a rapid growth in telecommunication services during the past years where fewer Afghans can be seen without having access to mobile phones. However 3G services will further boost improvements in telecom sector in Afghanistan. The tender for the provision of 3G services was put into tender by Afghan telecommunication ministry few months back where Etisalat was announced as the winner to provide the services in Afghanistan. Currently Afghanistan is being served by 5 private telecom companies however only one telecom company will have access to provide 3G services during the initial period while the 3G technology will cover all the regions of the country in the next two years. (March 19, 2012) www.khaama.com

Algeria

Chairperson: Ms. Zohra Derdouri

[Regulatory Authority for Post & Telecommunication (ARPT)]

The Vimpelcom subsidiary in Algeria, Orascom Telecom Algeria (OTA), which offers mobile services under the brand name Djezzy, will appeal fines totaling DZD99 billion (US\$1.3 billion) which have been imposed for alleged breaches of foreign exchange regulations. A senior executive at Djezzy is also facing a criminal sentence as part of the same court judgment. Algerian authorities first filed the case against Djezzy in 2010. A statement from the Russian operator reads: 'OTA is taking the necessary steps to file an appeal. The lodging of the appeal will provisionally suspend the judgment. Vimpelcom maintains that OTA and OTA's senior executive have acted in good faith and in compliance with the law. The management in Algeria continues to have Vimpelcom's full support.' The case further complicates the already strained relationship between Vimpelcom and authorities in Algiers. Throughout 2010 OTA and the Algerian government were embroiled in a bitter legal dispute, ostensibly over the payment of back taxes. However, the real issue was the government's attempt to derail Vimpelcom's pending acquisition of OTA shareholder Orascom Telecom Holding (OTH). In September 2010 Vimpelcom agreed to merge its telecoms assets with those of OTH, including its Algerian arm, in a transaction valued at US\$6.5 billion. The Algerian government, unhappy at the move, attempted to block the deal since, according to the terms of legislation passed in 2009, Algiers was supposed

to have first refusal over Djezzy if Orascom ever opted to sell the lucrative mobile unit. In October 2010 Vimpelcom conceded that it was happy to sell part of the OTH stake in Djezzy, but only if the Algerian government was willing to match its USD7.8 billion valuation – more than the Russian firm had eventually paid for the collective telecoms assets of OTH. Eventually, in January 2012, Vimpelcom signed a memorandum of understanding for the sale of a 51% stake in Djezzy to the Algerian state. Terms and conditions have yet to be finalized, and the latest developments will have done nothing to ease the negotiations. OTA/Djezzy is 96.8% owned by OTH, which is in turn 51.9% owned by Vimpelcom. By September 2011 mobile market leader Djezzy claimed 16.3 million subscribers, equating to 47.9% of the market. (March 29, 2012) www.telegeography.com

The government has revealed that it is hoping to have fixed a valuation on the country's largest mobile operator Orascom Telecom Algeria (Djezzy) by the end of March. The government has agreed a deal with Djezzy shareholder Vimpelcom to buy a 51% stake in the operator. Vimpelcom is believed to be seeking to retain management control of the cellco, as well as continuing to consolidate the operator under International Financial Reporting Standards (IFRS). While Vimpelcom has in the past placed a valuation on Djezzy of around US\$7.8 billion, the government is thought to be looking at figure of nearer US\$2-3 billion. Djezzy had a 48% share of Algeria's cellular market at the end of 2011. (March 7, 2012) www.telegeography.com

Bahrain

Chairman & General Director: Mr. Mohamed Bubashait

[Telecommunication Regulatory Authority (TRA)]

The Telecommunication Regulatory Authority (TRA) expects to release frequencies for high-speed next-generation telecoms networks in March 2013 and new operators could be introduced in the kingdom. TRA will invite bids to provide long-term evolution (LTE) services from September. These offers will likely be received by January 2013 before a final decision is taken in March. The frequencies earmarked for LTE are currently assigned to government bodies. (March 28, 2012) <http://gulfnews.com>

The Telecommunications Regulatory Authority (TRA) plans to conduct a license award process later this year or early next year for paired spectrum in the 2.6GHz band and other frequency bands used for mobile telecommunications. These could be used for post-3G mobile services to deliver ultra-high speed broadband communications over mobile networks. The 2.6GHz frequency band is the preferred evolutionary path for most public mobile operators in the Middle East and North Africa, African and European regions and would become available in the kingdom in two tranches. The review of spectrum will seek to determine the kingdom's public mobile spectrum requirements for 2020 and beyond. (March 21, 2012) www.tradearabia.com

Telecommunications Regulatory Authority (TRA) has released the results of its survey among 1,052 residential customers undertaken in October 2011. The TRA said the proportion of respondents who have access to a fixed line telephone has decreased by more than 50% since 2007. Compared with 2007, the average fixed call duration had dropped by more than 50% in 2011. The average monthly expenditure for fixed line services had declined by more

than 40% since 2007. Satisfaction with landline services had increased since 2007 in almost all categories, including overall satisfaction, reliability, problem resolution and overall value for money. The last category fared especially well, with satisfaction improving from 36% of respondents in 2007 to 68% of in 2011. Turning to the mobile sector, the TRA said over 99% of respondents had access to mobile phones. The proportion of respondents with two or more active SIM cards has increased from 12% (2007) to 31% (2011). According to the survey, prepaid customers represent 88% of respondents. Use of mobile phones is increasing, with the proportion of mobile national calls lasting more than three minutes having increased from 33% in 2007 to 52% in 2011. It also found out that average monthly expenditure for mobile phone services has increased by more than 50% between 2007 and 2011. The study said the majority of respondents use mobile phones most often to make their international calls. This proportion has increased from 40% in 2007 to 66 percent in 2011. On average, respondents make twenty-five international calls per week using mobile phones and eighteen international calls per week using fixed lines. (March 12, 2012) www.telecompaper.com

Telecommunications Regulatory Authority (TRA) has issued an invitation for expressions of interest in paired and non-paired radio spectrum within the band 1900MHz–2170MHz. Its purpose is to collect information to use in its analysis of the market demands for spectrum comprising 55MHz within the band. This spectrum amounts to a total of 55MHz comprising 15MHz of unpaired spectrum suitable for TDD applications and 40MHz of paired spectrum with a separation of 190MHz, suitable for FDD or TDD applications. It is intended that this spectrum will be included in a future tender for public mobile system licenses, which together with additional spectrum should be capable of facilitating advanced, post third generation mobile systems. (March 2, 2012) www.telegeography.com

Bangladesh

Chairman: Maj. Gen. Zia Ahmed

[Bangladesh Telecommunication Regulatory Commission (BTRC)]

Bangladesh Telecommunication Regulatory Commission (BTRC) submitted its final draft 3G licensing guidelines to the Ministry of Posts & Telecommunications (MoPT), under which it aims to earn around US\$1.5 billion in spectrum fees via an open auction on September 3, 2012 for four 2100MHz licenses alongside a fifth concession award to state-owned cellco Teletalk. The Cellular Mobile Phone Service (3G/4G/LTE) Regulatory Licensing Guideline 2012 says that Bangladesh will issue five technology-neutral concessions for 10MHz each in the 2100MHz band to Teletalk, one new foreign entrant and three privately owned Bangladeshi mobile operators. The BTRC also raised its previously quoted licensing revenue target from around BDT80 billion to BDT120 billion (US\$1 billion to US\$1.45 billion). The base price of 1MHz of 3G spectrum is BDT2.4 billion and therefore each operator must bid at least BDT24 billion for a 10MHz allocation (a floor price of nearly US\$300 million per license). Previously, the BTRC had set a base fee per MHz of BDT1.5 billion (a license floor price of BDT15 billion). BTRC would seek expressions of interest from May 7, 2012, and begin receiving formal applications from July 12. The final bidder list is scheduled to be announced on July 19 ahead of the September 3 auction. Lining up to compete for technology-neutral concessions will be four

domestic GSM operators, GrameenPhone, Banglalink, Robi Axiata, and the Airtel. Pacific Bangladesh Telecom Limited (CityCell) is another potential bidder, while the BTRC will also consider applications for 2G licenses from any overseas 3G concession winner. Whether any prospective bidders have plans to use the 2100MHz frequencies for 4G LTE mobile broadband services is not yet known. The BTRC decided that Teletalk will be permitted to launch a 3G W-CDMA/HSPA trial using 2100MHz band frequencies from March 26, 2012, with a six-month exclusivity period preventing any other operators from launching commercially until late-September 2012. Teletalk will not need to compete in the 3G license auction, but will pay for its UMTS spectrum allocation at a cost equal to the highest bid. The state-backed firm is yet to announce its trial 3G launch. (March 29, 2012) [The Financial Express](#)

The Bangladesh Telecommunication Regulatory Commission (BTRC) has begun a consultation on the establishment of the National Equipment Identity Registry (NEIR). Operators will be required to set-up a device identity registry which will be linked to the Central Equipment Identity Registry and Telecommunications Industry Association so that blocked and tracked IMEIs, ESNs, and MEIDs can be used in other countries also. Operators will also be required to establish their own fraud management system to identify false IMEI numbers and also to combat fraud with premium rate services, prefixes, voucher fraud, terrorism, corruption, threats, etc. Operators will be required to block access to their network for phones without a genuine IMEI/ESN/MEID and to phones with a forged Caller Line Identifier (CLI). Operators are required to implement these measures progressively within six months to one year. Separately, the regulator also issued guidelines on licenses for value added services (VAS) providers. VAS licensees will have access and interconnection of its approved short-codes with existing single point of Interconnection Exchange (ICX) and National Internet Exchange (NIX) to avoid individual connectivity with operators. Furthermore, all network providers are required to provide fair access to their network to the VAS licensee. VAS licenses will be valid for five years. (March 21, 2012) [www.telecompaper.com](#)

The Bangladesh Telecommunication Regulatory Commission (BTRC) fined US\$24.5 million to GrameenPhone (GP) for illegally terminating incoming international calls via voice-over-internet protocol (VoIP) technology, depriving the state-owned Bangladesh Telecommunications Company Ltd (BTCL) of revenue by bypassing its network. (March 12, 2012) [www.telegeography.com](#)

Egypt

Executive President: Dr. AmrBadawi

[National Telecommunication Regulatory Authority (NTRA)]

Minister of Communications and Information Technology has reportedly indicated that the country will launch a tender for mobile virtual network operator (MVNO) concessions within the next month. 'We are finalizing the format for the MVNO [license] and hopefully we should expect (to issue the tender) in four weeks' time,' minister was cited as saying. It remains unclear, however, as to how many virtual operator licenses the government is likely to make available, while the minister also declined to comment regarding pricing for the concessions, or indeed the money expected to be raised for the government by the auction

process as a whole. Minister meanwhile, was reported to have confirmed that the sale process for fourth-generation mobile licenses was also currently being examined. '4G will be included in the broadband strategy ... The broadband plan ... will be issued by the end of June,' the minister is reported to have said. (March 7, 2012) [Reuters](#)

Iran

Minister of Communications & Information Technology: Dr. Reza Taghipour

[Communications Regulatory Commission (CRC)]

Communications Ministers from Iran and Iraq have met to discuss the possibility of strengthening cooperation between the two countries in the telecoms sector. Iran's Communications and Information Technology Minister Reza Taghipour, met with his Iraqi counterpart Muhammad Tawfiq al-Allawi in Tehran. Plans under discussion include the deployment of telecoms networks in northern Iraq by Iranian companies. (March 12, 2012) [Fars news agency](#)

Lebanon

Acting Chairman & CEO: Dr. Imad Hoballah

[Telecommunication Regulatory Authority (TRA)]

Lebanese mobile operator MTC Touch announced the launch of a new national roaming service for its subscribers. The new service enables subscribers of the other mobile operator Alfa to switch to the MTC network should they lose signal in remote areas not served by the Alfa network. Alfa plans to launch the same service by the end of the month pending technical arrangements. (March 26, 2012) [www.telecompaper.com](#)

According to a report published by the International Telecommunication Union (ITU) Lebanon's mobile penetration rate reached 72.2% at the end of 2011 outperforming Syria (54.8%) and Sudan (50.1%), placing the country in the 12th spot in the region. The report said mobile subscriptions increased by 189,200 to reach 3.064 million during the first half of 2011, from 2.875 million users at the end of 2010. The report showed that fixed broadband Internet subscriptions also rallied by 43% in the first half of 2011 to reach 286,000, up from 200,000 at the end of 2010. The ITU report highlighted rapid growth in information and communication technology services across the region, emphasizing that most growth was achieved on the mobile front. The report revealed that the number of mobile subscriptions in Arab states almost tripled over the last few years, rising from 126 million in 2006 to 350 million, as of the end 2011. The region's mobile penetration rate was estimated at 97%, 10% higher than the world's global penetration rate. However, the report said that the region's Internet penetration rate lagged behind the rest of the world. It was under 30% in 2011 with a fixed broadband penetration rate of 2%, below the world's average of 9%. The report also noted that despite the implementation of 3G mobile broadband services in most Arab countries, and the increasing use of mobile devices for Internet browsing purposes, the Arab world's mobile broadband penetration rate stood at a mere 13% in 2011, trailing behind the world's average of 17%. (March 12, 2012) [www.zawya.com](#)

Nepal

Chairman: Mr. Bhesh Raj Kanel

[Nepal Telecommunication Authority (NTR)]

Nepal Telecommunications Authority (NTA) is preparing to formulate a separate national roaming regulation. The regulator had issued a consultation paper in November providing a month's time for telecom service providers to send their feedback. Later, the authority extended the time by another month following requests from telecom service providers. The authority has received suggestions and comments on the issue of national roaming. Currently, there is no provision for domestic roaming. Experts expect national roaming agreement among telecom service providers will create a lot of regulatory issues. The authority has planned to make stakeholders aware of the concept of domestic roaming and is preparing a standard agreement format in consultation with the operators. (March 30, 2012)

www.thehimalayantimes.com

Nepal's total telephone customer base reached 15.33 million at the middle of January, according to sources. The overall teledensity reached 57.56%. The total consumer base comprises 13.6 million mobile subscribers, 847,724 fixed-line subscribers, and 874,644 other telephony users (satellite and limited mobility services). The country had just over 4 million internet users leading a 15.2% overall penetration rate. The number of mobile customers grew from 13.35 million in December to 13.6 million in January. Of the total, 12.75 million were GSM users and the remainder use Nepal Telecom's CDMA service. Ncell has 7 million GSM subscribers, up from 6.85 million in December, followed by Nepal Telecom with a customer base of 5.74 million, up from 5.65 million a month earlier. (March 5, 2012)

www.cellular-news.com

The Ministry of Information and Communications (MoIC) says it is close to making an announcement concerning the government's much-hyped District Optical Fiber Program. Its endorsement of the plan would finally allow the Nepal Telecommunications Authority (NTA) to utilize Nepal's Rural Telecom Development Fund (RTDF), it said. The state-backed project, which has stalled due to the MoIC's heel-dragging in taking a decision over it, now looks likely to move forward after all the necessary arrangements were finalized last month. It is understood the NTA will invest NPR3.15 billion (US\$40.8 million) to deploy the new fiber-optic network. Further, the MoIC has confirmed it will provide that it would provide a 90% subsidy to any telco if they expand their optical fiber networks in the Kingdom's mid-western and far-western regions – both of which are currently unserved by such technology – and a 60% subsidy to operators if they expand their fiber-optic networks in central, western and eastern regions that currently have no access to broadband services. (March 5, 2012)

Himalayan News Service

Oman

Chief Executive Officer: Dr. Hamed Al-Rawahi

[Telecommunication Regulatory Authority (TRA)]

Telecommunication Regulatory Authority (TRA) has proposed a draft regulation to develop specific rules on reporting service outages and to lay down requirements for repairing faults within a specified time period, according to the type of outage, Muscat Daily has reported. Critical outage includes critical work halt, whether in mobile, fixed

or internet services, during the customer's normal working hours, affecting multiple sites. Major outages, which affect a part of the network and influence less than 20% of traffic, shall be repaired within four hours, while minor outages affecting individual sites or components of the network that do not interrupt service or performance exceeding 12 hours should be repaired within a day. (March 11, 2012)

www.ameinfo.com

The Transport and Communications Ministry announced the allocation of OMR 50 million (US\$129.5 million) to the radio frequency release plan, which aims to support the telecom sector across the country. The allocation approved by the Council of Ministers will provide new civil and commercial frequencies for communication services, the Times of Oman reported. (March 6, 2012) www.telecompaper.com

Pakistan

Chairman: Dr. Muhammad Yaseen

[Pakistan Telecommunication Authority (PTA)]

Mobility Network Portability (MNP) has become a popular choice for many mobile users in Pakistan and a total number of 5.6 million mobile users opted the service to shift to their preferred service provider. During the period of January to August 2011, Pakistan's telecom industry witnessed a huge number of subscribers migrating from one network to another. However while many operators experienced millions of users porting in to avail their services, some of their users opted to port out to other networks. The number of port in subscribers subtracted from the number of port-out subscribers thus defined their net gain. According to estimated figures, approximately 15 million subscribers used MNP service since its launch in March 2007. (March 16, 2012) <http://pakobserver.net>

Pakistan ended December 2011 with 1.79 million broadband subscribers, up from 1.73 million subscribers in November. The number of DSL subscribers rose to 792,397 from 770,696 a month earlier, while the number of Wimax internet users grew to 495,285 from 484,184 Wimax users in November. Furthermore, some 459,790 people connect to the internet via EV-DO, up from 428,803 in the prior month, and 37,491 people used HFC to access the internet, compared with 36,965 HFC users in November. Furthermore, there were 7,215 FTTH users in December, up from 7,017 a month earlier, and 2,289 broadband subscribers used other technologies. (March 14, 2012) www.telecompaper.com

According to latest figures Pakistan ended January with 114.61 million mobile subscribers, up from 112.88 million in December last year, and total mobile teledensity stood at 66.5 versus 65.8. Mobilink led with 34.70 million subscribers, up from 34.21 million a month earlier, followed by Telenor which had 28.47 million customers, compared with 28.13 million customers in December. Ufone's subscriber base grew to 22.02 million subscribers from 21.37 million, and Warid ended the month with 14.99 million customers, down from 15.29 million a month earlier. Zong grew its customer base to 14.42 million customers from 13.87 million in the previous month. (March 14, 2012) www.telecompaper.com

Pakistan Telecommunication Authority is all set to hire consultant of international repute for smooth process of 3G license auction. The requirements have been advertised

in the local and international media for hiring consultant. Sources said the process of planning and consultation, with stakeholders, was initiated simultaneously. Apart from the existing operators, potential investors, local and foreign, were identified and approached, they added. During the meeting with international investors, it was highlighted that the tentative timelines published by PTA for the auction process were difficult to meet. Sources said "Participation in the auction requires thorough planning, completion of procedural formalities and lining up of large sums of money. Arranging such finances on short notice is not easy, especially in the present global economic scenario. Other relevant stakeholders including Auction Supervisory Committee have emphasized the necessity of appointing the Consultant". Sources said "keeping our tradition of taking stakeholders on board and to make all possible efforts towards a highly transparent auction process, the final schedule will be given soon, with due consultation". (March 13, 2012) [Associated Press of Pakistan](#)

Qatar

Executive Director: Ms. Christa Cramer

[The Supreme Council of Information and Communication Technology (ictQATAR)]

The Supreme Council for ICT (ictQATAR) has issued its Radio Spectrum Policy, under a remit to provide a transparent, non-discriminatory and predictable approach to wireless spectrum management. Alongside frequency allocation components, the policy details licensing requirements, spectrum fees and billing, and monitoring and policy enforcement stipulations, while it also proposes creating the Qatar National Spectrum Coordination Committee (QNSCC) to assist in the management of spectrum by providing a forum for regular feedback from current and potential frequency users. In 2010 ictQATAR launched an ongoing review of market competition, with the ultimate aim of deciding whether to award further competitors to duopoly Qatar Telecom (Qtel) and Vodafone Qatar, but a final decision is pending on allowing additional service providers, which could include mobile virtual network operators (MVNOs). One area that the policy addresses is how to reallocate unused spectrum, including the 800MHz band currently used for analogue television, for new uses including 4G mobile services. The policy states that Qatar requires an analogue-to-digital TV switchover plan including coordinating the future use of the UHF band with neighboring countries in the Gulf region. To this purpose ictQATAR will work with national broadcaster Qatar Media Corporation to develop technical and policy proposals for digital switchover, through the establishment of a Switchover Working Group, and ictQATAR will instigate action as soon as possible to enable the early clearance of analogue TV services from the 800MHz band. Qtel carried out 4G Long Term Evolution (LTE) mobile broadband tests in Qatar in summer 2011 using 800MHz test frequencies, and in October it announced plans to deploy a network of 900 LTE base stations. Meanwhile, in December 2010 Vodafone Qatar and Alcatel-Lucent carried out demos of LTE technology in the 800MHz band in collaboration with ictQATAR, but commercial LTE rollouts must be implemented in both cellcos' existing frequency bands pending the announcement of any further spectrum auctions. The new policy does not give any timetable for 4G licensing. Elaborating on the digital switchover strategy, the policy states that the current management of spectrum assignments for broadcasting is legally the responsibility of

ictQATAR, but that, at a practical level, QMC largely self-manages the broadcast bands. QMC's current spectrum management activities will be undertaken by ictQATAR going forward, 'as this is consistent with the law and removes any potential conflict of interest that arises from QMC managing frequency ranges its competitors would like to access.' The regulator says the overall aims of its new policy include 'taking the least intrusive interventions consistent with achieving public policy objectives and efficient spectrum use.' (March 21, 2012) [www.telegeography.com](#)

Saudi Arabia

Governor: Eng. Abdullah A. Al Darrab

[Communication & Information Technology Commission (CITC)]

NCB Capital maintained its cautiously optimistic view on the Saudi telecom sector as margins remain under pressure due to price led competition. NCB Capital believes stability in margins is a key catalyst for the sector. NCB Capital maintained its overweight rating on Saudi Telecom Co. (STC) with a PT of SR50.2 (upside of 25%) and Mobily with a PT of SR75.5 (upside of 21%), and downgraded its rating on Zain KSA to underweight with a PT of SR7 (downside of 37%). The price targets for STC and Mobily have increased by 12% and 13% respectively on the back of good Q4, 2011 results, as well as an expansion in multiples given the strong dividend outlook (Mobily) and strong continued domestic growth (STC). (March 22, 2012) [www.zawya.com](#)

The Communications and Information Technology Commission (CITC), has estimated that spending in the country's telecoms and IT markets reached SAR83 billion (US\$22 billion) in 2011 and is expected to grow 12% this year. CITC said that there were around 53.7 million mobile subscribers registered at the end of 2011 giving a mobile penetration rate of 188%, with more than 87% of users on pre-paid tariffs. The number of fixed telephone lines stood at 4.63 million at end-2011, of which around 3.3 million, or 71%, were residential lines. Broadband internet subscriptions, including ADSL, fixed wireless (WiMAX), fiber and other technologies, grew to around 1.95 million by the end of 2011, while there were 11.3 million mobile broadband users at the same date, according to the CITC. (March 21, 2012) [www.telegeography.com](#)

According to the figures released by the Communications and Information Technology Commission (CITC), Internet subscriptions rose to 13.6 million by the end of 2011, from 11.4 million a year earlier. The number of fixed-line phone subscribers was 4.6 million by the end of December, the CITC said in a statement. (March 20, 2012) [www.zawya.com](#)

Saudi Telecom Company (STC), the dominant fixed line and wireless operator in the Kingdom of Saudi Arabia, has revealed that it would welcome resale partners on its mobile network. CITC has already announced that it is planning to issue the country's first three mobile virtual network operator (MVNO) licenses this year. (March 7, 2012) [Reuters](#)

Sri Lanka

Director General: Mr. Anusha Palpita

[Telecommunication Regulatory Commission (TRC)]

Sri Lanka has 18.417 million mobile subscribers at the end of September 2011, with a net addition of 241,000, down from 438,000 in June 2011. Sri Lankan operators

are searching for additional growth drivers to offset the declining subscriber growth opportunities. Mobile service providers in Sri Lanka are taking steps to increase the number of postpaid users. Companies are also looking at the broadband sector. Mobile broadband adoption is growing rapidly. According to Sri Lankan telecom regulator, there were 260,000 internet and email subscribers and 120,000 broadband subscribers in the country in September 2010. The push continued into Q1 2011 and Q2 2011. According to CBSL, the combined internet and mobile broadband subscriber figures increased to 673,000 and 692,000 respectively. At the end of September 2011, the CBSL said there were 722,000 subscribers. The momentum coincided with telecoms companies' efforts to improve their mobile data networks. (March 30, 2012) <http://telecomlead.com>

Tunisia

President: Mr. Hassoumi Zitoune

[National Telecommunication Commission (INTT)]

Tunisia based mobile network, Tunisiana has been awarded both a 3G license and a landline operator license by the Tunisian Ministry of Communication Technologies. Tunisiana is the country's largest mobile network by subscribers but unlike its rivals was not able to offer landline or mobile broadband services. Rival networks, Orange and Tunisie Telecom both have 3G licenses already. "The granting of this license will reduce the digital divide, by improving coverage of telecommunication services and access to these services," said Mongi Marzoug, Minister of Communication Technologies. Tunisiana has also signed an agreement with Huawei to deploy a 3G network in the internal regions within the country. The government owns 25% of Tunisiana, which was seized from the former ruling family. The remainder is owned by Wataniya Telecom. (March 28, 2012)

www.cellular-news.com

Turkey

Chairman & CEO: Dr. Tayfun Acarer

[Information & Communication Technologies Authority (BTK)]

The Turkish mobile operator Turkcell has still to decide on whether it will bid for a stake in the Bulgarian telco Vivacom, while dismissing as 'groundless' suggestions that it is preparing a bid which values Vivacom at US\$1.4 billion. The Turkish operator has released a statement which says: 'Turkcell continues to conduct studies in various countries as part of its ongoing evaluation of investment opportunities, and Bulgarian telecom operator Vivacom is a project evaluated within this context. However, our evaluations on the project continue, and no decision has been taken by the Board of Directors in this matter.' It has now been confirmed that three concrete bids have been entered for Vivacom, coming from the head of Bulgaria's Corporate Commercial Bank, Tsvetan Vassilev, Icelandic businessman Thor Bjorgolfsson, and UK-based private equity firm Pamplona Capital Management. A fourth bid is expected within days, local sources suggest, although further details have not been disclosed. Vivacom is the largest fixed line operator in Bulgaria and is currently 90%-owned by PineBridge Investments, a unit of Hong Kong-based telco PCCW. (March 5, 2012) www.novinite.com

United Arab Emirates

Director General: Mr. Mohamed Nasser Al Ghanim

[Telecommunication Regulatory Authority (TRA)]

The Telecommunication Regulatory Authority (TRA) has issued a statement confirming that it has no intention to license a third operator in the UAE telecommunications market. The statement was in response to articles which have been circulated in some local newspapers about this matter. The TRA would like to reaffirm that both Etisalat and du are currently meeting the needs of the UAE market. The TRA reports 199.3 mobile subscriptions per 100 inhabitants for December 2011. The ratings agency said when competition is introduced into more developed and saturated markets, the number one (Etisalat) and two (du) players suffer. Etisalat financial results are already under pressure. In 2011, Etisalat recorded revenue losses of three per cent for the UAE and its reported segment results decreased by 21% in the face of fierce competition from du. For its financial year 2011, Etisalat reported a drop in its segment result margin of 10% for its UAE segment, Moody's said. (March 30, 2012) <http://telecomlead.com>

The Telecommunications Regulatory Authority (TRA) said it has achieved a major landmark with the commercial launch of its carrier pre-selection (CPS) for fixed-voice calls by licensees, du and Etisalat. 'This is a significant milestone for the licensees and it carries a great benefit for the telecommunications industry in the UAE,' remarked TRA Director General while commenting on the implications this commercial launch has had on the UAE market. CPS is the more advanced mechanism of Carrier Selection (CS) as it allows customers to select their preferred service provider to route their fixed-voice calls without having to dial additional codes on the telephone or programming on-site equipment. In the early part of the third quarter of 2011, both licensees - du and Etisalat - had announced the soft launch of the service which was regarded as a final stage of the testing, said the TRA chief. (March 25, 2012)

www.tradearabia.com

REGULATORY ACTIVITIES BEYOND THE SAMENA REGION

ITU

The ITU Telecommunication Standardization Sector (ITU-T)'s Focus Group on Cloud Computing has completed its preliminary study into cloud computing's standardization ecosystem and has released its FG Cloud Technical Report (Parts 1 to 7). The reports signal the conclusion of the Focus Group's study period and its findings come to form input for the cloud computing work taking place across the ITU-T under the leadership of Study Group 13 (Future Networks), overseen by the Joint Coordination Activity on Cloud Computing. FG Cloud's Technical Reports provide a detailed overview of cloud computing standardization and benefits from telecommunication and ICT perspectives. Two new cloud services categories are identified, communication and network as a service (CaaS and NaaS). In addition, cloud ecosystems and a first ICT cloud reference architecture are defined. These outputs will form a reference base for the ITU-T Study Groups engaged with cloud standards development. Technical Reports includes introduction to the cloud ecosystem such as definitions, taxonomies, use cases and high-level requirements, functional requirements and reference architecture, Requirements and framework architecture of cloud infrastructure. Technical Report also includes Cloud resource management gap analysis, Cloud security, Overview of SDOs involved in cloud computing and Cloud computing benefits from telecommunication and ICT perspectives. (March 14, 2012) www.telecompaper.com

Industry and government leaders attending ITU's Connect Arab Summit (March 5-7) have identified market opportunities worth over US\$ 46 billion for new regionally focused projects designed to enhance ICT access, applications and services throughout the region. The investment opportunities identified by the Summit focus around key priorities for the region, including building a regional Arab ICT highway, developing e-services, empowering local people through training and human capacity building, leveraging ICTs for youth job creation, strengthening cybersecurity, and protecting Arab heritage and culture. The Summit welcomed some 540 participants from 26 countries. It was convened to forge regional consensus on new strategies to boost infrastructure deployment, extend access to marginalized populations, and stimulate innovation and employment across the Arab region. The Summit closed with a communiqué endorsed by all participating governments from across the Arab region, which set out four key development goals around Access and Infrastructure; Digital Content; Cybersecurity; and Innovation. "The energy in this region testifies to the Arab world's transformation into a major technology hub and a pre-eminent force in the global ICT industry. A growing number of the world's most exciting new ICT companies are now based here, and I confidently predict that within the next ten years, the ICT sector could become the single biggest employer of young talent," said ITU Secretary-General Dr Hamadoun Touré. Connectivity commitments and partnerships announced during the event included:

- A project between ITU and the League of Arab States to establish a 'dot Arab' domain name. UAE announced that it would host this important new domain.
- An Arab Women's Literacy project involving ITU,

ALESCO and UAE designed to empower women in the region with ICT skills in Arabic.

- A project between ITU and the Linux Professional Institute to promote open source software training and certification.
- A broadband toolkit to be developed by the World Bank, along with a regional broadband connectivity study to support additional infrastructure investment and an employment study focusing on the West Bank/Gaza.
- At the national level, Egypt proposed a raft of projects for investment, and made three announcements with ITU:
 - A project to enhance access to Arab digital content through the Memory of the Arab World project.
 - A project to strengthen Arab statistical indicators to better inform policy-making in the region.
 - A project to leverage the power of ICTs to help persons with disabilities.

The Arab Information and Communication Technologies Organization (AICTO) proposed several projects, including a regional cybersecurity initiative to promote safe and secure e-transactions; a digital broadcasting project; a new project to establish e-accessibility centers to provide education, training and retrofitting of Arab websites in partnership with W3C; and a common legal framework on e-accessibility in Arab region. In addition, a number of countries, including Djibouti, Mauritania and Sudan, put forward exciting ICT investment opportunities for which they are seeking partners. Djibouti's projects focused on improving core infrastructure, building ICT links to hospitals and schools, and boosting technology training for girls. Mauritania is seeking investment partners to improve its backbone links and to help develop a Technopole smart city project and new e-government initiatives. The high-level part of the event kicked off on March 6 with a lively Opening Debate on youth issues, moderated by ITU's Dr Touré. The session addressed three key questions which had been earlier debated and submitted by youth delegates:

- Youth asked the Connect Arab Summit Leaders to look for a mechanism to ensure that their voices are reflected in policy making.
- Youth requested a national or regional umbrella organization that would be responsible for training and mentorship, and that could possibly provide seed funding to help get their ideas off the ground.
- Youth suggested that policy makers engage in more profound awareness raising for the prominent role that ICT can play in social and economic development. In particular, they asked that leaders draw attention to the growing opportunities in the sector, especially when it comes to developing local content to meet local needs.

The opening debate was followed by five Roundtable sessions on education; policy frameworks to attract investment; cybersecurity; local content generation; and innovation and job creation. (March 7, 2012) <http://www.itu.int>

United States

The US National Telecommunications and Information Administration announced plans to work on refarming 95MHz of spectrum in the 1755-1850MHz band for commercial services. The band is used by a range of federal government agencies at the moment, and the NTIA has released a report on proposals to free up the frequencies. The NTIA, along with the FCC, was tasked by the White House to work on making available another 500MHz of spectrum for mobile services in the next decade. Combined with NTIA's prior recommendation to reallocate 115 MHz of spectrum, this latest plan would bring federal agencies' contribution to 40 percent of the President's goal. (March 28, 2012) www.telecompaper.com

The FCC has voted to investigate the technical factors that should be taken into account as part of an effort to make the entire lower 700 MHz band interoperate, Fierce Wireless reports. The FCC has also voted to look at the specific rules that would allow terrestrial use of Mobile Satellite Service (MSS) spectrum, an issue which is likely to have a significant impact on how and when satellite TV giant DISH Network deploys its network. The FCC adopted both items unanimously. (March 23, 2012) www.telegeography.com

The Federal Communications Commission (FCC) has announced proposals to release an additional block of radio spectrum by removing unnecessary barriers to flexible use of 40MHz of spectrum currently assigned to the Mobile Satellite Service (MSS) in the 2GHz band. This proposal would carry out a recommendation in the National Broadband Plan that the Commission enables the provision of stand-alone terrestrial services in this spectrum. The FCC noted that because of the international allocation for mobile broadband and the large blocks of contiguous spectrum in the 2GHz band, the National Broadband Plan recommended that it remove regulatory barriers to flexible use in this band through a rulemaking. The regulator has also proposed some new policies it encourage the uptake of some of the already sold 700MHz spectrum which has languished unused in parts due to issues with interoperability with other blocks within the same spectrum band. The move, if implemented would mandate that devices designed to work on part of the 700MHz band work on all blocks within that spectrum allocation. (March 22, 2012) www.cellular-news.com

Canada

The Canadian Radio-television and Telecommunications Commission (CRTC) has told VoIP telephony operators and resellers to meet regulations concerning emergency (911) call services, or face being shut down. Instead of applying the regulation directly to VoIP resellers, the CRTC has mandated regulated carriers such as Bell Canada to impose strict contractual obligations on its wholesale VoIP-based clients. Under its latest decision the regulator now has the power to order a regulated telco to disconnect the service of wholesale customers or subordinate resellers that fail to comply with rules governing VoIP-based 911 services. Obligations include clearly informing consumers about any limitations of 911 services from VoIP home phones during power outages, or when using 'nomadic' VoIP phones, which have a fixed number but can be used on any high speed internet connection, meaning that emergency services cannot automatically identify a caller's geographic location. (March 12, 2012) www.telegeography.com

Colombia

The Ministry of Information Technology and Communication (MinTIC) has launched a tender for 4G spectrum, suitable for the provision of LTE services. The auction will see the allocation of 225MHz of frequencies in the following bands: 1710MHz-1755MHz, 1850MHz-1990MHz, 2110MHz-2155MHz and 2500MHz-2690MHz. MinTIC would allocate up to 25% of the value of the auction back to operators to be used to encourage the uptake of wireless broadband services. Incumbent cellcos Comunicacion Celular (Comcel), Telefonica Moviles Colombia (Movistar) and Colombia Movil (Tigo), and digital trunking operator Avantel have expressed an interest in the auction, as have US-based Nextel, and Brazil's Oi. (March 23, 2012) www.telegeography.com

ETNO

ETNO, in co-operation with the ITU, announced a workshop entitled 'Revising the International Telecommunication Regulations (ITRs) - Preparations for WCIT 2012' that will gather a range of high level industry speakers from across the globe, including speakers from the ITU, ISOC, the Council of Europe, and the European Commission. The ITRs are to be revised at the next World Conference in International Telecommunications due to be held in Dubai in December. This will be an opportunity to adapt the ITRs to better reflect today's telecoms market and the innovation that has occurred since 1988, when the rules were last negotiated. This is a highly political debate and it is important that as many players as possible engage in the review process at an early stage, although ultimately not all will have a seat at the negotiating table in December. This workshop is aimed at bringing the issues to the fore and providing a platform for policy makers and industry to discuss the issues and any concerns, with a view to finding common ground or at least identifying areas for closer collaboration going forward. (March 15, 2012) www.etno.be

European Union

The European Commission has asked the European Court of Justice to impose a fine on Portugal because it has not respected a 2010 Court judgment requiring it to follow EU telecoms rules when deciding who should provide universal service in Portugal. Under EU law (the Universal Service Directive), basic services must be available throughout the country, including connection to the telephone network at a reasonable price, public pay telephones and emergency telephone numbers free of charge. The selection of any universal service provider must be based on an efficient, objective, transparent and non-discriminatory procedure. This means that all interested companies should be able to take part, and no company should be excluded from tendering. Despite a 2010 ruling of the EU Court of Justice, Portugal has still not designated its universal service provider(s) in line with EU law. (March 22, 2012) www.cellular-news.com

Europe's biggest telecom operators may face a competition investigation from the European Commission, amid concerns their meetings may have led to collusion. In the first stage of an antitrust action, Brussels competition officials have demanded information about discussions between the leaders of the five largest operators in Europe. Nicknamed the E5, the meetings, which started in 2010, included the four incumbents Deutsche Telekom, France Telecom, Telecom Italia and Telefonica, as well as Vodafone.

Competition officials began the inquiry with a questionnaire to the GSMA, which has recently taken over the work of the now disbanded E5. The GSMA confirmed that it has “recently received correspondence from [Directorate General for] Competition which we will respond to in due course,” but added that this was a confidential matter. (March 14, 2012)

www.telecompaper.com

The European Commission has confirmed its opposition to the Dutch draft legislation aimed at forcing cable operators to open up their networks to third parties, commissioner Neelie Kroes said in a meeting with European cable CEOs in Brussels. The cable industry is particularly concerned with two amendments related to the Dutch implementation of EU telecom directives as well as one amendment to the country's media law. The sector is questioning whether the amendments comply with the EU regulatory framework, which only opens up infrastructure if a market analysis has identified a dominant network. (March 11, 2012)

www.telecompaper.com

United Kingdom

OFCOM has approved an application by Everything Everywhere to use its existing 1800MHz spectrum to deliver 4G services. OFCOM does not believe that allowing the mobile network group to use its spectrum in this way would distort competition. On the contrary, OFCOM believes that it will bring material benefits to consumers, including faster mobile broadband speeds and – depending on how Everything Everywhere uses the spectrum – potentially wider mobile broadband coverage in rural areas. Interested parties have four weeks to submit their views on the proposals, which could make 4G mobile services available in the UK as early as 2012. (March 13, 2012)

www.telecompaper.com

The UK's mobile roaming rates are “unacceptably high” according to a House of Lords Committee which heard evidence from mobile phone companies and consumer groups last week. The House of Lords EU Sub-Committee on the Internal Market, Energy and Transport has written to Ed Vaizey, Minister for Culture, Communications & Creative Industries, outlining its views on proposals from the European Commission to lower mobile phone roaming charges within the EU. (March 13, 2012) www.cellular-news.com

OFCOM has outlined an action plan to tackle the problem of unexpectedly high phone bills for consumers. This follows an extensive review into the causes of ‘bill shock’, which concluded that mobile contract customers were the most likely to be affected by this problem. The research found that up to 1.4 million contract mobile phone customers could have been affected by ‘bill shock’ in the last six months. The regulator will now co-operate with the mobile industry on a range of measures to address the main issues raised by the review. However, if these fail to significantly reduce consumer harm, OFCOM may consider mandatory options. OFCOM wants providers to do more to educate customers on how to avoid bill shock. The review showed that the main causes of bill shock were: downloading data, primarily while travelling outside the EU; using mobile voice services in the UK, mainly by exceeding inclusive allowances or calling numbers outside of allowances; and lost or stolen phones, where the level of financial harm can be substantial. (March 2, 2012) www.telecompaper.com

Ireland

Telecoms regulator ComReg has revealed further details about the forthcoming auction of wireless spectrum in the 800MHz, 900MHz and 1800MHz spectrum bands covering the period 2013 to 2030, suitable for 4G services. The agency plans to conduct a further consultation on the sale process, but confirms the auction will now likely take place by this summer. (March 19, 2012) www.telegeography.com

France

The telecom regulator ARCEP has confirmed receiving a progress report by national frequency agency ANFR on Free Mobile's network coverage and intends to revise the definition of coverage and to improve QoS measurements at the end of the year. The regulator lists three main questions that need to be asked of all mobile operators, including new entrant Free Mobile: Does the network comply with license the license obligation? How is the network used? and what QoS are users receiving? ARCEP states that any estimate of routed traffic would have to be set against technical and pricing terms of their private roaming deal, which is a private contract. Concerning QoS, mobile users may be often unable to establish a call or obtain a fast enough connection in most city centers even though they are described as having coverage. After publishing its annual mobile QoS score card late in the year, ARCEP will issue proposals aimed at improving QoS measurements. The regulator also supports a revised definition of coverage, with detailed proposals to be made in a report on 2G/3G/4G mobile coverage in the autumn. (March 9, 2012) www.telecompaper.com

Switzerland

The Cabinet has announced plans to partially review the current Telecommunication Act (TCA) in order to prevent legislation falling behind technological developments. The Cabinet said that the TCA was established for copper networks and was no longer fully effective. In order to remedy this, the Council will draft a consultation paper during the current legislature, with the aim of making the legislation more flexible. The regulator Communication Commission (ComCom) added: ‘The provision of technology neutral, open and fair access to networks, the universal service, protection of users, and a functioning internet are at the centre of telecommunications policy. In all these areas it is important to create legal certainty for the future.’ (March 29, 2012) www.telegeography.com

Spain

Telecom Regulator CMT has rejected a call by the European Commission (EC) suggesting that mobile termination rates (MTRs) should be reduced at a faster rate. The EC earlier this week gave the regulator a three-month deadline within which it was to provide detailed plans for how it would reduce MTRs at a quicker rate than presently planned. In response, however, the CMT has claimed that any attempts to speed up drops in termination rates could damage the mobile sector. Last month the CMT unveiled its revised timetable for the reduction of MTRs between 2012 and 2014. Having initially set out plans under which the rate would fall to EUR0.0109 (US\$0.0144) by end-2014 for all four of the country's mobile network operators, as per the regulator's revised plans, that rate is now expected to be introduced from January 1, 2014. (March 7, 2012) www.telegeography.com

Lithuania

The Communications Regulatory Authority (RRT) has announced that the country's three mobile network operators – Omnitel, Tele2 Lithuania and Bite Lithuania – have won the tender for spectrum licenses in the 2500MHz-2560MHz and 2620MHz-2680MHz frequency bands. Each of the three cellcos has been awarded 2x20MHz of spectrum in the two bands, which is suitable for the provision of 4G services, such as Long Term Evolution (LTE). (March 23, 2012) www.telegeography.com

Poland

Telecom regulator UKE will likely be accepting offers from bidders for 1800 MHz high-speed internet frequency in July and eyes concluding the procedure in the fall. UKE wants to organize a 5-block tender for licenses in the 1800 MHz band, which means that the 1800 MHz frequency may have up to five operators. (March 21, 2012) www.warsawvoice.pl

Czech Republic

The Czech Telecommunication Office (CTU) could force the country's incumbent mobile operators – TelefonicaO2 CR, T-Mobile Czech Republic and Vodafone CR – to open up their networks to new mobile virtual network operators (MVNOs), possibly as early as this summer. The CTU said that under the plan, incumbent cellcos would be required to provide wholesale services to MVNOs wishing to enter the local market. The European Commission needs to assess the market. Then an analysis will be needed and an obligation to make a wholesale offer could be made. The CTU which has recently come under criticism from Czech Industry Minister for its handling of the domestic telecoms market has increased its activity in recent weeks. (March 29, 2012) www.telegeography.com

Denmark

The Ministry for Business and Growth has provided details and a provisional timetable for the auction of 800 MHz frequencies. The auction involves one block of two times 10 MHz and four blocks of two 5 MHz band. There will be a maximum of five allocations and the most any single bidder can get is two 20 MHz bands. The minimum bid for each frequency block is DKK 50 million and the minimum for exemption from coverage requirements is DKK 10 million per coverage area. Winners must provide access in 207 postal districts to mobile broadband services at a minimum of 10 Mbps. The spectrum will be available from January 1, 2013 and coverage obligations must be fulfilled by 2015. Interested parties should submit their bids by May 8, according to the indicative dates. By May 15-16, the ministry will publish the names of the bidders. The deadline for withdrawal is June 7. By June 8, the ministry will publish its list of qualifying bidders. The first round of bidding will start on June 18, with supplementary rounds due on June 26. On the same date, the ministry will publish the names of the successful bidders, the number of blocks that they have won and inform them of their starting prices. In allocation round bidders will submit their bids by June 28. On June 29, the ministry will publish the final auction results. By July 2 to 12, winning bidders must pay 20% of the license fee and a guarantee for the outstanding sum, or they may opt to pay the full fee outright. The licenses will be distributed between July 16 and 23. (March 27, 2012) www.telecompaper.com

South Africa

The Internet Service Providers' Association of South Africa has welcomed the implementation of the new regulatory framework governing license fees for radio spectrum, set to come into force on April 1. The new pricing model moves away from a fixed price of ZAR 770 per MHz per link per annum to one that takes into account different uses of spectrum and the need to ensure that licensees occupy appropriate spectrum for these uses. (March 30, 2012) www.telecompaper.com

The Independent Communications Authority (ICASA) has decided to postpone the licensing of 800MHz and 2.6GHz radio frequency bands "until further notice" to ensure a forthcoming policy direction from Communications Ministry. The move follows strong criticism from a number of operators that have warned that ICASA is opening itself up to possible legal action if it proceeds with its plans to license the spectrum without waiting for the Ministry's policy direction document. Efficient assignment of spectrum in the two bands is seen as crucial to delivering next-generation broadband services to South Africans and to overcoming the so-called "digital divide" between connected urban citizens and those living in rural areas. Though ICASA won't tell operators what technologies to use in the two bands, most will want to use the bands to offer next-generation wireless networks based on LTE. (March 5, 2012) www.techcentral.co.za

Australia

Government has banned Chinese vendor Huawei from bidding in any tenders for the supply of equipment for the National Broadband Network (NBN). It is understood that the decision was made in light of concerns regarding the potential of cyber-attacks being launched from China. Huawei, meanwhile, is reportedly fighting the ban, both publically and via diplomatic channels, with sources at the vendor cited as claiming that the Chinese government could retaliate if the ban on the company participating in tenders is not lifted. The Australian government, however, has seemingly remained unmoved regarding its position on the matter. (March 26, 2012) www.telegeography.com

Hong Kong

Following a consultation, regulator OFTA has concluded that the frequency allocation for PHS services in the 1895MHz-1906.1MHz band should be withdrawn. Subject to the approval of the Legislative Council, it is expected that the amendment will take effect by end-2012, when the selling of PHS apparatus in Hong Kong will cease, and the use of the apparatus will no longer be allowed by end-2015. (March 2, 2012) www.telegeography.com

Malaysia

The Malaysian Communications and Multimedia Commission (MCMC) has said that it is confident of meeting its target of achieving 50% broadband penetration in Pahang by the end of this month. The report cites that the penetration rate in the region currently stands at 49.6. The MCMC noted that among the initiatives undertaken in Pahang to boost penetration was the distribution of some 78,600 netbooks to qualifying secondary school students; 26,100 of these, it is understood, were handed out in 2010 and 2011, while another 52,500 are expected to be distributed this year. (March 5, 2012) www.telegeography.com

Thailand

National Broadcasting and Telecommunications Commission has approved master plans regarding telecommunications, broadcasting and frequency allocation which will become effective after they are published in the Royal gazette. Approval means the NBTC can hold an auction for licenses to use the frequency spectrum for third generation mobile telecommunication services, scheduled for the third quarter of 2012. NBTC said it will soon release details of the frequency allocation plan, including details of the 2.1 GHz spectrum for 3G and blueprints for the telecommunication and broadcasting industries. Frequency licensing is an important step toward the liberalization of the telecommunication industry, which is dominated by two state-owned companies which hold the rights to grant concessions to private operators. (March 22, 2012)

Dow Jones Newswires

India

Department of Telecommunications (DoT) reportedly plans to issue show-cause notices to wireless operators for attempting to circumvent regulations governing the provision of 3G services and the use of 3G spectrum. DoT has found that operators issued with 3G concessions in 2010 have established de facto 3G roaming agreements, which are currently illegal in India. The watchdog has to date been unable to enforce penalties – up to INR500 million (US\$9.52 million) for each circle where the licensees have allowed non-licensed players access to their 3G spectrum – as the case is currently being heard by industry arbiter Telecom Disputes Settlement and Appellate Tribunal (TDSAT). In other India news, the Telecoms Regulatory Authority of India (TRAI) plans to recommend that the license fees paid for the 122 2G concessions revoked by the Supreme Court in February remain non-refundable. (March 27, 2012)

Wall Street Journal

The government says that it would not be appropriate for it to calculate the impact of the recent cancellation of the 2008 GSM licenses on Foreign Direct Investments (FDI) into the country. Following the Court Judgment, Etisalat DB, which has foreign equity participation, has given notice to the DoT of its intention to shut down its mobile network by giving its subscribers 30 days notice. Another licensee, S Tel, which also has foreign equity participation, has stated that their network has been brought to a standstill. The Minister of Communication and Information Technology told the Parliament that the Government proposes to take action as per the Supreme Court's judgment, and terms and conditions of the respective licenses. (March 21, 2012)

www.cellular-news.com

TRAI has released a consultation paper inviting comments from industry stakeholders on the re-auction of spectrum concessions revoked by the Supreme Court. The paper broadly covers several frequency issues, such as the liberalization of spectrum and the size and quantity of blocks to be auctioned. Also mentioned in the document were comments on the auction process itself including whether the auction was to be single or multi-stage, what reserve price to set per MHz, eligibility and rollout obligations. (March 9, 2012) www.telegeography.com

The Telecoms Regulatory Authority of India (TRAI) has announced that the total number of telephone subscribers in India increased to 936.12 million at the end of January,

2012 from 926.53 million at the end of December 2011, thereby registering a growth rate of 1.04%. Of that, the total wireless subscriber base increased from 893.84 million in December 2011 to 903.73 million at the end of January 2012, registering a growth of 1.11%. The share of Urban Subscriber has marginally decreased from 65.59% to 65.41% where as share of Rural Subscribers has marginally increased from 34.41% to 34.59%. The overall wireless Tele density in India reached 74.89%. Wireless subscription in Urban Areas increased from 586.26 million in December 2011 to 591.10 million at the end of January 2012. The subscription in Rural Areas increased from 307.59 million to 312.62 million during the same period. Private operators hold 88.56% of the wireless market share where as BSNL and MTNL, two state owned operators hold only 11.44% market share. (March 6, 2012) www.cellular-news.com

The Department of Telecommunications (DoT) has submitted a review petition to the Supreme Court regarding the apex court's decision in early February to cancel 122 wireless licenses. The DoT argues that the court's ruling, which included instructions to re-auction the revoked licenses, was beyond the jurisdiction of the court, and may have unforeseen consequences in other sectors dealing with scarce natural resources. (March 5, 2012) www.telegeography.com

"Information contained herein has been obtained from sources, which we deem reliable. SAMENA Telecommunications Council is not liable for any misinformed decisions that the reader may reach by being solely reliant on information contained herein. Expert advice should be sought."

Javaid Akhtar Malik

Director Regulatory Affairs

SAMENA Telecommunications Council

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- 3G Wireless
- 4G Wireless
- Wireless LANs
- Data Networks
- Long Term Evolution
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Need for Sustainable Business Model

The media industry in the SAMENA region like the rest of the world has gone through the same rapid and disruptive process of convergence in the last few years. In SAMENA region over 60% of its population is under the age of 25 and media and technology have turned out to be increasingly important sectors and the fresh technological innovations which the digital age brings along with it have become increasingly popular. The influence of convergence on the media players is enhanced being that they are forced to significantly evaluate their particular traditional business models to maintain with modifications in consumer habits.

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The escalating demand from customers with regard to bandwidth on account of data-intense applications, the convergence of various digital communication technologies along with the increasing commercial significance about the Internet has given surge to one of the very important concerns in the approaching years: whether or not as well as how the Internet economic model needs to evolve as well as what role legislation should play within this process. Net

neutrality regulation, if and when formally implemented in some shape or form, has got the prospective to reallocate resources among industry participants, affect optimal pricing approaches and also eventually impact investment as well as innovation incentives. Through these effects, the regulatory framework will almost certainly have an effect on which business models will be at all feasible, which are going to thrive, as well as which will turn out to be outdated.

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As the SAMENA media industry makes the changeover coming from analogue towards digital technology, there exists an essential need to establish a sustainable business model in order to generate income from digital content. Data traffic is certainly thriving, which means that business models ought to establish in a manner in which the significant infrastructure expenditures linked to the boost in data needs to be insured. Infrastructure investments are generally influenced by expected values associated with

suitable return which indicates that in cases where more bandwidth is required, operators need to be in a position to profit from their investment for making this kind of extra bandwidth accessible.

there exists an essential need to establish a sustainable business model in order to generate income from digital content

As conventional platforms (including print media and television) continue to lose their interest in comparison with the fresh mass media platforms regarding content delivery, there can be two primary business models to take into consideration that are paid-for content (subscription driven) along with advertising-driven content.

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It has been historically been challenging to profit from subscription-led content within the SAMENA region. This is mostly due to the fact that extensive accessibility to a variety of Free-to-Air (FTA) Television stations is available. The issue is additionally increased through the plethora associated with piracy over all the platforms which often take the shape unlawful decoders, unlicensed Digital Video Discs (DVD's) as well as downloading material over the web.

On the other hand, monetizing digital content by means of marketing and advertising continues to be challenging. On the traditional television platform, advertising is normally regarded as significantly undervalued as a consequence of unavailable and reliable audience measurement methods within majority of the countries within the SAMENA region. However, the recently introduced release of phase one of a new people meter TV audience measurement effort within the United Arab Emirates (UAE), along with a well established system in Lebanon in addition to a significantly talked about related idea within Saudi Arabia implies that television content could possibly be in the process to obtaining its legitimate worth. Within the new convergent globe, individuals are progressively shifting in the direction of fresh platforms regarding content yet advertisers have at this point in order to catch up, along with the majority of the advertisement expend even now focused within conventional media. Entrepreneurs will need to commence moving their invest over the internet, in addition to discovering fresh revolutionary methods for taking advantage of the actual business opportunities made

available from the digital age, in the event that content material is intended to be monetized effectively within the new convergent world.

Possible Internet Business Models

A few probable future business models that each concentrate on an alternative aspect having a perspective towards sustainability with regards to the capability to support escalating traffic volumes as well as social welfare effects are:

- Congestion Model: This emphasizes the likelihood to deal with congestion difficulties by means of congestion-based costing.
- Best Effort Model: This maintains the traditional best effort network however provides ISPs a lot more slack with innovative offerings.
- Content Pays Model: This emphasizes the actual witnessed requirement associated with diverse applications for several degrees of QOS. This particular model, on the other hand, places the actual focus on customer choice regarding higher quality levels.
- User Pays model: This model puts the focus on consumer choice for higher quality levels.

For the "Congestion Model," it is experienced that it decreases congestion as well as simultaneously enabling more effective usage of the prevailing infrastructure. On the other hand, it is improbable to provide adequate incentives in order to completely get rid of congestion. Nevertheless, it provides a heightened involvement associated with (light) users and more effective incentives to invest in infrastructure as a result of superior utilization. Content suppliers might possibly be adversely impacted in as far as they generate heavy visitors and also are not able to shape the actual traffic based on peak times. Contrarily, off-peak services (and opportunities in such services) could possibly increase. From a wider policy point of view a small disadvantage is that uncoordinated execution can result in increased difficulty with regard to content providers along with consequently end users.

In the "Best Effort Model" situation ISPs would probably provide premium services to content providers who require their particular content material provided at premium fees (VAS (Value Added Services)). Assured dedicated bandwidth regarding priority novel services would certainly assure their quality as well as viability, and therefore stimulate the development of brand new services. Charges regarding best effort services are usually not anticipated to change. Nevertheless in this particular situation end users possess extra usage of individually advertised progressive services. However, having said that, the danger associated with foreclosures as a result of exclusive contracts as well as bundling strategies could possibly elevate.

For the "Content Pays Model", it is observed that higher qualities assist in fresh content. Charging content instead of billing consumers for the high quality levels will probably take full advantage of the worth of the platform, and in doing so boosts incentives to invest both equally in infrastructure in addition to content. Within an environment having robust levels of competition as well as the appropriately restricted market power associated with individual ISPs within the best effort section, the model generates little if any threat associated with foreclosure strategies. During

the absence of powerful competitors, however, the model presents a danger associated with under-investment within the infrastructure as a result of strategic motivation: degrading quality in best effort could possibly hike up the cost pertaining to higher quality levels.

Similar to the Content Pays Model, the "User Pays Model" likewise helps fresh content by means of higher qualities. On the other hand, billing consumers as opposed to the content provider for the high quality levels is probably going to result in reduced value as well as lesser incentives to invest for the system as compared to in the earlier business model. The regulatory threat associated with foreclosure strategies appears to be scaled-down, although, the ability of a prominent ISP to prefer a vertically-integrated content provider is lower. Both business models, endure a danger associated with market fragmentation in the instance that no new Internet standards come out.

Impact of Net Neutrality

The actual execution regarding the various types of net neutrality regulations influence the above mentioned business models on a varied level:

- The implementation associated with a powerful form of net neutrality would most likely prevent "Best Effort Model" as well as "Content Pays Model," but nonetheless allows the other two business models. It indicates that a few advantages of these new business models could be reaped together with net neutrality laws and regulations, however, some other things won't be able to work out as planned. The congestion-based costing may possibly reduce congestion to some degree and the capability to possess differentiation quality classes intended for customers would most likely open up the likelihood for higher quality content offerings. Having said that, billing customers as opposed to content providers for the higher quality levels is probably going to result in reduced value as well as decreased incentives to invest for the platform when compared to a situation in which the content provider compensates as well.
- In comparison, the implementation of a weak form of net neutrality could allow the adoption associated with an enterprise model which will charge content providers intended for higher qualities. The actual contrast among content pays and user pays situations consists of the subsequent trade-off: the potentially elevated threat associated with foreclosure within the content pays model has to be accessed alongside inefficiency associated with charging the consumer area.

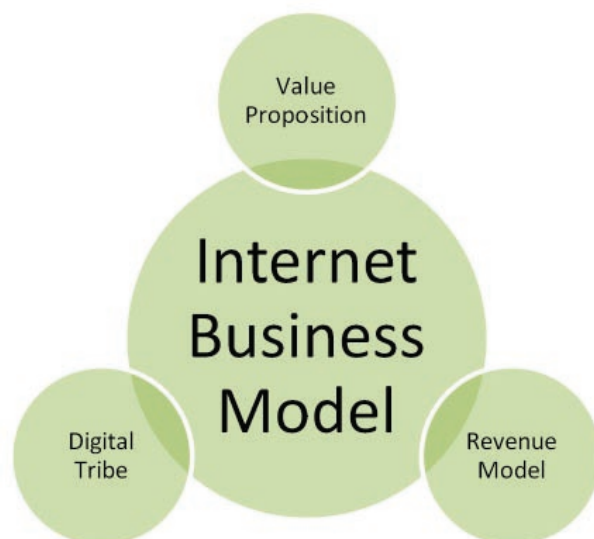
- Last but not least, the "Best Effort Model" signifies that net neutrality legislations simply relates to conventional services whereas unique revolutionary services will not experience these rules. Eventually, the important consideration is actually involving this kind of legislation as opposed to a modest, yet extensive net neutrality regulation.

Therefore, implementing a regulatory framework associated with electronic communications in the SAMENA region, policy makers as well as the government bodies must meticulously take into account the influence on business models as well as the inevitable advantages connected with those models in the short as well as long run.

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The following 3 actions will be the key towards creating the best business model:

1. Being familiar with the digital value proposition
2. Being aware of the target audience
3. Deciding on the suitable revenue model



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TOP TECHNOLOGY UPDATES

Sprint to Launch HTC EVO 4G LTE Smartphone

Sprint will launch HD voice-compliant HTC EVO 4G LTE smartphone in US. HTC EVO 4G LTE is built on Android 4.0, Ice Cream Sandwich, integrated with HTC Sense 4. HTC EVO 4G LTE features a 4.7-inch HD display, 1.5GHz dual-core processor, large 2000mAh embedded battery and dual-cameras (8-megapixel rear-facing and 1.3-megapixel front-facing). Sprint also plans to launch HD Voice network beginning in late this year as part of Sprint's Network Vision program. HD Voice. HTC EVO 4G LTE features HTC's Authentic Sound experience integrating Beats Audio. HTC EVO 4G LTE incorporates Beats Audio, including playing music stored on the device, streaming from a favorite service, watching a movie or YouTube video, or playing game. HTC Sync Manager Software also allows users to get their music on the device from their PC, and it works with current programmes, including iTunes. In addition, HTC ImageSense technology combines hardware and software advancements to the camera lens, sensor and software, including integration of a custom HTC ImageChip. HTC EVO 4G LTE will be available in the second quarter for USD 199.99 excluding taxes and surcharges. The availability date will be announced later. Customers can sign up for updates at sprint.com, and pre-order will begin from 7 May.

Sasktel Expands LTE Network to 8 Additional Locations

Canadian operator SaskTel has expanded its LTE mobile network to eight more locations across the province of Saskatchewan. The locations are Big Island Lake Cree Nation, Carry the Kettle First Nation and Ochapowace First Nation. The other tower locations, along with LTE coverage details, include Collins Bay providing coverage to the mining region near Points North Landing, Scout Lake offering coverage to the area south of Assiniboia including highway 2. Smoky Burn (Carrot Creek) provides coverage to the area northeast of Carrot River including highway 55, Saint Walburg North offers coverage to the area north of Saint Walburg including highway 26 and Waskesiu Lake Rural extends improved coverage in the Waskesiu area including highway 264. Three of the locations were completed as part of the First Nations Program, which will provide internet and LTE mobile service to 28 Saskatchewan First Nations by the end of this year. The project is jointly funded by the Government of Canada and SaskTel. The LTE network provides increased bandwidth with download speeds approximately four times faster than existing speeds (up to 21Mbps). It is also compliant with more than 80 percent of all networks around the world. SaskTel plans to support the existing CDMA digital network for the foreseeable future.

WiMAX Forum South Asia Conference 2012 Concludes Successfully

Pakistan Telecommunication Authority (PTA) and Wateen Telecom Pakistan organized The WiMAX Forum in Islamabad, Pakistan. The aim of the conference was to create awareness about how WiMAX is a cost-efficient, sustainable and easily scalable solution for broadband distribution. It can help improve the country's economy by helping industries such as electricity, aviation, oil & gas, agriculture, healthcare amongst others in becoming more efficient, transparent and vertical through its various applications. The Conference included speakers from Airspan, Fanoos Telecom, Gemtek Technology and Banglalion among others who discussed various go-to-market strategies, planning considerations and applications for WiMAX operators. Alepo, a leading provider of WiMAX solutions shared how broadband and mobile networks can collaborate for better provisioning of data services for consumers. Pakistan has four WiMAX operators in the country, namely Wateen, Qubee, Mobilink Infinity and Wi-Tribe who account for around 29% of the total broadband market share.

Orange LTE Rollout in EU to Be Completed By 2015

Orange France has announced that it will launch its pilot LTE network in June, starting in the city of Marseille. Orange has a combination of 4G frequencies -- at 2.6GHz and 800MHz -- for its LTE services, and the network infrastructure is being supplied by Alcatel-Lucent. In addition, the company said that over 50% of the population is now covered by its HSPA+ network offering theoretical peak speeds of 42Mbps. By end 2012, this coverage will gradually be enlarged to reach 60% of the population. The HSPA+ technology, until now available only to business companies, is now accessible to the public. Europe has forged a decision to make more mobile broadband spectrum accessible to the market, but Orange is continually encouraging them to promote a more favorable environment for the roll-out of radio access networks. Some operators in the United States and Canada have already deployed 4G LTE in major areas.

Telstra Launches LTE Mobile Wi-Fi Set in Australia

Australian communications provider Telstra has launched LTE mobile Wi-Fi set for customers to access mobile internet on their Wi-Fi enabled laptops, tablets and smart phones. The battery-powered Telstra Mobile Wi-Fi 4G and the Big Pond Mobile Wi-Fi 4G can share a Telstra LTE network connection with up to five devices simultaneously. Customers using the Telstra Mobile Wi-Fi 4G in LTE coverage areas can access typical download speeds ranging from 2Mbps to 40Mbps and typical upload speeds from 1Mbps to 10Mbps. When outside LTE coverage areas the Mobile Wi-Fi 4G uses HSPA+ Dual Channel technology to serve up Australia's 3G speeds. Customers can get 3G download speeds ranging from 1.1Mbps-20Mbps in all capital CBDs and much of the associated metropolitan areas and many regional locations. Outside of these areas the device transitions to Telstra's available 3G speeds.

New Mexico and Texas to Get Superfast 4G LTE Services

New Mexico and Texas are for the first time to be offered high-speed Internet access. Operating under the Fuego Wireless brand, PVT will bring blazingly fast 4G LTE Internet to the areas it serves; including expansive diverse terrain, rural agricultural communities, and metropolitan areas such as Santa Fe and Las Cruces. Fuego Wireless will provide access to its customers in areas across New Mexico and parts of Texas. With a history of providing customers with the latest innovations to help them in the home and business, PVT will provide 4G fixed wireless access via LTE. Under this agreement Alcatel-Lucent will provide a complete end-to-end 4G LTE solution including LTE base stations (eNodeBs), the Internet Protocol (IP)-based Evolved Packet Core (EPC) as well as our market leading services capabilities including project management, installation, integration and operations and maintenance services.

Net America Alliance Expects Second LTE Network

Net America Alliance has announced that its second company is expected to go live. Panhandle Telephone Cooperative Inc (PTCI), which is headquartered in Guymon, Oklahoma, is poised to launch LTE services in rural Oklahoma under the 'Bonfire' brand. Panhandle, which owns spectrum covering six counties covering over 45,000 people and more than 7,500 square miles, has rolled out a network consisting of 45 towers; at launch the network will cover 5,000 square miles and nearly 30,000 people. Chairman and CEO of Net America, commented: 'Panhandle is armed to serve the good citizens of Oklahoma with 4G LTE. This is why the Alliance was formed, to revitalize rural America with lifestyle and livelihood enhancing services, and today all the pieces have come together to make that happen'. Ron Strecker, CEO of PTCI, added: it is indeed a special time for our customers, for rural America and for PTCI. Prior to joining the Alliance we evaluated the risks and complexity of deploying a 4G LTE network on our own and decided the alliance model made a lot of sense.

China Telecom and Nokia Launch First CDMA Windows Phone

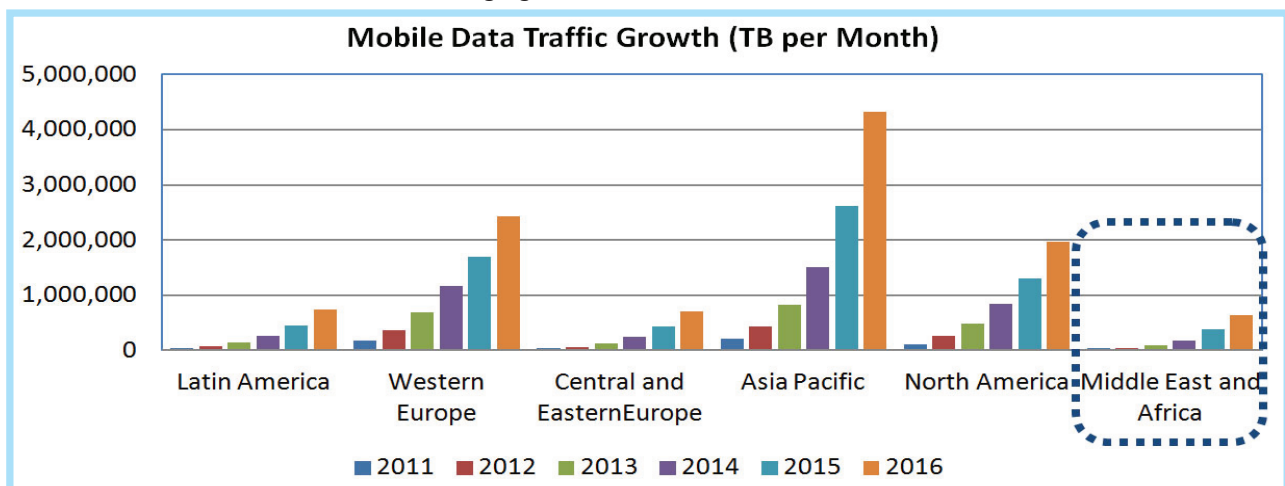
China Telecom and Nokia announced the Nokia 800C, the first CDMA Windows Phone in China and Nokia's first Lumia phone for the world's largest smartphone market. The Nokia 800C combines head-turning design and the fastest way to connect to the people. The partnership between China Telecom and Nokia extends beyond the Nokia 800C with the addition of Nokia's most affordable Lumia smartphone, the Nokia Lumia 610 also arriving in a CDMA variant to China Telecom's portfolio in Q2 2012. The Nokia 610C is targeted at a more youthful audience and provides a perfect introduction to Windows Phone with access to the same core signature experiences as the rest of the Lumia range in a package optimized for quality. Chairman of China Telecom, expressed that this grand launch for China's first CDMA Windows Phone represents our optimism and excitement for the future of Windows Phone and Nokia Lumia in China.



The quest for a Sustainable Internet Business Model in light of the Digital Content trends in the SAMENA region

SAMENA region has a diverse telecoms & ICT ecosystem in terms of fixed, fixed wireless, mobile, broadband, and converged services. Next generation mobile technologies such as LTE and mobile WiMAX are viewed as the key drivers of the digital content. With the growing data traffic resulting from an increasing number of bandwidth intensive applications, the operators' community needs to converge more on the need for innovative strategies. The region-wide need for digital content, more importantly localized content can not disdain the mounting significance

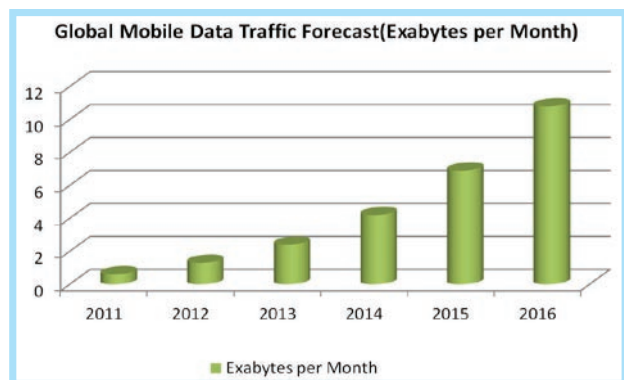
of next generation networks across the region. The region's telecoms markets are undergoing remarkable progression; broadband proliferation is progressively becoming the spotlight of mobile content and applications. Growth in the mobile sector is especially corroborated in the Middle East showing a strong demand for convergence and introducing challenges that the operators community must address in the shape of novel strategies and more attractive business models.



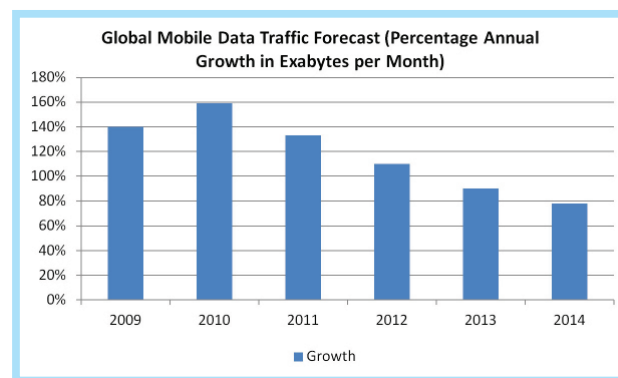
The emergence of diverse technological innovations in the telecom sector globally has only stressed the continual growing demands of the technology savvy consumer base that exist world over. Hence the provisioning of value added services, and over-the-top-content only leads to increased demands, thereby shifting the onus back on the operators to continually invest in their infrastructure and provide to the emerging demands. Effective deployment strategies are essential to ensure the economic success of the demanded technology and dynamic market beat for successful penetration. Thus the importance of such an approach is essential in the context of the SAMENA region.

Studying the existing market and its trend is the key towards ensuring regional performance and growth. According to a research study by Value Partners, "Population of the Arab states is young and growing fast, many of them with high incomes. In the GCC almost 70 percent of the population is under 30. Youngsters tend to be enthusiastic consumers of all types of digital media, and are said to form 75 per cent of all internet traffic in the GCC. We are witnessing a rapid deployment of mobile broadband technologies in these countries – with many of the key players in the region having already launched their mobile broadband offerings. We are seeing continual success in Saudi Arabia, Egypt, the UAE, and higher take-up in Bahrain, Qatar and Oman". The Middle East & Africa however has the lowest mobile data traffic growth forecasts compared to the other regions.

Operators, on the other hand, are increasingly demanding content providers to pay bandwidth fee. Increasing demand of bandwidth due the emergence of bandwidth hungry applications has lead to an increased CAPEX for the operators. The demand by operators for a bandwidth usage fee from OTTPs is mainly due to the huge investment required for new infrastructure and network capacity upgrades to meet bandwidth requirements. Operators believe that content providers receive significant financial gains from the massive infrastructure investments by the operators and therefore should share the upgrade costs. Regulatory policies and operators strategies need to highlight the overall development of the sector. However, regulatory bodies also have to take into account the trends in the convergent world and ensure a competitive business environment among operators and service providers for the effective development of technology. Continual progression of technologies such as broadband and mobile has lead to an alarming increase in global convergence and hence been extremely beneficial with respect to the development of the ICT sector. However, this has also opened up the doors to challenging issues such development of a win-win business model between operators/service providers, IP protection and data security issues.



It appears that the telecom industry will be largely driven through next generation wireless technologies in the region. In the meantime, a number of value added services are expected to add to the growing revenue of next generation service providers. Industry analysts agree that operators will come with new strategies to offer more "smart services". Gaming and P2P video sharing services are expected to be the most popular value added services. According to a recent research report by Informa, the future growth of broadband in Africa and the Middle East will be driven by mobile broadband, with the subscriber total increasing at a CAGR of 34% to reach around 38 million by 2014, slightly faster than the global average. In the SAMENA region, WiMAX is already being used in various markets as cost effective wireless broadband access and backhaul technology. LTE appears to begin to rollout, it is likely that WiMAX, LTE and other wireless broadband technologies will be used extensively for broadband access to cope with bandwidth intensive application. Despite so much ongoing focus, new investments, adoption



of transmission and access technologies, the overall broadband penetration is still below the global average. This makes a huge potential for mobile broadband service providers, be it WiMAX, LTE or any other technology. These technology trends are important to understand in the context of regulatory push including enacting rules that are market friendly and at the same time nifty and innovative so as to avoid the imperfection.

Net neutrality has only begun to draw some attention, though, there doesn't yet exist much open discussion about it in the SAMENA region. It is the due to the lack of a net-neutrality policy is majority of the markets across the region. The subject needs to be discussed openly so as to progress, particularly in the emerging markets that need more attention in terms of policy & regulation. The digital content souk within the region is not entirely new. Operators, content providers and regulatory bodies have made considerable progress through convergence, innovation, and policies & regulation. The process of re-engineering business models to reflect the characteristics of the emerging markets for content based services is still at its beginning in the SAMENA region. Nonetheless, it is already apparent that content based services will in the long run turn into an important revenue stream for the operators.

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SATELLITE NEWS

Africell Launches Thuraya Satellite Services

Sierra Leone operator Africell has launched Thuraya satellite services in the country. The two services include the Thuraya single-mode, satellite-only handset and the dual-mode GSM/satellite handset. Customers can switch between the Africell mobile network and Thuraya satellite networks and access applications including SMS, GPS, camera and data. As Thuraya's service partner in Sierra Leone, Africell will be authorized to sell their products and serve as their official representative in Sierra Leone. The XT-Dual and the IP are packed with feature rich applications and capacities including: convenience with the world's smallest, lightest and compact satellite phone; network selection between Africell network and Thuraya Satellite networks; and feature rich applications including SMS, built in GPS and camera, as well as the ability to connect a Bluetooth device. Thuraya IP is the world's first mobile satellite service to support 384 kbps streaming IP, with connectivity of up to 444 kbps available on standard IP. The Thuraya XT-Dual is a one sim, one number and on one phone to travel the world. It is a combination of a GSM and satellite phone that comes with splash water and dust protection and is shock proof.

Afghanistan Seeks Bids for Telecommunications Satellite

The Afghanistan government will accept bids from investors to build and place in orbit its first telecommunications satellite. Afghan Minister of Communications and Information Technology Amir Zai Sangin says that country will accept bids from investors to build and place in orbit its first telecommunications satellite. Sangin told RFE/RL's Afghan Service that the cost of the satellite will be approximately \$250 million and selection of the winning investor will be finalized within six months. Afghanistan has one assigned space in geosynchronous orbit for a satellite under international agreements but has never used it. Sangin said the satellite's orbital position is attractive to investors because it allows for providing telecommunications services across the country. Afghanistan's telecommunications market has been expanding dramatically over the past 10 years, but much is still concentrated in the capital. The winning bidder will reportedly be allowed to earn back the initial investment by providing channels for businesses such as private television and telecommunications companies.

Bangladesh Inks Deals with SPI for Satellite Launch

Bangladesh is set to launch its own satellite within next three years, said Minister for Post and Telecommunications Rajiuddin Ahmed Raju. The name of the satellite will be 'Bangabandhu', after the nation's founding father. The announcement came after the Bangladesh Telecommunications Regulatory Commission (BTRC) signed the relevant agreement with US-based Space Partnership International (SPI). SPI will act as consultant for the launch and will assist in market evaluation, marketing, and building expertise for satellite operation and ground station management. SPI will charge BDT 870 million. Currently, all TV channels, ISPs, Vsat and radio channels use foreign satellites. According to the BTRC, each TV channel pays about USD 200,000 annually to use the satellites, and all institutions taken together, including the 19 TV channels, pay US 4 million every year. Bangladesh may earn about USD 50 million a year after the satellite is launched, said SPI managing director Bruce Kraselsky.

Bskyb to Broadcast 40 New Olympic BBC Channels Through SES Astra

BSkyB will broadcast 48 new BBC channels dedicated to London 2012 Olympic coverage. Over 40 of the new channels will broadcast in the UK through the ASTRA Satellite System. The 24 HD and 24 SD channels will cover each of the Olympic locations and show the full range of different events during the Games. Both Freesat and Freesat from Sky will also benefit from the satellite capacity acquitted by Sky to facilitate and broadcast the new channels. This live transmission will use ASTRA satellite capacity at the 28.2 degrees East orbital position. SES owns and operates the ASTRA Satellite System. "The ability to stream these live Olympics channels shows the strength of satellite in delivering high bandwidth video, especially in HD", said Norbert Hölzle, Senior Vice President Sales Europe at SES. "Two dozen live feeds from the different Olympic locations will give viewers a fantastic opportunity to follow multiple events live, in both SD and HD. We are proud that SES will be used by our long-standing customers to deliver this fantastic showcase."

VNPT to Launch Vinasat-2 on 15 May

Vietnam Posts and Telecommunications Group (VNPT) expect to launch its Vinasat-2 satellite into orbit on the 15th of May, 2012. Assembly of the satellite began on 15 July by Lockheed Martin. It will be fully completed in May 2012. Vinasat-2 will feature 24 Ku-band transponders and will provide radio, television, and telephony transmission services for Vietnam and other parts of Asia Pacific. The satellite will cost USD 260 to 280 million. The satellite will have a lifespan of fifteen years and provide coverage in Southeast Asia. Vinasat-2 will be launched on an Ariane 5 or a Soyuz launch vehicle from the Guiana Space Center. To save cost, Vinasat-2 will be launched together with another satellite. After launching, Vinasat-2 will be operated by Vietnam Telecom International (VTI).

Intelsat to Offer Additional Satellite Coverage to Panasonic

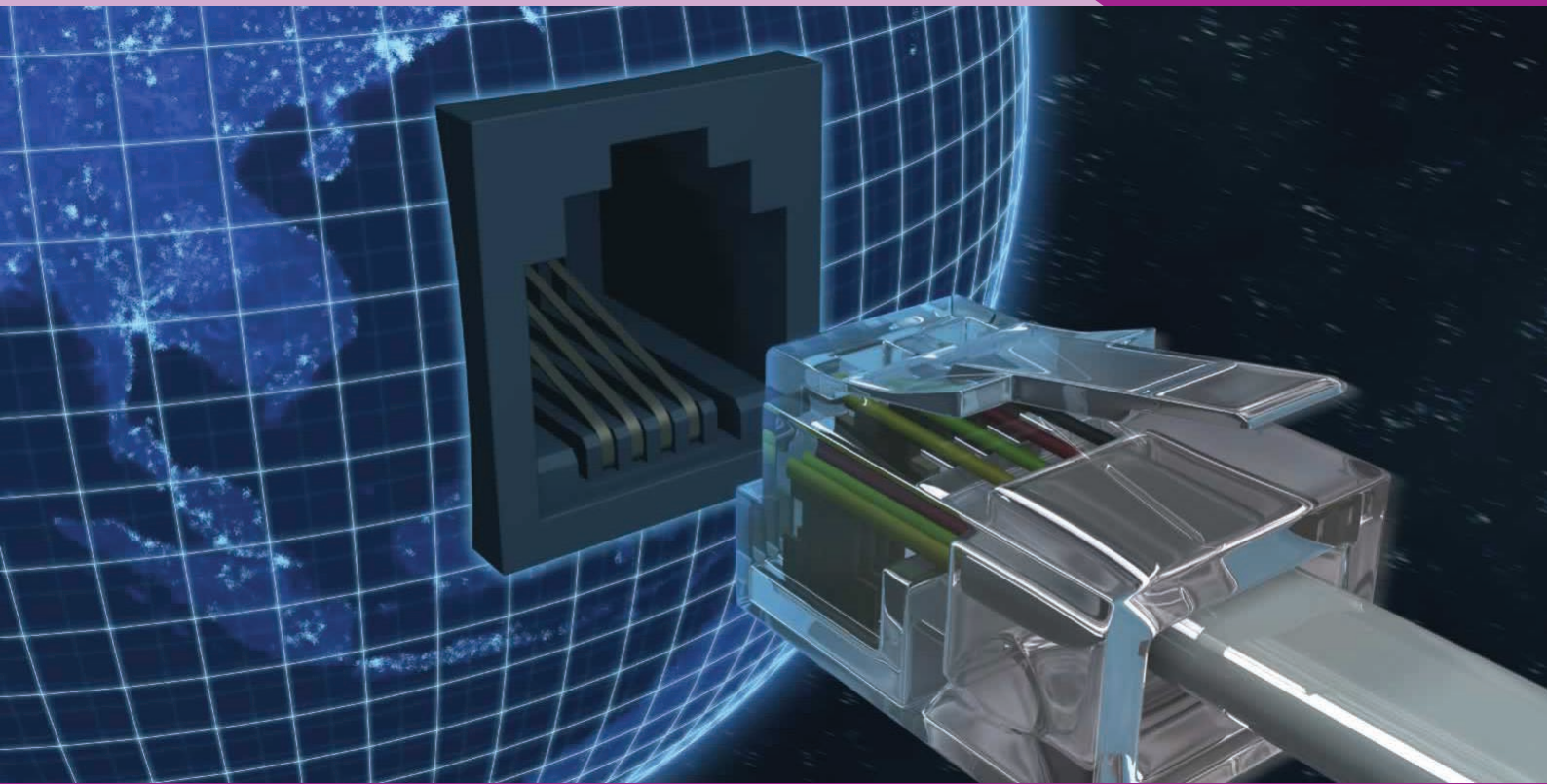
Panasonic Avionics has added additional coverage and capacity for its Global Communications Service via the Intelsat-14 satellite which is operated by Intelsat. The coverage provided by the Intelsat-14 satellite will enable Global Communications Service to offer services in Europe, The Mediterranean Sea and Africa. Panasonic's Global Communications Suite provides two-way broadband connectivity to an aircraft. It supports a range of passenger and crew applications including in-flight broadband internet access over Wi-Fi to passengers, and mobile phone service offered in collaboration with AeroMobile. Panasonic's in-flight connectivity service also includes the live television service to offer content from BBC World News, BBC Arabic, NHK World Premium, France 24, Euronews, IMG Media's Barclays' Premier League Channel, and IMG Media's Sport 24.

Skyband Expands Hughes HX Broadband Service

Hughes Network Systems announced that its long-time customer Skyband of Saudi Arabia is expanding its broadband satellite services business with an order for over 2,000 additional HX satellite terminals. In 2009, Skyband purchased a multi-satellite HX Gateway to support its broadband services. Based on the Internet Protocol over Satellite (IPoS) standard, the HX system can be configured to provide a specified quality of service for each link to a particular terminal, enabling operators to provide services tailored to a customer's specific requirements. An optimized bandwidth allocation scheme is employed which mitigates cost of space segment, whereby idle terminals release their bandwidth assignments to a shared pool. HX remote terminals use FDMA/TDMA channels to communicate with the HX Gateway in star mode, or simultaneously to other terminals in mesh mode, with each channel supporting high-speed data rates.

Yahsat Moves Second Satellite to Launch Site

Middle East-based Yahsat has overseen the transport of its second satellite Y1B from EADS Astrium facilities in Toulouse, France, to the Baikonur Cosmodrome, Kazakhstan. On arrival in Kazakhstan, the Y1B satellite, which was air-freighted by the world's biggest aircraft built in Europe (Antonov), will receive additional testing before it is moved to its final launch position. The Y1B will be launched by an ILS Proton Breeze M vehicle in April. The Y1B weighs more than 6,000 kg, features a spacecraft power of 14kW and has a 15-year designed lifetime. It is equipped with a commercial multi-beam payload in the Ka-band, which will be used to provide a variety of government and commercial applications, including YahClick, a new satellite broadband service. Yahsat's first satellite, Y1A, which is currently in geostationary orbit, was successfully launched in April 2011 by Arianespace.



ITRs Watch

Arab Telcos Discuss International Telecommunications Regulations (ITRs) Reforms with ITU Secretary General

The Chief Executives of the region's leading telecommunications groups converged on Dubai recently to share views on the proposed reforms to the International Telecommunications Regulations (ITRs) with the head of the International Telecommunications Union, Secretary General Dr Hamadoun Touré. The meeting kicked-off the dialogue that will help to shape the Arab region's contributions to the World Conference on International Telecommunications (WCIT) to be held at WCIT-12 in Dubai in December 2012. During the discussions, the region's operator community congratulated the ITU on the recent successful Connect Arab Summit held in Doha, and exchanged views and concerns regarding the reforms to the existing ITRs being proposed by various countries and which will be agreed at WCIT-12. A number of the current member state proposals seek to change the status, scope and operations of the ITU and if adopted will have wide reaching implications not just for telecommunications companies but also with respect to sustainable long term investments in and the growth of telecommunications markets. ITU Secretary General said that this is a multi-stakeholder process, including all Sector Members of the Union, and we should seize the opportunity while Mohammed Al Ghanim assured the meeting that the TRA UAE team will soon be inviting all UAE stakeholders to participate in the preparatory process for WCIT; to share ideas; to understand concerns and find solutions that will protect and promote the interests of the UAE and its telecommunications markets.

ETNO and ITU Bring Together Policy Makers and Industry Players to Discuss the Future of ITRs

ETNO, in co-operation with the ITU, is pleased to announce a workshop entitled 'Revising the International Telecommunication Regulations (ITRs) - Preparations for WCIT 2012' that will gather a range of high level industry speakers from across the globe, including speakers from the ITU, ISOC, the Council of Europe, the European Commission, Ambassador David Gross and US Ambassador to the EU, William Kennard. The International Rules for Telecommunications (ITRs) are to be revised at the next World Conference in International Telecommunications due to be held in Dubai in December. This will be an opportunity to adapt the ITRs to better reflect today's telecoms market and the innovation that has occurred since 1988, when the rules were last negotiated. This is a highly political debate and it is important that as many players as possible engage in the review process at an early stage, although ultimately not all will have a seat at the negotiating table in December. This workshop is aimed at bringing the issues to the fore and providing a platform for policy makers and industry to discuss the issues and any concerns, with a view to finding common ground or at least identifying areas for closer collaboration going forward.



ROAMING NEWS

Uganda Set to Revise Mobile Interconnection Fees Downwards

Uganda is expected to revise downwards the interconnection fees paid between telecom companies' to US\$.04 (Ush98) from US\$.052 (Ush131) starting May 1, 2012. This is expected to go down to US\$.03 (Ush84) in May 2013 and US\$.0295 (Ush73) in May 2014. According to the Uganda Communications Commission, it will bring down further the calling tariffs for mobile phone users. Most mobile companies charge US\$.0016 (Ush4) per second or US\$.09 (Ush240) per minute, which is still expensive according to sector analysts. Many telecom companies have agitated for the revision downwards of the interconnection charges with only the country's giant telecom operator MTN still opposed to the downward trend. They argue that the downward trend may make the investment climate unproductive. Orange Uganda Chief Strategy Officer said that this is a very good initiative. We think it will create fair competition in the industry.

Vodacom Tanzania Mobile Users to Gain from Roaming Savings in 9 African Countries

Vodacom Tanzania said its customers can expect huge roaming savings when travelling to 9 African countries where Vodacom and its Partners operate. These countries include South Africa (Vodacom), Mozambique (Vodacom), Lesotho (Vodacom), DRC Congo (Vodacom), Ghana (Vodafone), Kenya (Safaricom), Rwanda (MTN), Uganda

(MTN), Uganda (UTL) and Burundi (UCOM). The offerings include free incoming calls, free incoming SMS, lower calls and data rates while roaming on the Vodacom Lesotho, Vodacom Mozambique, Vodacom South Africa, Vodacom DRC, Vodafone Ghana and Safaricom Kenya, MTN Rwanda, MTN Uganda, UTL Uganda, and UCOM Burundi networks. Vodacom said its subscribers both post-paid and pre-paid will be able to receive free incoming calls, make calls and surf on the internet at affordable rates while visiting in one of these African countries with listed networks.

EU Considers Cutting Mobile Roaming Charges

Londonderry mobile phone customers will pay no more than 24 pence (US\$ 0.4) per minute to make roaming calls from July as a new EU cap kick in. Foyle MLA welcomed the news that the EU has moved to cap roaming charges for calls and downloading data. The caps will be enforced on mobile firms by July of this year. Consumers will pay no more than 24p (US\$ 0.4) per minute to make a roaming call and no more than 59p (US\$ 0.7) per megabyte downloaded. He further added that those of us along the border are well aware of these unfair charges. A trip across the border can end up creating sky high bills for consumers. He also added that these circumstances have acted as a ridiculous rip-off for those of us who frequently travel between the borders they have had negative effects on both business and ordinary consumers alike.

Bhutan Telecom Reduced Roaming Charges by More than Half

Bhutan Telecom (BT) has reduced its international roaming charges in India by more than 60 percent for postpaid users, starting April 1. Many people, including those who had to limit their Smartphones and tablets use to prevent returning home with massive bills while abroad, have welcomed the revised rates. An importer said that most traders are fed up with being ripped off by the high roaming charges, and used to buy Indian SIM card instead, which is a hassle. The new roaming deal, apart from low call charge, gives us a long-term structural solution for data and internet browsing, which can be done from anywhere. A civil servant, also commented that, because of high rates earlier, many departments cancelled issuing postpaid SIM card to head officials when traveling; and those who did placed tight restrictions on the use of mobile devices.

Mobilicity Adds More Value to Unlimited Plans

Canada: Mobilicity added more value to its unlimited plans. Mobilicity's top-of-the-line plan Unlimited Everything now comes with 60 free minutes of voice roaming and free phone protection, while its new US\$ 45 plan includes unlimited data, and 30 minutes of free voice roaming. Mobilicity added the new features into the plans without raising prices. The new rate card also marks the debut of voice roaming minutes included in most of its new plans for flat-rate calling across North America. Free incoming text messages are now also included on all its plans while roaming. Following the changes, Mobilicity's CAD 25 Unlimited Starter plan includes unlimited province-wide long distance and advanced calling features; Mobilicity's US\$ 35 Unlimited Plus plan includes unlimited Canada-wide long distance, global text, light data (email with social networking or BlackBerry Messenger) and 15 minutes of voice roaming; Mobilicity's US\$ 45 Unlimited Value plan includes unlimited data and 30 minutes of voice roaming; and Mobilicity's US\$ 55 Unlimited Everything plan includes free phone protection and 60 minutes of voice roaming.

Telia Data Roaming Traffic on the Rise Thanks to Lower Fees

Telia Sweden said it has seen its data roaming traffic increase by 137 percent in Europe and by 164 percent in the Nordic and Baltic countries since the launch of its roaming service 'Surf Abroad'. After cutting data roaming prices by up to 90 percent in 2011, Telia says its roaming prices for mobile data are about 70 percent lower than the new EU price levels. Under the EU's new price control package, roaming costs may not exceed US\$ 1.1442 (SEK 7.73) per 1 MB for mobile surfing in the EU from 01 July 2012. Telia says that it give its customers a price that is 70 percent below the specified EU levels, namely an average price of US\$.361 (SEK 2.45) per 1 MB. In May 2011, Telia lowered its roaming prices in the Nordic and Baltic region by up to 90 percent. Telia also lowered its prices in Europe in October 2011 and in Thailand and Turkey before the Christmas holiday of 2011.

Telecom Italia Launches Roaming Services for Operators

Telecom Italia Sparkle has launched four Enhanced Roaming services. These new services cater to the mobile operators looking to improve their roaming services proposition to their final customers. Welcome SMS offers an enhanced messaging platform based on an architecture that allows mobile operators to perform advanced messaging based communication to inbound and outbound roamers. The service is now available. Roaming Performance Viewer enables the management of roaming business by producing near real-time reports across many KPIs. The service will be available to the market on 5 April. Proxy Location Register optimizes the signaling traffic between visited and home networks through a significant reduction of location updates. It also prevents the steering of the home operator's traffic avoiding roamers redirection out of the visited network. The service will be available to the market on 18 April. Border Roaming Redirector offers operators the tools to actively prevent unwanted roaming on neighboring mobile networks by redirecting and retaining the subscriber on the home network wherever coverage is available. The service will be available to the market on 8 May.

Trumove Offers Incentives to Roaming Customers

Customers of TrueMove and TrueMove H will receive privileges from the cooperation of Conexus Mobile Alliance including a promotion of data roaming flat rate of US\$ 10.8 (THB 333)/day /network for unlimited data roaming usage, Sending SMS while roaming at US\$ 0.35 (THB 11) per message to every network and can contact their home call centre for free while roaming on Conexus' partner networks. Enterprise customers can receive a SIM replacement for free while in Conexus countries. The objective of the Conexus Mobile Alliance Conference is to share insights and experiences within the telecom industry and define the direction for cooperation among members in order to present a service that can meet swiftly changing demands and offer the greatest benefits to customers of the allied operators.



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