

SAMENA TRENDS

EXCLUSIVELY FOR SAMENA TELECOMMUNICATIONS COUNCIL'S MEMBERS

BUILDING DIGITAL ECONOMIES

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Voice & Data Roaming: Trends in the Region



Dr. Amer Awadh Al Rawas

Chief Executive Officer

Oman Telecommunications Company (Omantel)



A Perspective on Voice and Data Roaming

When it comes to addressing the issue of data and voice roaming in the SAMENA region—similar to any other region—customer perception, regulation and pricing, revenues, and the impact of roaming services take the center stage.

Generally speaking, the customer desire and the regulatory requirement to reduce roaming charges do not take into account the fact that there exist a host of both technical and legal aspects to reducing roaming charges, inclusive of the need to address major issues such as fraud, high taxation, to name a few. It is exactly this need to discuss such issues that can have a major impact on revamping the voice and data roaming models toward sustainability.

Roaming—both voice and data—are important to telecoms operators, as it is an integral revenue stream. With four of the ITU geographical regions showing a 100 percent cellular penetration rate, the rising adoption of mobile services is indicating a positive growth rate for the roaming segment. Furthermore, given the presence of alternative communication technologies, mobile voice and data roaming is undergoing improvement and new business models are already emerging. That is, for instance, rising alliance formation among operator groups is now contributing toward the reduction of roaming tariffs and improvement in transparency of information.

There is no denying of the fact that voice and data roaming will continue to rise. Some recent studies rightly predict that by 2015, more than 6% of total mobile services revenues could be attributed to roaming alone. A major catalyst of this growth, apart from rising adoption of mobile services, is the availability of mobile applications and the continually advancing handset terminals. These smart terminals, in turn, are impacting the usage level of data—which will inevitably become the main driver of global roaming charges over the near future.

In any case, new business models have to be explored and the search for innovation must be sustained. The real issue that operators providing international voice and data roaming services face today is lack of policy-level support, providing which would also encourage operators to undertake heavy network investments as well as invest on the adoption of digital services. Already, various regional operators have taken the initiatives to improve roaming services, both from quality and pricing points of view. Operators themselves face tremendous difficulties in dealing with the implications of high roaming prices and in providing roaming quality of service to their customers. A possible solution lies in enabling harmonization at both technology and spectrum level, and approaching the roaming issue with a non-legacy, “digital” policy mindset.

Yours truly,

Bocar A. BA
Chief Executive Officer
SAMENA Telecommunications Council



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Editor-in-Chief
Bocar A. BA

Contributing Editors
Izhar Ahmad
Javaid Akhtar Malik

Contributing Member
Coleago Consulting
Booz & Company

Publisher
SAMENA Telecommunications Council

Subscriptions
subscriptions@samenacouncil.org

Advertising
ads@samenacouncil.org

Legal Issues or Concerns
legal@samenacouncil.org

SAMENA TRENDS
#304, Alfa Building, Knowledge Village
PO Box: 502544, Dubai, United Arab Emirates
Tel: +971.4.364.2700

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EDITORIAL





REGIONAL NEWS

Qtel Group and its operating companies to unify under new brand

Qtel Group, one of the world's fastest-growing telecommunications companies, has announced that it will change its brand to Ooredoo, and that each of its operating companies in emerging markets across the Middle East, North Africa and South-East Asia will adopt the new brand during the course of 2013 and 2014. These companies, in which Ooredoo already has a controlling interest, include brands such as Qtel in Qatar, Indosat in Indonesia, Wataniya in Kuwait, Nawras in Oman, Tunisiana in Tunisia, and Nedjma in Algeria. The announcement was made by Ooredoo Chairman His Excellency Sheikh Abdullah Bin Mohammed Bin Saud Al-Thani at a special launch event at Mobile World Congress 2013 in Barcelona, Spain. "With Ooredoo we have chosen an Arabic word that means "I want", to reflect the aspirations of our customers and our core belief that we can enrich people's lives and stimulate human growth in the communities where we operate," said H.E. Sheikh Abdullah Bin Mohammed Bin Saud Al-Thani, Chairman, Ooredoo. Dr. Nasser, Group CEO, Ooredoo said: "We are very excited to become Ooredoo because the new brand signals our readiness to take the company to the next level. It is our belief that we can better serve our global customers by leveraging the combined resources and assets of a strong, unified global business under one brand."

Omantel to focus on brand structure to increase brand equity

With strategies to tap the opportunities while facing the newer challenges in 2013, Omantel is all equipped to add figures to this year's balance sheet and has decided to sharpen its focus on brand structure as a means to increase its brand equity. "The implementation of endorsed brand structure, using Omantel as the main brand and Oman Mobile, Omantel Business and Omantel Wholesale as the sub-brands has greatly contributed to a substantial increase in our brand equity. In 2013 too we will continue to build our brand, and emphasis on providing enhanced customer experience as well as bringing innovative and affordable services to our valued customers", Sultan Hamdoon al Harthy, Chairman, Omantel Board of Directors said in a statement. Omantel Mobile -- the company's mobile business arm -- continued to see a remarkable growth of 12.1 per cent with number of customers reaching 2.553 million making Omantel Mobile again the fastest growing mobile operator in the Sultanate for the third consecutive year. Including Resellers, Omantel Mobile network customers, increased by 8.5 percent to a total 3.06 million at the end of December 2012. Mobile and Fixed Broadband subscribers grew by 59.5 percent and 36 percent, while revenue also recorded a growth of 69 percent and 26 percent respectively.

Etisalat receives Strategic Partner Award during the Ministry of Education Loyalty Day

The UAE Minister of Education, His Excellency Humaid Mohammed Al Qatami, awards Etisalat's Chief of Corporate Communication, Ali Al Ahmed, for the telecom major's support to the education sector. Etisalat received the Strategic Partner Award during the Loyalty Day event organized by the ministry on Thursday to honour officials and strategic partners for supporting the ministry's initiatives. Etisalat has already made significant progress in this regard through its CSR initiative, Ayaadi. The Irshad program, the first in any Arab country, is specifically aimed at developing the skills of counsellors so that they can extend help beyond the school boundaries. There are several initiatives in the pipeline specifically aimed at the education sector.

Huawei reveals the world's fastest 4G LTE smartphone

Huawei, a leading global information and communications technology (ICT) solutions provider, has bolstered its worldwide consumer offerings with the introduction of Huawei Ascend P2, the world's fastest smartphone, during the 2013 Mobile World Congress in Barcelona. The company's Huawei Device business group also announced full-year global sales revenue of US\$ 7.5 billion, a 10 percent increase from the previous year, as well as more than 127 million devices shipped. To build on its success in 2012, Huawei's new 'Make it Possible' brand initiative will be a top focus for this year as the company shifts gears to be recognized as a global consumer brand through products like the Ascend P2. Huawei experienced unprecedented growth in the fourth quarter of 2012 with shipments of 10.8 million, an increase of 89.5 percent year-on-year, securing the number three position for smartphone vendors globally, according to IDC data.

In 2012, more than 5,000 dedicated Huawei retail counters were set up in 45 countries and territories around the world. The company also recently concluded its most ambitious global product marketing campaign—'Ascend to New Heights'—where the campaign targeted millions of consumers in 45 markets from 15 regions.

Nawras introduces 'Adab Mobile' SMS for Arabic poetry

Nawras is introducing 'Adab Mobile' service for keen Arabic poetry fans to enjoy, as the latest addition to its long list of customer driven services. Adab Mobile provides customers with a daily Arabic poem sent by SMS according to their preferred category selection. For only 300 Baizas a week, customers can select one genre from a list of six popular categories. Nawras Content Specialist, Marwa Salim Al-Farsi, said, "Arab poems and poetry are very much part of our culture in Oman and in the region. People like to express their emotions and feelings through rich verses and this new service is another example of Nawras providing entertaining content for our Arabic speaking customers." She added, "Customer experience is at the core of our operations and the Adab Mobile service further reinforces our commitment to continuously offering rewarding and innovative ideas." Customers can register for the service by sending "أدع اسم" to 91942. They will then be able to enjoy seven beautifully

written and renowned Arabic poems every week. The service will be renewed automatically and a reminder will be sent one day before.

Batelco praises the Kingdom's wise leadership for LTE auction decision

Batelco Group Chief Executive Shaikh Mohamed bin Isa Al Khalifa has welcomed the key decision taken by the Government to limit the upcoming LTE Capacity auction to operators already operating within the Kingdom of Bahrain. "On behalf of Batelco's Executive management team, I extend great appreciation to the Kingdom's leadership and government for their directives which has led to this crucial decision," said Shaikh Mohamed. "The ongoing support offered by the Kingdom's leadership for the advancement of telecommunications in Bahrain has ensured that Bahrain has remained one of the leading business hubs of the region." "The awarding of the frequency spectrum licenses is crucial for commercially launching LTE in Bahrain beyond the trails which have taken place; we are therefore very pleased to hear this good news. Batelco is ready with the network technology in place and we hope to be successful in winning the required spectrum in order to deliver this much awaited advancement to our customers," added Shaikh Mohamed.

BT Secures 2.6 GHz spectrum license

BT has secured a license for 2x15MHz of FDD and 20MHz of TDD 2.6GHz spectrum which can be used to provide fast 4G connectivity. This will enable BT to provide its business and consumer customers with an enhanced range of mobile broadband services, building on its existing strength in WiFi. The license was won via the recent 4G auction process conducted by Ofcom. The license, which is indefinite in length, was won at a price of £186 million. There are no further license fees for at least twenty years. Ian Livingston, BT chief executive, said: "We are pleased to have secured this spectrum. We have said that we do not intend to build a national mobile network. Instead, this spectrum will complement our existing strategy of delivering a range of services using fixed and wireless broadband. We want our customers to enjoy the best possible connections wherever they are and this spectrum, together with our investment in fiber broadband, will help us achieve that."

Batelco and Ericsson executives discuss extended global cooperation

Batelco, the Kingdom of Bahrain's leading communications company, hosted a senior delegation from Swedish-based Company Ericsson at Batelco head office in Bahrain on February 12th. The visit strengthened the cooperative relationship between Batelco and Ericsson, and opened new prospects for further coordination and cooperation between the two companies globally. Batelco Group Chief Executive Shaikh Mohamed bin Isa Al Khalifa welcomed the delegation which comprised of top senior management from Ericsson headquarters as well as regional and country heads. The delegation included Ericsson Group CEO Hans Vestberg and President of Ericsson Middle East Region Anders Lindblad, and other members of Ericsson group leadership team. In addition to Shaikh Mohamed the attendees from Batelco included Batelco Bahrain Chief Executive Officer Rashid Abdulla and Group CEO Strategic Assignments, Peter Kalioropoulos.



OPERATOR LEADER'S VISION

Dr. Amer Awadh Al Rawas is the Chief Executive Officer of Oman Telecommunications Company (Omantel). Prior to his current post, he served as the Managing Director – Oman Mobile Telecommunications Company (Oman Mobile). Dr. Rawas is Member and Chairman in several Board of Directors of hare holding Companies. Prior to his joining the Telecom Sector; Dr. Rawas served in various academic and leadership positions at the Sultan Qaboos University (SQU) the flagship university in Oman. Dr. Rawas holds a PhD in Computer Science and Artificial Intelligence from the Sussex University, UK, 1997.



Dr. Amer Awadh Al Rawas
Chief Executive Officer
Oman Telecommunications Company (Omantel)

Q. What is the market gap you are looking at to fill considering already established content providers and its impact on telecom revenues?

A. The emergence of over-the-top players (in voice, messaging and content) has added additional challenges to an already intensive competitive market. As operators, I believe we should try to find ways to complement and embrace our solutions inclusive of opportunities for strategic partnerships with OTT players. Of increasing importance will be the evolution of the regulatory framework, and more specifically net neutrality, will develop in this domain.

Q. Recently TRA has accredited Omantel as one of the accredited registrars for the country code top-level domains. How do you look at this new dimension as a trendsetter in Omantel's future?

A. We are pleased that we have been accredited as a registrar for the countries top-level domains. It is an important opportunity for companies in the Sultanate to benefit from a local web presence using the .om domain as well as the Arabic equivalent. In fact, this is adding value to the comprehensive portfolio of corporate services we provide to our business customers to maximize this opportunity.

Q. Please tell us about A'amali service bundles recently launched by Omantel for SMEs.

A. Omantel launched 'A'amali' bundles for small and medium enterprises (SMEs) during January 2013. The launch of this new offer comes as part of the company's efforts to provide tailored solutions to its customers. In addition, Omantel believes that SMEs is an important sector that is expected to play a significant role in realizing the economic growth plans and help creating more jobs and entrepreneurship opportunities for young Omanis.

'A'amali' have been designed to meet the needs of different SMEs and come in four packages namely A'amali I, A'amali II, A'amali III and A'amali Plus. The different packages include a bundle of free mobile data, free 3.5G modems, free voice calls between employees within the company, free SMS, free post-paid & pre-paid voice sim cards & blackberry service starting from R.O 27/ month only.

Q. Omantel recently received ABLF Award for best business practices. What were the core areas that Omantel has focused that supported the organization in achieving this landmark?

A. We are pleased to receive this regional prestigious award which comes in recognition of Omantel's success in applying the best business practices and maintaining its leadership position at the market despite opening the door for competition and the entrance of new operators to the market. Omantel has been the fastest growing operator in the mobile market and has more than 58% share of this market. This achievement qualified Omantel to many local, regional and international prestigious awards.

The ABLF Awards Grand Jury consists of a high-profile group of eminent industry experts, economic commentators and international leaders from government, business, academics, advisory and other professional disciplines.

Q. What key projects or upcoming ventures are under the spotlight of Omantel?

A. roadband data in both consumer and corporate market are key growth areas, and we focus on further

improving the value propositions for our customers, as demonstrated by being the first operator to commercially launch 4G LTE in Oman and to provide a seamless 3.5G and 4G experience for our customers. We are committed to continue our investments in 3.5G and 4G networks to ensure superior coverage and speed.

Q. Do you share the thought that international data roaming has a promising future in the SAMENA region, particularly in the Middle East?

A. Yes definitely, we can see that the data roaming growing and will be even more significant over the coming years for several reasons.

Roaming in general is picking up due to changed customer behavior (eg people are becoming more "addicted" to always be on line), the rates for using services when roaming have become more affordable, packages which bundles roaming services has become more common etc. On the operator side, especially in this region, a lot of attention has been laid down to improve availability and quality of networks to provide better roaming and cheaper roaming services. It may be noted that data roaming in the region has grown by more than 100% and in some countries/operators by 300-400%

Q. How do you think Omantel can collaborate with SAMENA Council to tackle the industry's key challenges in the region?

A. Omantel has been one of the key founders of Samena Council and we believe that Samena plays a very important role in bringing the different stakeholders of the telecom industry together for the benefit of the sector as a whole. The rationale for establishing SAMENA Council was to understand key topics of common interest for the operators in the region and to define joint position and actions. An example of this is roaming, where working groups have been established. We look to further collaborate together with SAMENA members.

Q. Increased traffic and relatively flat revenues is a key economic challenge faced by all network operators. What should be the strategy to overcome this issue?

A. The first priority is to continuously improve the experience of our customers and ensure that we offer the best service and value in terms of quality, coverage and price. We continuously work towards improving our customers' experience across different points of contact, from the time he opts for the service, use it, pay for it and resolving complaints.. Secondly, we concentrate on optimizing our infrastructure, replacing obsolete equipment with more cost efficient solutions, consolidate our systems and tools to maximize operational excellence and make our business processes more efficient.

Q. Keeping in view the declining ARPU, what is the significance of mobile digital content for the operators' community particularly in the SAMENA region?

A. Mobile digital content innovation largely takes place by OTT players like Whatsapp. As we all know, their innovations introduce challenges to telecom companies globally. We all expect to see OTT players grow their revenues and subscriber bases, albeit from a low base.

Telecom Operators can mitigate associated risks arising from the emergence of OTT by partnerships, leveraging their strengths. , OTT services may also be an opportunity to enhance customer experience, broaden range of services, enable the operator to position itself as an innovator, etc.

Q. With the growing competition in telecom sector, how is Omantel planning to be the market leader in terms of international roaming as well as wholesale?

A. On the global and regional arena there are multiple leaders and I'm happy to count Omantel as being part of this group and in particular in the wholesale market. Omantel has manifested its intention to be an active player in this area benefitting from the unique geographical location in the Middle East and Omantel's un-matched international capacity which have all made Omantel the preferred key interconnection point for carriers from Asia, Africa and Europe. As Oman being the entry into the Middle East, Omantel becomes the natural landing point for all the major cable systems coming into the region and together the Middle-Eastern operators can create an internationally very competitive cluster.

Coming back to Omantel's "footprint" on international roaming where we have more than 185 countries covered by voice services and more than 160 countries covered by Data roaming Obviously the main destinations for our customers are the countries in this region in which we are working actively with our partners to increase the business by offering competitive packages

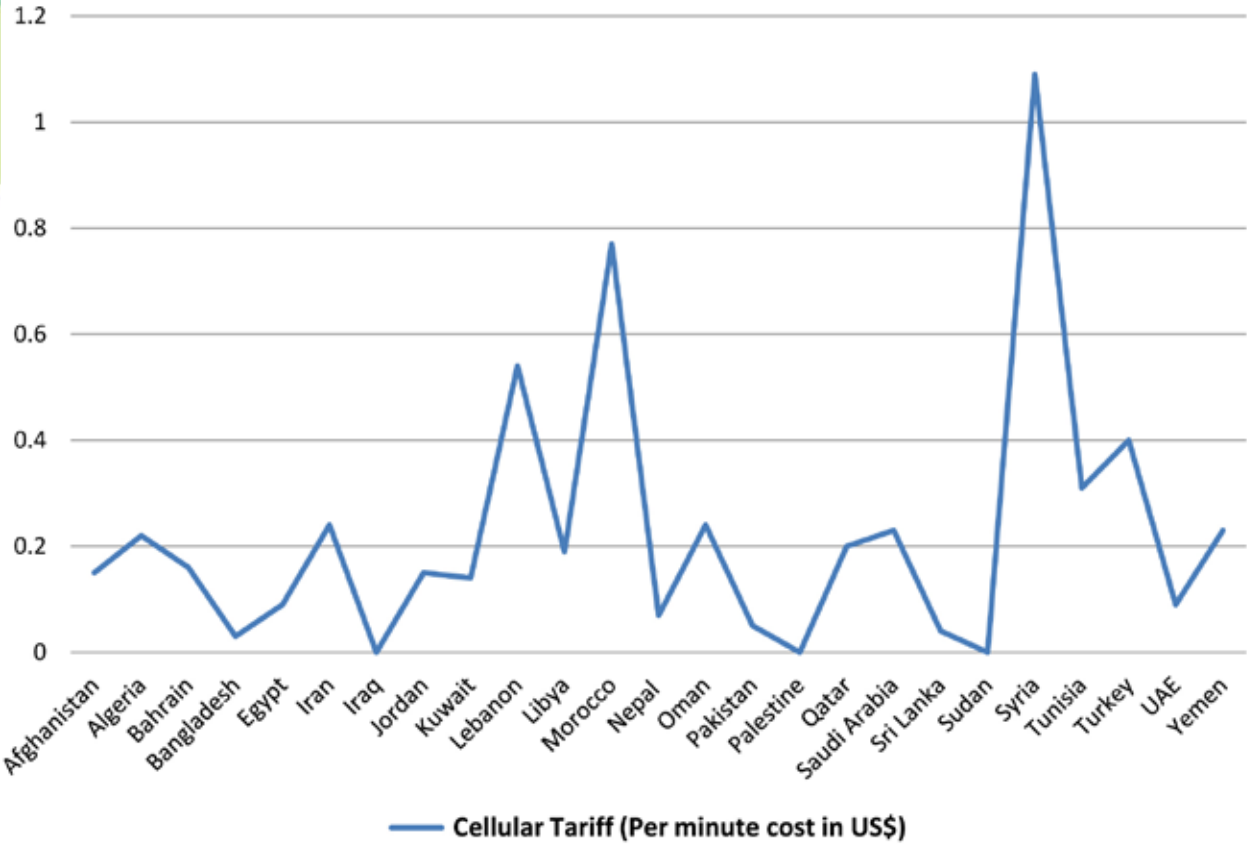
Q. How do you look at the wholesale market keeping in view the ever raising international traffic as well as the growing number of roaming agreements?

A. Omantel being one of the most active regional players in the wholesale business has been able to capture a good share of this important market not only in the local level but even regionally and internationally. Benefitting from the strong international connectivity through 7 submarine cables already operational and two more in the pipeline, Omantel has been able to host the international content locally of two of the biggest global content providers thus making the more than 20% of the global content closer not only to our customers in Oman but also to the whole region.

However, on the other hand, we recognize that competition in the wholesale market continues to evolve as new entrants demand their share in the sector. A rise in the international traffic is seen as a positive sign that further encourages innovation and puts an even greater pressure on service providers to cater for the quality & cost demands of the various consumers.

As for the roaming, by expanding our roaming footprint to one of the largest in the region we see this as a chance to turn the challenges of quality & cost into opportunities. We managed to partner with more than 580 operators for voice and more than 460 operators in data roaming. Overall we maintain quality of service for our inbound roamers especially tourists and business travellers.

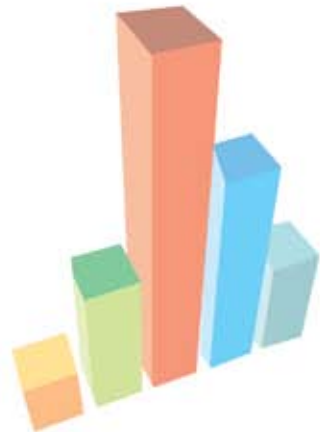
SAMENA: Cellular/Mobile Call Charges (Per Minute in US\$)



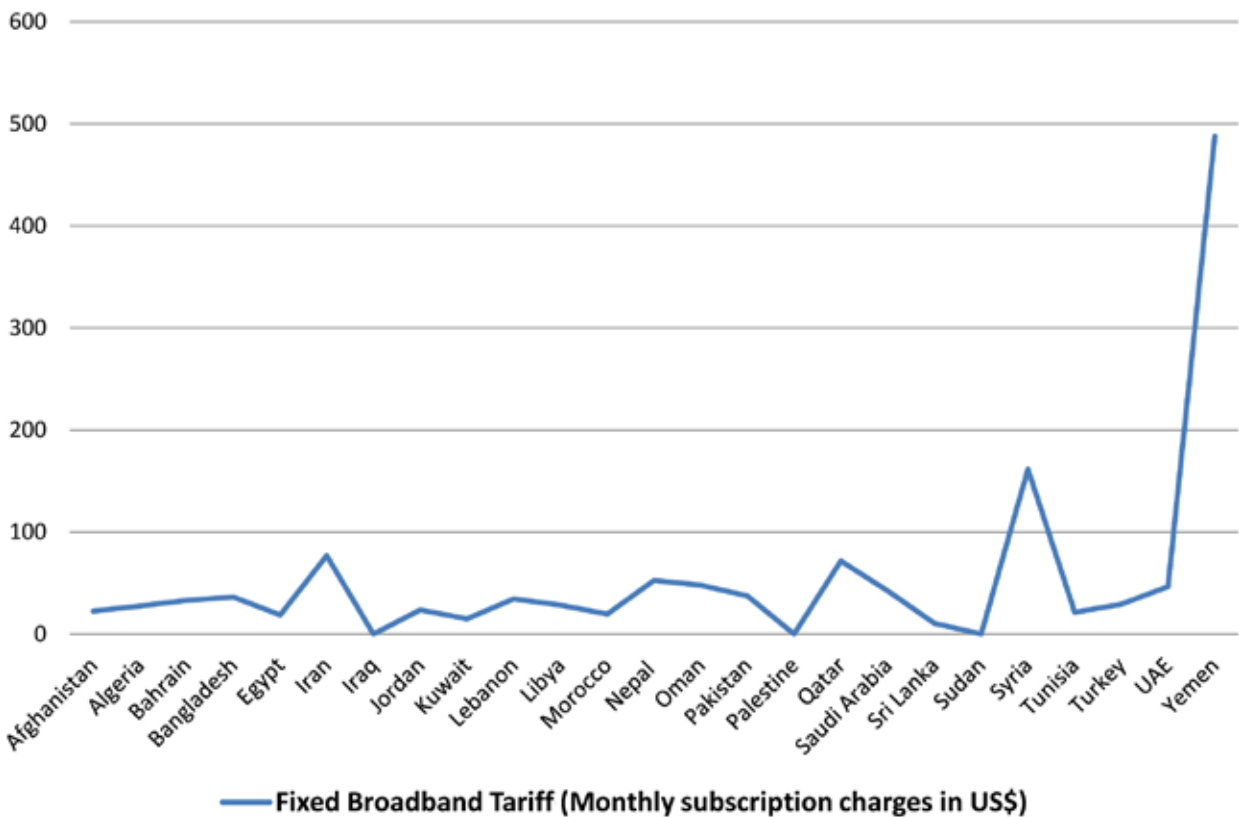
Research Note: This graph shows the average cellular/mobile call charges (per minute) of SAMENA Countries in US\$. Data for Iraq, Palestine and Sudan is not available.

Image Source: SAMENA Telecommunications Council

Data Source: The Global Information Technology Report by World Economic Forum & INSEAD



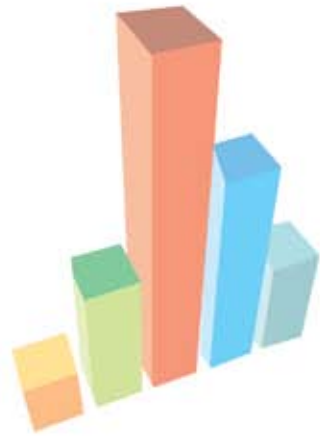
SAMENA: Fixed Broadband Subscription Charges (Per Month in US\$)



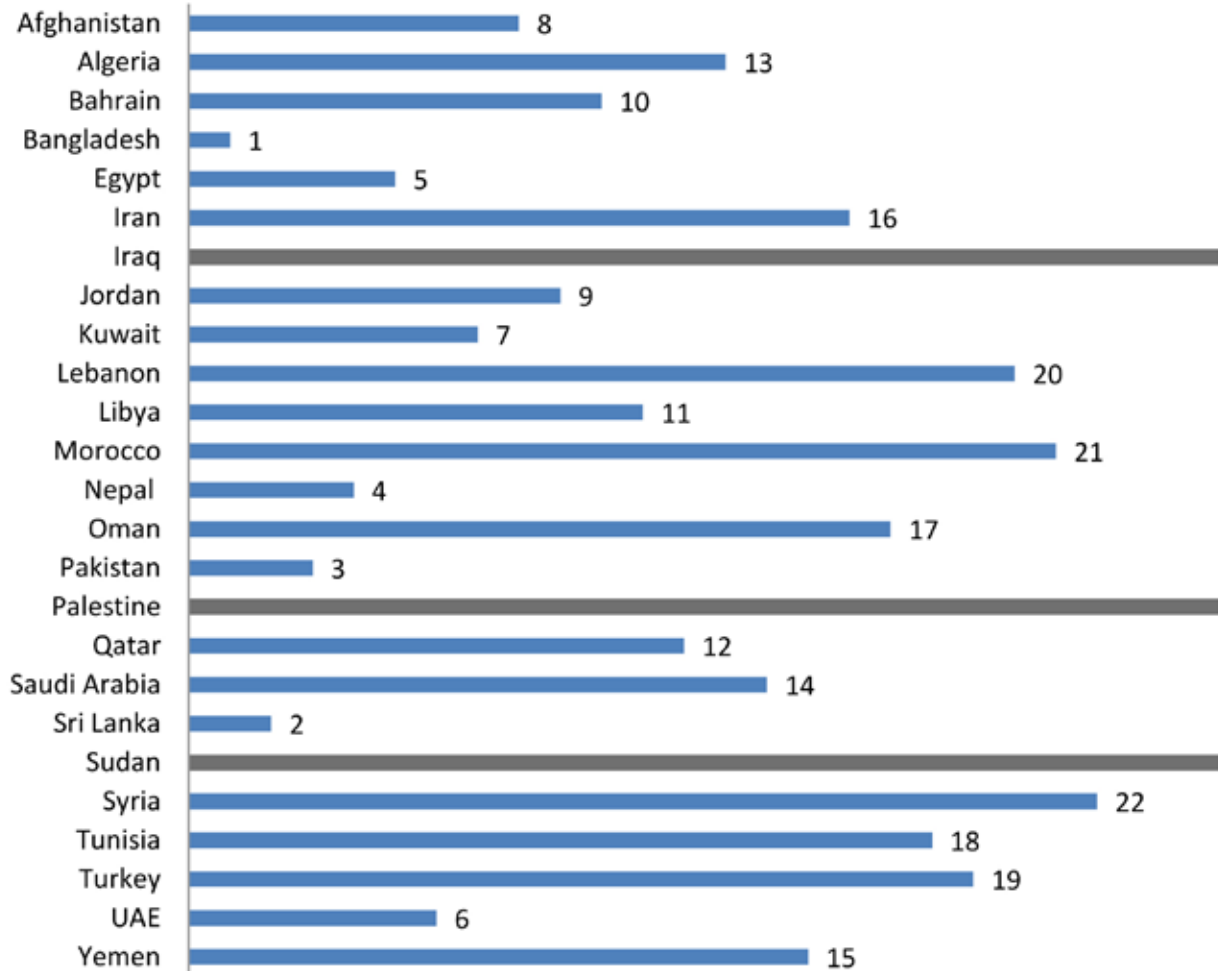
Research Note: This graph shows the average subscription charges of fixed broadband in the regional markets in US\$. Data for Iraq, Palestine and Sudan is not available.

Image Source: SAMENA Telecommunications Council

Data Source: The Global Information Technology Report by World Economic Forum & INSEAD



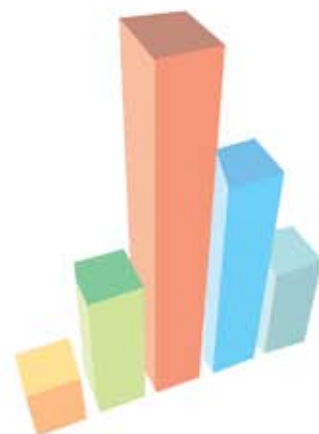
SAMENA: Ranking on the Basis of Cellular/Mobile Call Charges



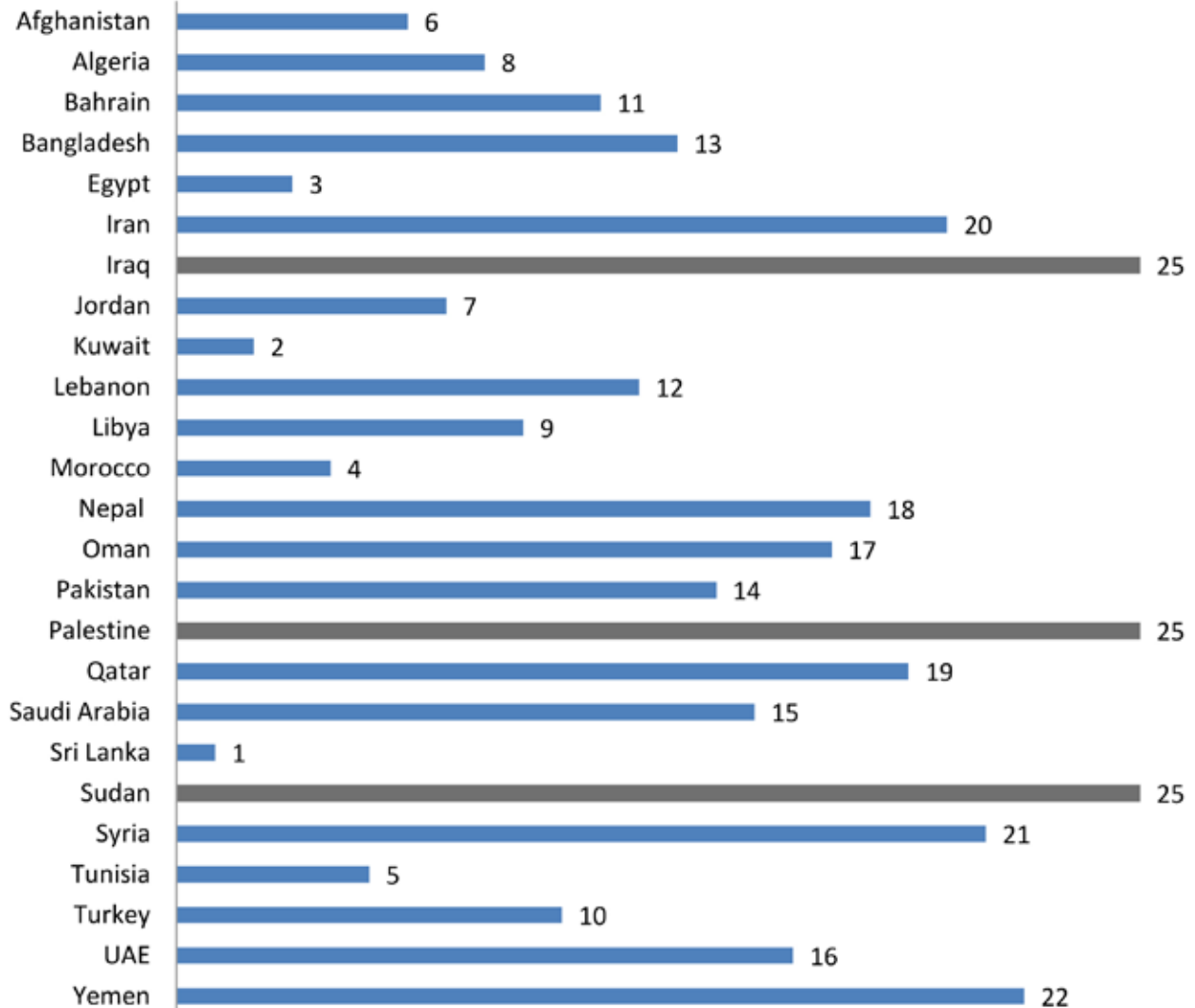
Research Note: The graph shows that within the SAMENA Region, Bangladesh has the lowest cellular/mobile call charges/tariffs. An interesting observation seen here is that the top 4 countries belong to South Asia. This is due to highly competitive environment as well as relatively weaker currency values within South Asia. Data for Iraq, Palestine and Sudan is not available.

Image Source: SAMENA Telecommunications Council

Data Source: The Global Information Technology Report by World Economic Forum & INSEAD



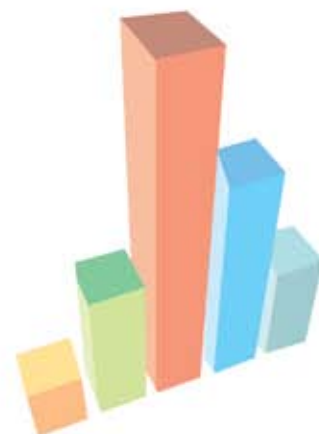
SAMENA: Ranking on the Basis of Fixed Internet Charges Per Month



Research Note: The graph shows that within the SAMENA Region, Sri Lanka has the lowest tariffs for cellular/mobile services. Yemen exhibits the highest cellular/mobile tariffs. Within South Asia, Sri Lanka has the lowest whereas Nepal has the highest, in the Middle East, Kuwait has the lowest whereas Syria has the highest and within North Africa, Egypt has the lowest whereas Yemen has the highest cost of fixed internet. The data for Iraq, Palestine and Sudan is not available.

Image Source: SAMENA Telecommunications Council

Data Source: The Global Information Technology Report by World Economic Forum & INSEAD





SATELLITE NEWS

Turkmenistan schedules launch of first space satellite for 2014

Turkmenistan scheduled the launch of the first national satellite for late 2014 according to the Neutral Turkmenistan newspaper. At present, French company Thales Alenia Space, which won a tender, is engaged in the development and construction of the spacecraft, under the contract signed with the Turkmen government. In the Turkmen market, Thales is known as a developer and supplier of advanced high-tech aero navigation equipment for the country's airports since 1991. At this stage, Turkmenistan services Russian satellite "Yamal", owned by JSC "Gazprom Space Systems." Digital national TV broadcasting and many Russian TV channels are broadcasted in Turkmenistan through this satellite. Use of own spacecraft will establish high-quality telephone service, in the first place, with hard-to-reach areas of the country, while eliminating the need to lay expensive cables. The geographical position of Turkmenistan will allow it to act as a transit country in channels broadcasting in Europe and Asia in the presence of the satellite, covering a large area. Turkmen communication satellite will provide TV broadcasts, radio telephone, telegraph and other types of communication between ground stations, placed at a distance of up to 10,000-15,000 kilometers from each other.

Spacecom, SatLink add TV5Monde Afrique to Amos-5 Bouquet

Spacecom and SatLink Communications have announced the addition of TV5Monde Afrique to the Amos-5 17 degrees east French-language broadcast bouquet. SatLink Communications is providing a TV distribution platform on the satellite via its MCPC (Multi Channel Per Carrier). "The demand for high quality broadcast content in Africa is an area which is seeing exponential growth, particularly within the Francophone communities, as it is one of the most desirable markets for broadcasters as they continue to push their content to all corners of the continent." David Hochner, CEO of SatLink Communications, said on a statement. "By provisioning full end-to-end broadcast solutions across three platforms on the AMOS-5 satellite, SatLink is able to provide full coverage across Africa for both international and national broadcasters looking to capitalize on this market opportunity." Using SatLink's Global Satellite and Fiber Network, the service is available on both Amos-5 Pan African C-band coverage in DVB-S and DVBS-2 and additional two Ku-Band MCPC platforms to serve Sub-Saharan countries. This gives broadcasters flexibility of distribute video content to and out of Africa for Direct-To-Home (DTH) or via Cable TV, DBS, DTT, MMDS, Mobile TV and IPTV partners across the continent.

Vietnam to launch third satellite into orbit

Vietnam will launch its third satellite into orbit in the second quarter of 2013. Vietnamese media quoted Bui Trong Tuyen, vice president of Vietnam's Space Technology Institute, as saying that the VNREDSat-1A, an earth observation optical satellite, is designed for the service of earth observation, analysis of natural resources, environmental management and natural disasters monitoring. VNREDSat-1A will be launched into sun synchronous orbit (SSO) at an altitude of 670 km. The 120-kg remote sensing satellite is built by France's Astrium, which will supply to Vietnam the complete satellite system and ground receiving facilities. During the project, Astrium will help training 15 Vietnamese engineers in controlling the satellite. The satellite, worth 70-million U.S. dollars, will be launched by the Arianespace at the Guiana Space Center, French Guiana. Vietnam's two communication satellites VINASAT-1 and VINASAT-2 were launched into orbit in 2008 and 2012, respectively.

Yemen to launch educational satellite channel for youth

Yemen's Ministry of Education on Monday (February 25th) signed an agreement with mobile telecommunications company MTN to launch an educational satellite channel for Yemeni youth, Yemen's al-Gomhoriah reported. Education Minister Abdul Razzaq al-Ashwal, who signed the agreement, said the company is to sponsor the project with 77.5 million riyals (US\$361,641). The new channel will have programs that seek to develop education in the country on the school, teacher, student and family levels, he said.

Lockheed Martin approved for GPS satellite components

Lockheed Martin has received the go-ahead from the Air Force to begin acquiring components for four new GPS III satellites. The company said it received two fixed-price contracts totaling US\$120 million to start the process. Lockheed Martin is already under contract to build the first four GPS III satellites. Production is under way at its Space Systems unit near Denver. The new contract is for parts for the fifth through eighth satellites. GPS III satellites are designed to improve the accuracy of military and civilian receivers to within three feet, compared with 10 feet now. Additional signals for civilian receivers will offer more precision and make more navigation satellites available. The Air Force plans to purchase up to 32 GPS III satellites.

NASA to launch UNM satellite into space

NASA is preparing to launch a University of New Mexico student-built satellite. The Albuquerque Journal reports that NASA will launch in August a 4-inch cube called Trailblazer. Officials say the satellite will gather radiation levels from space that will be analyzed by mechanical and electrical engineering students. Craig Kief, deputy director of Configurable Space Microsystems Innovations & Applications Center, says around 25 students helped design and build the satellite over the last two years. Kief says the satellite will be UNM's first foray outside of Earth, which, if successful, could help bring in more funding and federal grants for the university. The satellite will orbit at about 280 miles above Earth.

Eutelsat signs German ISP customer to five year Ka-Sat deal

Eutelsat has inked German Internet service provider skyDSL Global to a five-year multiple spot beam capacity contract on Ka-Sat, with an option for an additional five years, after providing the broadband service on the satellite for the past 18 months, the operator announced Feb. 21. The skyDSL customer will use selected capabilities of Ka-Sat to deliver a portfolio of Internet access and triple play services under its skyDSL2-Plus brand. The platform offers download speeds of up to 20 Mbps and upload speeds of up to 6 Mbps. "Our experience of Ka-Sat since 2011 has convinced us that this is an unmatched platform for driving penetration of high-quality satellite broadband in Europe," skyDSL Global Managing Director Jan Hesse said in a statement. "This new contract equips us to grow our business in our core markets of Germany, France, Italy and Spain, and penetrate new markets. We continue to contribute to closing the digital divide in our target markets with our high quality ADSL-style portfolio and compelling pricing."

Launch of satellite carrying smartphone into space

Taiwan's HTC Corp.'s smartphone has been taken into space. The aim of this launch is to test a phone's standard capabilities. The smartphone has been laden with many experimental applications, amongst which some are serious and the others for fun. Also, Google Inc.'s Android operating system is used by the phone. The Nano-satellite carrying Nexus One smartphone has been recently launched. Surrey Satellite Technology Ltd, British small satellite maker, told that the "STRaND-1" satellite was launched on February 25 into a 785-kilometer Sun-synchronous orbit. The satellite was developed by a team from the Surrey Space Centre at the University of Surrey and from Surrey Satellite. Two propulsion systems were also launched along with the satellite. In addition, a new high-speed attitude and orbit control system based on Linux was also lifted-off. It has been told that the satellite currently is on a demonstration and training mission. A number of in-orbit operations of the satellite are being planned to be switched from a computer to the smartphone.



REGULATORY NEWS

TRA hosts Arab Internet Governance Forum

Telecommunications Regulatory Authority (TRA) is hosting the Arab Internet Governance Forum (AIGF) under the slogan "We are all Partners," in cooperation with the Internet Corporation for Assigned Names and Numbers (ICANN) and the Regional Internet Registry in Europe and the Middle East (RIPE NCC) at the Radisson Royal, Dubai. "Internet governance is critical to enabling the broader ICT development of the region," said Mohamed Nasser Al Ghanim, Director General of the TRA. "The TRA hosts this seminal event to highlight the priorities of the region and promote dialogue and cooperation between different sectors and institutions responsible for the management of Internet resources. This meeting is in line with our efforts to enhance the development of the Internet and protect the interests of end-users and operators." The meeting comes on the heels of the rapid growth in internet use across the Arab region, and amongst larger questions about the direction and role of internet governance. 150 participants are joining the forum, representing public and private sector entities, as well as academic institutions from across the Arab world. This meeting aims to facilitate a platform to discuss issues related to regional internet policy, and aims to promote the principle of participation and cooperation among all parties concerned to achieve common goals. The meeting will discuss the implementation of ICANN in the Middle East, implementation of a regional domain name, and strategies to increase capacity for an expanding market.

PTA's directive on biometric systems yet to be implemented

The CMOs, according to a PTA directive of December 6, 2012, were to equip all sales channels with devices for online verification of customers' biometrics – such as thumb impression – through the National Database and Registration Authority (NADRA) by February 28. However, the two parties had by far failed to build any consensus regarding the procedure of integrating these devices, according to sources familiar with the matter. Although the CMOs agreed to deploy biometric devices at their customer support centers, franchises and retail outlets for the issuance of new SIMs, they expressed some concerns regarding the integration of these devices. A single device, offered by NADRA, will cost \$500 and CMOs are also concerned about the protection of subscribers' data. In its latest meeting with representatives of telecom operators, the telecom regulatory authority told the former that it had not yet prepared the procedural road map about the deployment of these devices; a telecom source told The Express Tribune. The PTA put off the meeting till next week without specifying the date, the source said. "The biometric devices offered by NADRA would cost \$500 each and did not include the cost of a computer equipped with internet, which was required to run these devices," the source said. Later on, NADRA offered cheaper devices, costing around \$100 each, he said.

Icasa to create industry database

The Independent Communications Authority of South Africa (Icasa) wants to become the first port of call for anyone looking for information on South Africa's information and communication technology (ICT) sector. It hopes that making this information available online will give government and industry a better idea of the state of the sector, help with decision making, and assist in positioning South Africa in relation to other nations more accurately. Icasa markets and competition GM Pieter Grootes says the authority wants to move to a "far more detailed explanation of what's going on in the South African ICT space". He says the sector is "one of the most prolific long-term investment parts of the South African economy", yet there is "no coordinated and free source of ICT indicators". This prevents and harms investment decisions, policy development, effective regulation and international competitiveness. "One of the reasons South Africa has been slipping in international ICT rankings isn't because it's necessarily falling behind but because it doesn't have current information." Icasa councillor William Stucke says the principal goal of the exercise is to "reduce opacity" in the sector. The authority hopes to collate various statistics, public documents, reports and other information from industry players and bodies like Statistics South Africa and the International Telecommunication Union (ITU).

Regulator calls for phone makers to come clean on radio quality

PTS wants operators and vendors to work together on a grading system that tells consumers how good the antennas in their smartphones are, allowing them to take that into account when buying a new device. Consumers want to know how many megapixels the camera has and which version of Android it uses, but they never ask about the quality of the radio reception and they should, according to Göran Marby, director-general at Swedish telco regulator PTS. "What we have discovered, and it's not secret in the industry, is that the kinds of phones people today choose don't have very good radio reception," Marby said. Somewhere along the line people have forgotten it's actually a radio they are carrying with them, and radio reception also isn't something vendors tout in their smartphone marketing, according to Marby. PTS doesn't have any hard data, yet. But at the end of last year an independent study was conducted in Denmark, and it concluded that the choice of mobile phone has a big effect on the quality of mobile coverage users get. To address this, PTS has started a dialogue with the telecom industry to see if operators and phone makers together can come up with a way uniform way of telling users about the radio characteristics and quality of their device. How it's constructed isn't what's important, as long as it is easy to understand, Marby said. Consumers can then use the information to make more informed buying decisions.

Uganda delays SIM card registration deadline

Uganda's telecoms regulator has again extended the deadline for SIM cards to be registered by their users or face having them cut-off. The deadline was due to expire but has now been extended to the end of May. Although the move is a climb down for the regulator who had said there would be no further extensions, the mobile networks had wanted a year long delay. Recently the networks were summoned to the regulator to discuss the issue as it was feared at the time

that around a third of SIM cards still had not been registered. It has been estimated that around five million people are still to register their SIM cards - out of a total subscriber base of 17 million. The main obstacle to registration has been the lack of ID documents by many customers. On average when a country enforces SIM card registration, around 10 percent of the currently active SIM cards are cut off. The move has also been criticized for costing too much - with some estimates putting the registration process at US\$40 million.

2.24 million Portuguese phone numbers on ported networks

Portugal's telecoms regulator, Anacom has announced that 2.24 million phone numbers are now ported to operate on a different network from its original under the country's number portability scheme. Of the total, some 1.67 million are landline numbers and 571 thousand were mobile numbers. Since landline number portability was introduced in June 2001, some 3.7 million landline numbers have been ported to another network. The figure is higher than the current tally due to customers later migrating the number back to their original provider. The same situation applies to mobile number portability, where a total of 914 thousand numbers have been ported since January 2002.

License exemption of wireless telegraphy devices: OFCOM Ofcom has decided that short range devices (SRDs) should use a new frequency band in future - 10.575 to 10.6 GHz, instead of the band they currently use, 10.675 to 10.699 GHz. (SRDs are various radio devices designed to operate over short range and at low power levels). In order to implement its decision, Ofcom will need to make license-exemption regulations under section 8 of the Wireless Telegraphy Act 2006. Following any representations from interested parties, Ofcom expects to publish a draft of the regulations by spring 2013.

Regulator calls for phone makers to improve radio quality

PTS wants operators and vendors to work together on a grading system that tells consumers how good the antennas in their smartphones are, allowing them to take that into account when buying a new device. Consumers want to know how many megapixels the camera has and which version of Android it uses, but they never ask about the quality of the radio reception and they should, according to Göran Marby, director-general at Swedish telco regulator PTS. "What we have discovered, and it's not secret in the industry, is that the kinds of phones people today choose don't have very good radio reception," Marby said. Somewhere along the line people have forgotten it's actually a radio they are carrying with them, and radio reception also isn't something vendors tout in their smartphone marketing, according to Marby. PTS doesn't have any hard data, yet. But at the end of last year an independent study was conducted in Denmark, and it concluded that the choice of mobile phone has a big effect on the quality of mobile coverage users get.



A SNAPSHOT OF REGULATORY ACTIVITIES IN THE SAMENA REGION

Active Consultations & Invitations for Feedback

Tunisia

The National Telecommunications Commission launched a consultation to choose a specialized consultancy firm to conduct a study on ways to exploit and assign frequencies for 3G spectrum allocation in the 2.1 GHz band. Electronic copy of the specifications relating thereto can be obtained from wajdi.garali@intt.tn. March 11, 2013 has been fixed as the deadline to receipt the bids. (February 25, 2013) www.intt.tn

Country-wise Policy & Regulatory Developments

Afghanistan

Board Chairman: Mr. Abdul Wakil Shergul

[Afghanistan Telecommunication Regulatory Authority (ATRA)]

The Ministry of Communications and Information Technology (MCIT) and the Telecom Regulatory Authority (ATRA) has launched a crackdown on the illegal sale of SIMs. In a press conference earlier this week the authorities stressed that telcos would face fines for the sale of pre-registered or unregistered SIM cards, instructing operators to identify unregistered SIMs within the next two weeks. Franchises caught selling SIMs without proper identification will be closed down. ATRA's Vice Chairman added that a number of companies had ignored MCIT regulations and were issuing SIM cards that could be used by terrorists and other criminals. The announcement followed recent raids in Kabul that led to the seizure of some 300 SIMs and three arrests. (February 28, 2013) telegeography.com

The telecoms regulator, ATRA has refuted an announcement by Etisalat Afghanistan that it is about to launch a 4G network. Earlier this week, the mobile network put out a lengthy press statement that was very light in details about the actual plans, but said that the company is doing something with a 4G network. In a press conference, the regulator denied granting any 4G license, test permission and consent of utilizing particular resources for 4G services to the company and said that the action of the mobile network was misleading and deceptive. The regulator also instructed the mobile network to retract its public statement, but the original claims are still on Etisalat's website unedited. Replying to questions of journalists, ATRA officials emphasized the importance of accomplishing obligations by all 3G service providers in regard to coverage, consumer protection and quality services in the country. (February 22, 2013) atra.gov.af

State-owned operator Afghan Telecom (Aftel) has struggled to compete with its privately owned rivals, Wadsam quotes telecoms minister as saying. The official noted that at end-December 2012, Aftel had signed up 150,000 subscribers – understood to refer to the company's wireless in the local loop (WiLL) users – compared to around 19 million mobile customers represented by Roshan, Etisalat Afghanistan, MTN Afghanistan and Afghan Wireless Communication Company (AWCC). Minister added that the telco generated revenues of US\$70 million in 2012, with expenses totaling US\$34 million. The operator has cash reserves of US\$64 million that will be used for further investment and expanding coverage. Aftel provides fixed and fixed-wireless telephony as well as DSL internet services and announced in November 2012 that it had contracted Chinese vendor ZTE to roll out a GSM network to areas without service or with limited or unreliable access. (February 22, 2013) telegeography.com

Etisalat Afghanistan has successfully tested a trial 4G Long Term Evolution (LTE) network in Afghanistan. The new network, the first of its kind in the country, will support speeds of up to 100Mbps allowing subscribers to utilize data-intensive services such as streaming high definition (HD) movies. The company did not comment on the footprint of the trial system, or a suggested time frame for its commercial launch. CEO Etisalat commented that the development demonstrated the group's ongoing commitment to bring the latest and most innovative technologies to the people of Afghanistan, technologies that make it easier, faster, efficient and convenient to communicate, to conduct business and to stay in touch with the world around them. Etisalat was awarded the nation's first 3G license, launching an HSPA+ network in the capital Kabul in March 2012, before extending coverage to Jalalabad, Mazar-i-Sharif, Herat, Kunduz, Parwan, Kandahar, Ghazni and Jawzjan over the course of the year. (February 20, 2013) telegeography.com

Algeria

Chairperson: Ms. Zohra Dourdour

[Regulatory Authority for Post & Telecommunication (ARPT)]

Global Telecom Holding (GTH) formerly known as Orascom Telecom Holding (OTH), part of the Vimpelcom group, has reportedly completed the purchase of Med Cable, which operates a submarine cable connecting Algeria to Marseilles in France. The cable connects to Algeria at Algiers and Annaba. The move will improve the international connectivity of Djedzy, GTH's subsidiary in Algeria. (February 19, 2013) telegeography.com

Bahrain

Chairman: Dr. Mohammed Al Amer

[Telecommunication Regulatory Authority (TRA)]

The Cabinet approved the launch of the country's 4G mobile license auction, which will be open only to existing mobile licensees in the country. Telecommunications Regulatory Authority (TRA) issued on January 28, 2013 an invitation to tender for the award of individual mobile licenses and associated frequency concessions in the 2600MHz, 2100MHz, 1800MHz and 900MHz bands via a competitive auction scheduled for March 31. Existing cellcos Batelco, Zain and Viva are likely to be joined in the auction by WiMAX operator Menatelecom, which has scheduled a TD-LTE launch for June/July this year after having all mobility restrictions removed from its 3.5GHz permit in February 2012. Batelco's CEO Shaikh Mohamed bin Isa Al Khalifa commented on the latest development: 'Batelco is ready with the [LTE] network technology in place and we hope to

be successful in winning the required spectrum to deliver this much awaited advancement to our customers.'

(February 26, 2013) Gulf Daily News

Telecommunication Regulatory Authority (TRA) Issued a clarifications regarding the Award of Individual Mobile Telecommunications Licenses and associated Frequency Licenses for the delivery of mobile telecommunications services in the 900, 1800, 2100 and 2600 MHz frequency bands in the Kingdom of Bahrain. (February 21, 2013) tra.org.bh

Telecommunication Regulatory Authority (TRA) released its final determination on the 2013 Cost of Capital, in which a cost of capital of 9.5% has been set. (February 21, 2013) tra.org.bh

The Telecommunication Regulatory Authority (TRA) released its final Dominance Determination for Wholesale International Services. The Authority has found that no operator holds a dominant position in relation to the wholesale markets in which international services are supplied. (February 20, 2013) tra.org.bh

Batelco has been talking to Ericsson with the aim of strengthening worldwide cooperation. Batelco hosted a senior delegation from Ericsson at its head office in Bahrain to study new prospects for further boosting partnerships. Batelco Group chief executive Shaikh Mohamed bin Isa Al Khalifa said that our long standing partnership with Ericsson goes back to the early 1980s which reflects the strength of our relationship, helping us to fulfill our vision and continuing to provide a superior customer experience. The delegation also discussed the challenges and benefits of the 'Networked Society' and its positive impact on the ICT industry in Bahrain. (February 19, 2013) Gulf Daily News

Bangladesh

Chairman: Sunil Kanti Bose

[Bangladesh Telecommunication Regulatory Commission (BTRC)]

Telecoms regulator, the BTRC has issued the formal invitation to companies to bid for 3G licenses in the country. The regulator confirmed that it will be issuing five 3G licenses all in the 2.1 GHz spectrum bands, although only four are available in the auction as one has been reserved for the state-owned operator, Teletalk. The licenses are all for 15 years, and can be renewed in 5 yearly installments. Although marketed as a 3G license auction, it is noted in the terms that the auction is technology neutral, and explicitly stated that networks can deploy LTE services if they prefer. In total 40 MHz of spectrum is being offered, in eight blocks of 5 MHz each. Bidders during the auction can apply for two blocks as a maximum, although if any spectrum remains unsold, then winning bidders can apply to buy up the spare blocks afterwards. The base price has been set at US\$20 million per MHz of spectrum. In addition, only one new entrant will be allowed to win a 3G license, although none of the licenses is being explicitly reserved for new entrants. As part of the rollout incentive, once a winning bidder has met the minimum coverage requirements, they can then apply for permission to reuse any existing 2G spectrum they hold for 3G services as well. (February 15, 2013) btrc.gov.bd

The telecom regulator has invited proposals from aspirant mobile phone operators for obtaining license for launching 3G services by May 12, 2013. The operators from home and abroad will have to apply to establish, maintain and operate 3G cellular phone services, said a release of the Bangladesh Telecommunication Regulatory Commission (BTRC). As per

the release, entities having adequate financial, technical and organizational capability to service in the field can apply with an updated list of their business record and record of experience. The prospective applicants can buy a copy of the 3G guideline by Tk 5,000. If the aspirant operators have any query regarding the issue, they can contact with the BTRC deputy director (Legal and Licensing Division) by March 21. The Ministry of Posts and Telecommunications (MoPT) Monday finalized the 3G mobile phone service guideline, titled 'Cellular Mobile Phone Service (3G/4G/LTE) Regulatory Licensing Guideline 2012.' As per the guideline, each slot of the spectrum will be of 5-Megahertz (MHz) instead of the previous 10 MHz, so that comparatively small operators can attend the auction. Besides, it will pave the way for engaging more foreign investors in the 3G licensing. The price of per MHz spectrum has been fixed at US\$ 20 million from the previously-set US\$ 30 million. Sixty per cent of the total spectrum assignment price has to be paid by 60 days of the auction as the first installment, while the rest 40% by 180 days as the second installment. A BSS report adds, the BTRC has decided to hold the much-awaited auction of 3G services on June 24 for paving the way of spreading mobile broadband services across the country, said officials. BTRC chairman Sunil Kanti Bose said the auction will take place on June 24. He said invitation proposals for issuing 3G license will be published in the newspaper today. He informed that the commission will hold a pre-bidding meeting on March 14 with the companies, interested to participate in the auction. "The companies interested to take part in the auction have to submit application by May 12, and the names of eligible firms will be published on May 20." The final list of successful companies, eligible for participating in the auction, will be declared on June 5," he added. The license tenure would be 15 years. (February 15, 2013) [thefinancialexpress-bd.com](#)

The national policy for the 3G mobile technology license was finalized on Tuesday by the Ministry of Post and Telecommunications assigning US\$20 million per megahertz wave. The finalized policy has been sent to Bangladesh Telecommunications Regulatory Commission (BTRC) and it will soon organize auctions for 3G waves. Three of the five private telecom operators and one other new operator will be getting the license. The decision to allow licenses to multiple foreign operators was reconsidered. It was not possible under current circumstances to allot more than one new foreign operator the mandate to allot 2G. State-owned Teletalk is one of the six mobile operators of Bangladesh currently providing experimental 3G services. Teletalk would not be participating in the auctions, but according to the policy draft, it would have to buy the license at the rate fixed at the auctions. A total of five telecom operators including Teletalk will be getting the license, said the secretary. The license will be valid for 15 years. Operators had asked for 20 years validity. Secretary said their decision was influenced by the practice in neighboring countries. The auction will have eight blocks of 5MHz each, according to the finalized policy. The draft had talked of four blocks of 10MHz each. This would facilitate operators with lesser customer coverage. Big mobile operators can buy two blocks. If there are leftovers, companies can buy it at the auction rate. Therefore, auction of these blocks will bring foreign investment. BTRC had sent draft of the policy to the ministry March 28 last year. Four companies including three of the five private mobile operators and a new operator were recommended for 3G license in the draft. (February 14, 2013) [bdnews24.com](#)

The regulator has decided to revamp the planned 3G spectrum allocations in a move that could see more than one foreign company able to secure a license. The current draft guidelines would allow one new foreign entrant into the market, but regulator has decided to split the 50 MHz of spectrum into 10 blocks of 5 MHz instead of the planned 5 blocks of 10 MHz. The plans had been to award four licenses to incumbent operators, and reserve one for a new entrant. The new plans would allow more new entrants into the market, but also could allow all six existing operators to secure a 3G license. The new slot of spectrum would not only help the small operators commercially, but it also paves the way for more foreign operators who are keen to invest here. The incumbent 2G network operators had consented to the changes. State owned Teletalk is already offering 3G services, but will be required to pay for its existing license based on the eventual outcome of the 3G license auction. The auction is due to be held in March.

(February 1, 2013) [cellular-news.com](#)

Egypt

Executive President: Dr. AmrBadawi

[National Telecommunication Regulatory Authority (NTRA)]

Egypt is officially gearing up for a new mobile phone operator's license, nearly two years after it had expected the fourth license to go through. State-run landline operator Telecom Egypt has shown the most interest and believes it will be awarded the new license. Egypt's National Telecommunications Regulatory Authority (NTRA) said "the price for the country's fourth mobile license will be set by the second half of 2013." The authority had already begun the procedure of issuing the license to the state-owned landline monopoly Telecom Egypt in December 2012. At the same time the three established mobile operators, Mobinil, Vodafone Egypt, and Etisalat, will be allowed to provide landline services using TE infrastructure. NTRA CEO told that the mobile communications market "had reached 115-120% penetration, but this was not a reason to hold back on a fourth license." He added that the authority "is still examining the issue posed by TE's ownership of 45% of Vodafone Egypt." (February 12, 2013) [itnewsafrica.com](#)

Iran

Minister of communication & Information Technology: Dr. Reza Taghipour

[Communications Regulatory Commission (CRC)]

Iran's first W-CDMA/HSPA mobile network operator Tamin Telecom (Rightel) has had its exclusivity in the country's 3G market extended by a further year to September 2014. The report also quotes Rightel's CEO claiming that the company is well ahead of its 3G license coverage obligations, as it has established a network presence in 'all provincial capitals and a total of 45 cities', compared to a stipulation that it must cover eight cities in its first year, although without confirming how many areas currently have live coverage. The company also claimed that early network shortcomings have been resolved – noting that the technical problems meant that 3G services were initially provided free of charge, and that because of this a two-year exclusivity period on commercial (paid-for) 3G services effectively began in the third quarter of 2012. Contrary to previous rumors, a French company has not taken an ownership stake in Rightel, which is a subsidiary of Iran's Social Security Investment Organization. The cellco has used Sofrecom, part of the France Telecom-Orange group, as a telecoms consultancy. Rightel's network rollout plan calls for 60% 2G and 40% 3G coverage by 2014; the company website suggests that its 3G network is capable of

supporting transmission speeds of 42Mbps over a HSPA+ platform. In October 2010 the Communication Regulation Agency (CRA) announced that the cellco's 3G exclusivity had been extended for a further three years (ending October 2013) to allow it to fully establish itself, before the latest move to extend the period by another year.

(February 15, 2013) ICTna.ir

South Africa based MTN Group has issued an independent report into the allegations that it used bribery to secure an operating license in Iran - and concluded that the company did not do what it was alleged to have done. The matter came to light after the former Iranian mobile license holder Turkcell has the license voided, and then it was later given to a consortium including MTN. Turkcell has launched legal action against MTN in the USA seeking compensation for its alleged losses. Turkcell had alleged that MTN had conspired with Iranian officials to oust Turkcell from the successful consortium and take its place by promising to use its influence with the South African government to procure the supply of defense equipment to Iran and to support the Iranian nuclear development program at meetings of the IAEA. Turkcell also made specific claims about bribery payments that it said MTN made to officials to secure the mobile operating license. In response, MTN appointed a UK judge, Lord Hoffmann to head a review into the allegations. In summary, the investigation found that most of the claims to be unfounded. It did however raise concerns about a US\$400,000 payment, but due to the unreliability of the witnesses was unable to find out what had happened to that money. In reaching these findings, following a critical examination of the evidence, the Hoffmann Committee found that Turkcell's allegations are "a fabric of lies, distortions and inventions". MTN said in a statement that it will continue to vigorously defend the US lawsuit and will continue to argue that the USA is not the correct legal jurisdiction for such lawsuits anyway. (February 4, 2013) cellular-news.com

Iraq

CEO: Dr. Buhan Shawi

[Communication & Media Commission (CMC)]

UK-based accountancy firm PricewaterhouseCoopers (PwC) is reportedly advising the Iraqi government on its long-awaited auction for a fourth mobile license, which is tipped to include concessions for both 3G and 4G Long Term Evolution (LTE) technology. The government is assessing a number of different options. One possibility could be regional mobile virtual network operators (MVNOs). A second source agreed with this notion, adding: 'The local operators have been pushing back against the decision to offer a fourth concession in the country, so it is more likely the introduction of licenses in the form of MVNOs out of regions such as Kurdistan is seen. The introduction of a fourth player was first mooted in July 2009, piquing the interest of a number of prominent overseas investors. Plans for the auction of the license received final cabinet approval in May 2010, by which time 15 firms had reportedly expressed an interest in entering bids, including US-based Verizon Communications, South Africa's MTN Group, Turkcell of Turkey and the UAE's Etisalat. However, in January 2012 Saudi Telecom Company pulled out of the running, citing the severe delay in awarding the concession, which has been valued at as much as US\$2 billion by Iraq. As per previous announcements, the winner will hold a 40% stake in a new mobile operator, which will also be 35% owned by the public, with the remaining 25% held by the Ministry of Communications. (February 25, 2013) TMT Finance

A US\$1.35bn sale of shares in Iraqi mobile telephone firm Asiacell, the country's first major public offer of equity since the US-led invasion in 2003, was fully subscribed, the stock exchange said. CEO of the Iraq Stock Exchange told that orders had been received for all 67.5bn shares on offer, comprising 25 percent of the company's share capital. The offer was one of the Middle East's biggest share offers in the last few years, and it was seen as a test of investor confidence in Iraq's economy as it recovers from years of war, political instability and financial sanctions. Some major local shareholders in Asiacell are reducing their holdings through the offer. By contrast, Qatar Telecom, which owns 53.9%, was expected to use the offer to increase its stake, head of the exchange's board of governors, said. The shares were sold at IQD22 (US\$0.02) each. Public trade in the shares had been expected to start on the exchange on Sunday, but it will begin on Monday, exchange officials said. They said they could not immediately reveal details such as the total size of orders received for Asiacell shares, or how many of the shares had gone to foreign and local investors. (February 3, 2013) arabianbusiness.com

Jordan

Chairman of the Board of Commissioners/CEO: Mr. Mohammad Al Taani

[Telecommunication Regulatory Commission (TRC)]

Six international companies showed interest in bidding for a tender to complete the National Broadband Network project, the Ministry of Information and Communications Technology said. The ministry, which is in the process of preparing the required documents for the tender, said it will float it next month to go ahead with the implementation of the scheme. In a statement the ministry said it held a meeting with the six companies to brief them about the tender, technical specifications and financing mechanisms. Last year, the Cabinet approved floating a new tender to go ahead with the project. In February 2012, the government announced that it would establish a company to complete the implementation of the network, work on which was halted in 2008 when the Kingdom was affected by the global financial crisis. About 35% of the project has been completed so far at a total cost of US\$36 million. Work on the project started in 2003 with the aim of connecting all public schools and universities to a nationwide fiber optic network. The project was expanded in 2007 to include government agencies, healthcare centers and hospitals. Once the project is completed, residents of rural areas will have access to the Internet at schools connected to the network.

(February 21, 2013) The Jordan Times

Zain Jordan will invest JOD76 million (US\$107.12 million) in 2013 on upgrading its infrastructure and services. CEO called for greater consistency in legislation regarding the telecom sector, as changes had negatively impacted operators and investment. The official threw his weight behind earlier criticism of the watchdog's decision to allow for the entrance of a fourth cellco into the market, noting that with population penetration in excess of 100%, there was no room for a new competitor: The already existing companies face challenges in terms of higher electricity costs and a drop in revenues generated from voice services, international calls and SMSs. CEO partly blamed the use of applications such as WhatsApp, which allows users to send messages for free via the internet, for shrinking revenues. The CEO of Orange Jordan fiercely criticized what he saw as a short-sighted and avaricious policy in the Telecommunications Regulatory Commission's (TRC's) decision to leave an opening for a

new operator in the spectrum auction launched last month: Unfortunately, we all know that the government is facing difficult financial conditions and may want to sell another license and get cash, but this is a short-term solution and a long-term nonsense. (February 18, 2013) *The Jordan Times*

Jordan Telecom Group has reported a 7.2% fall in net profits for full year 2012 to JOD83.2 million (US\$117.02 million). Total revenues, including the telco's wireless, fixed voice and internet services dipped 0.9% year-on-year to JOD408 million, whilst operating income fell by 4.5% y-o-y to JOD163.1 million. The operator faces stiff competition from rivals, particularly in the wireless sector where it vies with Zain Jordan and Bahrain-backed Umniah Telecommunications and Technology. At end-September 2012, Orange claimed 36.0% of the wireless market with 3.21 million subscribers, snapping at the heels of frontrunner Zain which represented 37.4% of the segment with 3.33 million users. (February 15, 2013) *Reuters*

Kuwait

Minister of Communication: Salem Mutheyb Ahmed Al-Utheina

[Ministry of Communication (MOC)]

Zain Group has reported consolidated revenues of US\$4.58 billion for 2012, down 4.3% year-on-year, despite a 6.0% increase in its consolidated subscriber base to 42.7 million active subscribers across all operations. The company blamed the sales dip on negative foreign currency movements, including a 55% decline against the US dollar of the Sudanese pound. EBITDA for the period came in at US\$2.04 billion, giving an EBITDA margin of 44.5%, while net income fell almost 13% year-on-year to US\$902 million. Commenting on the results, the chairman of the board of directors Assad Al Banwan said that 2012 has been a challenging year and Zain's financial indicators suffered from sharp currency translation impact in some of the markets in which we operate, which cost Zain's bottom line approximately USD109 million. Without the effects of the currency translation impact, consolidated revenues would have been USD4.88 billion, while EBITDA would have been USD2.15 billion, and net profits USD1 billion. (February 15, 2013) *telegeography.com*

Lebanon

Acting Chairman & CEO: Dr. Imad Hoballah

[Telecommunication Regulatory Authority (TRA)]

The Lebanese Cabinet extended the contracts with mobile operators Alfa and Touch until the end of June and authorized the telecommunications minister to prepare for a new tender. Telecoms Minister will prepare all terms of the tender in a maximum of two months. The terms of the new tender will be presented to the Cabinet for approval before the ministry issues it. The bidding process will be open to international telecommunications firms in addition to the two existing mobile operators. Sehnaoui is proposing to set the new contracts for five years and to eventually create a government-backed company to manage the telecoms sector. The minister says any such company would float 3% of its shares on the Beirut bourse. The operators are currently managing the cellular networks in return for a monthly fee and commissions. The telecoms sector generates more than US\$1.6 billion in revenues each year, US\$1.4 billion of which goes to the treasury to reduce the budget deficit. At present, there are more than 3 million cellular users in Lebanon. But despite the growth in the number of cellular users, the quality of reception and calls are relatively poor.

The minister has awarded a contract to a Chinese company to install 300 additional antennas all over the country to improve reception and coverage. (February 28, 2013) *www.zawya.com*

Lebanon will launch a tender to run its two state-owned mobile phone operators, currently managed by Kuwait's Zain and Egypt's OTMT, as part of a plan to revamp the telecoms sector, a senior government adviser said. The telecoms ministry wants to award contracts for an extended 3-5 year period to manage the two state-run mobile phone operators, Touch and Alfa. The government also plans to create a submarine cable link to Cyprus to increase bandwidth and spin off mobile telecom transmission towers into a separate state-owned business that could also be managed by a private company. "We want to transform Lebanon into a digital hub," Karim Kobeissi, senior adviser to the Ministry of Telecommunications told. Unlike other countries in the region that have liberalized their telecom sectors, Lebanon has kept its infrastructure under state control. Its mobile phone penetration rate was 89% in 2012, lagging many other countries in the Middle East. The existing contracts of Zain and OTMT to run Touch and Alfa ran their course at the end of January but have been extended to end-February to allow the cabinet to consider the revamp. Kobeissi said new companies could win the tender, but there were no plans for a third mobile company to operate alongside Touch and Alfa. "It will be open for qualified telecom operators," he said. "It's still early to see if other companies are interested." The management contracts of Zain and OTMT have been renewed repeatedly, usually on an annual basis, since they took up the work in 2004 and 2009 respectively. Touch is the market leader, with a 53% share of Lebanon's mobile phone subscribers. Touch and Alfa's combined revenue for 2011 was US\$1.6 billion, of which US\$1.4 billion went to the government. Both Zain and OTMT have told they were keen to continue operating in Lebanon. Losing the contract would be a bigger blow to OTMT, said Nadine Ghobrial, EFG Hermes telecoms analyst in Cairo. "It has been trying to expand its mobile portfolio and it likes these sorts of management contracts," said Ghobrial. "It wants to secure more of them in other countries." Kobeissi also said there would be no new attempts to sell stakes to private investors. "There's no political consensus on privatization in Lebanon," he said. But it may sell a separate management contract to run the transmitter tower company, Kobeissi added.

(February 14, 2013) *Business Monitor International*

Morocco

Director General: M. Azdine El MountassirBillah

[Agence Nationale de Reglementation des Telecommunications (ANRT)]

Maroc Telecom has announced that its overall user base has increased to 17.86 million through the end of 2012, representing a 4.3% increase from the previous year. The report from the company noted that this includes fixed customers to 3G Internet mobile users, which saw a 1.5 million person increase, or 40%. According to the company fixed customers rose 2.3% to 1.27 million and Internet customers grew 15.6% to 683,000. Its Moroccan operations saw a 7.4% decrease in revenues to MAD 23.18 billion (near \$3billion), as mobile revenues contracted 7.7% to MAD 17.48 billion (just over US\$2billion) and fixed line shrank 10.3% to MAD 7.43 billion (approximately US\$827 million). The operator cited recent mobile price cuts and what it described as "the capitalization of fixed revenues by mobile" as reasons for lower sales. It said it had a 3.6% increase in Moroccan fixed data revenues to MAD 1.78 billion (almost

US\$236 million), but mobile service revenues saw a 6.6% decline. Maroc Telecom also announced that it increased its overall group customer base of 13.5% to 33 million last year, with strong presence in Mauritania, Mali, Burkina Faso and Gabon. (February 25, 2013) itnewsafrika.com

Moroccan multi-service operator Inwi, formerly known as Wana, says that it expects to launch unbundled ADSL services before the end of 2013, and that it is preparing to launch 4G LTE services. The company revealed that it plans to spend MAD1.5 billion (US\$179 million) in 2013 as it seeks to raise coverage of its mobile network from the current level of 90% of the population. Inwi became Morocco's third mobile network operator in July 2008, and accounts for approximately 23% of the country's mobile subscriber base.

(February 21, 2013) telegeography.com

South Korean telecoms giant KT Corp has stepped up its approach to buy Vivendi's 53% stake in Maroc Telecom, lining up a number of banks to advise on a deal which could potentially be worth as much as US\$7 billion. Citigroup, Credit Suisse and Societe Generale will advise KT Corp and finance its potential bid – if it proves successful. With reference to the binding offers already submitted by UAE-based Emirates Telecommunications Corporation (Etisalat) and Qatar's Qtel, one of the sources admitted: The bidders have yet to hear back from Vivendi, and a deadline for binding offers has yet to be set, the sources said. A second source added: 'Vivendi is looking for the best price and there are political implications to working with the Moroccan government in future, so the buyer will have to fit into all these factors. This deal will be a major game changer in Africa. If none of the three aforementioned companies meets Vivendi's asking price for Maroc Telecom, the source named France Telecom-Orange amongst potential suitors, although in order to proceed FT-Orange might have to dispose of its 40% stake in Maroc Telecom's local rival Meditel. The source added local conglomerate Omnium Nord Afrique (ONA) and Kuwait's Zain Group to the list of potential bidders, although further conflicts of interest arise from this suggestion. ONA is a merged division of Societe Nationale d'Investissement (SNI), a Moroccan investment fund with assets of at least US\$2 billion which owns 69% of the country's third mobile operator Wana (Inwi), while the other 31% is owned by Zain Al Ajial, a 50/50 joint venture between Zain Group and the local Al Ajial Investment Fund Holding. (February 6, 2013) Reuters

Nepal

Chairman: Mr. Digambar Jha

[Nepal Telecommunication Authority (NTR)]

Rural telecoms service provider STM Telecom has submitted an application to the Nepal Telecommunications Authority (NTA) for a unified operating license – making it the third firm to apply behind United Telecom Limited (UTL) and Smart Telecom. UTL filed its application in October last year, while Smart followed suit a month later. The unified license regime, introduced in May 2012, allows telecoms operators to operate a range of services, including fixed line, GSM (mobile) and international long-distance calls through a single concession upon payment of an NPR357.5 million (US\$4.21 million) fee. In addition, they are required to pay an NPR20.13 billion renewal fee after ten years, and then every five years after that. If successful in its bid, STM Telecom will receive 3MHz of frequency from the NTA with which to operate GSM services. (February 26, 2013) telegeography.com

Nepal Telecommunications Authority (NTA) has renewed the operating license of privately owned alternative operator Nepal Satellite Telecom (NST), which offers services under the banner Hello Nepal, for the next five years. Further, the watchdog has confirmed that it has extended the time the regional service provider has to complete the second phase of its expansion into the Far- and Mid-western regions, by twelve months. At a meeting last week, NTA director Ananda Raj Khanal convened a committee to make 'essential decisions' on the market, in lieu of Nepal having appointed a new chairman to run the authority as per the rules of its setting up. Under the terms and conditions of its license award in February 2008, NST was originally required to roll out CDMA and/or GSM services in rural areas of the country which, upon completion, would make it eligible to expand nation-wide. Under phase one of its rollout, the altnet committed to deploying services in 273 Village Development Committees (VDCs) in the Mid-western region. Having signed a contract with ZTE of China in July 2012, the telco said it was hopeful of completing phase two of its rollout and launching services by March this year. However, its timetable was derailed due to external factors – including the timely allocation of spectrum, due to ongoing internal administration issues at the NTA. (February 18, 2013) telegeography.com

The Nepalese government's ambitions to see telecoms service providers sharing mobile towers, BTS, microwave equipment, fiber-optic networks and other ancillary equipment, have been derailed by the ongoing issue of naming a new chairman to head up the Nepal Telecommunications Authority (NTA). Although government guidelines were endorsed last year that would have paved the way for a long-awaited infrastructure sharing mechanism between telcos, NTA director Ananda Raj Khanal points out that the process of putting it into reality – defining the regulations, authorization procedure and licensing format – is impossible in the absence of a chairman at the regulator to oversee it. 'The regulator cannot initiate the process until the government either appoints a chairman or [puts in place an] alternative mechanism with legal teeth to perform essential tasks at hand,' he said. The infrastructure sharing plan is seen as a key tool to develop improved telecoms access in the mountainous country of Nepal. 'It will lower their investments on infrastructure and they can invest on quality enhancement,' he added.

(February-12,-2013) The Himalayan Times

The Nepal Telecommunications Authority (NTA) has published its latest 'Management Information System (MIS)' market report for the period November 16- December 15, 2012, showing that the total number of fixed telephony users continues to slide, while mobile take-up carries on apace. The fixed telephony base stood at 831,703 at December 15, 2012, down from 836,825 three months earlier, according to the MIS report, of which 639,170 were PSTN lines and 192,533 were wireless in the local loop (WiLL) connections. Meanwhile, in the data/internet segment, the total number of connections rose to over 5.5693 million, boosting population penetration of internet services to 21.49%, the NTA said. The overwhelming majority of users around five and a half million use a mobile (GPRS, EDGE, W-CDMA, CDMA 1xEV-DO) device to access the www, although ADSL (103,304 lines), cable (18,158), wireless or fiber-optic (49,690) and WiMAX (76) are also popular access platforms. In the mobile segment, the total number of GSM and CDMA subscribers in Nepal stood at 16.608 million at the end of the period under review, up from 15.810 million three

months earlier, a penetration rate of 62.68 lines per head of population. The overwhelming majority, 15.78 million were GSM users to either Spice Nepal Private (Ncell) or NT. The former had 9.05 million GSM customers at mid-December up from 8.60 million three months earlier, ahead of NT with 7.73 million (6.37 million). In addition, NT counted 833,367 CDMA Sky Phone users, up marginally from 832,864.

(February 6, 2013) telegeography.com

Nepal Telecommunications Authority (NTA) has decided to continue with the previous procedure to obtain type approval certificate (TAC). The telecom regulator had decided to implement type approval certificate provision four years ago but smuggling of mobile sets has not been controlled so far, according to an official at Nepal Telecommunications Authority. The authority had, last year, tried to make the process of acquiring type approval certificate stricter but could not do so due to pressure from the Ministry of Information and Communications (MoIC). NTA was forced to extend the previous provision of TAC for the next three months due to a directive from MoIC, a source at NTA said. Director at the authority Min Prasad Aryal, however, said that it is the Department of Customs which is responsible for controlling smuggling. "TAC is not the only reason for smuggling," he said, adding that weak monitoring by government agencies have contributed to the trend. Type approval is granted to a product that meets a minimum set of regulatory, technical and safety requirements, he said. "Generally, type approval is required before a product is allowed to be sold." Type approval simply means that the product is certified to meet certain requirements for its type, whatever that may be. The regulator had planned to introduce the system of equipment-based type approval last year. An online system of approving equipment types will save time and make the test more reliable, according to NTA. The need for an online type approval system has been realized by the regulator since the market of telecom equipment and ICT materials has been increasing every year, according to the regulator. Recently, the authority, issuing a public notice, had warned of strict action against those importing and distributing mobile phone sets without obtaining type approval certification. NTA issued the warning after it discovered a rise in illegal imports and distribution of handsets and other telecommunications equipment, like modems and USB dongles, among others. In the next step, NTA is preparing to work with operators to make it mandatory for customers to provide IMEI (International Mobile Equipment Identity) number to obtain SIM cards. If implemented strictly, customers using unregistered handsets may fail to get access to mobile service.

(February 1, 2013) thehimalayantimes.com

Oman

Chief Executive Officer: Dr. Hamed Al-Rawahi

[Telecommunication Regulatory Authority (TRA)]

Nawras, Oman's second national telecoms operator, has announced the signing of a further two bilateral revolving credit facility agreements totaling OMR20 million (US\$51.8 million) with a three-year tenure. The agreements with HSBS Bank Oman and Qatar National Bank Oman will help meet capital expenditure and working capital requirements. Last month Nawras, which is majority owned by Qatar Telecom (Qtel), signed a financing deal worth US\$182 million to partially finance its 'turbocharging' program, which aims to increase the speed, capacity and coverage of its mobile network across the Sultanate. (February 20, 2013) telegeography.com

As part of a program aimed at modernizing and expanding its network infrastructure, Oman's second national telecoms operator, Nawras, has announced the commercial launch of 4G Long Term Evolution (LTE) services. Both pre-paid and post-paid 4G mobile broadband services are available across the Muscat capital area with maximum download speeds of up to 15Mbps, the company's CEO Ross Cormack said during a press conference. The launch forms part of the firm's 'network turbocharging' program, which was unveiled in June 2012 and has already seen the speed, capacity and coverage of its mobile networks improved 'in most areas of Muscat and Al Batinah South' governorates. 'Starting from Al Bustan to beyond Musannah, Nawras has added 3G+ services to every base station, added new base stations and more than doubled the amount of broadband data traffic that can be carried at any one time. The launch of 4G services in Muscat adds an additional service with even faster speeds for those who require huge quantities of data,' noted Wolfgang Wemhoff, Nawras' CTO. The next stage of the turbocharging program is scheduled to begin in the near future and will see the company, which is majority owned by Qatar Telecom (Qtel), continue to roll out faster broadband speeds across the Sultanate. In other news, the Telecommunications Regulatory Authority (TRA) has agreed an initiative with the country's two telecoms network operators, Omantel and Nawras, to extend services to underserved and rural areas. According to local press reports, around 200 new base transceiver stations (BTS) will be constructed to provide coverage to 250 villages in remote parts of Oman. (February 18, 2013) telegeography.com

The incumbent Omantel has announced its preliminary financial results for the twelve months ended December 31, 2012, reporting a 4.1% increase in net profit to OMR116.2 million (US\$300.9 million) from OMR111.6 million in 2011. Despite a decline in revenue from international calls and SMS, revenue for the year totaled OMR458.9 million, up 1.4% compared to OMR452.6 million twelve months earlier, with growth driven by wireless arm Omantel Mobile, which achieved its highest retail revenue of OMR70.3 million in the fourth quarter of 2012. Total Omantel subscribers (including Pakistani subsidiary Worldcall Telecommunications) reached 3.831 million at the end of December 2012, an increase of 8.5% year-on-year, with Omantel Mobile customers totaling 2.553 million. Including resellers, mobile subscribers increased by 8.5% to 3.06 million at the end of 2012. Fixed broadband and mobile broadband customers meanwhile grew by 59.5% and 36% during 2012, while revenue also increased 69% and 26% respectively. 'We are delighted with the results the company achieved during 2012 that have seen our subscriber base growing despite the increased domestic competition as well as competition from over the top players and challenging conditions in the domestic market,' commented Omantel CEO, Dr. Amer Awadh Al Rawas, adding: 'During the year, we have successfully launched the first 4G Long Term Evolution (LTE) network and rolled out a major 3.5G network development program following the allocation of the required spectrums by TRA. These major investments along with the dedicated efforts and contribution of all our stakeholders have enabled us to increase our domestic mobile customer-base by 12.1% year-on-year. Despite the major investments we have made during 2012 to enhance our customers' experience, we were able to control our expenses and closed the year with a slight increase in the expenses by 1.3%, thanks to the operational efficiency initiatives launched by different units of Omantel.'

(February 13, 2013) telegeography.com

Pakistan Chairman:

[Pakistan Telecommunication Authority (PTA)]

The anti-trust watchdog the Competition Commission of Pakistan (CCP) has drawn up draft regulations regarding deceptive marketing. The guidelines aim to eliminate a number of anti-competitive behavior, classifying certain practices as 'deceptive' and therefore violations of the competition act, including: the distribution of false information in advertising, communication and points of sales as well as dealing with fine print, disclaimers and qualifications, substantiation of claims, comparative advertising, price disclosure and others. As it is not possible to predict future behavior of telcos, the CCP has indicated that the guidelines be subject to change and should be further developed and refined once in place, to reflect changes to the market. (February 28, 2013) ProPakistani.com

A Pakistan court has ordered the removal of the Chairman of the telecoms regulator after annulling his appointment to the post. The Lahore High Court ordered that Farooq Awan step down as Chairman of the Pakistan Telecommunication Authority (PTA) after it found that he lacked the necessary qualifications to hold the post and that his appointment was due to political bias by the government. The court's actions are however also being seen as politically motivated, and as Chairman, Farooq Awan had not built up stable relations with the industry, which was considered critical during the 3G license auction process. The court found that the appointment of the ICT secretary as the regulator Chairman did not follow the established procedures for an openly advertised role, nor were the other two members of the board considered for the role as would have been required. The appointment of the board of directors for the regulator is governed by the Telecommunication Act. The 3G auction timetable is not expected to be affected by the removal of the Chairman, as the government is keen to push ahead, if only to raise much needed revenue.

(January 22, 2013) cellular-news.com

Qatar

Executive Director: Mr. Greame Gordon

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

Qatar's Qtel has renamed itself Ooredoo in a bid to bring all its international businesses under a single brand identity. The announcement came on Monday evening at Mobile World Congress in Barcelona and was accompanied by the lighting up of a red badge on the chest of every attendee to show off the new brand. "From this moment on we are Ooredoo," said company chairman Abdullah Al-Thani, explaining that the word means "I want" in Arabic. "This name signals our aspiration and commitment to becoming a global force," Al-Thani added. "This is more than just a change of identity for us", he said, emphasizing the telco's renewed focus on customer experience and its involvement in social responsibility initiatives such as spreading education and involving women in emerging markets in the digital world. Welcome to Ooredoo – a brand and a communications company that stands for human growth," Al-Thani said. Qtel becomes Ooredoo in its home market, and its subsidiaries in the MENA and South East Asian regions, including Indonesia's Indosat, Wataniya in Kuwait and Tunisian operator Tunisiya will follow suit during the course of this year and next. "[Ooredoo] reflects and conveys our approach to customers," said Al-Thani. "It has a single look and feel...it's playful and engaging," he said. "It's a new name to unite the entire group." (February 26, 2013) totaltele.com

The Supreme Council of Information and Communication Technology (ictQATAR) recently announced the availability of Mobile Number Portability (MNP) as a key part of the liberalization of Qatar's telecommunications sector. MNP allows local consumers to freely switch between the service providers without having to sacrifice their existing number. MNP will further empower consumers to reap benefits of the competition in the market that has led to lower prices, innovative new services and enhanced customer care. MNP is available in the retail outlets run by the two service providers in Qatar - Qtel and Vodafone Qatar. Mobile Number Portability is an important component of a competitive telecommunications market anywhere. A liberalized, competitive market leads to greater innovation and enhanced services for consumers. In that manner, it is indeed an important aspect of a liberalized market in Qatar.

(February 21, 2013) ictqatar.qa

The number of mobile subscribers grew by 2.6% in Qatar on a quarter-on-quarter basis in the third quarter of 2012. Qatar's total mobile subscriber base has breached the 3 million mark, leading to a mobile penetration rate of around 170%. However, the potential for growth remains due to expected economic and population growth, Global Investment House's telecom report for the fourth quarter released on Monday said. Vodafone Qatar continued with the strong growth momentum, adding 57,800 subscribers in the third quarter of 2012, helped by launch of postpaid services in June 2012. The increase in Vodafone's subscriber base has also been due to strong growth in the pre-paid segment. (February 20, 2013) zawya.com

Qatar will see the commercial roll out of the ultra-fast 4G network over the next few months with the two service providers - Qtel and Vodafone reaching a crucial phase of the Long-Term Evolution (LTE) program that will deliver the fourth generation network in the country. Qtel is in the "final testing stage" of the 4G LTE mobile broadband network and is expecting to begin commercial launch in Doha in the coming months. Vodafone, on the other hand, would launch a trial of LTE "in the very near future". LTE is a wireless broadband technology that supports roaming Internet access via mobile phones and devices and which seamlessly interworks with 2G and 3G networks. Because of the significant improvements in download speeds and quality, it is called the 4G technology. In Qatar, the service is expected to provide customers with "universal connectivity at incredible downlink speeds" of up to 150 Mbps for a broad range of services, including high-definition (HD) video on demand, interactive gaming, cable TV and high-bandwidth content. Vodafone Qatar revealed it would "launch a trial of LTE in the very near future". "Vodafone Qatar will bring the vast experience and expertise of Vodafone Group in this field with plans to start rolling out state-of-the-art LTE capability in Qatar aiming to have commercial launch for the first half of next year," Vodafone Qatar's spokesperson told. "This should coincide with the availability of more mature devices and services that will allow customers to experience the full benefit of LTE technology. In this way Vodafone can assure customers a smooth, continuous and evolved customer experience," the spokesperson added. Qtel had earlier said its QR200mn LTE project would deliver mobile speeds of up to 150 Mbps and support a knowledge-based economy. Under the Qtel 4G LTE project, some 900 base stations will be deployed across the country, delivering the best penetration for 4G coverage in the GCC region. "Implementation will begin immediately, adding to the

strength and speed of Qtel's broadband network, which is already one of the best in the region."

(February 14, 2013) Gulf Times

Saudi Arabia

Governor: Eng. Abdullah A. Al Darrab

[Communication & Information Technology Commission (CITC)]

Saudi Arabia has remained one of the biggest IT markets in the region, with IT expenditure projected to have sustained a 9 percent year-on-year growth reaching US\$4.1 billion in 2012. The Kingdom's healthcare sector is expected to account for a significant percentage of the Kingdom's massive IT investments, as the Saudi government continues to take advantage of the latest technological advances to address the growing healthcare requirements of the rapidly expanding Saudi population. In 2012 alone, the Kingdom's healthcare expenditure already reached US\$24.35 billion, achieving a 16% increase compared to the previous year. A substantial percentage of the total expenses was used to purchase specialized e-Health and related IT solutions for healthcare. Moreover, Saudi Arabia allocated US\$1.74 billion for medical devices in 2012, up 17.8% from 2011. Mehmet Bilginsoy, Managing Director, CGM Middle East, said: "The Saudi government has strengthened its investments in technology as part of its commitment to enhance the quality of public services being provided to its citizens. In this regard, improving the technology infrastructure of the healthcare sector is one of the Kingdom's top priorities, which in turn has helped establish Saudi Arabia as one of the most lucrative markets for healthcare IT solutions." "We are confident that CGM is strongly positioned to cater to Saudi Arabia's growing demand for e-Health solutions that enable healthcare institutions across the Kingdom to vastly improve the quality of their services. We have already provided healthcare IT solutions to several prominent Saudi medical institutions, including King Fahad Medical City," he added. "Moreover, CGM has been stepping up its efforts to develop more personalized solutions that cater to the unique requirements of the Saudi market" said Thomas Reitmayr, Vice President, Business Development, CompuGroup Medical. CompuGroup Medical is one of the leading e-Health companies in the world. Its software products are designed to support all medical and organizational activities in doctors' offices, pharmacies and hospitals. Its information services for all parties involved in the healthcare system and its web-based personal health records contribute towards safer and more efficient healthcare. CompuGroup Medical's services are based on a unique customer base of over 385,000 doctors, dentists, hospitals, pharmacies and networks as well as other service providers. With locations in 19 countries and customers in 34 countries worldwide, CompuGroup Medical is the e-Health company with one of the highest coverage among e-Health service providers.

(February 18, 2013) zawya.com

Sudan

Director General: Dr. Izz Al Din Kamil Amin

[The National Telecommunication Corporation (NTC)]

The relatively low mobile penetration rate and the limited presence of fixed-line services are driving mobile growth in Sudan, especially in remote areas. While mobile broadband is expected to witness the highest growth due to better accessibility, the segment with the highest potential is broadband. The fixed-line segment will also get a boost with the prevalence of new technologies such as code division multiple access (CDMA) fixed-wireless technology. New analysis from Frost & Sullivan, Sudan Telecom Market, finds

that the market earned revenues of US\$ 2.13 billion in 2011 and estimates it to reach US\$ 2.85 billion in 2018. In 2011, Sudan had approximately 24 million mobile subscribers and the penetration rate stood at 55.1%. The number of subscribers in the country is anticipated to triple to 56.8 million between 2012 and 2018. "Sudan has a relatively liberalized telecom sector," said Frost & Sullivan. There are two fixed-line and five mobile operators providing services in the country and all operators have planned network expansion to take advantage of the growing demand in rural areas. However, with close to 40% of the population living below the poverty line, there is substantial pressure on the operators to find fresh revenue streams. In addition, high illiteracy rates restrict the uptake of sophisticated data services. (December 17, 2012) businesswireindia.com

Zain Group has reported consolidated revenues of US\$4.58 billion for 2012, down 4.3% year-on-year, despite a 6.0% increase in its consolidated subscriber base to 42.7 million active subscribers across all operations. The company blamed the sales dip on negative foreign currency movements, including a 55% decline against the US dollar of the Sudanese pound. EBITDA for the period came in at US\$2.04 billion, giving an EBITDA margin of 44.5%, while net income fell almost 13% year-on-year to US\$902 million. Commenting on the results, the chairman of the board of directors that 2012 has been a challenging year and Zain's financial indicators suffered from sharp currency translation impact in some of the markets in which we operate, which cost Zain's bottom line approximately US\$109 million. Without the effects of the currency translation impact, consolidated revenues would have been US\$4.88 billion, while EBITDA would have been US\$2.15 billion and net profits US\$1 billion. (February 15, 2013) telegeography.com

South Sudan

Minister: Madut Biar Yel

[Ministry of Telecommunication & Postal services]

Ministry of Telecommunications pushed back the deadline for mobile phone users to register their SIM cards or lose access to their phones, after few turned out for the registration effort. "We all agreed to extend the SIM card registration until the 28th of February. While I say this, I would urge all subscribers, South Sudanese and non-South Sudanese, to register," Deputy Minister for Telecommunications Beatrice Khamisa said. The South Sudanese government last year ordered that all mobile phone users register their SIM cards, citing security reasons. Thursday's delay was the second in as many months. Mobile phone users were originally given until December 31, 2012 to register their SIM cards, but that was pushed back by one month to January 31, 2013 after low compliance with the government-mandated registration. Khamisa said some government ministries were adamant that the deadline not be pushed back a second time. But the Ministry of Telecommunications argued for another extension, saying that mobile phones are the only connection to the outside world for many South Sudanese, especially those who live in remote areas. "During our discussion some participants demanded that we stop extending the registration date. But we thought the telephone in South Sudan is the main source of communication. Business is done over telephone, including social interaction -- especially when we don't have land lines and post offices are not operating efficiently," Khamisa said. Mobile operators will work with the ministry to publicize the registration campaign and its new deadline, to make sure as many people as possible register by the end

of February. The new deadline is absolute, Khamisa insisted. Anyone who fails to register by February 28th will have their mobile phone service cut off. (February 3, 2013) VOA

South Sudanese mobile phone subscribers have been given additional time to register their SIM cards by the Ministry of Telecommunications and Postal Services (MOTPS). Voice of America quotes deputy minister for telecommunications, Beatrice Khamisa, as saying that the deadline for registration has been extended to February 28, 2013. The extension is the second in as many months; subscribers were originally given until December 31, 2012 to register their details, but this was subsequently pushed back by one month amid low compliance with the government directive. Commenting on the MOTPS's decision to push back the deadline a second time, Khamisa said: 'During our discussion some participants demanded that we stop extending the registration date. But we thought the telephone in South Sudan is the main source of communication. Business is done over telephone, including social interaction, especially when we don't have land lines and post offices are not operating efficiently.' She added that the new deadline is final, and anyone who fails to register by the end of the month will have their mobile phone service disconnected. South Sudan, which gained independence from Sudan in July 2011, is home to five mobile network operators, namely: Kuwait-based Zain; MTN, owned by South Africa's MTN Group; Sudanese operator Sudatel; Gemtel (Green Network), part-owned by Libyan African Investments Portfolio (LAP) via its telecoms arm LAP Green Networks; and Network of the World (NOW), operating under the brand Vivacell. (February 4, 2013) telegeography.com

Turkey

Chairman & CEO: Dr. Tayfun Acarer

[Information & Communication Technologies Authority (BTK)]

Turkey's Turkcell has signed a contract with the country's Ministry of Transport, Maritime Affairs and Communications to provide mobile network coverage in currently uncovered areas under a universal services obligation for three years. Turkcell submitted the lowest bid of TRY312.77 million (US\$174.68 million) excluding VAT in a tender held by the ministry to provide mobile network coverage to Turkey's 1,799 rural locations with population of less than 500, and promised to operate these services for three years. Following the decision to grant Turkcell the status of universal service provider, the related contract was signed on February 20, 2013. (February 22, 2013) telegeography.com

Turkey's Postal and Telecommunications General Directorate (PTT) is poised to launch as a mobile virtual network operator (MVNO) under the 'PTT cell' moniker. From May 2013, PTT cell will sell pre-paid services via roughly 200 PTT branches, and the sales network will gradually be extended to include all retail outlets across Turkey. The initiative, which will see the new company piggyback on the network of Turk Telekom's Avea mobile unit, is being partially funded by the government's Universal Service Fund (USF), with a view to enhancing rural uptake. PTT has tossed its hat into the ring in this business with 4,500 PTT points at which citizens can benefit from this mobile service. One of PTT's 'T's' 'telephone' was lost in 1995 with the name change, but now we are bringing the telephone back to the PTT structure with the introduction of this system. The MVNO hopes to acquire 1.5 million subscribers in its first year of operation, increasing to five million after two years. (February 8, 2013) telegeography.com

United Arab Emirates

Director General: Mr. Mohamed Nasser Al Ghanim

[Telecommunication Regulatory Authority (TRA)]

Telecommunication Regulatory Authority (TRA) will announce launch of mobile number portability once the two telecoms operators are ready with the service. The commercial launching date for mobile number portability service will be announced after ensuring the readiness of both operators as soon as possible. There are no details on whether TRA has commenced testing the facility or by when is the commercial launch expected. Etisalat and du, the two telecoms operators, did not comment. Mobile number portability was first announced in the UAE in January 2011, but technical glitches have delayed the launch. TRA had announced in April 2011 that the facility would be launched in the third quarter of 2011 which will stimulate competition between the two operators because operators will try to hold onto their customers. Oman was the first country in the Gulf Cooperation Council countries to launch the service in 2006 followed by Bahrain in 2011. (February 25, 2013) zawya.com

Du has announced that its fourth-quarter revenues rose by 13.6% to reach AED 2.74 billion, while net profit before royalty increased by 71.4% year on year to AED 852 million. The company added 496,628 net new customers in the fourth-quarter, taking its customer base to 6.46 million at the end of last year. In addition to customer growth across segments, an increase in data volumes and stronger ARPU played a significant role in Du's continued growth in mobile revenues, which reached AED 2.18 billion for the quarter, up 15.42% on Q4 2011. Mobile ARPU for the quarter increased to AED 117. (February 19, 2013) cellular-news.com

Yemen

Minister: Dr. Ahmed Ebeid Bin Dagher

[Ministry of Telecommunication & information Technology (MCITT)]

Yemen's telecommunications and optical fiber network was struck at various locations by sabotage attacks and looting. Sabotage and looting at 89 locations have so far inflicted a cost of YR 59 million in 2013. General Manager of Amran's Telecommunications branch Al-Dhahbani stated that telecommunications network's infrastructure was regularly subjected to attacks and looting. A prominent telecommunications sector official stated the sector's revenues reach YR 60 billion per year, and the money is used to support basic services for society. The official also spoke about the difficulties which the sector encounters when it attempts to provide services and adopt new operating systems. "It's difficult to obtain licenses due to an unfair state of competition," he said. (February 20, 2013) nationallyemen.com

Regulatory Activities Beyond the SAMENA Region

GSMA

Mobile broadband connections in Arab states are likely to increase 255% to 142 million by 2017 from 40 million in 2011, according to GSMA. Mobile broadband connections have already overtaken fixed-line connections by over 350%. GSMA recommends governments in the region to offer spectrum in line with internationally and regionally harmonized spectrum bands, including the Digital Dividend, 2.6GHz and 1.8GHz bands. The release of additional spectrum could raise the region's combined GDP by US\$108 billion between 2015 and 2025. Santino Saguto, partner consulting, TMT Leader for Deloitte Middle East, says current spectrum allocations are not able to sustain the potential growth in data traffic and, unless increased, seem likely to raise costs of provision, challenge investment decisions and increase network congestion. A number of countries in the region, including Egypt, Jordan and Morocco, have extremely high taxes on mobile services as a result of mobile-specific or 'luxury' tax rates. If spectrum and regulatory needs are met, governments can generate additional revenue of US\$528.7 million in the Arab Middle East and US\$383.7 million in North Africa by 2025 from the mobile ecosystem. Mobile connections in the Arab States grew 32% (average annual growth) over the past 10 years to 391 million in 2012 from 19 million connections in 2002. Tom Phillips, chief government and regulatory affairs officer, GSMA, urged governments to take action to increase spectrum availability and stabilize the regulatory environment. Mobile adoption has directly contributed US\$132 billion to the economies of the Arab States, or approximately 5.5% of total GDP, in 2011. The full-time employment created across the Arab States as a result of the availability of mobile technologies is estimated to have been more than 1.2 million jobs in 2011. If additional harmonized spectrum were allocated to mobile broadband, 5.9 million additional jobs could be created by 2025.

(February 14, 2013) telecomlead.com

Ovum

In the second iteration of its annual Regulatory Scorecard, Ovum finds that competition and investment in the global telecoms industry is being held back by inconsistent regulatory frameworks. Having assessed and ranked the regulatory performance of 11 countries across three geographic areas, the analyst firm noted that countries getting the worst ranks across the board were those with generally less competitive markets, and the lack of competition is often due to the uncertainty around the frameworks that are in place. "In Japan and South Korea, for example, the relationship between the government and the regulator could be perceived as too close. Independence from political involvement is important in ensuring a credible NRA, whose decisions may be challenged through an effective appeals process," said analyst James Robinson, co-author of the Scorecard. Although Ovum's Scorecard highlights similarities between countries within the same geographic region, significant differences occur across regions in most areas of regulatory activity. For instance, the regulation of the wholesale fixed sector differs from country to country, and from region to region, mainly due to the varying uptake of copper- and fiber-based fixed broadband. Countries within the same region are often ranked very differently; for example, Mexico appears significantly below its counterparts

in South and Central America for almost every respect of the regulatory environment. "While Colombia and Brazil are making progress in setting out a stable framework which reflects the industry's developments, the regulatory process in Mexico appears confusing and slow. This inevitably leads to inefficiency in most areas of regulation," said analyst Luca Schiavoni, the other co-author of the Scorecard. By contrast, spectrum policy is one area in which current best practice can be observed across most countries. As the volume of mobile data traffic has grown considerably over the past few years, many regulators have acted to liberalize certain spectrum bands from previous technological restrictions. Ovum's Scorecard also notes that regulators are awarding more frequencies for the development of next-generation mobile broadband. "No one country appears willing to be left out from the opportunities of 4G. This is particularly true in South and Central America, where mobile connections go a very long way toward getting people online," concluded Schiavoni. Consumer protection is also now more important to regulators all over the world. As Ovum's research shows, NRAs across Asia-Pacific, Europe, and South and Central America are aiming to guarantee a certain quality of service for users' Internet connections, and to ensure that those users can easily switch between providers. Nevertheless, some countries must still work to improve transparency, in particular concerning the advertising of broadband speeds and traffic management policies. (February 12, 2013) cellular-news.com

United States

Federal Communications Commission (FCC) has taken the first steps to unleash significant additional spectrum to accelerate the growth and expansion of new Wi-Fi technology that can offer faster speeds of one gigabit per second or more, increase overall capacity, and reduce congestion at Wi-Fi hot spots. The Commission proposed to make up to 195 megahertz of additional spectrum in the 5 GHz band (a 35% increase) available to unlicensed wireless devices. It also proposed to create a more flexible regulatory environment, and to streamline existing rules and equipment authorization procedures for devices throughout this band. Unlicensed National Information Infrastructure (U-NII) devices today operate in 555 megahertz of spectrum in the 5 GHz band, and are used for short range, high speed wireless connections including Wi-Fi enabled local area networks and fixed outdoor broadband transceivers. The proposed modifications would provide access to additional contiguous spectrum with consistent technical requirements, allowing unlicensed devices to use wider bandwidth channels, leading to faster speeds. Because the 5GHz band is already used for other purposes by both federal and non-federal users, the effort will require significant consultation with stakeholders to enable non-interfering shared use of the spectrum. (February 21, 2013) cellular-news.com

The ongoing debate over interoperability issues in the Lower 700MHz band has meant that certain licensees will now have more time to construct their Long Term Evolution (LTE) networks, Fierce Wireless reports, citing the Federal Communications Commission's (FCC's) Wireless Telecommunications Bureau. The watchdog will extend its interim construction deadline by six months – until December 13, 2013 – for all active Lower 700MHz

band A-block licensees that have an interim four-year construction benchmark deadline falling prior to the revised deadline. Prior to the deadline extension, the commission required all A-block licensees with spectrum in the 698MHz-704MHz and 728MHz-734MHz bands to provide signal coverage and offer service over to least 35% of the geographic area covered by their license no later than June 13, 2013, or within four years of the issuance of their initial concession – if this occurred after June 13, 2009. The FCC commented: ‘The commission is reviewing the issues raised in the 700MHz Interoperability proceeding, and we find it is in the public interest to briefly extend the construction deadline for the Lower A-block licensees’. However, the regulator noted that it is not taking any action with respect to the Interim Construction Benchmark Deadline for Lower B-block licensees, and all requests for extension or waiver of the Interim Construction Benchmark Deadline filed by Lower B Block licensees will remain pending.

(February 18, 2013) telegeography.com

The United States is, in fact, among the world leaders in broadband deployment, according to a study released Tuesday by the Information Technology and Information Foundation. “Through this report, we identify multiple areas where America is doing well, where improvement is needed and most importantly the real reasons for some areas of lagging performance,” Rob Atkinson, president of ITIF, said at an event to market the release of the study. Speaking at a panel discussion, ITIF’s Richard Bennett said that Hispanics and African Americans are among the lowest adopters of broadband. He also noted that high-school dropouts, no matter what race, are the lowest adopters of broadband. Areas in need of improvement are digital and physical literacy in urban areas, he said. The ITIF study found that the U. S. “is near the top of the rankings in terms of the deployment and adoption of high-speed, wired networks and leads the [Organization for Economic Cooperation and Development] in adoption of advanced wireless LTE broadband networks.” LTE refers to the long-term evolution standard for fourth-generation wireless broadband. While not the top country in terms of speeds, the study concluded that the U.S. has one of the top ten broadband speeds in the world. Bennett noted that statistics such as these have been helped along by a recent boom in broadband investment, including the greatest purchase of fiber-optic cables in 2011, since the internet boom in 2000. The report and panel concluded that price may not be the biggest factor when determining who is using broadband. According to the report, the U.S. ranks second only to Israel in introductory broadband pricing. The report concludes that the country “needs to invest significantly more in policies and programs that encourage more of our residents to come online and reap the benefits of the broadband Internet.” (February 12, 2013) broadbandbreakfast.com

T-Mobile USA has joined the ongoing debate regarding the Federal Communications Commission’s (FCC’s) planned incentive auctions for repurposed broadcast television spectrum, outlining a proposed band plan, lobbying for 600MHz interoperability and pushing for spectrum caps on frequencies below 1GHz. Fierce Wireless writes that T-Mobile apparently supports much of the watchdog’s plan to reallocate and reassign 600MHz spectrum from broadcast TV to mobile broadband use but has suggested a number of ‘tweaks’. In a blog posting on the company website, Kathleen Ham, T-Mobile’s vice president of federal regulatory affairs, wrote: ‘We are working with the FCC and other stakeholders to ensure that the 600MHz band plan, the ‘forward’ auction,

and the ‘reverse’ auction all work in concert to reallocate and reassign spectrum from broadcast television to mobile broadband uses. T-Mobile’s proposals call for some tweaks to the FCC’s already well-conceived plan. First, with regard to the band plan, the Commission should work to maximize the amount of paired spectrum made available through the clearing process, avoid interference to and from licensed wireless and broadcasting services, and enable device performance and size consistent with existing smart phones and tablets ... Second, in designing the forward auction, the FCC should adopt policies that accelerate the auction, thereby lowering the costs of, and encouraging participation in, both the forward and reverse auctions. Offering ‘generic’, spectrum licenses that are not frequency-specific within each geographic area and separating the licenses by Major Economic Areas rather than the smaller Economic Areas would help increase auction efficiency. In addition, the FCC should promote interoperability across all paired 600MHz band channels by adopting an express interoperability requirement and by using a quasi-random assignment process to assign generic 600MHz blocks ... Most importantly, to promote long-term competition, encourage auction participation, and prevent the further consolidation of spectrum below 1GHz, the Commission should adopt rules that prohibit any licensee from acquiring more than a certain percentage of spectrum below 1GHz, applied on a market-by-market basis. As we have noted elsewhere, adopting a spectrum-based cap equal to one-third of the available commercial mobile spectrum below 1GHz would give bidders reasonable assurances that they can meaningfully compete for spectrum in a geographic area without the risk of only one or two of the largest carriers commandeering the entire market’. Fierce Wireless adds that, in its parallel presentation to the FCC, T-Mobile displayed a graph showing that AT&T Mobility and Verizon Wireless together currently hold in excess of 100MHz of lower-band spectrum averaged across the top 100 markets, while all other carriers combined hold around 20MHz.

(February 5, 2013) telegeography.com

Three of the USA’s largest mobile networks have signed a joint-deal to test the sharing 95 MHz of radio spectrum that is currently used by Department of Defense and other federal agencies. This spectrum is located in the 1755 to 1850 MHz spectrum band, which the NTIA has analyzed for potential clearing and sharing opportunities. The networks participating in the trial are AT&T, Verizon Wireless and T-Mobile USA. Over the next couple months, spectrum monitoring, sharing and simulation activities will be conducted within the band to determine whether existing federal use of this spectrum is negatively impacted by the introduction of commercial mobile broadband services in the band, and conversely how the incumbent DoD system would affect mobile broadband services. Spectrum will be monitored at five DoD-specified locations. The actual sharing of spectrum will be evaluated between low power mobile broadband uplinks (base station receivers) and four uses identified by NTIA, including air combat training systems, aeronautical mobile telemetry, satellite command and control, and small unmanned aerial vehicles. In a statement, Stacey Black, AT&T Assistant Vice President of Federal Regulatory said that “while clearing spectrum for exclusive commercial licensing must remain the top priority, when that is neither time nor cost effective, AT&T supports exploring sharing arrangements.” (February 3, 2013) cellular-news.com

Canada

The Canadian Radio-television and Telecommunications Commission (CRTC) has finalized rates for wholesale high speed internet access services used by independent service providers including ISPs, which it says will lead to significant reductions in the wholesale rates certain providers pay to the large network operators. The CRTC noted that the wholesale rates are based on the large telephone and cable network operators' costs plus a reasonable markup. 'Large and small independent service providers now have the certainty they need to continue offering Canadians a choice of innovative and competitive services,' said Jean-Pierre Blais, Chairman of the CRTC. The rates enable large companies to recover their costs and make further investments in their networks, the watchdog claims. All large telephone and cable companies that provide wholesale high speed access services to independent service providers must now use a single billing model and offer the same rates for business and residential end-users. This will result in a more straightforward billing process for independent service providers, the CRTC stated. Previously, certain large companies charged different rates under different billing models for wholesale and residential business services. The CRTC also expects that the new wholesale rates will have a favorable knock-on impact on prices charged in the competitive retail market. (February 22, 2013) telegeography.com

Consumer groups urged telecom regulators to erect a set of new consumer-friendly rules mobile carriers must abide by when selling services, while industry players countered with calls to limit regulatory meddling. "All consumers we speak with are united that they need safeguards to prevent bill shock," Janet Lo, a lawyer from the Public Interest Advocacy Centre told the Canadian Radio-television and Telecommunications Commission at a hearing in Gatineau, Que. So-called bill shock, or customers unwittingly racking up surprise costs on their cellphone bills, is one area of focus at the week-long hearings. Fees charged to cancel a contract is another sticking point, as is the overall length of term a subscriber is bound to a carrier, which is typically three years – a full year longer than what's generally offered in other countries like the United States and Europe. (February 13, 2013) globalnews.ca

Peru

Peruvian watchdog OSIPTEL has issued fines totaling PEN5.38 million (US\$2.09 million) to a trio of cellcos for selling SIMs without requiring customers to provide proof of identity. OSIPTEL handed fines of 536 tax units (UIT) equivalent to PEN1.98 million to both Claro and Movistar, whilst Nextel was handed a fine of 381 UIT or PEN1.41 million. The penalties relate to a study carried out by the watchdog, which found that between October 2011 and December 2012 the three providers were selling devices and activating lines without verifying the buyer's identity. (February 18, 2013) telegeography.com

Chile

In order to keep pace with other Latin American countries in 4G deployment, SUBTEL, Chile's telecom regulator announced its plan to auction 4G spectrum reusing the 700 MHz radio spectrum. SUBTEL declared that spectrum will be awarded via public tender and the successful telecom operators will get license across entire Chile. Nearly 703-748 MHz frequencies will be used for transmission stations while 758-803 MHz frequencies will be used for transmission

base stations. Higher proliferation of Smartphones and tablets has increased the demand for online games and HD movie downloads, which in turn has fueled the demand for spectrum. Brazil, the largest country in Latin America has already auctioned 4G airwaves in several regions and has garnered \$1.4 billion. Carriers like Telefonica SA (TEF), America Movil S.A.B de C.V. (AMX) and Telecom Italia SPA (TI) have acquired 4G airwaves in the 2.5 GHz frequencies, which will allow them to transmit increased data at faster Internet speeds. Last year, the Argentine government announced its plan to auction 4G spectrum in 2013, but is now planning to withhold a significant portion of spectrum to distribute it to Arsat, which is planning to build its own network. In March 2012, the Colombian government announced its plan to auction 4G spectrum for mobile broadband, but recently suspended its plan based on the potential merger deal between two participating carriers. According to market intelligence firm Maravedis-Rethink, Latin America will have 51 million 4G subscriber by the end of 2017. Chile's telecom market is highly competitive and is one of the most highly penetrated countries in Latin America. Apart from the big South American carriers the auction provides a significant opportunity to comparatively smaller operators like NII Holdings Inc. (NIHD) to enter into the Chilean market. The 4G auction will be beneficial for the government as 4G spectrum is more expensive and will fetch more money for them. However, lower band spectrum increases coverage but carries fewer data than the higher band, which signifies that it will increase operators LTE reach but would hamper their data transmission requirement. (February 14, 2013) nasdaq.com

Telecoms regulator, SUBTEL has published the details of its planned 4G spectrum tender which will be based on reusing the 700 MHz radio spectrum. The proposal establishes frequencies from 703 to 748 MHz for the transmission stations and the user terminals 758 to 803 MHz frequencies for transmission base stations. The frequency bands between 698 and 703 MHz and 803-806 MHz bands will be reserved. The proposal is for the spectrum to be awarded by public tender, with licenses covering the entire country. The regulator has also published details for its Wi-Fi network expansion plan to boost coverage in rural areas. The first phase will cover 321 locations nationwide and two routes of the Antofagasta Region. The second phase to develop a network of 1,036 Wi-Fi hotspots for free public access in 259 villages over the next five years. Funding will come from the telecoms development fund and the regulator. (February 11, 2013) TeleSemana

Telecom regulator Sub-Secretaria de Telecomunicaciones (SUBTEL) has set technical rules for the use of the 700MHz band for mobile broadband services. The watchdog has adopted the model set out by the Asia-Pacific Telecommunity (APT), pairing frequencies in the 703MHz-748MHz range (uplink) with those in the 758MHz-803MHz band (downlink). The Long Term Evolution (LTE)-suitable spectrum will be allocated by a public tender and the concessions will cover the whole of the national territory. Other LatAm countries such as Ecuador, Colombia and Mexico had opted for the APT 4G scheme. Commenting on the decision, SUBTEL said in a statement: 'the 700MHz band is conducive to expanding existing coverage which is designed for densely populated areas. This contest is a commitment of the government to provide more spectrum for the development of telecommunications services and, in particular, provide higher quality services in mobile broadband internet.'

(February 5, 2013) telegeography.com

Brazil

The Brazilian Ministry of Communications (Minicom) has published its decision in the official gazette (Diário Oficial) to allow the allocation of the 700 MHz spectrum band for LTE mobile broadband. This means that the Brazilian telecom regulator ANATEL now has the green light to open debates and studies on the use of 700 MHz for LTE deployment. Currently, the 700 MHz spectrum is allocated for analog television in Brazil. According to the minister of communications, Paulo Bernardo, the government has two main objectives in the coming process: to accelerate the digitalization of TV in anticipation of the analog signal shutdown in Brazil scheduled for July 2016. The second goal is to make broadband with higher speeds more widely available. The ordinance states that ANATEL can initiate administrative procedures for the spectrum discussion after TV digitalization. Bernardo said that the actual auction might take place in February or March 2014. ANATEL's auction framework is expected to be released by the end of this year. Raising money won't be the primary goal of the auction, according to Bernardo. Instead, the auction rules may prioritize obligations for the winning operators, such as requiring fiber optic infrastructure that guarantees a speed of at least 10 megabits per second in about 700 to 800 of Brazil's largest cities. Bernardo added that the government will not allow the analog signal to be shutdown without a major public awareness campaign. ANATEL might focus the spectrum debate on meeting the goals of the National Broadband Plan (PNBL) and setting another spectrum band for current digital and analog TV services to make sure that existing coverage is maintained. In addition, ANATEL may also ensure that there will be no LTE service interference in TV broadcasting. LTE services are just starting in Brazil. Last year, ANATEL auctioned the 2.5 GHz spectrum band, and four big carriers won licenses. Claro was the first carrier to launch LTE services in some areas, and it is still the only one currently offering the next generation of telecom technology. Vivo, TIM and OI have until April to launch services in the cities that will host FIFA Confederations Cup (check out ANATEL's auction rules). Brazilian wireless carriers have wanted to use the 700 MHz band for deploying LTE for some time. In fact, some telecom operators tried to postpone the 2.5 GHz auction because they hoped to deploy LTE in a lower band.

(February 11, 2013) rcrwireless.com

Costa Rica

Telecoms regulator Superintendencia de Telecomunicaciones (SUTEL) has selected Informatica el Corte Ingles as the administrator for mobile number portability (MNP). The company has been given four months to implement the service. A committee of representatives from the nation's cellcos – including virtual operators Tuyo and Full Mobile – met to select a company to manage MNP from the four companies shortlisted by SUTEL, but failed to reach a unanimous decision. Incumbent operator ICE Cellular, as had been expected, attempted to delay the service's launch by voting against its peers. Previously, SUTEL had revealed that it had rejected 20 appeals from ICE to slow or cancel plans to launch MNP. (February 7, 2013) telegeography.com

European Union

Europe's telecoms regulator has vowed to use EU treaty powers to force through plans to create a single market for mobile services across the region as part of moves to drag the industry from "near-collapse". During a closed meeting

with ministers and telecoms industry chief executives at the Mobile World Congress in Barcelona, Neelie Kroes, Europe's digital commissioner, outlined an "action plan" to put the region "at the heart of the mobile industry it established and once dominated". She has identified €7 billion of investment needed to create a modern mobile telecoms market. The plan includes improving operators' access to the spectrum they need for mobile services, as well as €50 million of funding for research to deliver "5G" mobile technology by 2020. (February 27, 2013) irishtimes.com

The European Commission (EC) has reportedly launched a formal challenge to Budapest's revamped tax on phone calls and SMS messages, saying it breaches European Union (EU) law. The EU has written to the Hungarian government giving it formal notice of its intention to commence a second infringement proceeding against the country's telecoms tax regime, EC spokesman Ryan Heath said. The ruling on the EC's previous objection to Hungary's special telecoms tax is currently pending a decision from the European Court of Justice, and should Budapest lose that case, it could be required to pay back about HUF180 billion (USD814.9 million) collected in special taxes between 2010 and 2012. Mr. Heath went on to say that the special tax violated an EC requirement which rules that any 'administrative charge be proportionate to the state's costs in running the system'. However, the Hungarian government maintains its position that this ruling does not apply, as the levy it imposed is in the form of a tax – not an administrative charge. The ministry of economy issued a statement saying it will not modify the country's tax law, and argues that the measure is compliant with EU rules. As such, it is ready to defend itself against any infringement proceeding. The Magyar government has been struggling to contain its budget deficit within EU parameters (i.e. 3 % of gross domestic product), and its 2013 budget forecasts collecting up to HUF44 billion through the latest tax – which replaced the controversial telecom special tax in a flurry of measures wheeled out by Budapest in May 2012. (January 25, 2013) Reuters

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. The Commission is suggesting a lump sum of EUR5,277 per day for the period between the 2010 judgment and eventual second Court ruling. Today's decision to refer Portugal back to the Court, with a view to imposing financial penalties, follows a previous Court referral decision from the Commission in March 2012. The Commission said that it has taken into account the progress made by the Portuguese authorities since then, in particular through the publication of invitations to tender, and has therefore proposed a reduced lump sum. 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 in the designation procedure, and no company should be excluded from tendering. (January 24, 2013) cellular-news.com

United Kingdom

Telecommunications regulator OFCOM has decided that short range devices (SRDs) should use a new frequency band in future – 10.575 to 10.6 GHz, instead of the band they currently use, 10.675 to 10.699 GHz. (SRDs are various radio devices designed to operate over short range and at low power levels.) In order to implement its decision, OFCOM will need to make licence-exemption regulations under section 8 of the Wireless Telegraphy Act 2006. Following any representations from interested parties, OFCOM expects to publish a draft of the regulations by spring 2013. A statement on the decision is available online. (February 26, 2013) ofcom.gov.uk

Telecommunications watchdog OFCOM has announced the winners of its 4G spectrum auction. The regulatory body kicked off its auction in late January and said there was a total of seven bidders taking part. There were Everything Everywhere, which already has its 4G network up and running, as well as HKT, Hutchison 3G, MLL Telecom, Niche Spectrum Ventures (a subsidiary of BT), Telefonica UK (O2), and Vodafone. Today OFCOM revealed that there were five winning bidders in the auction. The company said in a statement that after more than 50 rounds of bidding, Everything Everywhere, Hutchison 3G UK, Niche Spectrum Ventures (a subsidiary of BT Group), Telefónica UK and Vodafone have all won spectrum. According to OFCOM, 4G services from a range of operators expected within six months. "The auction has achieved OFCOM's purpose of promoting strong competition in the 4G mobile market. This is expected to lead to faster mobile broadband speeds, lower prices, greater innovation, new investment and better coverage," OFCOM said today. "Almost the whole UK population will be able to receive 4G mobile services by the end of 2017 at the latest." The seven bidders were vying for 28 lots of spectrum spread over two separate bands. The lower frequency 800 MHz band is part of the 'digital dividend' freed up when analogue terrestrial TV was switched off. The higher frequency 2.6 GHz band is said to be ideal for delivering the capacity needed for faster speeds. Everything Everywhere purchased 2 x 5 MHz of 800 MHz and 2 x 35 MHz of 2.6 GHz for a total of £588,876,000 while Hutchison 3G bought 2 x 5 MHz of 800 MHz for a total of £225,000,000. Niche Spectrum Ventures (a BT Group subsidiary) snapped up 2 x 15 MHz of 2.6 GHz and 1 x 20 MHz of 2.6 GHz (unpaired) for £186,476,000 and Telefónica UK ponied up £550,000,000 2 x 10 MHz of 800 MHz. Lastly, Vodafone, the biggest spender of all, bought 2 x 10 MHz of 800 MHz, 2 x 20 MHz of 2.6 GHz and 1 x 25 MHz of 2.6 GHz (unpaired) for a grand total of £790,761,000. The total raised was £2,341,113,000. (February 21, 2013) tomshardware.com

BT has secured a licence for 2x15MHz of FDD and 20MHz of TDD 2.6GHz spectrum, the company confirmed today. This spectrum, which can be used to provide fast 4G connectivity, will enable BT to provide its business and consumer customers with an enhanced range of mobile broadband services, building on its existing strength in Wi-Fi. The licence was won via the recent 4G auction process conducted by OFCOM. The licence, which is indefinite in length, was won at a price of £186 million. There are no further licence fees for at least twenty years. Ian Livingston, BT chief executive, said that they are pleased to have secured this spectrum. We have said that we do not intend to build a national mobile network. Instead, this spectrum will complement our existing strategy of delivering a range of services using fixed and wireless broadband. We want our

customers to enjoy the best possible connections wherever they are and this spectrum, together with our investment in fibre broadband, will help us achieve that. The final price to be paid may include an additional amount which will be determined during the assignment stage of the auction which now follows. (February 20, 2013) btplc.com

Telecoms regulator OFCOM has launched a review of the fixed narrowband services markets. With its last examination of such services having produced publications in September 2009, February 2010 and July 2011, the watchdog's latest proposals aim to regulate and promote competition in fixed line telephone calls for the three year period from October 2013 to September 2016. The watchdog will review 'fixed narrowband telephony services', including retail services, in particular voice telephone calls, and wholesale services such as call origination and call termination, offered between communication providers (CPs). OFCOM has put forward a number of proposals, including: the removal of remaining regulation in the Hull area, where it says that, although KCOM Group's market remains high in retail residential and retail business fixed calls, competition law should be sufficient to address any competition concerns; the relaxation of fixed line incumbent BT's obligation to offer wholesale services, so that carrier pre-selection (CPS) is available only to CPs which offer both line rental and calls together; a requirement for wholesale call origination for calls to non-geographic numbers, until a separate review of this market is complete, and a cap on BT's charges for retailing these services; and requirement that both BT and KCOM provide interconnect circuits to other CPs on request, though charge controls will only apply to BT. Alongside such plans, OFCOM has also set out plans to cap fixed termination rates (FTRs) at long-run incremental costs (LRIC). The consultation on the proposals closes on 2 April 2013, and OFCOM has said it is seeking view from stakeholders on the issues. Further, it has stated its intention to finalize the review in time for any new rules, including any new network charge control (NCC) remedies, to take effect when the current NCC expires in September 2013. (February 7, 2013) telegeography.com

The telecoms regulator, OFCOM is considering loosening the rules around the use of radio spectrum, to permit existing mobile spectrum holders to reuse their spectrum for LTE services. Vodafone and Hutchison 3G UK (Three) has asked the regulator to lift the restriction on their spectrum licenses to permit the deployment of LTE services. The regulator has already granted permission to EE to reuse its 1800 MHz spectrum for LTE services. Telefónica O2 and Vodafone have also requested an amendment to their 900MHz licenses so as to increase the maximum permitted base station transmit power by 3 decibels (3dB) for 3G use. OFCOM said that it proposes to agree to liberalize the radio spectrum so that LTE services can eventually be deployed at 800 MHz, 900 MHz, 1800 MHz, 2.1 GHz and 2.6 GHz frequencies. The regulator also said it is minded to approve the change to the 900 MHz spectrum licenses to allow the use of 3G services by increasing the base station power limits. The regulator has now launched a public consultation on the changes. (February 1, 2013) cellular-news.com

Mobile phone operators Vodafone and Three have asked British regulator OFCOM for permission to re-use their existing airwaves for 4G services, following in the footsteps of larger rival EE. Britain got superfast mobile broadband late last year, long after countries such as the United States and Japan, when OFCOM allowed EE to run 4G services over

its allocated spectrum. OFCOM said on Friday it had started a consultation over liberalizing more of the spectrum that was previously licensed for 2G and 3G mobile services in response to the requests. In a statement that indicated it was keen to press ahead with the idea, OFCOM said on Friday: "This will meet a long-standing objective to liberalize all mobile licenses so that there are no regulatory barriers to the deployment of the latest available mobile technology". If implemented, the changes would allow operators to deliver 4G services across their existing licenses in the 900 MHz, 1800 MHz and 2100 MHz wavelength bands, alongside the new airwaves in the 800 MHz and 2.6 GHz bands that are up for grabs in an auction. OFCOM last month started the auction of new radio spectrum, freed up for mobile services after TV switched to digital transmissions, for 4G. Matthew Howett, telecoms regulation analysts at Ovum, said the changes would be welcomed by operators and would bring Britain in line with other countries, but the airwaves were unlikely to be used for 4G services in the near future. "Despite operators being able to deploy 4G services in these bands previously restricted to 2G and 3G technologies, most are unlikely to do so in the short term," he said. "They would first need to be cleared of their existing use through a process of refarming that would probably take years rather than months, and so the spectrum that is currently being auctioned by OFCOM will most likely be used for Vodafone, O2 and Three's initial deployment of 4G services." The auction of new airwaves, which are being sold in 28 blocks that can be combined to provide coverage across the country, kicked off on January 23 and is expected to last around six weeks. The government has already penciled in a gain of 3.5 billion pounds (\$5.5 billion) from the sale. The closing date for responses to the consultation is March 29. (February 1, 2013) reuters.com

Netherlands

The Netherlands' spectrum frequencies watchdog Agentschap Telecom (AT) has formally extended 41 frequency licenses for the provision of public electronic communication services in the country. The decision was taken on January 2 and relates to the extension of 2G GSM mobile operating licenses in the 900MHz and 1800MHz bands in the country. KPN Mobile The Netherlands, Vodafone Netherlands and T-Mobile Netherlands will each pay almost EUR4 million (US\$5.3 million) per 100kHz for the 900MHz licenses, while the 1800MHz concessions will cost EUR930,000 per 100kHz. The four auction winners had until January 9 to pay for the licenses, having submitted deposits before the auction began. The announcement follows the recent successful conclusion of multi-band spectrum frequency licenses for 4G services in the Netherlands, which raised EUR3.8 billion for government coffers, significantly more than the EUR480 million estimate. KPN's mobile arm along with the other two incumbents – Vodafone and T-Mobile – each won 4G spectrum, as did new market entrant Tele2 of Sweden. Domestic cable operators Ziggo and UPC, which both have a strong presence in the broadband market had planned to bid jointly, but pulled out when the bidding price went too high. (January 11, 2013) Staatscourant

France

The French government has accepted operator Bouygues Telecom's request to refarm 1800MHz 2G frequencies to 4G at a price of around EUR 60 million a year over 20 years. This is around six times more than operators are paying to offer 2G and is also more than the 4G licenses sold in the

2600MHz band, which cost each operator around EUR 250 million. Operators who take up the option will continue to pay an additional variable fee of 1 percent of turnover. Digital Economy Minister told that the money raised would be used by the government to help finance the country's fiber rollout. Telecom regulator ARCEP has until March 20 to set the date when operators will be able to start using the 1800MHz band for 4G. (February 25, 2013) Les Echos

According to data published by French telecoms regulator ARCEP, the country's wireless subscriber base stood at 73.1 million at the end of 2012, up 6.6% year-on-year. Metropolitan France accounted for 70.5 million, with the remaining coming from France's overseas departments and territories, such as French Guiana, Guadeloupe, Martinique, Reunion and Mayotte. France's four mobile network operators Orange, SFR, Bouygues and Free Mobile claimed 62.8 million customers, while the share accounted for by mobile virtual network operators (MVNOs) fell 0.4% in the fourth quarter of 2012 to 13% of the total. (February 8, 2013) arcep.fr

Telecoms regulator ARCEP will consult with operators on February 7 on the issue of refarming spectrum in the 1800MHz band so that it can be used for 4G Long Term Evolution (LTE) services, rather than the 2G GSM services for which it is currently used. The watchdog is expected to publish a decision on the matter by the end of March. Bouygues Telecom is known to be a strong advocate of the proposal, as the company has a surplus of 2G capacity. However, rival operators Orange, SFR and Free are understood to be opposed the idea. (February 5, 2013) telegeography.com

Spain

Spain's antitrust body said it had kicked off disciplinary proceedings against France Telecom's Orange for failing to give it timely notice of its purchase of KPN's mobile operator Simyo. On February 13, the regulator approved the purchase of the virtual operator, which does not have its own network but rents it from established players. But the watchdog said Orange had completed the deal on December 14 before it informed the regulator. Orange and KPN did not disclose financial details of the deal. Orange inherited 380,000 clients from KPN, taking the total number of its customers in Spain to 12.2 million. It has said it intends to keep Simyo as a low-cost operator and would not change tariffs. The regulator said it had a maximum of six months to reach a final resolution on the matter, which could result in a fine for Orange. The operator was fined in December, along with peers Telefonica and Vodafone, for charging too much for text messages. (February 26, 2013) reuters.com

A letter sent by European Union (EU) Commissioner Neelie Kroes to the Spanish government expresses 'deep concern' over a plan to merge Spain's anti-monopoly authority with its regulatory agencies for telecoms and energy by mid-2013, which received state approval last year. The letter asks Spain to substantially revise its plan on the basis that it would result in a lack of independence of the resulting market and anti-trust watchdog; otherwise the EU Commission will open an infringement procedure against the country. The telecoms regulator, the Comision del Mercado de las Telecomunicaciones (CMT) operates under the auspices of the Secretaria de Estado de Telecomunicaciones y para la Sociedad de la Informacion, which itself is part of the multi-sector Ministerio de Industria, Energia y Turismo (Minetur). The National Competition Commission acts as Spain's anti-monopoly agency across all commercial sectors. (February 26, 2013) Dow Jones Newswires

Spain shed over 2.7 million mobile lines in 2012. Fixed broadband was the only market that grew in 2012, with net addition totaling 416,000. The number of fixed broadband lines increased by 3.7% year-on-year, mainly boosted by alternative operators. The fixed telephone market decreased in 2012 for the fifth consecutive year. Spain lost 277,347 mobile lines and datacards in December 2012, ending the month with a total mobile base of 52.94 million users, down by 5 percent over the same month of 2011, according to a report by Spanish regulator CMT. The MVNOs added nearly 102,79 net lines in December, Yoigo saw 38,280 net additions, while Orange shed 26,780 subscribers, Movistar lost 196,500 customers, and Vodafone shed 195,130 users in the month. The M2M sector went up by 11.4% over the same period of 2011, to over 2.79 million lines. The growth of the M2M sector brings the total number of mobile lines to over 55.74 million. Spain ported 510,491 mobile phone numbers in December 2012, up nearly 3.5% versus the same period of 2011. Yoigo, the MVNOs, and Orange saw a positive balance in portability, while Movistar and Vodafone registered a negative balance. Yoigo won 20,353 net users, the MVNOs added 106,182 users, Orange won 30,840 ported customers. Vodafone shed 91,742 customers, while Movistar shed 65,633 users in the month. Spanish operators added nearly 42,380 broadband users in December. Spain ended the month with a total base of 11.56 million broadband lines, up by 3.7% year-on-year and a penetration of over 25 lines per 100 inhabitants. The number of DSL lines increased by 2.9 year-on-year to 9.18 million lines at the end of December 2012. The overall number of fixed lines dropped by 20,579 to 19.01 million lines at the end of December. Fixed penetration slightly increased to 41.2 lines per 100 inhabitants in December 2012, versus 42.1% in the year-earlier month. Around 184,323 fixed numbers were ported in December, up by 18.3% from 155,830 fixed numbers ported in December 2011.

(February 12, 2013) telecompaper.com

New Zealand

New Zealand's communications minister has revealed that the country will conduct an auction in the third quarter of 2013 for spectrum freed up by the digital dividend. With the minister confirming plans to sell off 700MHz frequencies, it is understood that the spectrum will be organized into blocks according to the Asia Pacific Telecommunity band plan. Winning bidders are expected to gain access to the frequencies in January 2014, once the final stage of the digital TV switchover has been completed the previous December. However, it has been suggested that early distribution of spectrum could be on the cards if the early access is negotiated by those that emerge from the sale process with frequencies. Meanwhile, it has been confirmed that the state will not set aside 700MHz spectrum for either emergency services or Maori groups, the latter of which had reportedly been seeking to stake a claim over the spectrum. However, the government has outlined plans to establish a NZD30 million (US\$25.2 million) 'ICT development fund', which the government will examine methods to 'assist Maori leverage the potential benefits from new technologies, and promote and support the language and culture in a digital world.' Emergency service providers for their part have indicated a preference for spectrum in the 800MHz band.

(February 21, 2013) ZDNet Australia

Slovak Republic

A spokesperson for the Telecommunications Office of the Slovak Republic (TU SR) has confirmed that successful bidders will be issued new mobile licenses via the country's eagerly anticipated 4G auction for 800MHz/1800MHz/2600MHz frequencies this year, in a process which the government hopes will attract a fourth national wireless network operator. In a report spokesperson was quoted as saying that the TU SR 'plans to implement the electronic auction and issue the successful bidders permits in 2013', although a firm timetable has still not been set despite previous statements from the regulator indicating the auction would be initiated in 'early' 2013. The spokesperson also indicated that a competitive tender for a consultancy/partner to oversee the electronic auction (which was launched in September) has now been completed. Spokesperson also noted that the government/regulator has been in regular contact with 'consulting firms that represent foreign applicants wishing to enter the Slovak market.' The same report quoted a spokesperson for Slovakia's transport and communications ministry, stating the case for a new market entrant: 'We can say that the arrival of a new mobile operator usually leads to increased competition in the market. It might [affect] customers either in the form of lower prices of existing services or introducing new services.' Under the TU SR's proposals, an individual spectrum cap in the 1800MHz band is applicable, of 30.4MHz (2x15.2MHz) – which all three existing domestic cellcos already hold – therefore leaving the 1800MHz portion of the auction for a newcomer. There is a total of 38.8MHz (2x19.4MHz) of spare 1800MHz frequencies potentially available, but the TU SR has stated that it will offer a new entrant 2x15.2MHz to match the existing operators, in the interests of a fair market. Vietnamese military-owned global telecoms group Viettel and the PPF Group are among the potential bidders linked with the upcoming auction, alongside the UK's Vodafone Group, India's Bharti Airtel and Japan's NTT DoCoMo, although none have publicly confirmed their intentions to bid. In addition to Slovakia's three established cellcos – Slovak Telecom (T-Mobile), Orange and Telefonica (O2) – two other Slovak telecoms operators, SWAN and UPC Slovakia, have indicated they will consider participation in the 4G auction, dependent on the final tender conditions.

(February 25, 2013) HNOnline.sk

Macedonia

Incumbent telco Group ICE has challenged the decision by sector regulator Superintendencia de Telecomunicaciones (SUTEL) to select Informatica El Corte Ingles as the administrator for the nation's number portability (NP) system, TeleSemana reports. ICE said that the selection process was flawed, adding that none of the bids met the minimum requirements stipulated by the watchdog and that the winning bidder altered its offer after it was submitted. The telco, which operates in the wireless market via its mobile arm ICE Celular and provides services under the 'Kolbi' name, also fought criticism that it was further attempting to hold the process, saying that its challenge 'should be interpreted as an action against the regulator and not as a way to block number portability.' ICE added that certain aspects of the terms of mobile number portability (MNP) violate constitutional rights. SUTEL has rejected more than 20 appeals from ICE to halt or delay MNP. In the selection process for an NP administrator, a committee representing all of the nation's operators voted on the submitted applications: a unanimous vote was required for a winning bid. As had been anticipated, ICE cast its vote against its fellow carriers, obliging SUTEL to intervene.

(February 18, 2013) TeleSemana

Greece

The National Telecommunications & Post Commission (EETT) has presented an action plan for 2013 which identifies priority areas as: facilitating the expansion of high speed broadband networks across the country (including fixed VDSL and mobile LTE); reducing wholesale network termination rates; simplifying Greece's mobile licensing framework; and applying the entire new European Union (EU) electronic communications framework. A specific area of focus is the management of spectrum from the transition to digital terrestrial television (DTT) – which was implemented in July 2012 – including the exploitation of the digital dividend (790MHz–862MHz) for mobile broadband services and the more efficient oversight of available spectrum via an enhanced 'Spectrum and Radio Frequency Management Information System', the EETT stated.

(February 21, 2013) telegeography.com

Hungary

Hungary's top court, the Curia annulled a mobile frequency tender that would have enabled the launch of a fourth mobile telecommunications company, owned by the state. The Curia decision said the tender was unlawful, upholding the judgment of the country's Metropolitan Court and following an appeal by the telecom firms against the outcome of a frequency tender that ended January 31 last year. Hungary's mobile market is small and highly competitive so the appearance of a fourth player let alone a state-owned firm would have posed further challenges for the three existing operators. The decision means the launch of a planned fourth, state-owned mobile company in Hungary will be postponed or canceled. The state-owned company would have won a frequency band covering a range that would support both Internet and voice services. Under the tender, the mobile phone companies operating in Hungary Norway's Telenor ASA (TEL.OS), the U.K.'s Vodafone Group PLC (VOD) and Magyar Telekom Nyrt.(MTELEKOM.BU), owned by Germany's Deutsche Telekom AG (DTE.XE) would have been awarded parts of the 900 megahertz frequency band on offer which would have allowed them to widen their existing businesses. Vodafone said in a statement that it would be open to a deal with the state on the frequency band it would have won, as it has already used the 2 MHz band for building its mobile Internet coverage. Magyar Telekom and Telenor said they hoped the state would find an effective way of handling the spectrum. The state wasn't immediately available for comment. (February 26, 2013) totaltele.com

Nigeria

Nigeria's telecoms network operators will continue to pay 2.5% of their annual revenue as operating levy, the Nigerian Communications Commission (NCC) has said. The NCC held a public review on the draft Annual Operating Levy (AOL) regulation last week, which also seeks to impose sanctions and penalties on defaulters. Director General of NCC, Eugene Juwah, said the draft regulations are aimed at creating and providing an effective and efficient administration of the operating levy regime. 'The Commission is certain that these regulations will provide the guiding standards and principles for a dynamic AOL administration regime in the Nigerian telecommunication industry and represent another effort by the commission towards ensuring that the standards in the industry reflects international best practices while taking into consideration our local circumstances,' he said. In other news, the NCC has invited stakeholders to take

part in a forum on March 4 to discuss the options available for licensing the two remaining 20MHz slots in the 2.3GHz band. (February 25, 2013) Daily This Day

The number of fixed and mobile telephone subscribers in Nigeria increased to over 113.195 million at 31 December 2012 from 107.367 million three months earlier and 95.886 million at the end of 2011, according to the latest statistics from the Nigerian Communications Commission (NCC). GSM mobile operators accounted for 97.03%, or 108.829 million, of Nigeria's total telephony user base at the end of the fourth quarter of 2012 (up from 90.566 million users twelve months earlier), followed by struggling CDMA mobile networks with 2.6%, or 2.948 million, of the total (down from 4.601 million), while fixed and fixed-wireless operators claimed just 0.37%, or 418,166, of the total, compared to 719,406 users at end-2011. According to the NCC, the largest mobile operator by subscribers remains South Africa-based MTN, with around 47.44 million users on its GSM network at the end of September 2012, up 3.9% quarter-on-quarter and accounting for 42.4% of Nigeria's total GSM and CDMA wireless subscribers. (February 12, 2013) ncc.gov.ng

Azerbaijan

According to the Ministry of Communications and Information Technology (MCIT) Azerbaijan's three mobile network operators Azercell, Bakcell and Azerfon have signed an agreement on the implementation of mobile number portability (MNP) in the country. The introduction of MNP has encountered a number of delays in Azerbaijan. In January 2010 communications minister said that MNP documents had been drawn up and submitted to the Cabinet of Ministers, but the country's mobile operators had not agreed to implement the service. It was not until June 2011 that the MCIT was reported to have finalized the legal framework for the implementation of MNP, with operators asked to start preparing their networks the following August. At the start of 2012 mobile operators began switching to a ten-digit numbering system in preparation for the introduction of MNP, which at that date was expected to take place by the end of the first quarter of 2012.

(February 25, 2013) telegeography.com

Brunei

The Authority for Info-communications Technology Industry of Brunei Darussalam (AITI) has assured B-Mobile subscribers that it is determined to resolve all matters pertaining to the disruption of the cellco's services in recent months, and will protect public interest in the light of recent reports pointing to the company's financial frailties. A statement from the regulator, published by The Brunei Times, read: 'The [AITI] has taken note of the Notice of Petition for winding up against B-Mobile published on 5 February and will do its utmost to protect the public interest, particularly those of the affected subscribers with the intention to facilitate the early restoration of an acceptable level of services in accordance with the Authority's Code of Practice on Quality of Service'. Last week co-owner Telekom Brunei (TelBru) submitted a petition to the Supreme Court to wind up B-Mobile, and a court hearing has been scheduled for February 28 to discuss the move. While no reason has been publicly stated for TelBru's drastic legal move, the speed of the developments suggests that the company's troubles are far worse than initially feared. (February 11, 2013) telegeography.com

Korea

The Korea Communications Commission (KCC) has turned down applications from two companies for a mobile network concession. Echoing developments just over a year ago, the regulator has reportedly put paid to applications from Korea Mobile Internet (KMI) and Internet Space Time (IST) for the license; both companies were similarly rejected in December 2011. Following the latest applications, it has been revealed that, having needed to score more than 70 out of 100 to receive regulatory approval for a license, KMI and IST only managed 64.21 and 60.08, respectively. In particular it is understood that the KCC cited a number of factors, including a lack of knowledge regarding technology, unclear business plans and funding. Notably, with financial stability one of the watchdog's key criteria, it has been revealed that both would-be operators scored below 70 in this area, with IST some way off with a score of just 53.14. Commenting on the importance of financing, KCC vice-chairman Kim Choong-shik was cited as saying: 'they need to invest in the trillions of won ... (Despite a lack of funds) small- and mid-sized firms continue to file for approval.' Further, the regulator is also believed to have claimed that IST's proposed subscriber target of eight million in five years was 'implausible'.

(February 4, 2013) telegeography.com

Thailand

Thailand is looking at the possibility of holding an auction for 2G spectrum by the third quarter of 2014, as the current contract with state-owned CAT Telecom will wind down this September. According to The Nation's report Wednesday, local operators True Move and Digital Phone Company (DPC), a subsidiary of Advanced Info Service (AIS), will be returning their 12.5 megahertz (MHz) of 1800MHz bandwidth each to CAT Telecom once their concessions end later this year. As such, state regulator the National Broadcasting and Telecommunications Commission has set up a sub-panel to look into the feasibility of holding the 2G auction next year. The schedule may be pushed back if CAT Telecom wishes to extend its spectrum licenses for another two years based on its existing contract terms, noted Settapong Malisuwan, chairman of the NBTC's telecom committee, in the report. Settapong added a panel for the auction proceedings will be set up by the middle of this year, should things advance positively. Meanwhile, the sub-panel has also been looking into the actions needed to take to ensure customers of True Move and DPC are not affected should there be a spectrum auction. Among its considerations is expanding the number portability capabilities of all local operators, so that if True Move and DPC customers move to other service providers, their phone numbers remain consistent. The NBTC will finalize the plans for number portability "early next month", the report added. The current daily limit for number transfer for the five domestic operators is capped at 40,000 numbers.

(February 14, 2013) zdnet.com

The telecoms committee of the National Broadcasting & Telecommunications Commission (NBTC) has tentatively set the third quarter of 2014 as the re-auction date for 25MHz of 1800MHz spectrum to be returned to the Thai regulator when concessions expire in September this year. 12.5MHz apiece will be returned by True Corp's True Move unit and Digital Phone Company, a subsidiary of Advanced Info Service (AIS), after their build-transfer-operate (BTO) concessions under state-owned CAT Telecom elapse, and the watchdog plans to package the 1800MHz frequencies in 4G-suitable licenses. The chairman of the telecoms committee,

Settapong Malisuwan, added that provisions must be made to migrate the existing 2G 1800MHz service users, including expanding the capacity for mobile number portability (MNP) to transfer users to new 3G/4G networks, which is currently 40,000 numbers per day. AIS' 1800MHz subscriber base is only a minor segment of its total users, but migrating True's large existing 1800MHz user base within a year or so of the concession expiry date represents a significant undertaking.

(February 13, 2013) The Bangkok Post

A plan by the National Broadcasting & Telecommunications Commission (NBTC) to reallocate 1800MHz band mobile spectrum after concession periods expire has been approved in principle by the Thai regulator's telecoms committee. The committee is expected to form a panel to prepare an auction of the returned spectrum in 2014, following the expiry of concessions under which private operators offer 2G services, firstly True Corp's True Move subsidiary and AIS' DPC unit in September this year. State-owned TOT and CAT Telecom, the issuers of the original build-transfer-operate (BTO) 2G concessions, have lobbied to be automatically granted 1800MHz spectrum when rights to the frequencies expire.

(February 7, 2013) telegeography.com

Taiwan

Taiwan's mobile networks have called on the government to clarify the rules for the planned 4G license auction following confusion about how the auction would affect existing 2G licenses. Some of the spectrum due to be auctioned off is currently used by the 2G networks and is not due to be released for other services until 2017. It had been suggested that the smaller networks may be persuaded to sell or surrender their 2G licenses early. "It is important for the government to set clear game rules for 4G license holders so they will have networks that will work," Acer chairman J.T. Wang, who serves as chairman of the Taipei Computer Association (TAC), told. The networks have also expressed concerns about the potential reserve prices for the 4G licenses, saying that they should not be set at the high-levels that were used for the 3G licenses in 2002, when the government raised US\$1.65 billion from the auction.

(February 22, 2013) Taipei Times

Hong Kong

Telecom regulator OFCA has announced the bidders in its upcoming auction of 2.5GHz/2.6GHz mobile spectrum licenses as: China Mobile Hong Kong, China Unicom (Hong Kong), CSL, Genius Brand (an infrastructure-sharing joint venture of PCCW [HKT] and Hutchison [3]), and SmarTone.

(February 22, 2013) telegeography.com

The four Hong Kong cellcos which currently hold 2100MHz 3G spectrum – CSL, Hutchison (3), PCCW and SmarTone – have written a joint letter opposing proposals by the government and the Office of the Communications Authority (OFCA) to re-auction a third of the frequency band in 2016 when the existing license periods expire. The letter addressed to an ICT panel within Hong Kong's legislative council alleges that the government's preferred option is specifically aimed at giving the territory's fifth operator China Mobile Hong Kong its own portion of 3G spectrum. The Hong Kong arm of the Chinese cellular giant has previously resorted to reselling 3G capacity of its local rivals, although last year it launched its own 4G network using both the 2600MHz and 2300MHz bands. The foursome's letter gives the opinion

that surrendering some of their 2100MHz spectrum would result in network congestion, slower data speeds and dropped or disrupted calls for consumers, particularly in high-traffic areas. OFCA published its second consultation paper on the proposed reallocation of 3G spectrum on December 28, 2012 to seek further views by a deadline of February 28, 2013. A final frequency reassignment strategy decision is due before October 2013, to give the incumbent 3G licensees at least three years' notice before an auction mooted for October 2016. (February 5, 2013) [TelecomAsia](#)

India

India has received just one application to participate in the planned spectrum auction next month, the Department of Telecom announced. Sistema Shyam Teleservices, which operates under the name MTS India, applied to bid for spectrum in the 800MHz band. There were no applicants for the frequencies in the 900 and 1800 MHz bands. The auction includes frequencies not sold in the auction last November, which was boycotted by many operators due to high reserve prices. The government has lowered the prices this time around, but operators are still calling for deeper cuts. In addition, existing operators such as Vodafone India and Bharti Airtel are opposing the auction of their 900MHz band frequencies before they expire. The government is under a court order to sell off the entire spectrum associated with the licenses canceled in early 2012 by the Supreme Court, due to irregularities in the previous allocation system. Much of this spectrum was included in the planned auction in March, but government officials said another auction would be needed after that to complete the process. (February 26, 2013) [telecompaper.com](#)

India's Telecom Disputes Settlement and Appellate Authority (TDSAT) has been suspended from making judgments following the retirement of the last of the three-person adjudications panel. The body adjudicates in disputes between government and telecoms networks and requires a three-person panel to issue rulings, but has been down to just one last remaining member for several months. He has now retired as well, leaving the body without a ruling panel to make decisions. The Chairman of the panel retired last November, leaving the panel with just two members, and causing the problems when the two members split on the vote as to whether 3G roaming was legal as the networks argued, or illegal as the government preferred. At the moment, any appeals and rulings will have to be left in limbo pending the appointment of a new panel of judges. It is not expected that the new panel will be named before the end of the month. (February 18, 2013) [cellular-news.com](#)

The operators offering 4G services with 2,300-MHz spectrum are likely to get the options of switching to the more efficient 700-MHz band, with the Department of Telecommunications (DoT) working out modalities to offer the latter in the next round of auction. Reliance Industries, Bharti Airtel, Aircel and Tikona Digital are among the major telcos that had won 20 MHz of 2,300-MHz spectrum in each circle for 4G services. Bharti has already launched services in a few cities, while RIL is expected to make an announcement in June. These firms and BSNL had together paid Rs 38,543 crore for three blocks of spectrum. Of the total, RIL's subsidiary had forked out Rs 12,847 crore for pan-Indian operations. Under a 'swap' scheme, this money would be adjusted against the value of the spectrum they win in the 700-MHz band. It is still being considered how much spectrum they would be

allowed to swap. Telcos say the 700-MHz band, one of the most efficient spectral bands, requires only half the number of towers for offering the same quality of service as 2,300-MHz spectrum. That means a substantial cut in the capital investment required for rollout. Also, with many countries like the US (AT&T Mobility, Verizon), Latin America and Australia setting up 700-MHz-based LTE networks globally, an ecosystem is already in place. So, there already are 284 4G devices currently working with 700-MHz spectrum. Just a month ago, AT&T had paid \$ 1.9 billion to buy additional 700-MHz spectrum from Verizon. A DoT official says the department is considering the Telecom Regulatory Authority of India (Trai) recommendation that spectrum in the 700-MHz band be priced at four times the 1,800-MHz base price. Many experts say, at this high price, the swap option might not look attractive, as it would effectively mean the base price for 5 MHz of 700-MHz spectrum for pan-Indian operations would be a staggering Rs 47,508 crore — more than 10 times the price of an equivalent amount of 2,300-MHz spectrum. That would almost neutralize the lower investment requirement and the advantages of higher spectral efficiency. As part of the plan being considered, about 90 MHz of spectrum would be available in this band for auction. The government is looking at offering up to 10 MHz in each circle, in eight blocks, with no restriction on operators for the number of blocks they want to bid. A top DoT official says: "We are looking at an auction of about 100 MHz of the 700-MHz spectrum in the first half of 2014-15. Its likely 2x45 MHz would be auctioned, while 10 MHz would be kept in between as guard band. We might consider allowing operators to swap 2,300-MHz spectrum with the 700-MHz one." The limit for operators' spectrum acquisition in this band would be 50 per cent of that assigned in their respective circles and 25 per cent of the total spectrum assigned in all bands in all service areas put together. As part of the plan, a large part of the 700-MHz spectrum, used by analog and digital broadcasting services, will be shifted to a new band. (February 18, 2013) [business-standard.com](#)

India's Supreme Court has ordered that the mobile networks who had their licenses cancelled last January, and also did not take part in the re-auction of those licenses last November should shut-down their networks "forthwith" The news could see the immediate suspension of the MTS India (SSTL) network, which has been fighting to have its suspension order set aside pending the auction of the remaining spectrum due next month. In addition, the court ordered that the networks that did take part in the GSM spectrum auctions should be required to launch services as soon as the spectrum is vacated.

"Telecom companies, which have been unsuccessful in the bidding and those after the cancellation of the licenses did not participate in the fresh auction, are directed to cease from continuing operations forthwith and the successful bidders will immediately start in their respective circles," the court said. Bharti Airtel, Vodafone, Telewings (Telenor), Videocon and Idea Cellular all bid for licenses in the November auction, although bids and interest were lower than expected due to the high reserve fee set by the government. The remaining licenses are due to be offered next month, at a lower reserve fee. (February 15, 2013) [cellular-news.com](#)

India's Supreme Court has ruled that all spectrum vacated by operators as part of its cancellation of 122 concessions in February 2012 must be put up for sale in the upcoming auctions. The apex court also instructed all cellcos that had

been given permission to continue providing services until 4 February must cease operations unless they intend to bid for spectrum in the March 11 auction. The ruling will allow Russian-backed cellco Sistema Shyam Teleservices (SSTL) to continue operating until March, after the operator chose not to participate in the spectrum auction in November 2012. (February 13, 2013) *The Economic Times*

As per the 'Highlights on Telecom Subscription Data as on December 31, 2012' released by the Telecom Regulatory Authority of India (TRAI), Mobile Number Portability requests increased from 77.13 million subscribers at the end of November 2012 to 80.06 million at the end of December 2012. In the month of December 2012 alone, 2.94 million requests have been made for MNP. Active wireless subscribers on the date of Peak VLR in December 2012 are 701.60 Million, 81.14% of the total subscribers. Broadband subscription reached 14.98 million in December 2012 from 14.88 million in November 2012. The number of telephone subscribers in India decreased to 895.51 million at the end of December, 2012 from 921.47 million at the end of November 2012, thereby registering a monthly growth rate of -2.82%. The share of urban subscribers has declined to 62.20% from 62.70% whereas share of rural subscribers has increased to 37.80% in the month of December 2012. With this, the overall Teledensity in India decreased to 73.34 at the end of December, 2012 from 75.55 of the previous month. Subscription in the urban areas decreased from 577.78 million in November, 2012 to 556.96 million at the end of December, 2012. Subscription in rural areas decreased from 343.69 million to 338.54 million during the same period. The monthly growth rate of urban and rural subscription is 3.60% and -1.50% respectively. The overall urban Teledensity has decreased from 155.76 to 149.90 and Rural Teledensity decreased from 40.49 to 39.85. Total wireless subscriber base decreased from 890.60 million in November 2012 to 864.72 million at the end of December 2012, registering a monthly growth of 2.91%. This decline is majorly due to large scale disconnections of inactive SIMs by some of the service providers. The share of urban wireless subscribers has decreased from 62.19% to 61.65% where as share of rural wireless subscribers has increased from 37.81% to 38.35%. The overall wireless Teledensity in India has reached 70.82. Wireless subscription in urban areas decreased from 553.91 million in November 2012 to 533.12 million at the end of December 2012. The wireless subscription in rural areas decreased from 336.70 million to 331.60 million during the same period. The urban wireless Teledensity has decreased from 149.32 to 143.48 and rural Teledensity has decreased from 39.67 to 39.04. Wireline subscriber base declined from 30.87 million at the end of November 2012 to 30.79 Million at the end of December 2012. Net reduction in wireline subscriber base was 0.08 million. The share of urban subscribers has increased from 77.34% to 77.43% where as share of rural subscribers has declined from 22.66% to 22.57%. The overall wireline Teledensity has marginally decreased from 2.53 in November 2012 to 2.52 in December 2012, with urban and rural Teledensity being 6.42 and 0.82 respectively. BSNL and MTNL, the two PSU operators hold 79.57% of the Wireline market share. (February 11, 2013) government.in

Department of Telecommunication (DoT) is known to have proposed a unified license for the telecom and broadcasting offerings. With the unified license proposed the customers would be able to get variety of service such as the mobile, landline, DTH, cable TV from a single company

without the entity owning the full infrastructure. A special committee, which was constituted to prepare the Unified License document under the recommendation of DOT has recommended two licenses—Unified License (National) and Unified License (Service Area) for the telecom operators as reported by Business Standard. This new service operator may not be required to own complete infrastructure for delivering the services as required at present. The DoT had earlier proposed to split the unified license (UL) for access service into two sub sets—UL (Network Services) and UL (Service Delivery) that could increase competition and lessen regulatory interference. The DoT had suggested this based on the recommendations made by TRAI. TRAI had recommended that a national level or service-area level unified license and a separate wireless operating license for telecom operators, following the suggestions of the National Telecom Policy 2012, which had directed delinking of spectrum allocation from licensing. The committee proposed Unified License (National) will be a combination of telecom services and would be delinked with spectrum and will have limited terms and conditions for spectrum. This will help administering services at a national level, the committee has stated in a note. (February 11, 2013) mediamughals.com

Idea Cellular wants DoT to remove 2G spectrum clauses that bar the mobile service provider from entering into roaming agreements with other operators on the 3G network. Challenging DoT's move to introduce a new clause in the letters of intent (LoI) for seven circles where it bagged 2G licenses, the Aditya Birla group company approached the Delhi High Court. If the department of telecommunications adds the new clause in LoI, it will prohibit Idea Cellular from 3G roaming pacts with other operators. (February 8, 2013) telecomlead.com

Javaid Akhtar Malik
Director Regulatory Affairs
SAMENA Telecommunications Council

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ROAMING NEWS

TOT, CAT sign 3G roaming pact

Coinciding with TOT's launch of an expanded 3G 2100MHz mobile service across Thailand recently, the state-run telco and its sister company CAT Telecom signed a network roaming agreement allowing up to 400,000 3G voice/data roaming users on each of their respective networks, with an interconnection charge of THB0.50 (USD0.0166) per minute, the Bangkok Post reports. TOT currently has less than 300,000 3G subscribers on its 2100MHz network in the Bangkok area via five mobile virtual network operators (MVNOs) but last week expanded the service to over 4,000 base stations in provinces across the country, and will reach 5,000 cell sites in April. CAT's 850MHz 3G retail service under the 'My' brand is offered over the 10,000-plus W-CDMA/HSPA base station network shared with private sector partner True Move H (which is expanding the 850MHz network to 13,000 base stations this year), although CAT only recently announced that it was resuming the commercial marketing of My services, following suspension of activities due to a legal inquiry into the True-CAT partnership and a re-evaluation of the state firm's business plan. No recent My user figures have been released, but the total is assumed to be low. TeleGeography adds that CAT's CDMA2000-based 2G/3G provincial network will be shut down on 26 April 2013, with the firm hoping to migrate the 100,000 or so remaining users to HSPA-based services. TOT also has a network roaming agreement in place with AIS catering for one million mobile users, with the same agreed interconnection rate as the new deal with CAT.

TeliaSonera became the first operator to introduce 4G roaming in Europe

TeliaSonera has launched 4G roaming for its Danish customers visiting Sweden. This is the first step towards global 4G roaming in all of TeliaSonera's markets, where the customers will be able to enjoy the lightning fast 4G technology. Since 2009, when TeliaSonera became the first operator in the world to commercially launch 4G services, the 4G technology has become widespread and loved by many because of the huge increase in data speeds. Faster surfing, better streaming experiences, and online gaming are some of the great advantages of 4G. Now, as the first in Europe, TeliaSonera takes the next step to allow its Danish customers to enjoy the advantages of 4G abroad. "We are proud to once again act as pioneers and introduce 4G roaming. We strongly believe that modern mobile technology should be accessible and easy to use both domestically and abroad. That is the reason why we have a strong focus on enabling the customers to utilize the possibilities with 4G seamlessly - even across border. This great news is the first important step in that direction," says Tommy Ljunggren, VP and Head of Network development Mobility Services, TeliaSonera. Danish TeliaSonera customers can now use their 4G connection on TeliaSonera's network in Sweden, which is the first country where roaming is implemented. The possibilities to roam also on the 4G network offer great opportunities also for business users. One example is that with 4G roaming in place, the TV channels in Denmark will be able to stream live from the European Song Contest in Malmö through 4G. The high up- and download speeds make the handling of huge video- and picture files a joy.

OneSimCard: International roaming SIM cards now available

OneSimCard, a provider of international mobile roaming services for businesses and leisure travelers, announced its international SIM cards are available at all Fry's Electronics retail locations nationwide. With an online store and 34 retail locations spanning nine states, Fry's Electronics sells more than 50,000 items in each store including consumer electronics, computer hardware and mobile telecommunications products. "As a leading source for the latest advances in mobile communications, Fry's is a natural partner for OneSimCard and our line of global SIM cards," said James O'Neill, Vice President of Marketing for OneSimCard. "International travelers have long-searched for the best ways to avoid high roaming charges when using their mobile devices in other countries. We are very pleased about our partnership with Fry's that will now allow their tech-savvy customers to save 85% or more on calls, texts and data by simply swapping their regular SIM card with our OneSimCard global SIM card before traveling abroad." The OneSimCard product line consists of a combination SIM card that can be used as both a regular size SIM and micro SIM – providing compatibility with almost any unlocked GSM mobile device including the iPhone 4/4S, iPad 2/3, Galaxy SIII and others – and a nano SIM card for the new iPhone 5, the first-ever global nano SIM to be made available in the U.S. In addition to providing mobile service over traditional cell networks, smartphone owners have the option of routing calls over Wi-Fi for an even greater savings.

Enhanced cellular/Wi-Fi roaming to launch commercially in 2014

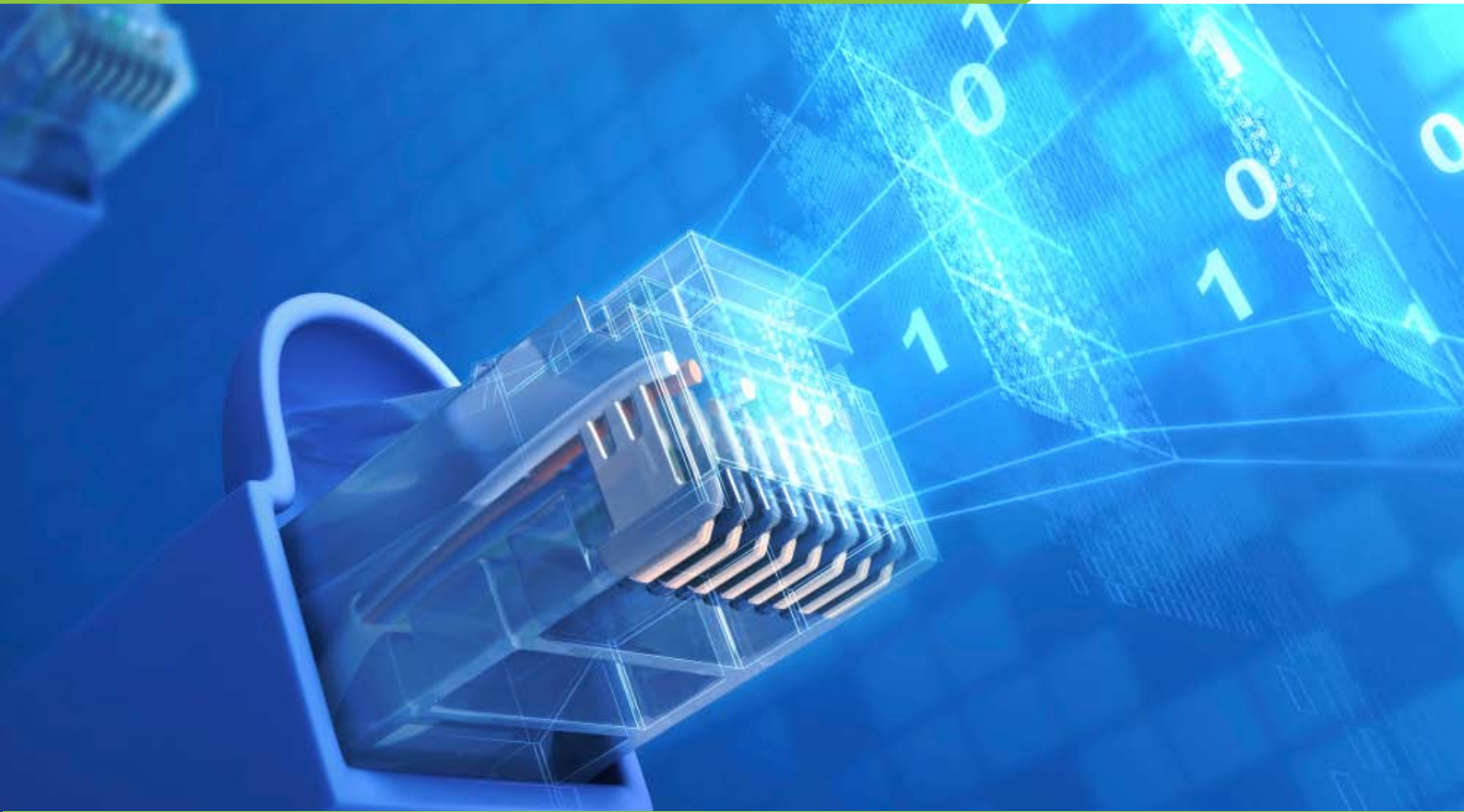
The Wireless Broadband Alliance's seamless and secure cellular-to-Wi-Fi roaming invite is likely launch commercially in early 2014, and when it does AT&T Mobility is expected of be a leading player, according to a senior executive from hotspot aggregator Boingo Wireless. Christian Gunning, vice president of corporate communications at Boingo, said that right now wireless carriers and Wi-Fi operators are testing in labs the back-end integration for the WBA's Next Generation Hotspot (NGH) program, with work on the commercial aspects of the plan, such as billing, beginning in the third quarter. By early 2014, Gunning predicted, the initiative may be ready for commercial launch. He said he "would expect AT&T is probably going to be the first" U.S. carrier to launch the NGH service on its network, in part because of the extensive work its already done with the WBA and because it has a large proprietary Wi-Fi network of its own. The program was supposed to be further along than it is now, but Gunning said that the second phase of NGH, the back-end technical work, did not get started until December, when it was originally scheduled to start early in the third quarter of 2012. Other operators that have been making strides recently include China Mobile, KT, NTT DoCoMo and France Telecom Orange. Gunning said the timing of commercial launches will depend on how trials proceed this year. "All the carriers are going to move at different places," he said.

Telecom North America launched roaming hub

Telecom North America launched the multi-IMSI roaming hub, a roaming service trading platform which allows MNOs (Mobile Network Operators) and MVNOs (Mobile Virtual Network Operators) around the world to lower costs and increase revenues by selling and buying roaming services to and from one another. The platform allows established MNOs to generate incremental income by reselling their outbound international roaming agreements to other Members of the hub, without any CAPEX expenses, while full MVNOs can generate additional income by reselling service in their home countries to other Members on the hub. Members can also increase their roaming footprint, or reduce their outbound roaming costs by accessing lower rates for outbound roaming in dozens of countries, which allows them to provide more attractive roaming packages to their subscribers in order to compete more effectively against other operators and virtual operators in their home markets. "Attractive roaming offers are often key to gaining and retaining the lucrative VIP or business customer segment which roams heavily and generates the highest ARPUs," says Jean Gottschalk, President of Telecom North America. "MNOs and MVNOs from North America, Europe and the Middle East have already been trading services on the hub during our pre-launch phase, proving that there is an increasing need from the industry to optimize outbound roaming costs for the benefit of consumers."

Tata Communications introduces smooth global LTE roaming

Tata Communications Limited unveiled details of its 18-month intensive trial to deliver one of the industry's first complete LTE Roaming Services to Mobile Network Operators (MNOs). Available in market following rigorous testing, the LTE Roaming Service is designed to eliminate the interconnection and interworking complexities of global LTE roaming. The experience gained from the trial resulted in a managed service that simplifies global roaming complexity, offering a single interconnect point and facilitating protocol interworking across multiple mobile operators. With 4G LTE revenues projected to exceed USD 100bn globally in 2014, enabling users to roam in 4G is critical to maximizing revenues. Tata Communications' LTE Roaming Service enables MNOs to fast track their roll-out of LTE roaming in a cost-effective and scalable manner, while creating differentiation in a highly competitive marketplace. The end-to-end managed solution leverages the company's extensive experience as the largest mobile signaling inter-provider to streamline roaming interconnect arrangements between mobile operators, replacing the need for hundreds of bilateral peer associations with a single centralized robust interconnect point. This simplifies roaming interconnect to deliver a seamless user experience and assure service continuity as mobile operators migrate to 4G.



TECHNOLOGY NEWS

4G network to lead the world

China Mobile Communications Corp, the parent company of the world's largest telecom carrier by subscribers, announced that it plans to deploy the world's biggest 4G LTE network in China this year, covering more than half a billion people, according to the company's chairman. In a keynote speech at the Global TD-LTE Initiative summit in Barcelona, Xi Guohua said the homegrown TD-LTE technology is gaining in popularity across the globe as the industry matures. China Mobile will build a TD-LTE 4G networks in China this year that will cover more than 100 cities, or about 500 million people, Xi said. "It will be the largest LTE network around the world." Meanwhile, China Mobile is about to acquire more than 1 million TD-LTE terminals, including smartphones and data cards, in 2013. "Besides high-end mobile phones (supporting TD-LTE standard), low- and mid-end mobile phones will also enter the market, providing customers with more choices," the chairman said. Mobile phone vendors LG Electronics, HTC Corp, Huawei Technologies Co Ltd and ZTE Corp have partnered with China Mobile to launch four models of TD-LTE smartphones. The newly unveiled handsets are all multi-mode, multi-band devices, which means customers can use one smartphone to connect different mobile networks anywhere, including networks that support the other mainstream FDD LTE 4G standard.

True Move to launch first 4G service in Thailand in April

Thai operator True Move will launch the country's first 4G mobile service this April starting in Bangkok, in a bid to steal a march on its bigger competitors. The third largest mobile operator in Thailand said it plans to roll out 300 4G base stations in central Bangkok, and increase this to 2,000 base stations in 15 major cities later this year. Its rivals, Advanced Info Service (AIS) and Total Access Communications (TAC), are set to launch their 3G services in April under the new licensing regime. Suphachai Chearavanont, CEO of True Move's parent company True Corporation, said its 4G move reflected the operator's long-term spectrum management strategy to better serve consumer demand. True Move will also focus on expanding its existing 3G network coverage through its partnership with CAT Telecom, the report said. True's subsidiaries, Real Future and Real Move, signed a contract with CAT in 2011 to provide 3G service on the 850MHz (megahertz) frequency. Suphachai said True Move will have 13,000 3G bases on the 850MHz frequency this year, as well as 5,000 more on the 2.1GHz spectrum. True Move will launch its upcoming 4G service on the 2100MHz frequency. The company was awarded the 2100 MHz band in October last year by the country's regulator, the National Broadcasting and Telecommunications Commission (NBTC).

Three NZ telecoms to set up US\$60 million fiber-optic cable

New Zealand's Telecom, Vodafone and Telstra stated that they will set up a US\$60 million undersea fiber-optic cable. The three telecommunications firms said that the internet-powering cable, which is scheduled to complete by the end of 2014, will link the country with Australia. According to the firms, the cable's capacity is 30 terabits per second, which is nearly 300 times New Zealand's data requirements, noting that the cable is expected to provide sufficient capacity for the coming twenty years. The companies noted that the new cable will enhance New Zealand's slow internet speed and expand the economy. It is worth noting that New Zealand depends mainly on the Southern Cross cable, which expands from Sydney through Auckland and on to Hawaii, to connect with the rest of the world.

All new homes in China to have FTTH connections from April

The Chinese government has mandated that all new homes in China must have fiber to the home (FTTH) connections from April this year. According to China Daily, the new policy was recently issued by China's Ministry of Industry and Information Technology. In areas where multiple fiber networks are accessible from a property, developers are also obligated to let consumers have a choice in which network they connect to. FTTH is the main technology being rolled out in Australia through the National Broadband Network.

Indonesia develops fiber optic network in eastern region

A senior official at Indonesia's state-run telecommunication firm, PT Telekomunikasi Indonesia (Telkom), said that development of fiber optic telecommunication network has commenced in the country's eastern region, aimed at narrowing information technology (IT) gap between west and east regions. "We are expecting to entirely settle the telecommunication infrastructure projects in the second half 2014," Telkom Enterprise and Wholesale Director Mohammad Awaluddin said in Banyuwangi, East Java as quoted by the Tempo online. He said that fiber optic network projects will serve key cities of Gorontalo, Manado, Ternate, Ambon, Sorong and Timika in the eastern region. According to Awaluddin, telecommunication in eastern region is heavily served by satellite as of now. He said that fiber optic technology would reduce the burden of satellite in serving telecommunication in the region thus speeding up the data transferring. Due to its tough geographical condition and location that is far from the country's center of business, eastern region has been facing tougher problems in telecommunication and transportation sector as most of islands in the region are separated by deep and vast waters.

Cuba activates first-ever fiber optic cable

Cuba has long lagged behind its regional counterparts in telecommunications and Internet technologies, trailing even neighboring Haiti in numbers of mobile phone users and per capita internet access. But in January Cuba took a big step forward in potential connectivity with the activation of its first fiber-optic cable connection. Although the cable linking Cuba and Venezuela is not yet fully operational, it can provide a much faster, much less expensive data transmission than the island's current communications systems, which relied exclusively on satellite hook ups. Experts estimate that the new cable has the technical capacity to increase by up to 3,000-fold Cuba's capacity to send and receive data. Despite this recent progress, questions remain about how quickly Cuba's national telecoms provider can bring the cable sufficiently online to noticeably boost the functionality of mobile phone devices and the average user's Internet speeds.

IPTV market leads Russian pay TV growth

The Russian IPTV market grew by 62% over the last year, compared with growth of 3% for the country's cable industry and 20% for satellite TV, according to a survey by J'Son & Partners Consulting. The overall Russian pay TV market amounts to 31.9 million homes, according to J'Son & Partners. About 1.3 million of the 1.8 homes that signed up for satellite services last year subscribed to low-cost operator Tricolor TV's service, giving it a 28% pay TV market share. Other pay TV leaders include Rostelecom with 21%, MTS with 9%, ER-Telecom with 7% and Akado with 4%.

Egypt sees massive telco fiber deployment

Responding to increasing rate of Fiber-to-the-Home (FTTH) deployments by telecommunications companies in Egypt, Reichle & De-Massari (R&M) Middle East, Turkey and Africa, the Swiss structured cabling specialist, announced it would further increase its focus on Egypt's growing market. Alfred Tharwat, Area Sales Manager, Africa at R&M confirmed that the company is collaborating with major telecom providers in Egypt and is currently involved in the new FTTH projects in North Coast and Sokhna city. The company has also recently been awarded Fiber-to-the-Building (FTTB) projects in New Cairo and 6th of October city. Tharwat stated in a press release that the company is on the verge of launching new products to further expand its FTTH portfolio. These will include the introduction of the new Venus FXXL solution with an integrated Single Circuit Management (SCM) system and field connectors which offer un-matched flexibility when planning building connections.



DO WE NEED TELEPHONE NUMBERS?

Stefan Zehle
Chief Executive Officer
Coleago Consulting

In the future, people may need only a broadband connection that allows them to access the Internet and use OTT services, but they may not need telephone numbers.

Already most communications that take place over telecoms networks do not involve telephone numbers. Email and other internet based communications increasingly dominate business and consumer communications. Fixed network voice calls are moving to mobile and Skype like services. By some estimates the last fixed line phone will be retired in 2025. Even if the decline of fixed phones and with it fixed telephone numbers is not that fast, clearly the writing is on the wall. In future people may need only a broadband connection that allows them access the internet and use OTT services, but they may not need telephone numbers.

Meantime in the mobile world, telephone numbers are growing fast. However, sending messages to mobile numbers and calling mobile numbers has started to go out of fashion. Messaging services such as WhatsApp are replacing SMS and increasingly people use Skype on their handsets. Of course Skype also sells telephone numbers, but most Skype users don't bother to buy one.

The trend away from making standard mobile voice calls is accelerating with the adoption of LTE. For example, in contrast to older versions of the iPhone, the new iPhone with Apple's iOS 6 upgraded FaceTime from a WiFi only feature to a cellular feature. AT&T Wireless was the first to allow customers to use FaceTime over LTE if they signed up to their new shared data tariff plan. The key aspect about the new tariff plan is that in terms of pricing it is data centric, with voice playing minor role. Most mobile operators still base their tariff plans on a minute bundle with data added to that, but this will change rapidly as LTE becomes commonplace.

If telephone numbers become obsolete, this poses challenges not just for operators but also regulators. The world of telephony is organised around telephone numbers and there is an element of sovereignty in country codes and national numbering plans. If telephone numbers become obsolete, governments have surrendered this sovereignty to the internet. This is a frightening prospect to some governments.

If telephone numbers become obsolete, this poses challenges not just for operators but also regulators.

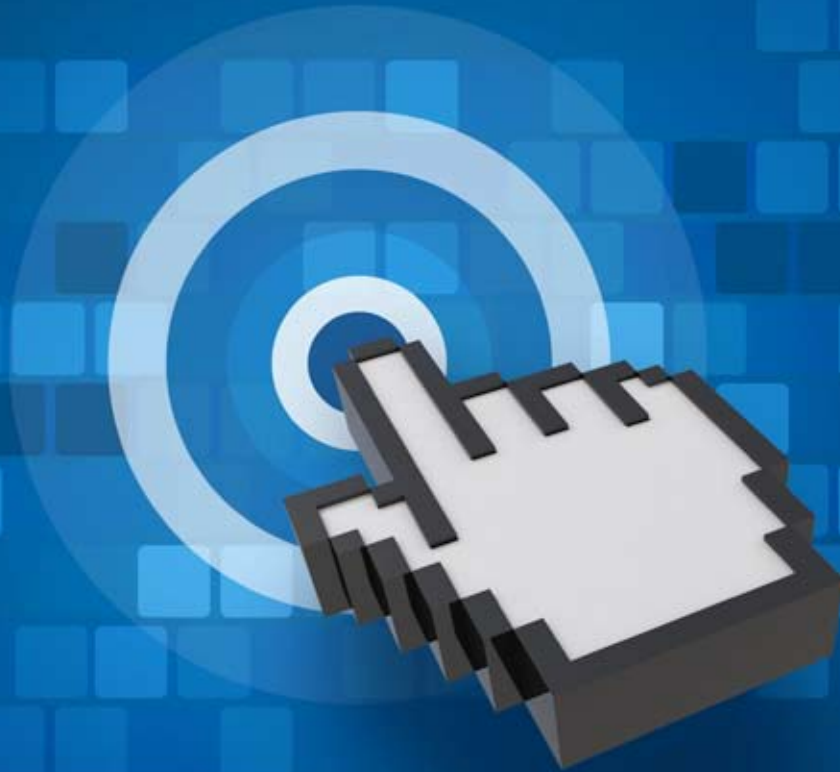
Many aspects of telecoms regulation are number focussed. If people no longer need telephone numbers, national regulatory agencies effectively lose control over telecommunications within their borders as well as internationally. The spat at the December 2012 ITU meeting in Dubai over regulating the internet is only the opening skirmish in what is likely to turn into a major battle.



The way in which the obsolescence of telephone numbers will impact will differ between markets. Some emerging market countries still have not fully rebalanced fixed network tariffs, e.g. Tunisia, Algeria, Kuwait to name a few I am familiar with. Subsidising the cost of the line rental from long distance calls will no longer be possible. For example, in the case of Tunisia the fixed line rental retail price would have to increase by a factor of four to cover costs. Such price increases are politically unacceptable and hence it seems tempting to look for money elsewhere, e.g. from Google, Skype (Microsoft), and perhaps even from the most valuable company on the planet, Apple.

The transition will not be problem-free for developed markets. Already regulators fret over the issue of calls to emergency services. On its website Skype clearly states "Skype is not a replacement for your telephone and can't be used for emergency calling".

On the plus side, if telephone numbers become irrelevant, operators and regulators will not have to worry anymore about fixed and mobile number portability.



THE 4 TRILLION DOLLAR DIGITAL OPPORTUNITY AT THE BOTTOM OF THE PYRAMID

By Bahjat El-Darwiche
Partner

Milind Singh
Principal

Sandeep Ganediwalla
Rawia Abdel Samad
Associates

Booz & Company

Between 2009 and 2011, digitization—the mass adoption of connected digital technologies and applications by consumers, enterprises, and governments—helped create 17 million new jobs and contribute US\$350 billion to the GDP of developing countries. Booz & Company analysis now reveals that digitization in these emerging markets could deliver an additional \$4.4 trillion in nominal GDP and 64 million new jobs over the next 10 years.

Enhancing digitization to promote yet more growth and economic opportunity will require investment of \$1.4 trillion. It will demand a concerted public and private effort to increase the digitization index (DI) of the poorest people in middle and low-income developing countries, those at the “bottom of the pyramid.” Yet the rewards are such that this cost will be recovered many times over.

The DI is a composite score of 23 indicators that measure a country’s digitization level on a scale from 0 to 100. In developing countries, the average DI is 27, almost half that of developed economies. But there’s more to the story—there is a digital divide within developing countries. We discovered that the poorest citizens of developing countries, who number 3.9 billion globally, have an average DI of just 17.5.

The low digitization level of the poor is no surprise. Too often, digital technology is beyond their means and knowledge.

But what if digital technology were more readily and affordably to hand? If we could double the DI at the bottom of the pyramid in developing countries over the next 10 years, we could lift more than half-billion people out of poverty. There could be gains in job creation and GDP, along with the unlocking of new markets—with \$700 billion of new activity in healthcare and education alone.

To achieve this, we would have to bridge the gap between the \$47 per person per year it will cost to digitize the poorest and the \$5.50 per person per year that they can currently afford to pay for digital access and devices.

These mismatches can be addressed through a collaborative effort that combines supply-side and demand-side solutions.

This gap between what the ability to spend and making digital technology more available reflects the underlying digitization challenge in emerging markets. On the demand side, for example, consumers at the bottom of the pyramid are struggling to find work, a consistent monthly income, and affordable credit. They are unwilling to spend on digital technology. There is little relevant content and their customer experience is low-quality. On the supply side, existing network operators are overburdened. Plus there are few established distribution and retail networks, and limited expertise with bringing services to market for the bottom of the pyramid.

On the supply side, it will take innovation, co-investment, and standardization across the four pillars of digitization: reliable network coverage, affordable devices, a cost-effective go-to-market approach, and relevant applications and content. Network operators, for instance, will need to adopt innovative, two-sided business models that generate revenue from bottom of the pyramid consumers and earn money from the brand advertisers that typically have no other means to reach the bottom of the pyramid. Private and public players will need to invest jointly in areas beyond their normal domains, especially in developing network and commercial infrastructure, to create viable markets at the bottom of the pyramid. Standardized technologies, processes, and practices, such as interoperable standards for applications, will be needed to reduce fragmentation among diverse markets of the poorest consumers, thereby maximizing the opportunity to capture scale.

On the demand side, the digital purchasing propensity of the bottom of the pyramid can be expanded by increasing its ability and willingness to spend hard-earned money on digital products and services. For example, digitization can become an income generating tool, either directly through employment opportunities in the information, communications and technology sector, or indirectly by providing access to information. We can increase the willingness to spend by expanding the availability of content and applications that address the basic economic and social needs of excluded populations.

As developing countries look to increase their level of digitization and to compete with wealthier economies, their best bet is to close the digital divide between the richest and poorest in their own societies. Many developing economies have impressive achievements in the digital arena, as China and India have demonstrated. They can build on this success by giving the bottom of the pyramid the opportunity to participate in the digital revolution.



#304, Alfa Building, Knowledge Village, PO. Box: 502544, Dubai, UAE.
Tel: +971-4-364-2700 | Fax: +971-4-4369-7513

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