

SAMENA TRENDS

EXCLUSIVELY TO SAMENA TELECOMMUNICATIONS COUNCIL'S MEMBERS

BUILDING DIGITAL ECONOMIES

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Telecom Revenue Growth Through Services Ecosystem

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BT Global Services, Middle East & North Africa

AWARD CEREMONY 2012

Convergence to Turkey 2012

**“Meeting the Digital Agenda:
Maximizing revenue through excellence”**



8th November 2012

8 pm – 11:30 pm

Venue: Mabeyn Ball Room, Ciragan Palace, Kempinski Hotel, Istanbul, Turkey

SAMENA Awards

SAMENA Awards, now in the fifth year, are a way to recognize leadership and excellence in the telecommunications sectors of the South Asia – Middle East – North Africa (SAMENA) region. The awards are bestowed upon the most deserving telecoms organizations professionals, assessed after meticulous performance-based evaluation. Both the SAMENA Awards Evaluation Committee (AEC) and the general public have the power to decide the winners. SAMENA Council created the Awards Committee by inviting a group of leading professionals drawn from across the telecommunications industry to serve as members of the committee

AWARDS CATEGORY

Operators Awards (Organizational)

1. Best Local Content Provider of the Year
2. Best M&A of the Year
3. Best Wireless Broadband Operator of the year
4. Best FTTx (GPON/Active Ethernet) Operator of the Year
5. Best Operator in South Asia of the Year
6. Best Operator in North Africa of the Year
7. Best Operator in Middle East of the Year
8. Best Innovative Value Added Services of the Year

Executive Awards (Individual)

1. Best Technical Leader of the Year
2. Best Pioneer Leader of the Year
3. Best Business Leader of the Year
4. Best Telecom Regulatory Leader of the Year

Manufacturer/Vendor Awards

1. Best Innovative Technology Provider of the Year
2. Best Green Technology of the Year

Regulatory Awards (Organizational)

1. Most Progressive Telecom Regulator in South Asia of the Year
2. Most Progressive Telecom Regulator in Middle East of the Year
3. Most Progressive Telecom Regulator in North Africa of the Year

Satellite

1. Best Satellite Mobile Service Provider of the Year
2. Best Satellite Broadband Provider of the Year



EDITORIAL

Digitization-enabled New Service Ecosystem

The panacea for all operators and related industry private sector entities is the ability to generate earned income while gaining the most from previous investments made into infrastructure over a period of time, constituting strong performance from said investment. Technologies are being introduced at such a rapid pace that investments in long-term infrastructure can be fraught with risk. The key to getting there is to further understand the market and its capability to have a strong consistent uptake of service offerings, which offer value for the investment. The criteria for such opportunities are that it meets consumer or enterprise demand sets, has a fair price, and has the strong potential for sustainability in the market place without wild obtuse fluctuation on availability, cost or operational support, along with the ability to build strong balance sheet results while providing brand allegiance and customer satisfaction. This is a tall order, indeed.

The SAMENA slogan, which states "Building Digital Economies", is highly relevant to the new generation of services that the operators are, should and will be rolling out to their customer bases. Digitization is simply the future. Operators have the prowess, skills and interests in bringing forth to the market place untold digital capabilities that are just now becoming available. Multiple sectors in the business environment are all welcome recipients of all things digital, for the new information age brings efficiency, useful data along with highly driven focus on markets. Digital economies are appropriate with regard to bringing forth the advent of the new sustainable Internet (business model) Economy. Multiple studies have shown clearly that the increased market uptake of digital services through adoptive broadband deployments creates positive increases in national GDP numbers. This leads to job creation and stronger economies; wholly important in this day and age. There is opportunity for the operators, with strong and proactive market and investment based policy (the regulatory frameworks, new or existing will and are going to have a large effect on which business models supporting which service sets will be feasible) which needs to be put in place, to become stronger engines for growth and while bringing direct economic rewards to various sectors, bringing opportunity to many more individuals and business's in national markets.

The new Digital Internet Business model, encompassing many different facets, is already being forced to come to fruition, due to exponential demand for bandwidth due to data-intense applications, where the convergence of multiple digital communications technologies are bringing

capabilities of the network, even after billions in investment dollars have been spent to a critical apex juncture point with the ever-expanding growth of data traffic on the network. New service offerings may be able to offer efficient use of the network capacity and strategies being put in place by the operators, but must need to also replace decreasing voice and SMS revenues.

New service sets are imperative to constructing a long-term digital service value branding of the relationship with customers for the operators today. Such service sets are also integral to the realization of new revenue growth prospects. Furthermore, such service sets can potentially bring about almost immeasurable results to the interests of the consumer and enterprise, along with the SME customer base.

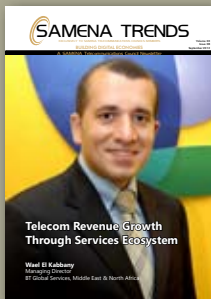
Information is power and always will be. There is a seemingly unquenchable thirst for information in today's business environment and the operators are at a zero point with regard to having relevance and value in this activity. Entire economies are based on the foundation of knowledge, and the conversion of many an industrial economy to a service or knowledge-based economy has set the stage for the importance of offering new services to clients worldwide. The onset of the knowledge economy is upon us here in the SAMENA region, which will lead to investment in innovation and entrepreneurialism, which all can be tied to digitization and those services based on it.

SAMENA is currently performing a region wide ICT digitization study, which will bring much of the current and potential future policy requirements needed to support advanced digitization program developments to greater clarity and light. Therefore, developing strong foundations for services providing all stakeholders an advanced stage to work on going forward, bringing people, machines and other mediums and forms much closer together than ever before, are so much a requirement for our future success.

The impact of digitization on national GDP is globally recognized and the SAMENA region is no exception. Today, this region is witness to the evolution of the operators, transforming from mere voice and data service providers to enablers of information societies across multiple sectors; bringing value and relevance to what was once a dormant and quiet environment. Indeed, the opportunity is there for taking. All the stakeholders must share in the creation or renewal of the digital ecosystem in a manner that allows investment to be made in the future, so that revenue growth is also sustained and, ultimately, the society itself benefits from the technological and service growth patterns underway.

Truly Yours,

Thomas Wilson
CEO & Managing Director
SAMENA Telecommunications Council



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EDITORIAL





REGIONAL NEWS

Roshan Secures 3G License for Afghanistan

Roshan announced that the Ministry of Telecommunications and Information Technology (MCIT) has issued the company with a license that will enable Roshan to further expand and develop its already market-leading, innovative data packages via the 3G platform. Roshan celebrated the issuance of the license in a signing ceremony presided by His Excellency, Minister Amir Zai Sangin and other honorable ministerial dignitaries at the Ministry of Communications and Information Technology in Kabul. Roshan is aiming for a commercial roll out of its 3G service later in the year. Roshan has brought to market a range of robust data platforms for Afghan individuals and business. Most recently, Roshan launched "Kahkashaan," an innovative galaxy of web portal services that allows customers to access rich content on their mobile phones, including ringtones, pictures, games and applications. The company was also the first to bring Blackberry and M-Paisa mobile money services to Afghanistan. "We are delighted to introduce 3G technology to Roshan's six million and counting customers, expanding access to data-rich products and converged solutions to meet their needs," said Karim Khoja, chief executive officer of Roshan at the ceremony. "3G technology is vital for the economic growth and development of Afghanistan in a host of different sectors – from education to health to commerce," said His Excellency, Minister Sangin. "In awarding this license to Roshan, we are embracing the mobile broadband revolution, expanding the country's data services and enhancing capacity, aimed at improving the lives of Afghans as they connect with each other and the rest of the world," added Sangin.

Thuraya and Quicklink Set to Showcase Innovative and Cost-Effective Broadcast Solutions at IBC 2012

Leading global mobile satellite services operator, Thuraya Telecommunications Company and the innovative UK-based solution provider Quicklink, will feature technologically advanced, easy-to-use, cost-effective voice and data solutions for the broadcast and media sectors at the upcoming IBC 2012 conference for the electronic media and entertainment industry. One of several cutting-edge broadcast solutions on display will be the Thuraya IP Quicklink solution, which operates by combining the company's industry leading Thuraya IP terminal with the Quicklink broadcast solution. Thuraya IP is the only satellite broadband modem that features 'Asymmetric Streaming', which allows users to adjust uplink and downlink speeds based on their usage, resulting in cost savings of up to 40% when compared to other solutions available in the market. When combined with the Quicklink solution, the Thuraya IP terminal enables seamless live video broadcasting at optimized speeds over Thuraya's satellite network. This enables reporters in the field to break the news as it unfolds. At IBC, Thuraya will be showcasing its MediaComms solutions to the broadcast and media industry as well as promoting several of its voice and data solutions including the Thuraya XT-DUAL, which is the world's only dual-mode satellite/GSM phone.

du Caller Tunes Gets Even Better, with the Launch of the UAE's First Song Search Enhancement!

Further enriching its customer experience, du is the first telecom in the UAE to launch Song Search, a voice-based enhancement. Song Search makes searching for caller tunes even more impressive: customers just need to say the name of their desired tune, and the intelligent feature narrows down the results for a quicker, easier and more convenient selection process. The unique feature can be accessed through du's IVRS, by calling 156 from a du mobile (call browsing charges are 0.005fils per second). Clear instructions will direct the customers to an open-ended search, from which they need to say the name of the song or movie they wish to find. Song Search then narrows down the thousands of caller tunes in the database to find likely results, from which the customer can select his caller tune. Charges of AED5 apply for selecting a song, and an AED5 subscription fee is applicable for non-Caller Tune subscribers.

Nawras Sponsors a Range of Multicultural Community Events

Engaging with customers and the community, Nawras, Oman's customer friendly communications provider, has sponsored and supported a rich variety of social and cultural events this month and is now proud to be the Platinum Sponsor of the second Human Resources Development Expo and Conference being held in Oman this week. The company is presenting its innovative HR practices which were recently recognized with an award at the Asia Pacific HRM Congress Communications Awards. Mutassim Hamood Al-Zadjali, Head of Corporate Affairs at Nawras, said, "As an integral part of Omani society, we want to bring customers together through a variety of events, emphasizing the importance of reaching out to communities across our beautiful country." Nawras was delighted to be the key sponsor for the launch of The Oman Real Estate Association under the patronage of His Excellency Saif Bin Mohammed Al Shabibi, Minister of Housing, and attended by government officials and senior corporate figures. The company also provided funding for the Soft Cricket League in Al Amerat as Nawras engages with the community through popular sporting activities.

STC Reminds SAWA Customers to Update their Personal Information

In anticipation of the Communication and Information Technology Commission's (CITC) regulation, Saudi Telecom Company (STC) has been issuing reminders to customers urging them to update their personal information. The reminders are issued through SMS, social media, and IVR, as the deadline to implement the CITC regulation draws near. The new regulation, which was set by CITC on 12/11/1433H, requires customers to input their national identification number (Iqama) immediately after entering their prepaid card number to charge SIM cards, recharge, or transfer balances. SAWA customers have to update their personal information to avoid service disconnection. To facilitate the transition & verification process, STC employed more than 100 temporary offices across the Kingdom. Customers may also update their personal information at STC's customer care centers, Khadamati portal, and through the company's website www.stc.com.sa.

Batelco Slashes Business Broadband Rates

Batelco, the Bahrain's leading broadband services provider, is delighted to announce that its business customers are to benefit from up to 40 percent discount on their Business Broadband packages. Batelco's current Business Broadband customers will benefit from the discounted rates which are being implemented automatically. The new tariff reductions apply to all Business Broadband packages and are subject to one year contracts. Additionally Batelco's Fixed IP service will now be offered at 50% discount, which is only BD10, representing great value for money.

Mobily and IBM in Strategic Alliance Agreement to Deliver Innovative Services for the Business Sector and Build First Information Security Data Center in the Region

Etiihad Etisalat "Mobily" and IBM recently held a media briefing to outline the details on their five year strategic agreement. The agreement will provide Mobily with faster, targeted access to new technologies and expertise in order to build a strong infrastructure to keep pace with the company's business growth. The broad portfolio of modern IT solutions will allow Mobily to provide innovative services to its business sector clients and help deliver enhanced services to Mobily subscribers. Mobily and IBM earlier announced a 5-year agreement worth approximately \$280 million to provide comprehensive IT solutions for the Saudi Arabian company. Mobile computing is driving increasing demand for IT services in the telecommunications industry," said Bruno di Leo, IBM Senior Vice President of Sales and Distribution. "With this relationship, IBM provides Mobily with the robust IT infrastructure and near term innovation to provide their customers with the best technology has to offer."

Luis Alvarez to Become the CEO of BT Global Services

BT announced that Luis Alvarez is to become CEO, BT Global Services from October 1, 2012. Alvarez has been with BT for 12 years in a variety of roles, most recently President of BT Global Services Europe, Middle East, Africa and Latin America. He brings a wealth of global experience and knowledge with him. Alvarez will take over from Jeff Kelly who has decided to return to the US following almost three years as CEO, BT Global Services. Under Kelly's leadership, BT Global Services has firmly established itself as a global leader in the provision of managed networked IT services to global corporations and governments around the world. The financial performance of the business has substantially improved in that period and its risk profile and delivery capabilities have been transformed. BT Global Services has been transformed in recent years and Alvarez will lead the team to ensure the very high levels of support received by its customers continue to improve. The business has won industry recognition and numerous awards during the past three years including the Best Global Operator at the World Communications Awards two years in a row.



Operator Leader's Vision

Wael El Kabbany
Managing director

BT Global Services, Middle East & North Africa



Although Wael El Kabbany holds a B.Sc. in communication engineering, he developed his postgraduate studies and knowledge in marketing, corporate governance and financial planning. His career spans more than 20 years of management experience in the field of communication and information technology across the Middle East and North Africa.

Wael has been with BT since 2006. In his role as managing director for Middle East and North Africa, he is responsible for BT operations across the region, developing and securing business opportunities and designing market-entry strategy for potential growth countries.

Q. Please tell us about BT operations in region. What are the BT's major forthcoming ventures?

A. BT has a proven track record of success in the Middle East and North Africa with operations first set up in the 1980s. Today we operate out of our regional hub in Dubai, serving customers across the region that spans from Morocco in the west to Pakistan in the east.

We see the Middle East as an important high-growth market and we believe we are uniquely positioned with tailored solutions and services for key industry sectors, such as airlines and logistics, banking & financial services, consumer goods, manufacturing, government & health and of course the telecom sector.

We already serve a prestigious list of global multinational companies with operations in the region, as well as expanding local multinationals. Examples of global multinationals include Unilever, P&G, PepsiCo, HSBC, Visa, ThomsonReuters and many others. Among the rapidly expanding local multinationals branching out beyond the region, some of our customers include Emirates Airline, Etihad Airways, Habib Bank and Jumeirah Group (in partnership with du). Our BT Radianz Cloud set of services and solutions underpins Dubai's claim to becoming a global financial centre.

In the Middle East region specifically, the telco sector is of great importance as well, both in terms of business opportunities and consulting services. Besides providing basic connectivity, our BT Global Telecom Markets unit is very strong in providing international carrier services, niche propositions and consulting services to customers such as Etisalat, Saudi Telecommunications Company (STC), UAE alternative operator du and others.

Consulting is provided by its professional services arm, BT Advise for Communications, which shares BT expertise in areas like solutions for the enterprise market, field force automation and optimization of fixed and mobile networks.

Located in Abu Dhabi is the first telco-focused research & development centre in the Middle East, the Etisalat BT Innovation Centre, or EBTIC. EBTIC is jointly funded and hosted by Khalifa University of Science, Technology & Research (KUSTAR) at its Abu Dhabi campus, with management and research staff provided by BT, Etisalat and KUSTAR. The centre today comprises more than 20 researchers, with ambitious plans to grow that number to about 70 within three years.

Q. You say BT sees the region as an important growth market. Would you explain in more detail?

A. Of course. We see our global customers investing in the region and they require from us more and more proactive support. On the other hand we see also local companies expanding internationally and looking for global partners. This is why in February 2012, we announced a series of focused investments into the Middle East and Africa region, adding new people on the ground, further enhancing our infrastructure and rolling out new products and services from our rich portfolio.

According to BT research, the addressable market in Turkey,

the Middle East and Africa was worth a combined £5.4bn in 2011. The growth rates we see in some countries in the region are in double digits. Global multinationals, such as Nestle, Unilever and others, are investing heavily into the region and we see an increasing number of local enterprises spreading their wings beyond their home countries and indeed beyond the region itself.

As part of this investment – we announced similar programmes in Latin America and Asia earlier – BT is hiring around 170 new employees across the region, including highly skilled professional services specialists to provide local support to customers and deliver consulting, integration and managed services.

Network reach and access options are being improved in Sub-Saharan Africa through new routing facilities and investment in its own infrastructure. In the Middle East specifically, three new network nodes are being added to the existing network presence with one in the UAE operated by du, and one in Qatar operated by QTel already launched and one more scheduled for Oman.

New products and services deployed in the region so far include BT On Demand Compute, BT Cloud Contact and BT One Enterprise.

We believe all this puts us in a very strong position to serve our existing customers even better and win new business from both local enterprises expanding internationally and global companies growing into the region.

Q. Please tell us about the BT Telecom and Government for Economic Development (TGED) platform. How BT aims to support and collaborate with operators to discuss key challenges in the region?

A. This year we're pleased to be running our fourth annual TGED roundtable in October. This is the first one to be produced in association with the SAMENA Telecommunications Council. Board members from a number of our key customers get together with BT executives for a dialogue. They talk about the key challenges that operators face in the region, and how the issues and the industry itself have evolved since last year's event. It's an opportunity for us to listen to our customers and understand how we can help them meet the challenges they face.

Q. What key issues will be under the spotlight at the upcoming GTM roundtable event?

A. We expect a lively debate on these subjects, led by senior subject-matter experts from BT and from our customers:

- The migration to sustainable new business models and interoperability: How to do it, what CAPEX is required and how much revenue will it generate for operators in the region?
- The increase of telecom usage in MEA (fixed and mobile; data, voice and video) and how to tackle the resulting growth in capacity needs for the region: the LTE vs. Wi-Fi case
- Network security, risk management and business continuity: Necessary evil or competitive advantage?
- Creating growth through sustainable investment in

innovation in the region

- Portfolio evolution in the enterprise segment: How to speed up deployment of your services to the market

I'll be leading the discussion on that last topic myself. Chris Bruce, the co-chair of the Wireless Broadband Alliance and the new director of BT Advise for Communications, will lead the discussion about LTE vs. Wi-Fi.

Q. One of the issues you mentioned is "migration to sustainable new business models and interoperability". What are the IP migration scenarios for the MEA region?

A. We think IP-based interoperability is the key to migration to IP networks: It enables operators to connect traditional voice calls with VoIP, and the seamless integration that it provides makes it possible for operators to make a smooth and CAPEX-friendly evolution.

Interoperability provides two key advantages: You can build new networks and replace old ones step-by-step at your own pace and manage the resource and the time. You can also migrate your customers seamlessly from one platform to the other.

We're very proud of our IP Interoperability platform, BT Global IP Exchange. BT is a first mover and global leader with more than 200 service provider customers on the platform. The IP voice minutes carried over the IP Exchange increased more than 80% in our fiscal year 2011-12.

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

A. We're excited about our membership and we want to make the most of it. As I mentioned before, SAMENA is helping us to produce our TGED customer roundtable. They are helping us develop the content and Tom Wilson, the CEO and founder, will moderate our event.

BT people in the region and outside of it, too, have signed up to support and share the work of various SAMENA committees: Regulatory, Satellite, Technology, Content, International Roaming and CMO.

BT has been at the forefront of liberalisation since 1984 and has had to transform its business more than once. This is valuable experience we can share with SAMENA Council members.

More recently we deployed the communications infrastructure for London 2012, the most connected Games ever. I'm sure that many of the players in the region could benefit from BT's learning on the project.

We expect our participation to be a win-win-win for SAMENA, for its members and for BT.

Q. Keeping in view the BT activities and vision,

what benefits do you anticipate especially from the exchange of knowledge and expertise with SAMENA Council?

We would like to develop the existing relationships we have with key service providers in the region who are members of SAMENA. We hope to get on-the-ground insight into what our telecom customers and partners expect from us.

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

A. In BT we have a three-part strategy that GTM managing director Beatriz Butsana-Sita laid out about a year ago at Telecoms World Middle East.

First: Embrace the threats – for example, substitution of fixed revenue by Mobile, VoIP and Wi-Fi – and turn them opportunities. Making a virtue out of necessity is not easy, but it is possible.

Second: Create one unified "network" that is intuitive, scalable, adaptable; a network that enables new business models allowing wholesale customers to compete in non-traditional markets – and does it credibly.

Third: Build a bridge between legacy and next generation networks to enable seamless migration at the wholesale customers' pace on a "pay as you grow" basis.

Q. How are alternative technologies like VoIP negatively affecting operators' revenues? What practices should be followed to handle this state of affairs?

A. Even though revenues are down, telecommunication is becoming a bigger and bigger part of both our business and our private lives. It has become a commodity that we can buy along with other items we need in our daily lives. You may see voice as legacy, but it's still the biggest application and it still generates the most revenue for many carriers and operators.

Still, our customers' needs are evolving beyond what the traditional network can deliver. So we have to build new platforms to serve them. The need for a unified network has never been greater, and that's the cloud that you hear about so much these days: Globally distributed services when we need them, delivered across different networks.

We have to avoid creating useless applications and simply replacing commodity voice. Nobody wants a "dumb cloud", so we must deliver transparent, value-added services that our customers want and are willing to pay for.

Q. Keeping in view the declining ARPU, what is the significance of international roaming for the operator community, particularly in the SAMENA region?

A. The first thing I'd like to say about declining ARPU is that operators are enthusiastic about the potential of high-definition (HD) voice to lengthen call times, increase customer loyalty and drive greater revenue generation. BT GTM is enabling HD Voice on the Global IP Exchange platform. Currently it is only available on certain test implementations, but it's coming.

As to declining ARPU and international roaming, the key is



access to data and applications when roaming because they drive revenue more than roaming itself does. The launch of high speed downlink packet access (HSDPA, also known as high speed data packet access) services has allowed mobile operators to start competing in the fixed network space for data and internet access business.

BT has provided roaming services for more than 18 years with our roaming signalling product Roam Connect.

Now with the Global IP Exchange platform we can broaden the offer and provide hubbing.

We currently offer clearing and SMS hubbing, plus RIM relay with our roaming hub. BT's core competence here is the technical connectivity platform, which also provides technical interoperability between networks, protocols and means of connection among our customers.

BT in the UK offers Wi-Fi roaming via BT Openzone, the UK's leading Wi-Fi network and service provider. BT Advise for Communications is developing a Wi-Fi consulting proposition to share this expertise with clients.

Q. How do you look at the wholesale market with ever-rising international traffic and the growing number of roaming agreements?

A. Several trends are increasing the need for a more efficient way to manage the number of roaming partners and interconnects in general. The revenue from roaming is decreasing because of regulation, though it is still a good business.

At the same time the complexity of managing roaming and interconnects is increasing because more service providers are entering the market. Think of mobile operators, mobile virtual network operators, over-the-top players, and the list goes on.

Plus new services and applications mean that more direct connections are necessary. Think of HD voice, Wi-Fi offload, the explosion of data roaming services for end-user devices, etc.

Service providers need to reduce all that complexity and also reduce the cost of people to set up and manage hundreds of interconnects, not to mention the cost of errors from failure to update technical details, pricing, etc.

The BT solution is the hubbing that I mentioned earlier, enabled by our Global IP Exchange. By connecting to a hub, a service provider gets one contract, one link and consolidated pricing, while also extending reach to other countries, operators, networks, technologies and services – Wi-Fi, GSM, 3G, LTE, HD Voice and so on.

Q. Do you think that international data roaming has a promising future in the SAMENA region?

A. Of course, and in other markets all over the world. As long as people travel internationally with their smartphones, they will need access to their data. And the operator's commercial model will determine competitive advantage in the long run.

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Economic Impact of ICT Services (Rated out of 10)

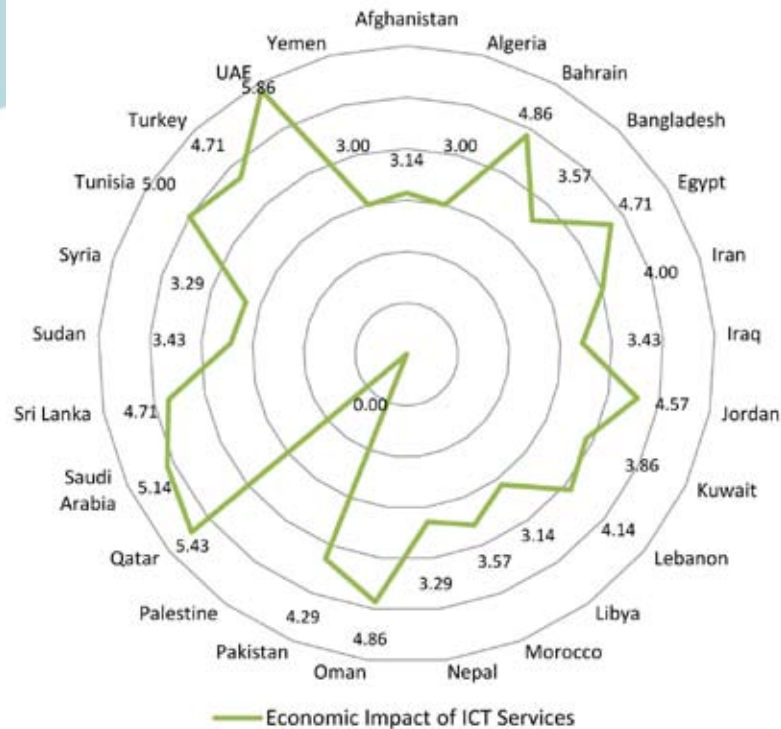


Image Source: SAMENA Telecommunications Council

Data Source: The Global Information Technology Report 2012 by World Economic Forum & INSEAD

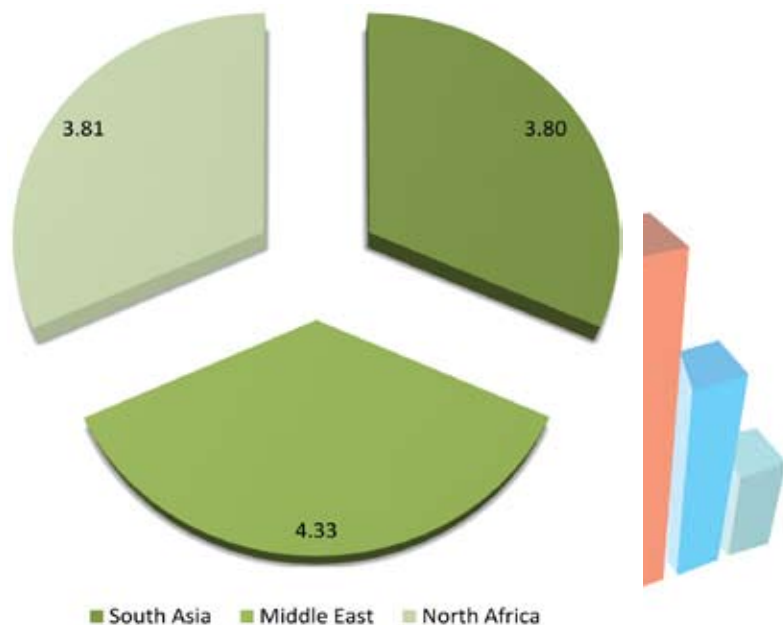
Research Note: Economic impact has been calculated by SAMENA, based on data derived from the World Economic Forum. The impact of ICT services on the economy has been given a value from 1 to 10 where 1 being the lowest and 10 being the highest. According to this data the ICT services in UAE have the highest impact on the economy followed by Qatar and Saudi Arabia. Data for Palestine is not available.

Regional Analysis of Economic Impact

Image Source: SAMENA Telecommunications Council

Data Source: The Global Information Technology Report 2012 by World Economic Forum & INSEAD

Research Note: A mathematical analysis of the data shows that Middle East has the highest economic impact in the tri regions. It is followed by North Africa and South Asia has the lowest overall economic impact. The primary reason for this is that countries within the Middle East have a relatively less fierce competition of ICT services which results in a higher revenue and thus higher economic impact as compared to North Africa and South Asia.



SAMENA Rank of Economic Impact of ICT Services

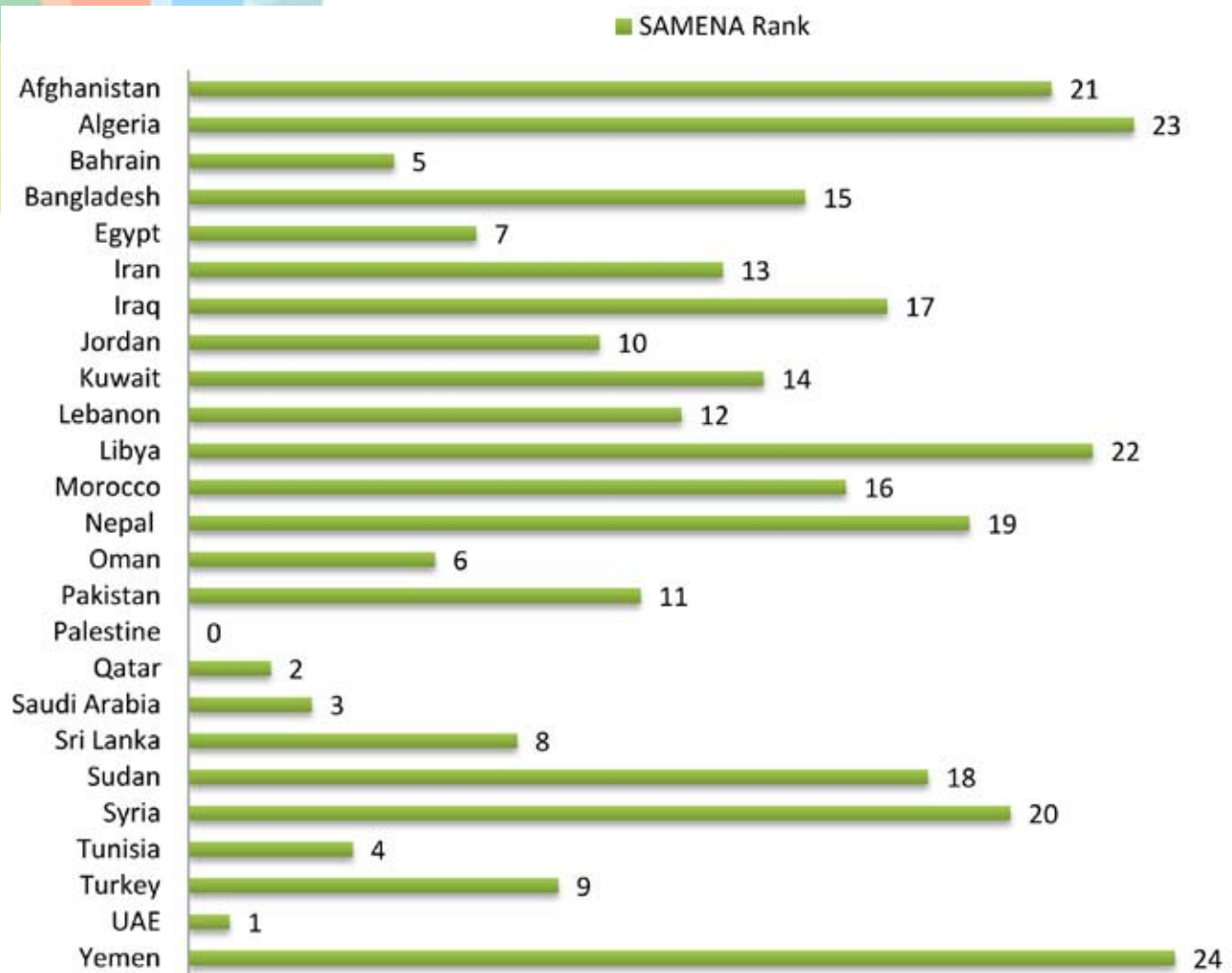
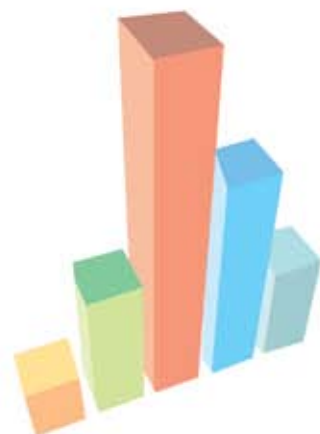


Image Source: SAMENA Telecommunications Council

Data Source: The Global Information Technology Report 2012 by World Economic Forum & INSEAD

Research Note: Ranking has been done by SAMENA, based on data derived from the World Economic Forum with 1 being the highest ranking. According to these rankings, Sri Lanka is the top ranked country from South Asian region, United Arab Emirates is the highest ranked country from Middle East whereas Tunisia is the highest ranked country from the North Africa region.





REGULATORY NEWS

Osiptel Cuts Price Cap for Fixed-to-Mobile Calls by 23 Percent

Peruvian telecommunications regulator Osiptel has reduced the price cap for fixed-to-mobile calls by nearly 23 percent from PEN 0.30 to PEN 0.23 per minute (VAT included). The proposal applies to Telefonica as dominant operator on the Peruvian fixed telephony market. The reduced tariff will be applied starting 1 October, for all calls made by Telefonica del Perú's over 2 million fixed-line voice subscribers to national mobile numbers.

East Africa Communication Regulator Sets up Office in Kigali

The East African Communications Organisation (EACO) Secretariat has been formally launched in Kigali, 14 months after Rwanda was chosen to host its permanent head offices. The organisation's board of directors was already operational, but with no permanent offices, the *New Times* reported. EACO is a regional body that brings together regulatory, postal, telecommunications and broadcasting organisations in the East African Community (EAC). The secretariat will temporarily be hosted at the offices of Rwandan regulator RURA, until permanent offices are found. Rwanda's Minister of EAC Affairs, Monique Mukaruliza, said the development was an important milestone in the regional integration that reflected the commitment of EACO members to realise their goals without the intervention of the EAC council of ministers.

Assignment Rounds in Romania Auction to be Held Soon

Romania's telecom regulator Ancom announced that the last additional round of the spectrum auction for allocating the frequencies in the 800, 900, 1800 and 2600 MHz bands has been held on 17 September. After this round, the generic blocks won by each bidder and the amounts they must pay have been determined. Ancom's commission announces that the seven assignment rounds corresponding to each category of frequencies have been scheduled to take place on 21 September and on 24 September. The position of each block won in the band will be established in the assignment rounds. The primary rounds and the additional rounds allowed for determining the number of generic blocks the winning bidders acquired in each category as well as the basic prices for the frequency blocks, but not the specific frequencies these bidders are to be assigned. The purpose of the assignment rounds therefore is to determine how the frequencies will be distributed among the winners, while additional prices are to be paid by each winning bidder for obtaining a specific assignment. The bidders who have won frequency blocks in the primary and additional rounds will express their options based on a list of pre-defined options provided for by the Ancom commission.

TP Broadband Margin Squeeze Test Positive

Polish regulator UKE announced the results of the margin squeeze tests for Telekomunikacja Polska's retail options at 20 Mbps, 40 Mbps and 80 Mbps. UKE tested the following offers: Neostrada to door, Neostrada with phone to door, FunPack to door, New Internet Power with tablet for PLN 1 and New Internet Power in FunPack with tablet for PLN 1, available with a contract for 24 months. UKE used data provided by TP for the following access levels: Ethernet and unmanaged IP (for options 40 Mbps and 80 Mbps). The results of the tests were as follows: positive for ATM access level (for service option 20 Mbps), negative for the level of managed IP access with the exception of the promotion Neostrada and phone to door (for 20 Mbps, 40 Mbps, 80 Mbps), FunPack to door (option 20 Mbps), New Internet Power in FunPack and tablet for PLN 1 (option 20 Mbps), for which the result is positive; and negative for unmanaged IP access level (for service option 20 Mbps).

Roshan Secures 3G License for Afghanistan

Roshan announced that the Ministry of Telecommunications and Information Technology (MCIT) has issued the company with a license that will enable Roshan to further expand and develop its already market-leading, innovative data packages via the 3G platform. Roshan celebrated the issuance of the license in a signing ceremony presided by His Excellency, Minister Amir Zai Sangin and other honorable ministerial dignitaries at the Ministry of Communications and Information Technology in Kabul. Roshan is aiming for a commercial roll out of its 3G service later in the year. Roshan has brought to market a range of robust data platforms for Afghan individuals and business. Most recently, Roshan launched "Kahkashaan," an innovative galaxy of web portal services that allows customers to access rich content on their mobile phones, including ringtones, pictures, games and applications. The company was also the first to bring Blackberry and M-Paisa mobile money services to Afghanistan.

Uganda Regulator Says 40% of Sims Registered

Uganda's telecommunication companies have urged customers who have not registered their Sim cards to do so before the deadline of 01 March 2013, in order to avoid being cut off from services. The mobile operators said the exercise had slowed down due to people's perception that there is more time for them to register, the Independent reported. Jael Christine, director of customer service at Airtel Uganda, called on customers to register in time so that they can all move at the same level. David Holliday, MD of Uganda Telecom said the registration was important to enable the Uganda Communications Commission and the security agencies to handle crimes related to mobile phones. The UCC said that about 40 percent of the 17 million mobile phone users had so far registered. Over the next six months the Commission and operators will work on raising awareness, including a joint outreach project in major towns and suburbs starting at the end of October.

NTA Plans M-commerce Regulation

Nepal Telecommunications Authority (NTA) — the regulator of the telecom sector in the country — has said that it will prepare the draft of a regulation on mobile commerce within the current fiscal year.

Technological developments have made it possible to offer financial transactions such as ticketing, banking, marketing, auctions, and location-based services through mobile handsets, said assistant director at NTA Baburam Dawadi, adding that the country must immediately start planning for a regulation for mobile commerce — popularly known as m-commerce — because in the future we could witness fraudulent activities. Mobile commerce is in a nascent stage in the country at present, he said, adding that the overall management of the service will be complex if the regulator fails to timely introduce a regulation. Some service providers have introduced applications such as paying post-paid bills, ticket reservations, banking and other services through mobile phones, he said. "The risk of criminal activities has also increased along with the rise in use of mobile technology for commercial purposes."

UK Regulator Finds BSKyB Fit and Proper

British Sky Broadcasting is a "fit and proper" company to hold an operating license, U.K. regulators said Thursday in response to the phone hacking scandal that engulfed the parent company. But it criticized the former CEO and chairman, James Murdoch, for poor management. The company's license was called into question because of the scandal at a newspaper owned by News Corp., which effectively controls BSKyB through a 39 percent shareholding. If the company had not been found "fit and proper" it could have been stripped of the license that yielded a net profit of \$1.4 billion in the year ending June 30.

The Office of Communications, known as Ofcom, concluded that James Murdoch was not complicit in a cover up at the tabloid News of the World, but his failure to initiate appropriate action on a number of occasions was "difficult to comprehend and ill-judged." The report found no evidence that Rupert Murdoch "acted in a way that was inappropriate in relation to phone hacking, concealment or corruption by employees" of his British newspapers. Though Ofcom said it might review the situation if there are further revelations, the decision removed any immediate threat of BSKyB losing its license. The company's shares were up 0.5 percent in early trading in London.

Czech Regulator Proposes Fresh Cuts in Termination Rates

Czech regulator CTU has proposed further sharp reductions in termination rates. The draft decision plans a reduction in the mobile termination rate from CZK 0.55 per minute to CZK 0.27 and would cut the fixed rate to CZK 0.04-0.08 per minute, from the current range of CZK 0.15-0.34. The new prices would take effect from 01 January 2013. The rates are based on the pure LRIC cost calculation method recommended by the European Commission. Following a one-month public consultation and clearance from the EC, the CTU aims to issue a final decision by year-end.



A SNAPSHOT OF REGULATORY ACTIVITIES IN SAMENA REGION Active Consultations & Invitations for Feedback

United Arab Emirates

For building the digital society, the TRA is developing a draft National ICT Policy 2013-2016 for submission to the Board. In keeping with the TRA's values of transparency and sector engagement, the TRA is conducting a Public Consultation on the draft National ICT Policy 2013-2016. The objective of the Consultation is to give all stakeholders the opportunity to review the draft Policy and contribute to its development before a final draft is submitted to the Board. Closing Date for submission of Initial Responses has been fixed as October 11, 2012. (July 26, 2012) www.tra.gov.ae

Oman

The Telecommunication regulatory authority has issued a public consultation on 'Analysis and Recommendations for Market Definitions, Dominance and related Regulation'. The objective of liberalization is to promote competition which is believed to deliver better services in terms of price and quality. In order to maintain an effectively competitive environment and to provide necessary safeguard from the abuse of dominance the TRA has set a competition

framework based on Ex-ante and Ex-post Regulations and Guidelines for the Telecommunications Sector of Oman. The TRA has recently issued The Ex-ante Regulation (The Regulation of Dominance) and the Market Definition and Dominance Guidelines after carrying out quite extensive public consultation process. The next stage in this process is to carry out "Market analysis". This analysis comprises market definition, dominance determination, and proposing suitable remedies to avoid risk of harm of dominance. In accordance with the above referred regulations and guidelines, the Authority has prepared a preliminary analysis with preliminary recommendations in the draft Market Definition and Dominance Report. The TRA is seeking the comments of stakeholders and other interested parties on the said report so that such comments can be considered by the Authority before it finalizes its decision. All Telecom licensees and other interested parties including consumers and the general public are invited to look into the Consultation Paper and provide their comments and views by October 3, 2012. TRA shall give due consideration to all comments and contributions received from the interested parties. (August 8, 2012) www.tra.gov.om

Country-Wise Policy & Regulatory Developments

Afghanistan

Board Chairman: Mr. Abdul Wakil Shergul

[Afghanistan Telecommunication Regulatory Authority (ATRA)]
The Ministry of Telecommunications and Information Technology (MCIT) has issued Roshan a 3G license. Roshan celebrated the issuance of the license in a signing ceremony presided by Minister of Communications and Information Technology. The Minister said that in awarding this license to Roshan, we are embracing the mobile broadband revolution, expanding the country's data services and enhancing capacity, aimed at improving the lives of Afghans as they connect with each other and the rest of the world.

(September 24, 2012) www.starafrica.com

Afghanistan's GSM base grew to 18.64 million at the end of June from 18.11 million at end-March. The country also counted 150,874 CDMA users, up from 221,276 three months earlier, according to statistics from the ICT ministry. The number of landlines totaled 86,482, up from 83,904 and penetration of communications services remains at rose to 70% from 66%. The number of telecommunications base stations totaled 4,670 versus 4,539 in March while total investment stood at US\$ 1.84 billion.

(September 12, 2012) www.telecompaper.com

Afghanistan's Ministry of Communication & IT (MCIT) has signed agreements with three of the nation's cellcos to install and manage 220 new base transceiver stations (BTS) in unserved rural areas. The US\$28 million project will be funded by the Telecommunication Development Fund (TDF), a universal access fund into which each telco must pay 2.5% of net revenues. Afghan Telecom will deploy the lion's share of the towers with 195, whilst Afghan Wireless Communication Company (AWCC) and MTN Afghanistan will roll out nine and 16 respectively. The new BTS are to be installed over the next 18 months and will cover an estimated 440,000 people. (September 7, 2012) www.telegeography.com

Algeria

Chairperson: Ms. Zohra Derdouri

[Regulatory Authority for Post & Telecommunication (ARPT)]

The mobile telephony segment in Algeria is reaching maturity. Mobile subscriber growth rates are projected to slow down even as mobile penetration rate was expected to reach 100% by the first quarter of 2012. 3G services are likely to be the next major trend in the Algerian market and are set to boost broadband penetration. However, an inefficient regulatory environment threatens the development of the telecommunications industry. New analysis from Frost & Sullivan finds that the market earned revenues of US\$ 4.96 billion in 2011 and is estimated to reach US\$ 7.36 billion in 2018. The highest growth potential is anticipated to lie in the broadband segment. Algeria has a 2.5% broadband penetration rate as of 2011, noted Frost & Sullivan Research. However, the demand for high speed data services is evident and is expected to increase, thus driving its growth. Algeria has among the lowest broadband penetration rates in the region. The fixed-line broadband services are monopolized by Algerie Telecom as all the ISPs have to use its network. The growth in the telecom market is likely to be fuelled by the broadband segment. Frost & Sullivan believes that mobile and wireless services will be the key drivers of broadband adoption in the country. The expected launch of 3G services

in 2012 could also accelerate broadband growth. Also in 2009, Algerian Telecom developed a major 5-year US\$ 6 billion infrastructure development plan. At the moment, however, fixed-line monopoly and delayed privatization of the incumbent is causing limited infrastructure upgrade and poor quality of service. Additionally, the Regulator, Post and Telecom Regulatory Authority (ARPT) has been ineffective in policing the networks' behavior and has delayed some key licensing decisions. ARPT should speed up 3G license launch as the growth in the telecom industry is now expected to be driven by broadband segment. The launch of 3G services is likely to accelerate broadband growth. Vendors should seek opportunities to implement their solutions and provide support in 3G network expansion. Operators have already planned huge investments due to the anticipated launch of 3G. (September 21, 2012) www.cellular-news.com

Bahrain

Chairman & General Director: Mr. Mohamed Bubashait

[Telecommunication Regulatory Authority (TRA)]

The Telecommunications Regulatory Authority (TRA) has appointed a consultancy, Frontier Economics, to design and manage a competitive 4G mobile licensing process scheduled to begin in the first quarter of 2013. A first stage will involve two paired 40 MHz allocations in the 2600 MHz band auctioned under technology-neutral licenses in Q1 2013, while a further 2x30 MHz in the band will become available by the end of 2014.

(September 10, 2012) arabianbusiness.com

Telecommunications Regulatory Authority (TRA) has denied reports that it had sold subscriber details to marketing companies. There has been an upsurge in spam messages sent to mobile phones in recent months, and it had been suggested that the database of phone numbers had been supplied by the regulator. In a statement, the TRA denied the claims and pointed out that selling such information would be illegal anyway. The TRA also advised customers to contact their mobile network provider to request a free block on inbound marketing messages, although that would only block messages originating within the country. It is claimed that most of the recent surge in messages originate outside the country. Some consumers see promotional messages as a breach of their privacy while some consider them as a source of information. TRA balances these needs and concerns by introducing some safeguards to provide consumers with the choice of receiving or blocking such messages, the regulator added.

(September 3, 2011) www.cellular-news.com

Bangladesh

Chairman: Maj. Gen. Zia Ahmed

[Bangladesh Telecommunication Regulatory Commission (BTRC)]

All of Bangladesh's cellular network operators, except market leader GrameenPhone, implemented ten-second pulse call billing by restructuring their call packages from Saturday onwards, as per the directive of the telecoms regulator. State-owned mobile operator Teletalk reportedly implemented the decision first, on August 15, followed a month later by Airtel, Banglalink, Robi and CityCell. A spokesman for GrameenPhone told that the company needs more time to execute the decision due to technical problems, but has every intention to implement the measure, which is aimed at providing a fairer customer service. (September 17, 2012) *The Financial Express*

Bangladesh's National Board of Revenue (NBR) ordered banks to freeze accounts of three cellcos – Robi, Banglalink and CityCell – for 15 days, and to deduct overdue value added tax (VAT) from the accounts, and deposit it to the public exchequer, due to the companies' failure to pay their dues within a stipulated timeframe. The Central Intelligence Cell (CIC) of the NBR sent a letter to all banks concerned, asking them to suspend all transactions, including withdrawal and transfer of money from accounts of the three companies, who owe a total of BDT3.93 billion (US\$47 million) in VAT to the NBR. The VAT bill is attributed to the sale of SIM cards dating back to 2005; following a legal battle over the payment, the NBR won a final court verdict on August 1, 2012. (September 14, 2012) www.telegeography.com

The Bangladesh Telecommunication Regulatory Commission (BTRC) has extended the deadline for applications for new licenses allowing termination of international incoming voice-over-internet protocol (VoIP) calls, to October 4, 2012. The BTRC published its VoIP Service Provider Policy on July 22, 2012 and invited applications from companies wishing to secure new VoIP termination concessions, valid for five years; the watchdog is prohibiting existing domestic mobile operators and international gateway operators from applying. (September 7, 2012) www.telegeography.com

Egypt

Executive President: Dr. AmrBadawi

[National Telecommunication Regulatory Authority (NTRA)]

New analysis from Frost & Sullivan, Egypt Telecom Market, finds that the market earned revenues of US\$6.35bn in 2011 and estimates this to reach US\$11.22bn in 2018. The introduction of new triple-play licenses in the country is expected to generate US\$1bn investment over five years in the telecom market. These new triple-play licenses promise innovative services for subscribers. In October 2010, the regulator announced winning bidders for two new triple-play licenses. The first license was signed with Link - a consortium including Mobinil and Orascom Telecom. The second triple-play license was signed with Tele Tech, a consortium led by Vodafone Egypt. New license holders will compete with Telecom Egypt as it already offers triple-play services. While these are positive signs, there remain certain market challenges. (September 27, 2012) www.ameinfo.com

Egypt's smallest cellco by subscribers, Etisalat Misr, has revealed that it expects to spend approximately US\$500 million on developing and modernizing its existing network, while the investment will also reportedly help fund the rollout of Long Term Evolution (LTE) technology. Etisalat Misr CEO said that his company is currently waiting for bids for the upgrade project from interested vendors, while also noting that preliminary testing has been conducted for parts of the project. (September 5, 2012) [Zawya.com](http://www.zawya.com)

MobiNil has inked a deal for EGP2.9 billion (US\$475 million) consolidated loan. The funds will be used to repay some of the operator's debts, while a portion will go towards the expansion of its cellular network. back in May 2012 European telecoms giant France Telecom-Orange (FT-Orange) increased its MobiNil to 94%, having completed the purchase of 93.9 million shares of the 100 million it did not previously hold at a pre-agreed price of EGP202.5 per share; the transaction cost it around EGP19 billion in total. The development came after FT-Orange the previous month had unveiled plans to spend up to EUR1.5 billion (US\$1.97 billion) to increase its stake in MobiNil as part of

its plans to ramp up its presence in emerging markets. At that date it confirmed it had reached an agreement with its partner in the Egyptian venture, Orascom Telecom Holdings, under which it would acquire all but 5% of MobiNil from Orascom at the EGP202.5 per share price. Later that same month Egypt's financial market regulator, the Egyptian Financial Supervisory Authority (EFSA), approved the tender offer, which then ran from April 24, 2012 to May 23, 2012.

(September 3, 2012) [Zawya.com](http://www.zawya.com)

Iran

Minister of communication & Information Technology: Dr. Reza Taghipour

[Communications Regulatory Commission (CRC)]

The main reasons for internet related complaints in Iran have been revealed by the Computer and Internet dispute council of Tehran's prosecutor's office. According to the member of the Computer and Internet dispute council, Baghir Afhami, the most common complaints are connected with personal information theft, e-mail hacks and bank accounts theft. Afhami noted that this occurs because users do not pay enough attention to security when they are online. He added that most of the time, criminals online are driven by personal revenge towards their victims. Lately, the wave of cyber crimes in Iran has increased. In July, unauthorized withdrawals from customers' bank accounts made up the greatest share of Iran's cyberspace crimes.

(September 5, 2011) www.zawya.com

Iran plans to launch a national information network, which will counter all kinds of cyber attacks, Communications and Information Technology Reza Taghipour said. He told that the first phase of the network will be inaugurated by the end of the current Iranian month. The development of internet-based services in schools across the country is among objectives of the ministry. Since 2005, Iran has been developing a "national Internet" to improve control over its content as well as speed. The project, which is separate from the World Wide Web, will be completed by 2013. This network will be separated from the rest of the internet, specifically for domestic use. Iran plans to increase its internet bandwidth to 2 terabits per second from 520 gigabits per second by the end of its fifth five-year development plan (March 2016), the minister said. He added that the bandwidth has been increased to 520 gigabits per second from 23 gigabits per second during the past three years.

(September 3, 2011) www.zawya.com

Iraq

CEO: Dr. Buhan Shawi

[Communication & Media Commission (CMC)]

Asiacell has been admitted to the Iraq Stock Exchange (ISX) and trading of its shares could begin as soon as next month. ISX chief executive said that they are just waiting for a few technical things to happen before we can start trading in Asiacell. We need to contact the communications regulator and figure out if they have a specific plan on how they want to go about the initial public offering (IPO), agree on a date for the first day of trading, publish financial statements on our website and other filings ... and see if any rules or regulations need to be fine-tuned for the specifics for trading on telecommunications companies'. Under the terms of their operating licenses, Iraq's three national mobile operators were required to float their capital on the ISX within four years, as the bourse was not ready to handle the listings when the concessions were handed out in 2007. In March 2009 the government reiterated the operators' obligation to list around 25% of their shares, in a move that could

triple the value of shares on the stock market to over US\$6 billion. With progress proving to be painfully slow, in June this year Iraq's Communications and Media Commission (CMC) revealed that it would fine Asiaccell US\$8,500 a day, applied retroactively from September 1, 2011 for its failure to list; rival mobile operators Korek Telecom and Zain Iraq were also incurred financial penalties. Asiaccell finally won approval to list on the ISX from the stock market regulator last month. (September 17, 2012) www.telegeography.com

Zain has said it will fight a US\$262 million fine imposed on its Iraqi subsidiary, as the local bank assets were frozen by the regulators. The fine was imposed back in January 2011 for allegedly breaching its operating license. The company had been accused of putting 5 million SIM cards in the local market without permission from the regulator. Zain claimed that the regulator did not have the authority to impose the fine. Shortly afterwards, the regulator ordered the other networks to block interconnection to the 5 million SIM cards in dispute. At the time the company said it had three months to appeal the decision, but the mobile network and regulator have been deadlocked in negotiations ever since. The regulator is seeking to revise the order to limit it to bank funds up to the value of the fine, especially as freezing the bank accounts means Zain cannot pay its bills to the regulator either. (September 5, 2012) Reuters

Kuwait

Minister of Communication: Dr. Mohammed Al-Baseeri

[Ministry of Communication (MOC)]

The Kuwaiti cellular operator Zain has launched a Wi-Fi hotspot roaming service in partnership with global Wi-Fi provider iPass. The service, which is being marketed to Zain customers under the label 'Zain Pass', gives users access to over one million hotspots around the world. Zain says that its operations in other Middle East markets will soon be launching their own respective Zain Pass services. Zain and iPass first inked their hotspot roaming agreement in March this year. (September 11, 2012) www.telegeography.com

Following on from reports at the end of last month that UK mobile giant Vodafone Group was close to signing a roaming deal with Kuwait's Zain, the former has now confirmed the agreement. Claiming that the deal 'significantly expands Vodafone's presence in the Middle East and provides Zain with greater access to Vodafone's global footprint', the pair has reportedly inked a Partner Market agreement. Under the terms of the non-equity partnership agreement, the deal, the UK company claims, will 'enhance both Zain and Vodafone's ability to meet growing demand among multinational businesses for sophisticated voice and data communications solutions as well as advanced roaming services within the Middle East'. Further, Vodafone has said that the development will complement its existing regional operations in Egypt and Qatar, while increasing the number of countries in which it has Partner Market agreements to more than 50. As per the deal, Zain will gain access to Vodafone's devices and services in its home markets, while also becoming the latter's preferred partner in respect of the agreed areas of cooperation. The pair will reportedly work to provide customers with 'enhanced network coverage' and 'harmonized roaming rates across multiple countries with greater cost efficiencies', while it has also been confirmed that Zain will be permitted to utilize the Vodafone brand. (September 4, 2012) www.telegeography.com

Lebanon

Acting Chairman & CEO: Dr. Imad Hoballah

[Telecommunication Regulatory Authority (TRA)]

The CEO of Lebanese state-owned mobile operator Touch has made a statement on its ongoing efforts to address a deterioration in services caused by a surge in new subscribers and the introduction of 3G data services. Claude Bassil told journalists that Touch and fellow government-owned cellco Alfa will need another year to optimize the reliability of their 3G networks which were launched in November 2011. Bassil said that during the initial upgrade phase, users' connections often suffered disruption as a result of being transferred between 2G and 3G reception, while he also blamed some poor performance on illegally imported handsets. Touch and Alfa (part of the Orascom/Vimpelcom group) had their contracts extended in February and were commissioned to build 400 new broadcast stations and install 1,200 antennas across the country, necessary to optimize the 3G network, Bassil said, adding that 50 new stations are essential to eliminate coverage gaps. Addressing other service issues, the Touch CEO said that introducing per-second call billing rather than the current per-minute system was 'unlikely' due to the resultant impact on revenues – relied on by the state, which has repeatedly blocked proposals to privatize the mobile sector. He also flagged up inefficiencies in Lebanese mobile operations stemming from government ownership of the sector, including the fact that over half of employees are engaged in 'support functions including maintenance, refueling generators, and so on', rather than outsourcing these functions to concentrate on services. Finally, when asked about prospects for 4G Long Term Evolution (LTE) services, Bassil said that a 4G network would take 'at least two years' to be rolled out and launched in Lebanon.

(September 20, 2012) www.telegeography.com

Libya

Minister: Dr. Anwar Alfatorji

[Ministry of Communication and Information]

The Hermes Communications Technology, a Libyan joint venture partner of international Wide Area Communications specialists Hermes Datacomms, has been awarded a telecoms license in Libya. The concession, which will allow Hermes to provide communications service to the oil and gas industry and other corporate sectors, reportedly encompasses fixed line telephony, international transmission, VSAT communication and internet services. Hermes Communications Technology first established a presence within the Libyan capital, Tripoli in 2005, trading continuously and supplying VSAT communications solutions to clients in both urban and rural locations. UK-based parent company Hermes Datacomms specializes in providing tailored Wide Area Communications services to the upstream oil and gas industry, chiefly in 'challenging' locations such as Algeria, Angola, Malaysia, Kazakhstan, Iraq, Russia and Turkmenistan. (September 21, 2012) *The Libya Herald*

Nepal

Acting Chairman: Mr. Ananda Raj Khanal

[Nepal Telecommunication Authority (NTR)]

Nepal's Ministry of Information and Communications (MoIC) will use the NPR 5.63 billion in the Rural Telecommunication Development Fund (RTDF) to expand fiber to rural areas. The ministry will establish a committee for the implementation of the project, which aims to improve voice and data access in rural areas. The committee will include the chairman of the Nepal Telecommunications Authority (NTA), members of the ministry and the National Planning Commission.

The RTDF, which is funded by operators and ISPs who are required to pay 2% of their annual revenues to the fund, has remained idle for more than a decade as there was no policy on developments. (September 26, 2012) [The Republica](#)

The Nepal government is preparing to divest a 30% share of Nepal Telecom (NT) to a strategic partner. The committee formed to provide recommendations to the government on the matter submitted its report to the finance secretary and recommended the government sell a 30% stake. The government owns 91.49% of NT, after already divesting a 4.65% share to employees and 3.83% to the general public. The committee suggested the process of bringing in a strategic partner will take about 18-22 months. Concluding that the existing Public Procurement Act has created hurdles in competitive market expansion, the committee recommended the government to also relax provisions of the Act before inviting a strategic partner at NT. The committee has suggested a three-stage process to introduce a strategic partner: Nepal Telecom will present its status in the first stage, take feedback from the firms which could be interested in the second stage, and the third stage would be the management transition. (September 25, 2012) [The Himalayan Times](#)

The broadband penetration in Nepal has almost doubled to around 19% from 10.89% within a year. According to the Nepal Telecommunications Authority (NTA), the total number of internet users in Nepal had jumped to 5.04 million as of August from 3.11 million a year earlier. During this period, the number of mobile and fiber optics users more than doubled to 45,602. The NTA statistics also show that presently, there are more than 187,000 GPRS users, whereas a year ago there were fewer than 100,000. ISPs attributed the increasing web usage to services that integrate the internet with e-banking, e-shopping and so on. The number of ADSL users jumped to 92,000 from 68,000. Customers of cable internet and dial-up continue to decline. The number of cable internet users fell to 15,000 from 18,000 and the number of dial-up users has decreased to 15,000 from 20,355 in August 2011. (September 24, 2012) [The Republica](#)

Nepal Telecommunications Authority (NTA) has said that it will prepare the draft regulation on mobile commerce within the current fiscal year. Technological developments have made it possible to offer financial transactions such as ticketing, banking, marketing, auctions, and location-based services through mobile handsets, said NTA, adding that the country must immediately start planning for a regulation for mobile commerce — popularly known as m-commerce — because in the future we could witness fraudulent activities. Mobile commerce is in a nascent stage in the country at present, he said, adding that the overall management of the service will be complex if the regulator fails to timely introduce a regulation. The regulator has planned to define the scope of m-commerce, its basic security aspect, and tariff structure on Value Added Service to be used for m-commerce. The regulator is preparing the Terms of Reference to appoint a consultant to study the probability of m-commerce in the country and its management and NTA will float consultation papers to the public for comments and then only finalize the paper. The authority has planned to introduce the regulation by the end of the current fiscal year. (September 20, 2012) [www.thehimalayantimes.com](#)

Nepal Telecom (NTC) has initiated process for bringing in a strategic partner with intent to fight competition with various private operators in Nepal. The NT has forwarded a proposal

to the government to this effect. The NTC had formed a committee to prepare a draft to make recommendations to the government to bring a strategic partner. It is said that the draft is forwarded to the government seeking immediate decision. It was claimed in the report that that NTC cannot compete with other telecommunications service providers unless it is not allowed to bring partner. Likewise, existing legal provisions are also mentioned as barriers to compete with other companies. Once the government gives authority, the NTC will present its status in the first stage and take feedback from firms that show interest, a senior official said this weekly preferring anonymity. (September 4, 2011) [www.reviewnepal.com](#)

Oman

Chief Executive Officer: Dr. Hamed Al-Rawahi

[Telecommunication Regulatory Authority (TRA)]

Seven telecom services were exempted from the provisions of the law regulating licenses as stipulated in the Telecommunication Regulatory Law. The exemption, which came into effect yesterday, includes operators who offer mobile telecom service onboard aircrafts, reloading of Internet access in public places, telephone subscriber support service, audio-visual studios transmission via Satel, automated management of vehicles and private telecom networks designed for personal use which are not linked to the public network unless this service is set up or operated via satellites. Satel is an ISO certified company, which has specialized in designing and manufacturing radio modems for over 25 years. This came in a decision issued by Oil and Gas Minister Dr Mohammed bin Hamad al Rumhy, who is also the Board Chairman of the Telecommunications Regulatory Authority (TRA). The decision states that exemption from the specific license terms shall be made following a decision by Chief Executive Officer in response to written application by the party concerned. The applicant should establish having received a radio license from the TRA to utilize the frequency required for the service that is requested. The applicant should also provide required documents to show that the service is among those cited in the decision, as well as bill payment documentation. (September 17, 2012) [www.zawya.com](#)

Pakistan

Chairman: Malik Farooq Awan

[Pakistan Telecommunication Authority (PTA)]

National Telecommunication Corporation (NTC) has planned to lay a submarine cable between Pakistan and the United Arab Emirates (UAE). The estimated cost of laying the cable will be worked out by a consultant in the proposed techno-commercial study and feasibility, besides tracing source of funding. The official said Pakistan was already connected with three international fiber-optic cables, but the reason for carrying out the feasibility of fiber-optic cable was to examine the technical and commercial viability of the project and have another option of SMW-3 & 4 and other networks at Fujairah (UAE) through NTC network Pakistan with Trans-Asia-Europe-Fiber-Optic-System (TAEFOS) for linking Central Asian Countries through China and Iran. (September 17, 2012) [www.brecorder.com](#)

Pakistan Mobile Communications Limited (Mobilink) has signed a Memorandum of Understanding (MoU) with the Special Communications Organization (SCO) to initiate infrastructure sharing between the two companies. Under this agreement, Mobilink and SCO shall share tower and backhaul media as part of Infrastructure sharing arrangements. This arrangement will allow both organizations to economically

manage their growing subscriber base in the urban and rural areas of Azad Kashmir (AK) & Gilgit Baltistan (GB). Moreover, this initiative aims to optimize the utilization of energy and fuel resources, leading to reduced carbon emissions and thus helping both organizations achieve broader environmental goals. (September 13, 2012) <http://pakobserver.net>

Branchless banking witnessed an impressive growth during the fourth quarter (April – June) of FY12 as the number of mobile banking accounts had touched 1.45 million, depicting a remarkable growth of 37%. According to the State Bank of Pakistan (SBP) the accounts activity level has also improved considerably during the quarter under review as the number of active accounts increased by 66%. Over 28 million transactions worth Rs 115.3 billion were processed during the April – June quarter. The number and value of transactions grew rapidly during April – June quarter by 12% and 36% respectively. The growth in value of transactions was almost three times more than the growth in the number of transactions. The overall average size of transaction has increased from Rs 3,367 to Rs 4,065 during the quarter under review, the SBP said. The agents' network rose to 29,525 on June 30, 2012 from 26,792 on March 31, 2012, registering an increase of 10%. The agents now have presence in 90% of the districts in the country. Bills payments and mobile top-ups remained the dominating activity with 50% share in total numbers, followed by person to person (over the counter) fund transfers with a share of 36%. Loan repayments of Rs464 million primarily of microfinance institutions were collected through branchless banking agents during the quarter, the SBP added. According to the SBP, the growth expectation in coming quarters is fairly high as the existing two branchless banking players are increasing their scale of operations and six other banks are in pilot phase and are likely to start their branchless banking operations shortly. Moreover, banks are exploring avenues to increase the attractiveness of the m-wallets for their customers, and offering them new services such as purchasing air-tickets, receiving salaries/pensions, utilizing ATM through debit cards and internet banking. (September 12, 2012) www.thenews.com.pk

'Fair Trial bill', a draft that has been approved by federal cabinet and is likely to be tabled in parliament, will authorize the state to intercept all private communications of citizens to catch terrorists. This private communication includes, and is not limited to, Emails, text messages, phone calls, audio and visual tapes or anything that the law enforcement agencies will consider necessary. The bill, which government of Pakistan argues will allow investigation "by modern techniques and devices", if passed in current shape will pose serious threats to citizens' privacy. If passed by parliament, the bill will enable phone calls, text messages, emails and other private communication as admissible evidence while suspects will be held for six months after a warrant issued by a sessions and district court judge in his chambers. After the approval of Fair Trial Bill, state agencies that are known for bypassing the regulations will be able to intrude into anyone's private communication. It is largely feared that privacy of all Pakistani, whether they are present in Pakistan or if they are anywhere in the world, will be impacted to a level that the concept of private communication will fade away. (September 7, 2011) <http://propakistani.pk>

Qatar

Executive Director: Ms. Christa Cramer

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

The Supreme Council of Information and Communication Technology ictQATAR said its analysis has found that Qtel and Vodafone have met 20 out of 30 quality of service (QoS) indicators set for the delivery of world-scale communication service in the country. The 30 QoS indicators have been set for total compliance by 2015. According to the analysis, the incumbent operators were found to have complied with 20 out of the 30 service quality indicators used in the market. The quality of service (QoS) report covers a wide range of compliance standards related to the quality of service obligations set forth in providers' licenses, including the time taken to solve billing complaints, network quality, complaints received per 100 subscribers, successful call ratios, dropped call rates, and billing accuracy. As part of the regulatory authority's recurring review process, IctQatar once again designated Qtel as a dominant service provider (DSP) in all fourteen relevant retail and wholesale markets in Qatar, including access to mobile and fixed networks, international telecommunication services, broadband services, access to network facilities, and call origination and termination. Vodafone was deemed to be a DSP in two wholesale terminating markets (fixed and mobile) in which a network operator is always inherently dominant. (September 7, 2011) www.telecompaper.com

The Supreme Council of Information and Communication Technology (ictQATAR) has released its 2011 annual report, which covers the last fiscal year from April 2011-March 2012. The report highlights the achievements of the past year, showing progress towards attainment of the goals outlined in Qatar's 2015 National ICT Strategy. The Annual Report details how ictQATAR worked to improve connectivity, boost human capacity, foster economic development and modernize the sector's regulatory and legal framework. These efforts resulted in Qatar being ranked 2nd out of all Arab nations on the International Telecommunication Union's ICT Development Index and 28th among the 142 developed and developing nations on the World Economic Forum's Networked Readiness Index 2011. The 2011 Annual Report is organized around the goals of Qatar's 2015 National ICT Strategy, which are addressed through a total of 11 different programs and comprise nearly 60 unique projects. (September 5, 2012) www.ictqatar.qa

Saudi Arabia

Governor: Eng. Abdullah A. Al Darrab

[Communication & Information Technology Commission (CITC)]

Saudi Arabia has become one of the fastest growing IT markets in the Middle East and is projected to account for around 50% of the GCC's total ICT investments during 2010 to 2012, according to a report from RNCOS, a research solutions company. Government organizations are among the largest IT service providers in the Kingdom. With 22 objectives with 46 supporting initiatives, the Second National e-Government Action Plan is a fully formed project able to take the Kingdom's e-government performance to the next level. There are four strategic themes to the new plan build a sustainable e-government work force, improve the experience of the public in their interactions with Government, develop a culture of collaboration, and improve government efficiency all resulting in the efficient and immediate delivery of services and goods to Saudi citizens. The 3rd Annual e-Government Summit organized

by business information company naseba and being held yesterday and today in Riyadh, presents the new initiative in detail. The welcome address was given by Mamdouh Khawaji, vice president of IT at SEDCO, who examined the need for public awareness in e-government initiatives. He noted the "United Nations defines e-government as the employment of the Internet for delivering government information and services to the citizens: Hence citizens are a key component of this service." With the implementation of the Second National Plan, the government also hopes to increase collaboration with private companies as a way to ease project workload and to further develop Saudi Arabia's economy by creating jobs. The first panel of the day was an in-depth case study on countries such as Singapore who have adopted public-private partnerships (PPP). It was led by industry leader Abdulaziz Al-Mulhem, assistant minister and CIO of planning at the Ministry of Culture and Information, Saudi Arabia. He cited how constraints on resources coupled with wealth in the private sector and bureaucracy in the public sector means PPP is a much needed tool to facilitate opportunities such as jointly owning technology or services. He concluded by saying "e-government means the engagement of people, government and PPPs - which creates people-public partnerships - it is the people who are the most important." Alexander Zarovsky, international business chief at InfoWatch, led a panel discussion on national digital information traffic monitoring, data loss prevention, social media monitoring and other topics. In it, he stated the timeliness of the summit, highlighting how 92 percent of security incidents online are now related to personal data - for example, credit card numbers, bank accounts and personal emails, which can lead to company-level hacking. He concluded "compliance and risk management are the leading drivers for the national program and this summit allows us all to come together and discuss these issues." Other panels included dialogue on digital security threats and solutions, e-participation - which involves connecting people and politics through the internet - and a panel discussion on effective ways to implement e-government interoperability. (September 26, 2012) www.zawya.com

Sri Lanka

Director General: Mr. Anusha Palpita

[Telecommunication Regulatory Commission (TRC)]

Sri Lanka will become the first South Asian country to have Fourth Generation (4G) telecom technology when three operators launch their upgraded services soon. This will be followed by the deployment of Fiber-to-the home (FTTH) technology which allows homes with broadband speeds up to 100Mbps via optical fiber by late next year. A senior officer from Telecommunication Regulatory Commission of Sri Lanka (TRC) said that these developments were a part of their plans to acquire 4G and FTTH by the end of 2012. FTTH will provide high speed internet on fixed lines while 4G will give high speed internet access for mobile users. The 'Mobitel' will launch 4G by the end of this year while speculations were rife that the 'Dialog' would also deploy the technology. However it is not yet certain who could be the third player as all operators were tight lipped on the subject as each player wants to be the first to launch this technology with much fan fare before the other. Meanwhile reaching further heights in terms of fixed internet arena, TRC is striving to deploy internet with speeds up to 100 Mbps to homes via optical fiber (FTTH) replacing current copper-based DSL by end of next year. Currently Sri Lanka Telecom (SLT) and Dialog provide high speed internet access to businesses/buildings (FTTB) via optic fiber cables. According

to the Director General of TRC broadband connectivity via optical fiber will cover 100% of the market within the next four years. However it is learnt that despite several attempts TRC failed to get this high speed technology off the ground this year. (September 24, 2012) www.nation.lk

Data published by Sri Lanka's Central Bank show the country's fixed wireless telephony subscribers decreasing in the second quarter of 2012 to 2.46 million at the end of June, down from 2.64 million a year earlier and a peak of 2.66 million at end-December 2011. Meanwhile, the statistics indicated that copper wireline local access was expanding, driven by the take-up of ADSL broadband, with the Bank calculating that wireline connections - nearly all provided by Sri Lanka Telecom - had reached nearly 970,000 at end-June 2012, up from 918,000 twelve months previously. Mobile broadband growth was also reported to be surging, with the Bank's data showing a 77% year-on-year rise in 'internet and e-mail' subscribers to 1.15 million by end-June 2012. (September 11, 2012) www.telegeography.com

Tunisia

President: Mr. Hassoumi Zitoune

[National Telecommunication Commission (INTT)]

Government representatives in Tunisia have confirmed that the country has officially brought its stringent Internet censorship policies - known as 'Ammar 404' - to an end. According to Information and Communication Minister Mongi Marzoug this has been brought on by the recent revolution in Tunisia and the interim government will now try to promote access to information and freedom of expression. The launching of the country's National Forum of Internet governance will be "the end of Ammar 404" he said. "The Minister said that Tunisia will announce its membership to joint action for freedom of expression on the Internet Freedom online, which holds its second session, on September 6-7, 2012 in Nairobi, Kenya". Tunisia will also try to prove to the world that they have truly ended censorship as he presented the main objectives of the upcoming ICT4All conference to be held in Tunisia. This event aims to give a new image of Tunisia as a country leader in the field of ICTs and freedom of expression and boost the country's role in this sector on the Maghrebi, Arab and African levels. (September 7, 2011) www.itnewsafrika.com

Turkey

Chairman & CEO: Dr. Tayfun Acarer

[Information & Communication Technologies Authority (BTK)]

Fast-growing international mobile virtual network operator (MVNO) Virgin Mobile is in talks with Turkish mobile giant Turkcell regarding the establishment of an MVNO in Turkey. While the UK-based reseller stopped short of confirming that a deal is on the table, it confirmed that it has entered 'preliminary discussions with various parties' in Turkey. The Virgin Mobile wants to become an MVNO in Turkey, so they have been talking to companies in the market. They have reached a certain level in talks with Turkcell. Turkey takes 15% tax on gross sales from both mobile operators and their MVNO partners. The head of Turkey's regulator Bilgi Teknolojileri ve İletişim Kurumu (BTK), Tayfun Acarer, confirmed that Virgin has not yet filed an application to enter the market as an MVNO. (September 14, 2012) Reuters

United Arab Emirates

Director General: Mr. Mohamed Nasser Al Ghanim

[Telecommunication Regulatory Authority (TRA)]

The telecoms regulator and its counterpart at the National Media Council are examining ways of curbing mobile spam messages. A meeting between the two bodies held last week emphasized the need to adhere to regulatory policy regarding "spam and electronic communication" issued by the TRA on December 30, 2009. TRA Director General told that TRA gives great importance to this aspect in the telecommunications sector in the UAE therefore, has issued the necessary legislation to reflect the roles of both licensees

"Etisalat" and "du" in reducing the phenomenon of spam promotional, and the TRA created mechanism for that to allow those affected to report spam as instructed operators to provide the necessary technical resources that prevent access such messages to users and prevent the recurrence of access if the user reporting. Director General added that TRA is keen to emphasize on the need to take the prior approval of the target before sending marketing messages via mobile phone, noting that regulatory policy established by the TRA in this regard stipulates to respect the individual privacy and prohibits sending marketing messages via mobile phone. (September 6, 2012) www.cellular-news.com

Regulatory Activities Beyond the SAMENA Region

ITU

At the end of the year Dubai will host the World Conference on International Telecommunications (WCIT), where countries around the globe will revise the International Telecommunication Regulations (ITRs). Because all of them should have their own point of view, different sectors of the EU defended its position on ITRs at the European Parliament on September 18. The first treaty adopted on ITRs was signed in 1988, when government regulation over telecommunications "had sense", said Megan Richards, Director Coordination of DG CONNECT, European Commission. "But things are really transformed itself now", she said, adding that "we have to review the ideas to make them last 25 more years." The International Telecommunication Union (ITU) is the specialized agency of the United Nations which is responsible for information and communication technologies, but its latest project has generated big criticisms among citizens, NGOs and the telecommunication industry. According to them "ITU power" will affect human rights, such as freedom of expression and privacy. Megan Richards stated that Europe will not accept any imposition that could transform current regulations and community laws. She admitted that "adjustments need to be made", but the European Commission will "avoid any limitations on our ability to innovate and develop." In this way, the EC's proposal rejects limitations on internet access and considers that negotiations between countries must take place to express EU's clear position and to ensure that the "advantages of internet can continue." Telecommunications industry has changed its environment for the last years and due to this shift it needs new regulations and rules to continue generating innovation. The European Telecommunications Network Operators Association (ETNO) has developed a ITRs proposal to Address New Internet Ecosystem and its Executive Board Chari, Luigi Gambardella, defended it at the European Parliament. Despite the disapprovals received, Gambardella explained that ETNO "is not asking for any regulation or change in the current model of internet", and the group "wants to avoid new regulatory measures that would prevent new businesses models to limit consumers choice." Overall, ETNO is asking for a more sustainable internet model, based on flexible ITRs to encourage future growth and the sustainable development of telecoms markets, always respecting leadership, independent Multitask holder governance and commercial agreements. Regulations may be needed, but is complicated to make decisions when they could affect citizen's rights. "Internet growth was

facilitated by a policy framework based on competition, non discrimination, openness and protection of human rights" and ITRs are "not good for the future of internet", stated Jim Dempsey, Vice President for Public Policy at the Center for Democracy & Technology. According to him ITU has a main role in the Member States, "there is not discussion on that", but there are challenges such as cybersecurity and property rights that can be faced by other institutions, not by governments. If they want to make the decision, it must be "through treaties" and with negotiations. Richard Hill, Counsellor at the ITU, said that "there is nothing about internet governance" in the new ITR that will be discussed in December. During the last years, countries decided to control mobile roaming prices, created the "https" protocol and SMS, also developed keyboards and Wi-Fi connections; all under the first ITU treaty, he explained. Therefore, the new one will also "continue with innovation."

(September 20, 2012) www.neurope.eu

In an international agreement that takes action to lower roaming costs, International Telecommunication Union (ITU) members – from private and public sectors – have approved measures aimed at combating high mobile roaming rates. The ITU said on Friday it had initiated a number of measures to empower consumers and encourage operators to lower tariffs. In line with this, the ITU has called on governments and regulators to "explore ways to protect and empower consumers in determining their best choices among the array of options available to them in the rapidly evolving mobile marketplace". One of the measures, says the ITU, is that of making information on international mobile services clearer and more transparent. "In addition, alerts should be sent to consumers as they approach a certain cost limit for roaming, with a block placed on further usage unless authorized by the user," says the body. The ITU has advocated market-based solutions, including promoting regional cooperation among operators and regulators, and encouraging them to reach agreements on lowering wholesale roaming tariffs. "Possible regulatory measures are also recommended, such as placing caps on prices charged to consumers for mobile roaming." (September 17, 2012) www.itweb.co.za

SAMENA

SAMENA Telecommunications Council organized an International Telecoms Regulations (ITRs) Roundtable discussion on September 17 in Dubai. Hosted by Etisalat, the roundtable provided an opportunity to discuss the

potential amendments proposed by the various ITU WCIT Regional Council Working Groups (CWGs) globally, as well as SAMENA's and other industry associations and groups to the 1988 ITRs Treaty. Thomas Wilson, CEO and Executive Managing Director of SAMENA Telecommunications Council said, "In the light of the recent regional and international preparations for the World Conference on International Telecommunications (WCIT) in Dubai in December 2012, the SAMENA Council decided to convene the regional telecom industry players and facilitate dialogue on the various amendments that have been proposed to the ITRs Treaty. The sustainability of the current multi-stakeholders telecommunications model through the support of decisive, consensus-driven and collaborative efforts will be the primary focus of the meeting." "It has become imperative for the SAMENA region's key stakeholders including policy makers, regulators, telecom operators and technology providers, investors and the ICT professional community to be pro-actively engaged in this process", added Wilson.

(September 18, 2012)

United States

The Federal Communications Commission FCC says that it is to take a fresh look at its mobile spectrum holding policies given the changes in technology, spectrum availability, and the mobile marketplace since the last review of these rules more than a decade ago. The FCC said that in recent years, wireless providers, as well as trade associations and public interest groups, have requested that the FCC review its current policies regarding mobile spectrum holdings to keep pace with market changes. With this review, the FCC added that it is seeking comment on ensuring that its policies provide the certainty and predictability needed to make informed investment decisions, including participation in upcoming incentive auctions and secondary market transactions, while also promoting the competition needed to sustain a healthy wireless marketplace. In related news, the FCC has approved plans to use an "incentive auction process", making the United States the first nation in the world to implement this major policy innovation, which aims to repurpose broadcast television spectrum for mobile broadband use. These auctions are a market-based tool to repurpose broadcast television spectrum for mobile broadband by offering unique financial opportunities to broadcasters, including a portion of the auction proceeds for participants.

(September 29, 2012) www.cellular-news.com

The Federal Communications Commission is allowing cable companies to take over telephone companies that serve customers in their franchise areas. The request was filed by the National Cable & Telecommunications Association and concerned so-called competitive local exchange carriers.

(September 18, 2012) www.bloomberg.com

The FCC has announced 52 qualifying bidders in the Connect America Fund Mobility Fund reverse auction to be conducted on September 27. Qualified bidders include five units of U.S. Cellular; four units of T-Mobile; Alaska's GCI Communication; Commnet Wireless, which operates a rural wholesale roaming network, and numerous small rural wireless carriers. Commnet's participation is no surprise, considering that the mobility fund auction targets roadways where 3G wireless service is not available. A total of \$300 million is up for grabs in the auction, which will bring 3G or 4G wireless to rural areas where 3G is not available today. The money for the program was freed up through cost savings in other areas of today's Universal Service fund

and will be the first test of the FCC's long-expected reverse auction approach. Carriers will bid to deliver service to at least 75% of the service area, and funding will be awarded to the carrier that offers to deliver service at the lowest level of support. Service areas are established on a census tract basis except in Alaska, where funding will be awarded based on census block. According to a public notice issued earlier this year, sealed bids were due by July 11 and funding will be awarded on a single-round sealed bid basis. According to a release issued today, a mock auction will be conducted on September 20. (September 17, 2012) www.telecompetitor.com

The telecoms regulator FCC is considering proposals to change how it reviews mergers and competition within the mobile industry. The review would look at how the FCC decides whether a company holds too much radio spectrum, in a move which could affect how it approves mergers in the future. Currently, the FCC assesses each situation on its merits but based on spectrum policies drafted for the case being discussed. The proposal would be to create a uniform set of rules applying to every company. The move would reduce regulatory risk, albeit while also diminishing the opportunity to argue individual cases. An unnamed FCC official explained to the politics blog, The Hill that a single standard for all deals could provide "clarity and predictability" to the FCC's review process. But the official emphasized that the FCC is only seeking input and could ultimately leave its current process unchanged. The review is expected to take place before the planned auction of "digital dividend" spectrum to the mobile networks.

(September 3, 2011) <http://thehill.com>

Canada

The Competition Bureau says that it has begun legal proceedings against Bell Canada, Rogers Communications, Telus and the Canadian Wireless Telecommunications Association (CWTA), requiring them to stop what it claims are misleading adverts that promotes "premium texting services", and to compensate consumers. The Bureau is seeking full customer refunds and administrative monetary penalties -- US\$10 million each from Bell, Rogers and Telus, and \$1 million from the CWTA. The Bureau's investigation concluded that Bell, Rogers and Telus, in conjunction with the CWTA, facilitated the sale to their own customers of premium-rate digital content (such as trivia questions and ringtones) for fees that had not been adequately disclosed. Customers were misled into believing this content was free, when it was not. In fact, in the case of Bell, Rogers and Telus, they pocketed a share of the revenues collected. Aggravating the situation, Bell, Rogers, Telus and the CWTA led customers to believe that measures were in place to prevent these unauthorized charges. "Our investigation revealed that consumers were under the false impression that certain texts and apps were free," said Melanie Aitken, Commissioner of Competition. "Unfortunately, in far too many cases, consumers only became aware of unexpected and unauthorized charges on their mobile phone bills." The premium-rate digital content in question can cost up to \$10 per transaction, and up to \$40 for a monthly subscription, rates over and above standard text messaging plans. The legal proceedings are before the Ontario Superior Court of Justice under the misleading advertising provisions of the Competition Act. "We take misleading advertising very seriously," said Lisa Campbell, Deputy Commissioner, Fair Business Practices Branch. "We want to ensure that consumers are not misled about pricing terms and have

greater control over third-party charges on their wireless invoices." (September 18, 2012) www.cellular-news.com

Brazil

The telecommunications sector regulator ANATEL presented its project for monitoring the quality of broadband internet access on fixed networks. Consumers will supply the data, with 12,000 volunteers nationwide receiving free measurement software to test their internet quality. ANATEL expects the first results will be available in December.

(August 29, 2011) www.telecompaper.com

Nicaragua

Nicaragua has launched a tender for two new mobile operator licenses, EFE reports, citing Orlando Castillo, head of telecoms regulator Telcor (Instituto Nicaraguense de Telecomunicaciones y Correos). License winners will be able to provide mobile voice, broadband, and 4G services across the country. Nicaragua currently has two mobile voice operators, namely America Movil's Claro unit and Telefonica which operates under the Movistar brand name. Yota Mobile WiMAX and IBW provide mobile data services. According to Telcor data, Nicaragua has over 4 million active phone lines, of which 2.5 million are in the Claro network, and 1.5 million in Movistar's network. However, according to Castillo, Claro and Movistar have not covered the entire Nicaraguan territory. Particularly, rural and semi-rural areas are currently uncovered, Castillo added. The Telcor representative estimates that over 1 million new customers would be interested in acquiring a mobile phone line. Castillo further said that companies from China, South Korea, and Taiwan have already shown interest in bidding for a new mobile license in Nicaragua.

(September 8, 2012) www.telecompaper.com

Bahamas

The telecoms regulator URCA has awarded a 700 MHz spectrum license to the Bahamas Telecommunications Company (BTC). The license is valid for of fifteen years and are approved for use by LTE services. A license for Cable Bahamas Limited (CBL) is also expected to be issued shortly. This follows a competitive evaluation process initiated in March 23, when URCA issued a Request for Applications (RFA) for the newly opened 700 MHz spectrum band. A total of five applications were received. URCA made 72 MHz of the 108 MHz band available for this process. Operators were permitted to submit applications for specified blocks within the bandwidth, up to a maximum of 24 MHz, and not including blocks reserved for public health and safety use (12 MHz) and additional mobile services (24 MHz) when BTC's exclusivity in the mobile market expires in April 2014. BTC must make 700 MHz spectrum services available to at least 75% of populations in New Providence, Grand Bahama, Abaco and Eleuthera within 18 months of the issue date of the license; with improvement to 99% coverage on those islands within 30 months plus the addition of at least two family islands. Subsequent additions of not less than two additional islands by both 42- and 54-month milestones are required. In each instance 75% population coverage is the minimum standard. (September 3, 2011) www.cellular-news.com

European Union

Greater use of the internet to store and process data remotely, also called cloud computing, could boost the European Union's gross domestic product by 160 billion

Euros [US\$205.96 billion] annually by 2020, the EU's digital chief said. "Without EU action, we will stay stuck in national fortresses and miss out on billions in economic gains," EU Commissioner for the digital agenda Neelie Kroes said when setting out the bloc's new strategy. "We must achieve critical mass and a single set of rules across Europe... We must tackle the perceived risks of cloud computing head-on." The strategy, which is a non legally-binding set of guidelines, aims to set standards for cloud computing and remove cross-border barriers such as tax issues and conflicting data protection rules. The commission will work with the support of the European Network Security Agency, or ENISA, and other relevant bodies to set up EU-wide voluntary certification schemes in the area of cloud computing. Cloud services vary from large-scale operations for major companies, such as those offered by Oracle Inc., Cisco Inc. and Amazon.com Inc., to consumer-focused products, such as Apple Inc.'s iCloud or Microsoft Inc.'s SkyDrive. Reason for the EU setting out its strategy now is to encourage more European players in this area; Germany's SAP AG posted a 13% rise in profit in the second quarter, driven in part by its cloud computing operations, but most cloud computing firms are based in the U.S. Under the new guidelines, users of cloud computing should be able to request that their data is stored in a specific region, if they wish. With regard to others' personal data, the existing EU Data Protection Directive requires data to either be stored in the European Economic Area or in a territory that has equivalent privacy laws. The commission said a greater take-up of cloud computing could lead to the creation of 3.8 million jobs overall, including those in the wider economy as access to IT services becomes easier for smaller companies, compared with 1.3 million if the regulatory and other policy barriers aren't tackled. "Cloud computing is a game-changer for our economy," Ms. Kroes said. "Europe needs to think big."

(September 27, 2012) Dow Jones Newswires

The European Commission urged regulatory regimes to catch up with technological advances that enable more efficient use of mobile spectrum. "If we run out of spectrum then mobile networks and broadband won't work. That is unacceptable," said Neelie Kroes, European digital agenda commissioner. "We must maximize this scarce resource by re-using it and creating a single market out of it," she added. "Radio spectrum is economic oxygen," Kroes said. The European Commission is calling on national regulators to monitor and potentially extend license-exempt spectrum bands. It also wants to see consistent regulatory approaches across the EU that incentivize the sharing of spectrum and provide legal certainty for those involved in spectrum-sharing. With "new technologies" a number of users could share the same spectrum, the EU said, using Internet service providers as an example. It also advocates the use of white spaces spectrum. "National spectrum regulation often does not reflect the new technical possibilities, leaving mobile and broadband users at risk of poor service as demand grows, and preventing a single market for investment in such communications markets," the Commission said in a statement. "A coordinated European approach to sharing spectrum will lead to greater mobile network capacity, cheaper wireless broadband, and new markets such as tradable secondary rights for a given spectrum allocation," it added. Monday's proposals comprise the first measure of the Commission's five-year Radio Spectrum Policy Program, adopted by the European Parliament in February. Under the program, by the end of 2012 EU member states should have authorized the use of the harmonized

2.5 GHz-2.69 GHz, 3.4 GHz-3.8 GHz, and 900/1800 MHz bands for mobile broadband. By January 1, 2013 members should have authorized the use of the 800 MHz band for mobile broadband. And by mid-2013 the Commission, in cooperation with member states, pledged to set out the details for an inventory to analyze efficient spectrum use in the 400 MHz to 6 GHz range. (September 4, 2011) www.totaltele.com

Eastern Europe

The presidents of telecoms regulatory authorities in six eastern European countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine, the members of the cooperative within the Eastern Partnership [EaP]) met to sign a memorandum of understanding (MoU) establishing a new association – the Network of EaP Electronic Communications Regulators. In signing the MoU the new members also discussed regulatory proposals for the associations work plan for next year, which will hopefully be approved and adopted when they next meet in Kiev at end-January 2013. The stated objectives of the EaP Regulators Network are to increase cooperation between EaP and EU regulators, and to coordinate regulatory principles between member states in order to ‘improve the efficiency and predictability of their regulatory activity’. (September 13, 2012) www.telegeography.com

United Kingdom

Everything Everywhere, Vodafone UK, and O2 parent company Telefonica UK announced that their mobile payment joint venture has received “unconditional clearance” from the European Commission. In a statement, the companies said they are now looking to launch their cross-carrier mobile payment platform in the UK “as quickly as possible,” though they have yet to announce a target date. The as-yet-unnamed initiative will provide mobile wallet services to consumers, as well as a marketing and advertising platform for retailers. The idea, according to the carriers, is to make these services available across all major handsets and operating systems, both for in-store, contact-less purchases, as well as online commerce. This all-encompassing approach sounds similar to the ISIS initiative, which launched in the US last year. The announcement comes just a few days after Everything Everywhere announced a mobile wallet deal with MasterCard, capping off a busy month for the provider. The company, a joint venture between Orange and T-Mobile, won a major victory in August, when UK regulator OFCOM approved its plans to roll out LTE service in the UK ahead of the country’s official spectrum auction.

(September 6, 2011) www.theverge.com

Britain’s regulator of premium rate phone services has fined a Russian company around US\$79,000 for “serious breaches” of its code, including price violations, misleading information and issuing charges without consent. The regulator PhoneyPayPlus levied the fines against Russia’s Connect Ltd. The company also must refund within three months all money it collected from users, regardless of whether they claim a refund. Failure to comply could result in higher court-ordered fines. It says Connect Ltd. tricked Facebook users into installing a malicious application on their Android phones that provided access to games. When installed, the phone owner was charged 10 pounds for an auto-reply message. Notification of the fee was buried on page six of the terms and conditions, saying “charges of about 5 pounds” would be incurred.

(September 4, 2011) www.cellular-news.com

Netherlands

The Dutch spectrum agency AGENTSCHAP Telecom announced that the auction of multiple bands of spectrum will start on October 31 with five participants. The auction will redistribute frequencies in the 800, 900, 1800, 1900, 2100 and 2600 MHz bands. The agency did not name the qualified bidders, but the three existing network operators - KPN, T-Mobile Netherlands and Vodafone Netherlands - are thought to be among the participants. Other likely participants are Tele2 Netherlands and the cable operators Ziggo and UPC, which have previously formed a consortium to bid on frequencies. The government earlier agreed to reserve three spectrum blocks for newcomers, including two 5 MHz blocks in the 800 MHz band and one in the 900 MHz band. One of these will now likely be opened up to the existing operators. (September 7, 2011) www.telecompaper.com

France

French telecom regulator ARCEP has adopted its planned decision on DTT for 2012-2015, confirming its pertinence for ex-ante regulation and the significant influence of TDF in the wholesale DTT market. The authority has set out access, transparency, non-discrimination and tariff obligations on TDF. First tabled by ARCEP in December 2011, the regulatory decision was based on several exchanges with industry players and support both ARCEP audiovisual regulator CSA’s efforts to ensure long-lasting competition in DTT. It also took into account comments from the European Commission, which supported ARCEP’s decision. The decision basically follows on the previous cycle, with new roles for increased transparency and market visibility.

(September 18, 2012) www.telecompaper.com

France, including its overseas territories, added 250,000 broadband subscriptions in the second quarter, taking the overall figure to 23.3 million, according to telecom regulator ARCEP. The number of subscription with peak download speeds under 50 Mbps and upload speeds under 5 Mbps increased by 210,000 to 22.6 million. Subscriptions to faster services via FTTH, FTTB and fiber-coax increased by 45,000 to 760,000. Continued investment by operators increased the number of homes eligible for very high-speed services (over 50 Mbps/5 Mbps) to over 5.5 million, including 1.67 million outside very-high population density areas. There were 1.75 million homes and businesses passed by FTTH at the end of June, 45% more than a year earlier. For 785,000 of these homes and businesses, at least two operators were present to sell FTTH offers, 134% more than a year earlier, with 260,000 of them outside very high density areas and 280,000 were passed by networks deployed under public initiative contract agreements.

(September 7, 2011) www.telecompaper.com

Poland

Polish national telecommunications regulator UKE has started negotiations with the main fixed operators, Telekomunikacja Polska (TP) and Netia, on FTTH network deployment. The two operators cooperating on FTTH deployment has been discussed, as well as efforts to avoid duplication of FTTB networks and provide open access to each other’s infrastructure under reference wholesale offers. The talks have not covered any division of geographic areas or terms of a possible cooperation.

(September 12, 2012) Rpkom.pl

Hungary

The Hungarian telecoms regulator has been ordered to annul the radio spectrum auction it held earlier this year following a court order. The Budapest court ruled that the regulator, the NMHH had incorrectly allocated radio spectrum to a new state-owned company, MPVI, which had been forbidden by the clauses in the spectrum auction. The three incumbent mobile networks had objected to the launch of a fourth network - especially one owned by the government. The court has handed the matter back to the regulator to sort out, and decide if the allocation of 900 MHz spectrum to the three existing networks can proceed, or if it will have to run the auction again. MPVI is made up of a consortium comprising Magyar Posta, Magyar Villamosművek and MFB Invest. (September 18, 2012) www.cellular-news.com

Spain

Spain shed some 238,428 mobile lines in June, ending the month with a total mobile base of 54.64 million users, up by 0.9% over the same month of 2011, according to a report by Spanish regulator CMT. Yoigo added nearly 60,920 net lines in June, the MVNOs saw 33,170 net additions, and Orange attracted 30,260 new subscribers. Movistar lost 201,830 customers, while Vodafone shed 160,940 users in the month. The M2M sector went up by 9.4 percent over the same period last year, to over 2.64 million lines. The growth of the M2M sector brings the total number of mobile lines to over 57.28 million. Spain ported 395,727 mobile phone numbers in June, down nearly 13.1% 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 43,477 net users, the MVNOs added 68,476 users, and Orange won 12,482 ported customers. Vodafone shed 73,986 customers, while Movistar shed 55,449 users in the month. Spanish operators added 9,655 broadband users in June. Spain ended the month with a total base of 11.30 million broadband lines, up by 3.7% year-on-year and a penetration of over 24.5 lines per 100 inhabitants. The number of DSL lines jumped by 3,758 connections over the same period of 2011, reaching a total of 9 million lines at the end of June. The overall number of fixed lines dropped by 48,514 to 19.19 million lines at the end of June. Fixed penetration decreased to 41.6 lines per 100 inhabitants in June 2012, versus 42.3% in the year-earlier month. Around 126,498 fixed numbers were ported in June, down by 16.1% from 150,746 fixed numbers ported in June 2011. (September 7, 2012) www.telecompaper.com

Romania

The five operators that participated in Romania's spectrum auction organized by telecom regulator ANCOM have won a combined 485 MHz spectrum in the 800 MHz, 900 MHz, 1800 MHz and 2600 MHz bands. The increases the spectrum resources available to operators by 77%, while also supporting the introduction of 4G technology and more efficient distribution of the 900 MHz band. The license fees totaling EUR 682.14 million need to be paid by November 30, 2012 or June 30, 2013, depending on the frequency blocks. The five operators that took part in the auction were 2K Telecom, Cosmote Romania, Orange Romania, RCS & RDS and Vodafone Romania. OTE subsidiary Cosmote won one block in the 800 MHz band, two blocks in the 900 MHz band, five blocks in the 1800 MHz band and two blocks in the 2600 MHz (FDD) band, valid from 2014 through 2029, for an amount of EUR 179.88 million. Cosmote thus renewed

its rights over the spectrum portfolio previously held and increased its holdings by 58%. Orange Romania obtained two blocks in the 800 MHz band, two blocks in the 900 MHz band, four blocks in the 1800 MHz band and four blocks in the 2600 MHz (FDD) band, valid from 2014 through 2029. Furthermore, Orange Romania won short-term licenses for five blocks in the 900 MHz band and three blocks in the 1800 MHz band valid between January 1, 2013 and April 5, 2014. Orange Romania grew its spectrum portfolio by 84%, for an amount of EUR 227.14 million in license fees. RCS & RDS won one block in the 900 MHz band, valid from 2014 through 2029, for which it will pay EUR 40 million. With this licence in the 900 MHz band, RCS & RDS increased its spectrum portfolio by 29 percent. Vodafone Romania obtained two blocks in the 800 MHz band, two blocks in the 900 MHz band, six blocks in the 1800 MHz band and one block of 15 MHz in the 2600 MHz (TDD) band, valid from 2014 through 2029. In addition, Vodafone Romania won short-term licenses for five blocks in the 900 MHz band and three blocks in the 1800 MHz band, valid between January 1, 2013 and April 5, 2014. Vodafone Romania's spectrum holdings are now 78% larger, after paying EUR 228.52 million for the new licenses. 2K Telecom, the new operator on the market, won two blocks of 15 MHz in the 2600 MHz (TDD) band, valid from 2014 through 2029, for which it will pay EUR 6.60 million. (September 24, 2012) www.telecompaper.com

National Authority for Management and Regulation in Communications (ANCOM) has confirmed that demand from operators for frequencies currently being auctioned will not exceed supply, as had previously been suspected. Last month the regulator revealed that the holding of primary rounds of bidding would be required because the initial number of bids surpassed the available spectrum blocks in at least one frequency band. However, in the event several frequency allocations went unclaimed, prompting the introduction of additional rounds of bids for the unassigned spectrum, which are scheduled for later this week. ANCOM previously described the auction as its largest ever single allocation of frequencies. The bandwidths are being made available for the provision of wireless services covering the period 2013-2029 and include spectrum in the 800MHz, 900MHz, 1800MHz and 2600MHz bands. Operators participating in the auction are Vodafone Romania, Cosmote Romania, Orange Romania, Romania Cable Systems (RCS&RDS) and 2K Telecom. While the majority of the bidders are already prominent presences within the domestic wireless market, 2K Telecom is something of an unknown quantity. The broadband provider, which was founded by local business man Sebastian Ghita in 2000, claims to operate a nationwide data network, with coverage in most cities and towns of over 10,000 inhabitants. While its primary focus is thought to be the enterprise market, 2K also offers wholesale WiMAX connectivity in partnership with a number of other companies. (September 13, 2012) www.telegeography.com

Telecom regulator ANCOM has cut the interconnection rates charged by the operators of mobile telephone networks by 24% to 3.07 eurocents per minute. The new rate applies starting with September 1. This is the second phase of lowering the maximum interconnection rates for mobile telephony, after the 19%– 30% cuts applied in March this year. The rates have been regulated following a market study conducted by ANCOM in 2011 which showed that all 6 mobile operators on the Romanian market, namely Cosmote, Orange, Romtelecom, RCS & RDS, Telemobil and Vodafone, held significant power on the wholesale market

of voice call termination on their individual mobile networks. ANCOM then imposed on all operators the obligation to observe certain maximum interconnection rates. According to ANCOM data, since 2003, the average tariff for voice call termination at mobile locations in Romania has decreased by over 70%. (September 3, 2011) www.telecompaper.com

Czech Republic

National telecoms regulator the Czech Telecommunication Office (CTU) has received four bids for its upcoming auction of mobile frequencies suitable for 4G Long Term Evolution (LTE) technologies. The companies to have submitted applications include the three incumbents – T-Mobile Czech Republic, Telefonica O2 CR and Vodafone Czech Republic – and a possible new market entrant, local financial firm PPF Group's subsidiary PPF Mobile Services. The CTU is confident that the auction will generate 'billions of crowns' for state coffers, as well as from the ongoing annual fees licensees will be required to pay for using the frequencies. The watchdog says that by October 10 it will have assessed whether or not the bids received comply with the tender requirements, and that it should complete the auction for allocations of spectrum by the end of this year. A final decision is expected to be announced at the start of 2013, once the CTU is in receipt of the monies from the successful bidders. The watchdog will auction off spectrum in three frequency bands – 800 MHz, 1800 MHz and 2600 MHz – with the lowest band considered key to developing widespread high speed broadband mobile internet coverage across the country. The reserve price for this band has been set at CZK1.1 billion (US\$54.89 million) for the six blocks on offer but, partly in response to comments from industry players, it is understood the CTU believes that an extension in national roaming conditions would be the best way for a newcomer to get off the ground without prohibitive start-up costs. The regulator also now intends to cut the cost of new frequencies in the 1800MHz band by 20% to attract a newcomer, with the PPF Group (controlled by billionaire Petr Kell) considered the only viable contender to establish a venture to challenge the big three incumbents at this time. However, analysts remain to be convinced that that Czech mobile market is big enough and lucrative enough to support a new entrant. In June this year local press reported as saying that the CTU had appeared to distance itself from an earlier plan to auction off frequencies in the 800 MHz band. However, its statement this week confirms that the sale of 800 MHz band frequencies is on the table.

(September 13, 2012) www.telegeography.com

Telecom regulator CTU is preparing an experiment to verify the impact of LTE 800 MHz band networks on reception of terrestrial broadcasting. The experiment will set procedures for detecting interference and localization of an interference source. In the past, CTU evaluated interference of BTS with TV sets for CDMA and GSM networks. In the case of LTE, the regulator expects similar effects in areas with a strong signal. CTU invites all applicants for LTE spectrum to take part in the experiment, with the participation request deadline 14 September. (September 5, 2011) www.telecompaper.com

Slovakia

Slovak regulator TUSR said it will look at market demand for coordinating the end of spectrum licenses in the 900 and 1800 MHz bands. TUSR aims to include these frequencies in the auction planned for 2013. There will be blocks available for two operators for the period 2021-2026. As a result, in 2026, all of the 900 and 1800 MHz bands will be available and will be offered at auction. TUSR plans a public discussion on this proposal. There was a similar procedure used by Swiss regulator Bakom, which in 2011 awarded blocks in the bands 900 MHz and 1800 MHz with validity from 2014 and blocks in the band 2100 MHz with validity from 2017. TUSR experts will participate in a workshop organized by Bakom on this matter in mid-September. TUSR is currently running a tender for an international advisor to provide expert support and consultancy in setting the bid price for blocks in the bands 800, 1800 and 2600 MHz and preparing the electronic auction. . (September 5, 2011) www.telecompaper.com

Portugal

There were around 2.89 million users of mobile internet services in Portugal at the end of the second quarter, up 12% year-on-year, regulator ANACOM reported. Of the total, 1.04 million used data cards or modems. At the end of June, TMN had a 41.3% share of active mobile internet customers, followed by Vodafone with 37.2%, Optimus with 20.1% and Zon Multimedia at 1.4%. Among card/modem users, TMN's share of customers was 39.7%, Vodafone was at 28.4%, Optimus took 28.1% and Zon was at 3.8%. In the second quarter, mobile internet traffic saw annual growth of 17.8%, but was down 7.3% on the quarter. Optimus had a 44.6% share of internet traffic, followed by TMN at 33.4%, Vodafone Portugal with 19.5% and Zon at 2.5%. Mobile accounted for just 3.8% of all internet traffic, with fixed internet still at 96.2%, up 34.9% year-on-year and 4.5% over the quarter. Portugal Telecom and Zon had the highest shares of fixed traffic (45.3% and 36.7%, respectively) and also the highest shares when it comes to fixed accesses (50.7% and 32.6%, respectively). At the end of June, there were about 2.3 million fixed internet access customers in Portugal, 26,000 more than in the previous quarter and 6.3 percent more year-on-year. ADSL was the main technology for fixed internet access (47%), followed by cable modem (39.6%), and FTTH/B (13.3%).

(September 4, 2011) www.telecompaper.com

Rwanda

MTN's Rwandan has refuted claims by the regulator that its network is failing Quality of Service tests, but says that it will be upgrading its network in the reportedly affected areas. The regulator have given the company a month to upgrade its network in areas where it said the company failed to meet its license conditions, otherwise it will face Frw3 million per day fine. MTN says that it carried out its own tests and could not replicate the problems found by the regulator, other than issues beyond its control such as breaks in backhaul fiber. Nonetheless, the company is continuing network upgrades and is focusing efforts on the regions highlighted by the regulator. Rival network, Tigo has also been warned that it will need to carry out network upgrades to meet its license conditions. (September 25, 2012) www.cellular-news.com

Russia

The federal telecommunications regulator Roskomnadzor has issued a draft document including new principles for calculating the levy on frequencies used by mobile operators. The proposed principles include calculating the levy according to the amount of bands allocated by the regulator. The levy is currently calculated based on the band volume per base station. The current principles encourage operators to minimize their number of base stations, which leads to a decline in the quality of services.

(September 10, 2012) www.telecompaper.com

Australia

The registration of the new Telecommunications Consumer Protections (TCP) Code with improved regulations governing the Australian telecommunications industry commences September 1. The TCP code was developed by Communications Alliance and registered by the Australian Communications and Media Authority (ACMA). Telecommunications service providers that do not comply with the code face a direction to comply from the ACMA, while further breaches could lead to Federal Court action where civil penalties of up to AU\$ 250,000 are possible. The implementation of the code follows the ACMA's Reconnecting the Customer public inquiry which examined the root causes of the industry's poor customer service and complaints-handling performance and which mandated the range of improvements required before the TCP code would be registered. (September 1, 2012) www.telecompaper.com

Singapore

The telecoms regulator IDA has fined SingTel a total of S\$300,000 (US\$245,000) for breaching the country's Service Resiliency Code. The fine follows IDA's investigation of the disruption of SingTel's "mio Voice" services on October 28 and 29 and November 4, 2011, which found that SingTel had not fulfilled its obligation to provide resilient fixed line telephone services under IDA's Service Resiliency Code. Investigations showed that the service disruptions were caused by a hardware capacity limitation of the Optical Line Terminals at the Tampines Exchange and the Bukit Panjang Exchange. Following the service difficulties, SingTel upgraded the hardware capacity of all its OLT equipment, including those at areas that were not affected by the service disruptions. IDA has decided to impose a financial penalty of \$300,000 on SingTel for its contravention of the Service Resiliency Code. As the cause of the service disruptions was a hardware limitation in SingTel's equipment, the IDA said that it was not satisfied that SingTel had actively monitored and taken adequate steps to ensure sufficient hardware capacity was provided. In its decision, IDA had also taken into account the fact that the impact to end users was localized and affected an aggregate of more than 500 end users. (September 24, 2012) www.cellular-news.com

Philippine

The Philippines mobile network operators may be barred from signing up any new customers if they do not improve their network quality of service, the regulator has warned. The National Telecommunications Commission (NTC) said that it was particularly concerned about the congestion on the mobile networks. The regulator is currently carrying out its latest benchmarking tests to see if the networks have improved since its last batch of testing. Blocking networks from signing up new customers is an increasingly popular tool of national regulators with recent bans imposed in

Brazil being a notable example.

(September 26, 2012) www.cellular-news.com

Vietnam

The Vietnamese government has decided to delay the award of LTE based 4G licenses until 2015 after concluding that the market is not ready for the high-speed services. The Authority of Radio Frequency Management (ARFM) reported that five mobile networks have been running LTE trials for over a year; however, the uptake of 3G services has been slower than expected and lagging international averages, so the Ministry felt it was not appropriate to push ahead with 4G licensing. If the number of 3G subscribers saw a 100 per cent growth rate each year from now to 2015, the authority would consider giving licenses to mobile operators. The Viet Nam has over 16 million 3G subscribers out of 123 million mobile phone subscribers, although prediction of annual growth is 15% for 3G subscribers during the 2012-16 period.

(September 25, 2012) VietNam News

Taiwan

China is planning to speed up the issue of 4G licenses and could grant LTE licenses in around one year. Earlier, Miao Wei, head of the Ministry of Industry and Information Technology (MIIT), said that China would wait two or three years before issuing 4G licenses to give the industry more time to roll out networks and release handsets. However, Miao told Xinhua that the licenses would now be issued in about a year. (September 12, 2012) Computerworld

Thailand

The Supreme Court has dropped a lawsuit against the former telecoms regulatory body, in a move which clears its replacement to push ahead with the long-delayed 3G license auction. The new regulator, the NBTC asked the Court to withdraw the lawsuit against the former National Telecommunications Commission for failing to hold a 3G license last year. That lawsuit had been filed by the two state-owned networks, TOT and CAT who had claimed that the NTC lacked the necessary authority to carry out the 3G license auction. The replacement regulator has the necessary authority, and the auction is now due to take place on the October 16. In related news, the regulator has asked the police to provide at least 30 officers to protect their headquarters during the auction process in expectation of protests against the auction.

(September 27, 2012) www.cellular-news.com

The telecoms regulator has said competition for the forthcoming 3G spectrum auction will be healthy as operators vie for preferred frequency slots in the 2100 MHz band. Nine slots of 5 MHz each will be auctioned on October 16, with each slot having a reserve price of THB4.5 billion (US\$145.7 million), according to National Broadcasting and Telecommunications Commission (NBTC). The auction will have two stages with operators first competing for licenses before positions on the spectrum slots are allocated. The regulator said the highest bids will get priority when choosing frequency slots. Slots with low levels of interference will be preferred as they allow for better quality of service. According to Total Telecom 15 bidders have indicated their interest in taking part in the auction. However, the Thailand Development Research Institute (TDRI) has expressed concern that the reduction in the maximum amount of spectrum bidders can win from 20 MHz to 15 MHz could stifle competition. The three main local operators - AIS,

DTAC and True - could potentially bid for the full 45 MHz of spectrum available by bidding for the maximum allowance each, leaving no room for rivals. If the maximum slots were 20 MHz, operators could bid for more slots than others, pushing up prices. The TDRI also feels that the country will receive less income than it could from selling the spectrum if it sticks with the reduced spectrum allowance. The NBTC lowered the maximum frequency allowance after a public hearing suggested too much competition could lead to excessively high prices, with operators passing the costs onto customers. (September 18, 2012) www.mobilebusinessbriefing.com

The National Broadcasting and Telecommunications Commission (NBTC) is considering issuing temporary mobile licenses to allow TrueMove and Digital Phone (DPC) to continue services after their concession contracts expire. The two companies' concessions on CAT Telecom's network are set to expire in September next year with other concessions on TOT's network to expire in 2015 and 2018. TrueMove has 17 million subscribers and DPC has 80,000 customers. The NBTC is concerned about service disruptions after the concession contracts end and is considering a proposal to issue temporary licenses, The Bangkok Post writes. The regulator has already established a committee to deal with the expiring concessions and a plan is expected this year. (September 3, 2011) www.telecompaper.com

India

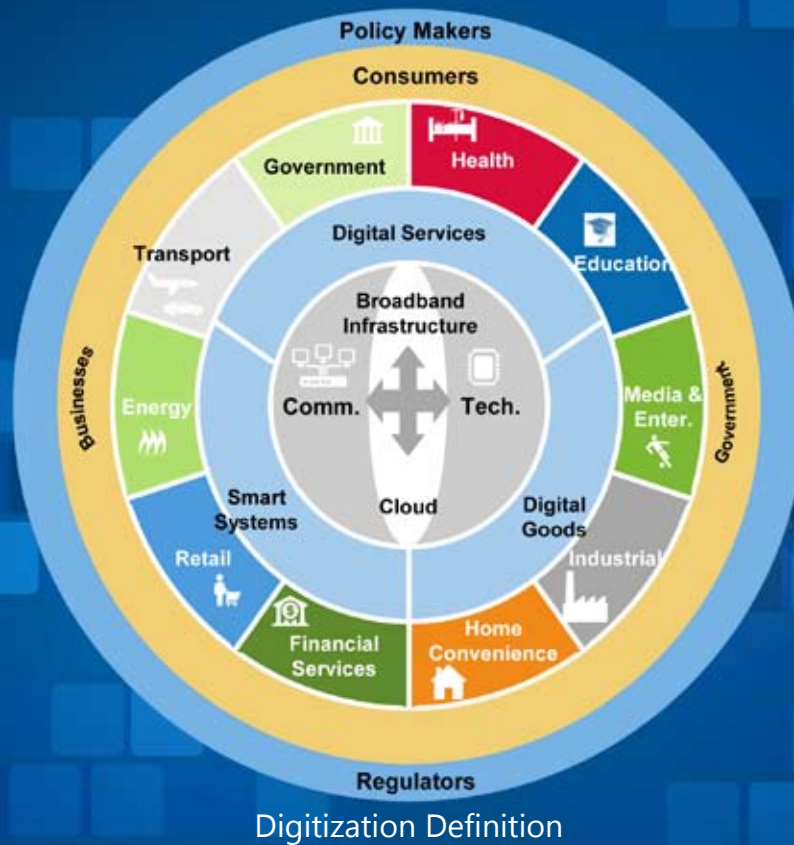
The number of telephone subscribers in India fell to 944.81 million at the end of July, down 2.14% from 965.52 million at the end of June, figures from the Telecom Regulatory Authority of India (TRAI) show. Overall teledensity reached 77.79, down from 79.58 at the end of June. The mobile subscriber base fell to 913.49 million from 934.09 million in the previous month, down by 2.21%, due to large scale disconnections by some operators. Private operators hold 88.80 percent of the mobile market share while state-owned providers BSNL and MTNL hold a 11.40% market share. Meanwhile, the fixed-line subscriber base declined from 31.43 million in June to 31.33 in July. BSNL and MTNL hold 80.02% of the fixed-line market share. Furthermore, the broadband subscriber base has increased 1.20% to 14.68 million from 14.50 million a month earlier. The top five ISPs in terms of market share (based on subscriber base) are: BSNL (9.36 million), Bharti Airtel (1.37 million), MTNL (1.08 million), You Broadband (0.66 million), and Hathway (0.37 million). (September 10, 2012) www.telecompaper.com

India's mobile networks have been instructed that they cannot provide local phone services to foreign visitors for more than three months. The move is claimed to be a clamp down on unspecified abuse of SIM Cards. Any foreign visitor to the country wanting to use a local SIM card in order to avoid roaming costs will need to provide their passport and Visa before being allowed to purchase a SIM Card, and the account has to be limited to the expiry date of the Visa, or no more than three months at the most. It was said that there were unspecified abuses of accounts by customers after they left the country, although no evidence was provided about the scale of the problem to justify the clamp-down.

(September 3, 2011) www.cellular-news.com

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

Javaid Akhtar Malik
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SAMENA Telecommunications Council



Digitization Definition

Digitization in SAMENA

In a world where people have more access to mobile phones than to electricity, it comes as no surprise that digitization - the mass adoption of connected digital services by consumers, enterprises, and governments - is significantly impacting our daily lives. It is also disrupting existing business models and has led to the creation of new ones. Realizing the opportunity that digitization presents, government and business leaders worldwide are determining how to promote and structure the digitization of their economies through their policies and strategies for ICT, Internet access, communications, media, and digital applications.

In this changing context, SAMENA and Booz & Company are conducting a study to assess digitization in South Asia, and the Middle East and North Africa (SAMENA) region, and identify ways to maximize the impact of digitization going forward. The objective of the study is to produce a roadmap that will help guide all stakeholders in the digitization ecosystem toward maximum impact of the technology.

The study will first assess the state of digitization in the region based on a Booz & Company Digitization Index (DI). The DI is a composite score that calculates the level of a country's digitization using 23 indicators to measure six key attributes. These encompass ubiquity, affordability, reliability, speed, usability, and skill.

Next, the study will determine the socioeconomic impact of digitization in the region, specifically the contribution of digitization to GDP and job creation. Booz & Company's analysis reveals that a 10-percent increase in a country's digitization score on average results in a 0.75 percent rise in its GDP per capita. Moreover, digitization creates jobs,

with a 10 point increase in the digitization score on average leading to a 1.02 percent drop in the unemployment rate.

The subsequent part of the study will involve identifying digitization opportunities across key economic sectors such as healthcare, education, financial services, and energy. Digitization impacts enterprises in different sectors across four dimensions: business model, go-to-market, production, and operations. Digitization is fundamentally reshaping business models. It is lowering barriers to entry and expanding market reach for enterprises. Digitization is changing how companies build brands and products, communicate, and provide services to their customers. It is changing the way companies manage their production assets and leading to the emergence of new manufacturing technologies. Additionally, digitization has drastically changed the way companies operate, and ultimately, develop their competitive edge. Thanks to digitization this is through remote working, outsourcing, and enabling technologies for the workforce.

Finally, the study will determine policy imperatives for driving digitization in SAMENA. Policymakers have traditionally focused on improving the reach and affordability of ICT services, and facilitating large-scale broadband deployment. However, in the future, policymakers need to become digital market makers—creators of a digital economy that provides its citizens, enterprises, and economic sectors with the competitive edge necessary to thrive in an increasingly global market.

Booz & Co.



TECHNOLOGY NEWS

Deutsche Telefon Offers Panasonic SIP Multi-Cell Products

German IP phone systems integrator Deutsche Telefon Standard (DTS) is now offering the new SIP Multi-Cell products from Panasonic. It is the first provider of IP Centrex phone systems in Germany to offer these Panasonic products. The SIP Multi-Cell range currently consists of two handsets and a base station the basic handset KX-UDT111 and the high-end handset KX-UDT121.

Virgin Media Could Possibly Have its 4G Network before O2 and Vodafone

Virgin Media could possibly have its own 4G LTE network before O2 and Vodafone. Currently, it is talking to EE (known as Everything Everywhere in the past) about potentially launching its own 4G service. With the network potentially launching its 4G network, this would mean that it will offer devices with 4G support such as the Samsung Galaxy S3 LTE and the 4G version of the iPhone 5. Virgin Media said, "4G will play an important part in meeting the growing demand for wireless capacity. Launching 4G services this year promises to bring significant benefits to UK consumers as people begin to make the most of forthcoming superfast mobile connections." Virgin Media is in the perfect position to launch its 4G services as early as EE, since it uses the spectrum of EE for its own phone network. This means that it already has access to EE's 1800GHz, which Ofcom cleared for the 4G use.

Idea adds Aurus Android Smart Phone to its 3G smartphone portfolio

Mobile operator Idea has expanded its 3G devices portfolio with the addition of a new dual-SIM smart phone 'Aurus' - an Android handset. The fourth phone in the Idea 3G smart phone portfolio, Aurus delivers video-calling, Android 2.3 (Gingerbread) OS, 800 MHz processor, 3.5 inch multi-touch screen display, and cloud backup functionality. The handset packs a 5 MP primary camera (using software interpolation), along with a front camera to support video calls allowing users to not only talk but see the person live in real-time. Aurus is priced at Rs 7,190 and will be available across all major mobile retail stores and Idea outlets across the country. Idea users who recharge with Rs 259 will get 3G benefits worth Rs. 2,340 with the smart phone. So, the end user cost translates to just Rs. 5,109.

PLDT's Smart Now Offering Tri-Band LTE

Smart Communications, the mobile arm of Philippine Long Distance Telephone Company (PLDT), has successfully deployed Long Term Evolution (LTE) services in the 1800MHz band, making its 4G service tri-band. The cellco was already using the 850MHz band and the higher 2600MHz band to carry the service, launched on 25 August, says PLDT and Smart network and IP systems head Rolando Pena. Smart is looking to give its customers a choice of networks and services for advanced mobile data.

Nextel Launches New PTT Network in Mexico

Latin America based NII Holdings (which operates the Nextel brand) says that it has launched its next generation network in Mexico. The company said that its new network provides a differentiated Push-to-Talk (PTT) service and high-speed data capabilities, incorporated into Android-based smartphones.

The new high performance PTT services are integrated with the mobile broadband data services available on the network and deliver an instant PTT service. In this first phase of the deployment, the next generation offerings will be available in 34 cities in the country, including Mexico City, Guadalajara, Monterrey, Puebla and Cancun. A second phase expansion expected to cover all of the main cities in Mexico is scheduled to launch in 2013. "The launch of our next generation network along with the new high performance PTT experience in Mexico is both an exciting and highly anticipated milestone for our employees and our customers," said Peter Foyo, president of Nextel Mexico. "Our customers have come to expect quality and cutting-edge services from us, and we are proud to provide these enhanced offerings, which will allow us to provide more options and benefits for our customers."

GSMA Launches mWomen Design Challenge

The US Agency for International Development, Qtel Group, the Australian Agency for International Development and the GSMA Development Fund have announced the launch of the GSMA mWomen Design Challenge: Redefining the User Experience. The challenge calls on the global digital design community to develop products that will make the smartphone user experience more intuitive, particularly for women in developing countries who, because of lack of opportunity, struggle with technical literacy. GSMA research shows women to be 21 percent less likely than men to own a mobile phone in low- to middle-income countries. The resulting mobile phone gender gap represents as many as 300 million women in the developing world who do not have access to this potentially life-enhancing tool. A key step towards closing the mobile phone gender gap, according to the study, is to consider the user experience of resource-poor women as being central to mobile device design. About 22 percent of women surveyed in Egypt, India, Papua New Guinea and Uganda who do not use mobile phones say it is because they do not know how to use the phone. To serve these women, mobile tools must be designed with simpler interfaces that overcome reading and technical literacy barriers.

Fujitsu Selects Brocade Network for Australia's Fastest Supercomputer

Brocade has established a new alliance with Fujitsu Australia and New Zealand to provide network switching capabilities for the recently announced High-Performance Supercomputer (HPC) installation at the Australian National University's National Computational Infrastructure (NCI) data center. To support the organization's operations, the NCI Supercomputer must be reliably networked to servers and numerous management devices, which is key to the inclusion of Brocade Ethernet switches as part of Fujitsu's

turnkey solution. Fujitsu will deploy Brocade® FastIron® SX Series switches as the high-availability, low-latency core of the data center management network with 10 Gigabit Ethernet (GbE) fiber connections to the Fujitsu supercomputer and supporting servers. This configuration also features 1 GbE connections to more than 100 Brocade FastIron WS Series switches that provide network access to a wide range of system management and monitoring devices.

NeoPhotonics Unveils Mode Coupling Receiver for More Efficient FTTH

NeoPhotonics Corp. has announced a multiport Mode Coupling Receiver (MCR) optical line terminal (OLT) transceiver. The SFP optical transceiver is designed to enable operators to maximize the split ratios of GPON fiber-to-the-home (FTTH) networks. MCR transceivers increase the split ratio individual OLT ports can support. The new GPON MCR transceiver, the first in what is likely to be a family of MCR modules, is a four-port MCR GPON Class B+ OLT in a pluggable SFP form factor that can increase the split ratio in a standard PON from 1:32 to 1:128 while maintaining the original link budget and reach. This ability helps operators minimize costs, particularly when GPON FTTH networks are newly installed and customers are just beginning to be added.

US Banks in Talks to Merge e-Payment Platforms

Four of the largest banks in the US are discussing linking their digital payment systems to enable more consumers to transfer money via SMS and e-mail, writes news agency Reuters. JPMorgan Chase, Bank of America and Wells Fargo want to connect their clearXchange system to a system called Popmoney managed by Fiserv, a global provider of financial services technology products, which is used by Citigroup and 1,400 smaller banks. By linking the two systems, the financial services providers hope to create a network with a critical mass of customers who can use the systems to pay one another. Popmoney and clearXchange's combined number of customers account for roughly half of deposits owned by individual consumers.

Ghana Gets New Rural Wireless Networks

Wireless network solutions provider Altobridge has announced the completion of the first phase of a project to provide mobile voice and broadband services to rural areas of Ghana. The solar-powered satellite-backhauled network is being operated by domestic cellular operator Tigo Ghana. The project has been funded by the Ghana Investment Fund for Electronic Communications (GIFEC), an implementing agency of the Ministry of Communications set up by the government to facilitate the provision of access to internet connectivity and communications infrastructure to underserved and unserved areas of the country.



Digitization - Transforming the way we live

The upshot of an ever increasing level of digitization is reaching into every corner of our lives. Driven by a mix of consumer demand and the emergence of new and innovative information and communications technologies (ICT), the world is swiftly transforming. This process, often termed as digitization or adoption of digital services at a large scale, has been transpiring since the arrival of the computer 60 years ago, but in the past several years the development in the telecoms & ICT industry has resulted in rapid "mobile" transformation that has changed everyday life in an unprecedented way. Technological developments such as emergence of mobile broadband, smart phones, introduction of innovative applications, social media, mobile banking, mhealth, and a number other innovative services have essentially changed our society. According to Cisco's forecasts, connected Internet devices will outnumber people by two to one in 2015. Today, over 4.6 billion phones frequently send information on the location of their users to service providers helping them offer more targeted services using location based services (LBS). Similarly, an increasing number of iPhone and Android apps are being downloaded every day. Mobile phones are being used more and more for services like mhealth, mbanking, info services, entertainment, and mpayments, among others. All these trends have been the driving force behind digitization.

Smartphones have been a great driver of the pace of digitization. Over 10 billion applications have been downloaded from Apple's store. Similarly, people generate 100 million tweets on Twitter every day. Digitization is being

driven in part by the technology companies that make use of digital infrastructure and in part by the end users of the technology. The market for online IT and digital telecom is growing at a good speed with corporate sales showing considerable growth. Similarly, the market for consumer devices and services that aid into the process of digitization (such as cloud-based services and SAAS) is undergoing a rapid growth.

Many of the services and technologies underlying the digitization phenomenon are not new; indeed, some have been there for quite some time. Taken together, however, they will create a degree of change comparable in scope to the great industrial revolutions of the past. The push to develop a fully digitized ecosystem, continue to exist world over. The amount of data generated has reached almost 35 trillion gigabytes, annually. According to Booz & Co., 1 trillion sensors will be deployed globally in the form of "smart dust," processing trillions of gigabytes of information from the analog world, and transmitting it wirelessly to a growing number of "big data" machines for storage and analysis. Mobile technology's integration within the health sector has the great potential to promote healthy lifestyles, improve decision-making by patients and health professionals. This convergence will enhance healthcare quality by improving access to medical and health information and facilitating instantaneous communication.

The delivery of health information by SMS and MMS or medical help line that connects mobile phone callers to a



health care call center can be used to raise awareness and to educate masses. Furthermore, mhealth service can be used to provide remote diagnosis support to field staff and also to suggest treatments. Similarly, mobile money is designed to meet the need of customers and facilitate them to make life easy in day to day business. In the SAMENA region, particularly in Africa and the Middle East, where general figures suggest that less than 10 percent of the population have access to bank account but more than 60 percent have a mobile phone. This signify an excellent opportunity for telcos in the region to promote mpayment services, mobile money transfers, utility bill payments and other day to day financial services the region resulting in ease for the general and new revenue streams for the telcos.

In short, although the current level of digitization has already given us a world that's very different from the one we knew a decade ago, the new wave of next generation devices, platforms, and applications will further encourage the process of digitization. This clearly show that the trends to digitization will only accelerate, transforming the ways in which technology influence our everyday life. Ubiquitous broadband, cloud based services, social media, smart phones, and innovative applications are all changing the way we, work, study, socialize, communication and do business. Booz & Co. forecasts that growing digitization will result in the increased capital investment, which will flow to all kind companies includ-ing suppliers, whether high-tech hardware and software companies, lower-tech construction companies, professional services companies, or disruptive new players.

Digitization is the future and it's the foundation on which new digital economies will rest.

Bocar A. BA
President
SAMENA Telecommunications Council



Improvisation Amidst Change in the Ecosystem

Today, one of the most important changes happening to the ecosystem are brought about by cloud computing. The current ecosystem, struggling for stability in a tough operating environment, is a composite of smart service delivery platforms, application layers, evolving business models that increasingly focus on collaboration, technology evolution, investment and operational issues, regulatory expectations, and changing consumer behavioral dynamics.

In essence, the focus for telecom operators is now on mitigating decreasing voice revenues and on improving broadband and new service delivery. The change underway has surfaced in various forms, catalyzed by various factors, with some shown in Exhibit 1. However, this change foreshadows business success.

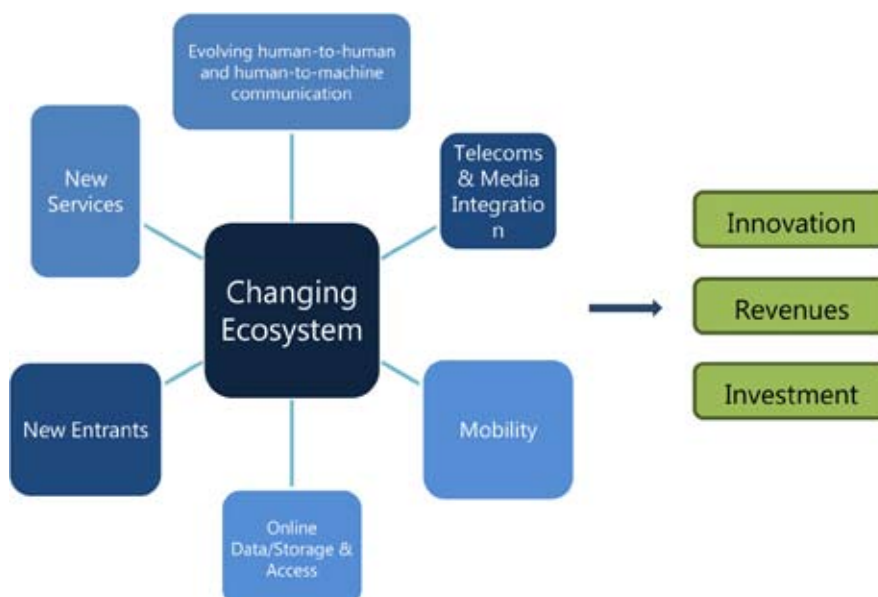
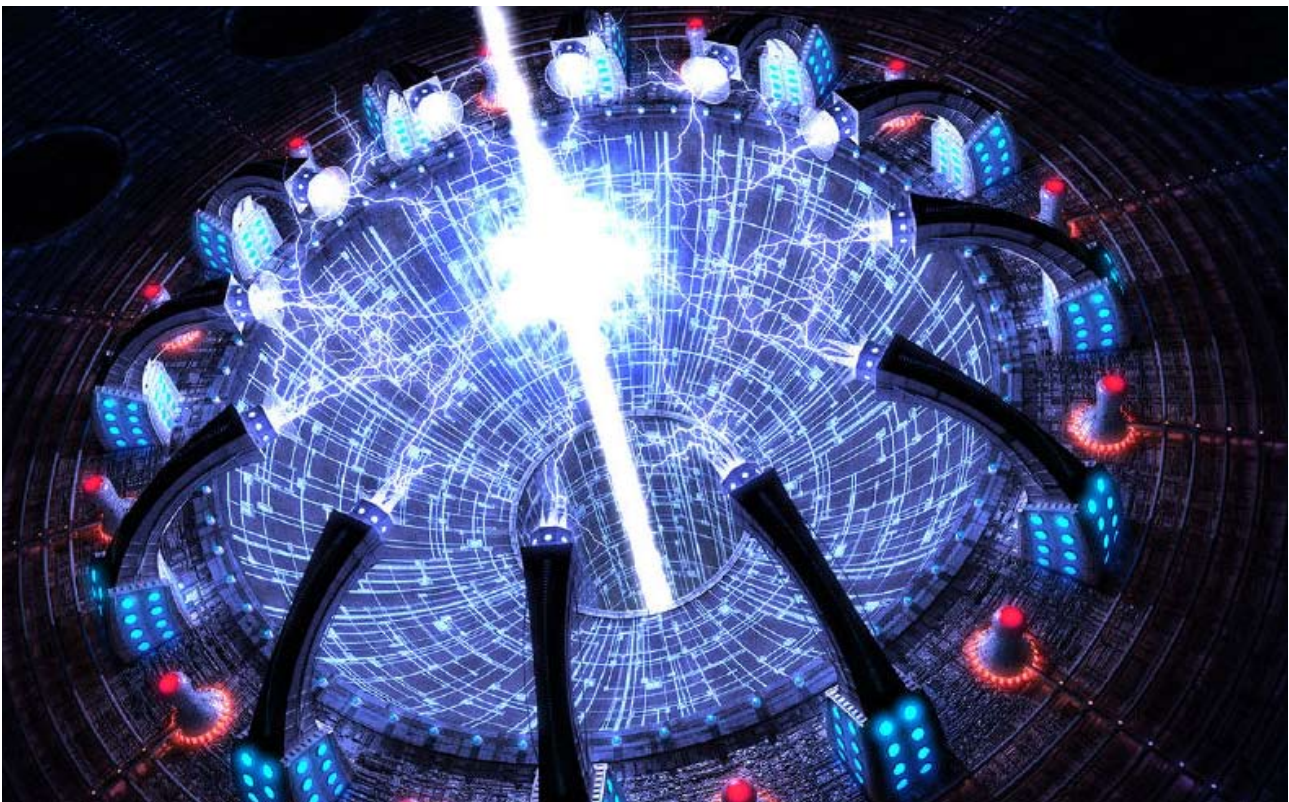


Exhibit 1: Changing Telecoms Ecosystem and Favorable Outcomes

At the consumer end, preferences are shifting toward self-services that are enabled by smart handheld devices and powered by an expanding cloud structure. Such self-services include various educational and mobile financial services, among others. For mobile financial services, particularly, strong potential has emerged in the large markets of the SAMENA region. Specifically, as a globally recognized example of earliest adoption of branchless banking, Pakistan has achieved expansive mobile coverage, which has directly aided the adoption of mobile financial services across both urban and unbanked localities. Similar to other value-added telecoms services, however, the future of mobile financial services in Pakistan is now critically dependent on strong business models, and thus on the stability of the telecoms ecosystem.

On the technology end, various complex applications are being developed to cater to various new demands and emerging needs. The virtual front, as it expands, continues

To effectively realize revenue opportunities, importance should also be given to the need to actively promote cloud computing and to raise customer awareness about its practical benefits; which include but are not limited to low CAPEX on the use of IT, storage, and communication services, flexibility in computing, ready information access, and freedom from infrastructure-related issues. In parallel, fortification of the human resource is also required, so that revenue growth-oriented strategies are put in immediate action. Such fortification would comprise technical capacity-building, development of corporate cultures fed on ethics, compassion and A-grade thinking, and sound performance management cultures. Attention to the management of regulatory pressures will further equip telecom operators to drive revenue growth. Such management can be realized through the development of active teams and working groups that can help develop intelligent argumentations and alternative solutions in non-confrontational manners, and present them before key industry stakeholders.



to draw in greater participation from both existing players and new participants within the telecommunications industry. Such participation is rendered from the content front, which itself is being enabled by Saas, Paas, and Iaas methodologies.

Amidst transformation in the ecosystem, telecoms operators are prescribing to the objective that they need to strategize on being customer-centric and cost-effective. Expressed differently, this objective demands that new experiences be offered to customers and, at the same time, realistic but strong financial results be shown to the investors. At its foundation, the fulfillment of this objective requires achieving success on the innovation front, which, in turn, is a function of the capability and willingness to promptly and wholeheartedly embrace change. Achieving revenue growth then simply becomes inevitable.

As pillars of the communications industry, telecoms operators as well as policy makers are in need to adapt to change. This adaptation entails reviewing emerging trends and requirements from new perspectives, driven by openness, collaboration, and, where needed, improvisation—for example, improvisation as to how the network can be offered as a product.

Collaboration and improvisation, from a survivability perspective, are what is required to realize revenue growth in this changing telecommunications ecosystem.

Izhar Ahmad
 Director, Government & External Relations
 SAMENA Telecommunications Council



Snapshot on Local Content Development

With the tremendous increase in the usage of social media over the past few years especially in the Arab Region, the question of local content generation comes into sharper focus. Recent statistics shows that there are more than 51 million Internet users in the Arab world, which represents only 3% from the overall population. Also, the Arabic language is ranked the 8th in the top 10 most widely used languages on the Internet. But unfortunately the Arabic language content represents only 0.3% from the Internet overall content and hence the importance of supporting local content is crystal clear. It is alarming to notice that the ratio of Arabic content in the Internet (in its size and quality) is so inadequate for the exponentially growing number of Arabic users in the Internet. Also, the insufficiency of Arabic web content compared to the number of Arabic users in the web, has forced Arabic users to use other languages (mostly the English Language) to perform all online activities. Broadband can be deeply applied in a way to promote not only tradition text content but also new types of local content, such as audio and video content, which will aid in the engagement of all segments of the society and to preserve identity and heritage.

Development of traditional text content is not of less importance than new types of audio and video content. There are many types of text content that can be enhanced by the implementation of broadband. For example, the Journalism industry is widely affected by the rapid increase Internet penetration rates. Today, for a newspaper to compete in the market and maintain its rank among others,

an online version of the newspaper, updated regularly, is not an option anymore. The phenomena of "Citizen Journalism", which is rapidly rising by enabling the Internet user to comment on news and articles, creates a new type of text content that in many cases attracts the online user more than the news or the subject of the article itself. Also, "Blogs", for example there are more than 160,000 blogs in a country like Egypt, with the growing awareness of the importance of Internet in shaping people's life, it is estimated that this number will increase more and more as a medium where one express his own points of view in whatever aspect of life. "Twitter", described as Internet SMS, is also considered to be one of crucial types of text content that is used widely in the Arab region lately. Twitter motivates the Internet user to deliver his opinion in a direct and to the point manner due to the limited length of the message (140 characters). Through Twitter, Internet user can send and receive instant updates from friends, industry experts, favorite celebrities, and what's happening around the world. Therefore, with all the above-mentioned samples of text content categories, it is inferred that providing broadband services will assist in boosting the number of Internet users.

On the other hand, audio and video content consumes much more bandwidth than other sort of content, which then requires adequate broadband services. For example, in the Arab world, there are 100 million YouTube video playbacks and on average 1 hour of video upload every 1 minute. Mainly, given the fact that YouTube is the 2nd largest search engine, YouTube and video streaming applications in general



can be used extensively in way to engage new segment of Internet users, such as people with language disabilities. Although, providing rich content in video format has many advantages in promoting the use of Internet, broadband and high speed data rates are mandatory to maintain the quality of service to end user. Many industries are taking advantages of providing video content in promoting their businesses. "Media" industry, represented in News and Sports channels or talk shows, can supply video content and online video streaming services in way that serves their goals and objectives. Also, "Marketing" industry can use video content to connect with potential customers, convey emotion and personality, and improve search engine ranking. Most importantly is the implementation of video content in Education. There are unlimited benefits that can be achieved in using video based e-learning modules. As an interactive communication medium, video in e-learning stands out in a number of ways:

- Stimulates better brainstorming, knowledge sharing and information gathering.
- Provides students with the opportunity to learn by participating in a 2-way communication platform.
- Improves retention and appeal to a variety of learning styles by including diverse media such as video or audio clips, graphics, animations, and computer applications. Further graphics and video do a great job of illustrating skills and techniques that are difficult to explain. This first hand learning is especially good for visual learners.
- Lowers the cost of delivery and overcomes the need for centralized location-based training.

- Heightens motivation as the excitement of being able to see the presenter or the co-participants enhances the motivation level of the students.
- Improves Presentation and Speaking Skills, Communication and Management Skills, and Questioning Skills
- Gives the distant learners an opportunity to achieve a sense of belonging with a peer community
- Video content as described above can be used in numerous ways that help at the end in the progress of many sectors nationwide, and hence has a constructive reflection on the overall economy nationwide

In conclusion, the local content generation industry still needs lot of improvements and can be stimulated by providing high quality broadband strategies. It is clearly inferred that broadband services should come first in order to achieve desired progress on the local content industry. It is a must to take into account the economic and development objectives of to develop digital content industry, such as the fields of digital content industry that the Governments will be focus in; provide the enabling environment for the development of the content industry; means to securing the necessary funding; and the essential partners at national, regional and their roles. Investing in broadband services is an important criterion in assessing the development of nation and measuring their competitiveness. Hence, Internet content is of paramount importance to achieve the goals of economic and social development

George Victor Salama
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Growth of Telecom Revenues through Services Ecosystem

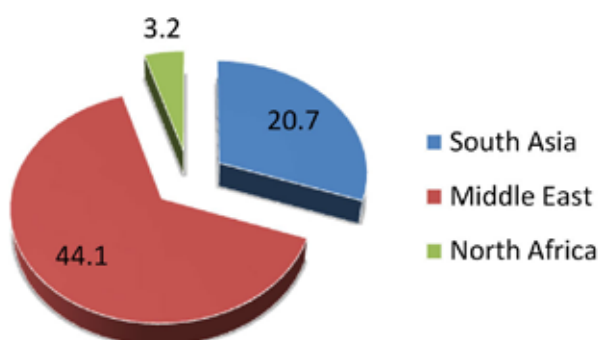
SAMENA Region has seen tremendous growth in the revenues generated from telecom industry in the past

Revenue generated from Telecom services has reached to a hefty to US\$ 68 billion in the SAMENA Region annually

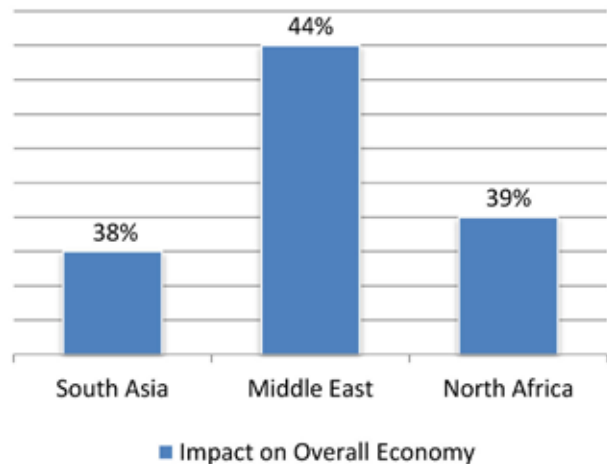
several years. Revenue generated from Telecom services has reached to a hefty to US\$ 68 billion in the SAMENA Region annually. Middle East saw the highest revenue at US\$ 44.1 billion followed by South Asia at US\$20.7 billion while the North Africa Region stands at US\$ 3.2 billion.

The increasing revenue is playing an extremely vital part in the overall economies of the regional markets. South Asia

SAMENA Region Revenue from Telecom Services (US\$ Billion)



Percentage revenue coming from Telecoms services



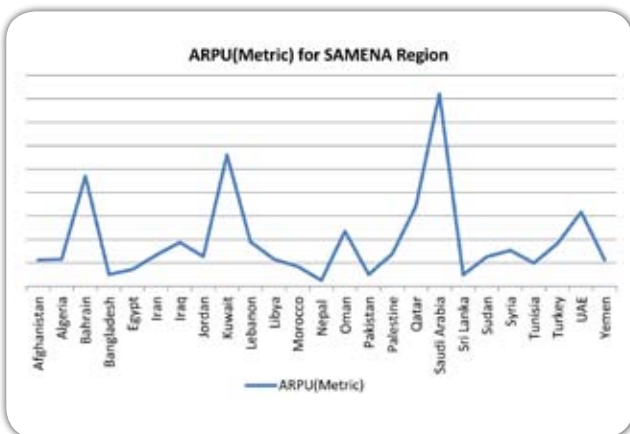
(including, Pakistan, Afghanistan, Bangladesh, Sri Lanka, Nepal) region has 38 percent of the overall revenues coming from telecom services., whereas the telecoms services revenues from the Middle East and North Africa are 44 percent and 39 percent respectively.

However, now the telecom industry is evolving in a way that the factors which were the drivers of the success in the past may not be as relevant in the future. The operators and other stakeholders need to predict how the industry may morph in the years to come and thus rethink their business models to be able to gain maximum benefit and to remain competitive. The stakeholders need to determine what factors would be critical to show continuous expansion, increased revenue and growth in profits.

“ telecom industry is evolving in a way that the factors which were the drivers of the success in the past may not be as relevant in the future ”

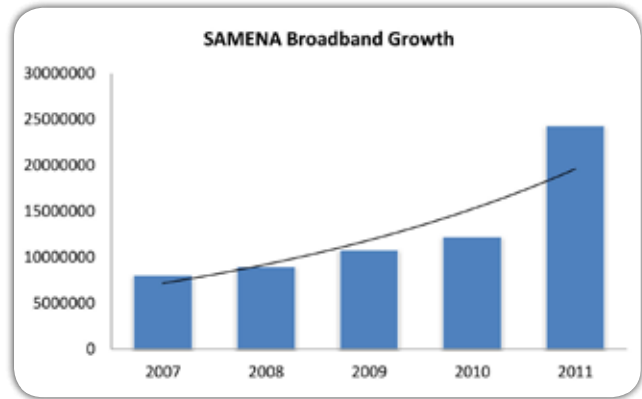
There are 3 major trends which are the driving force behind the growth, transformation and changes within the telecom sector.

1. Voice Becoming a Commodity: Competition within the SAMENA and especially within the South Asia region is extremely intense. Due to the large number of Operators, the cost of voice traffic is getting lower which is leading to decreased voice Average Revenue per Users (ARPU). This trend of lowers voice ARPU is expected to decline even further. It is therefore becoming essential for the operators to increase adoption of Value Added Services (VAS) which would enable them to deliver new revenue streams. These revenue streams would help compensate the stakeholders for the commoditization of voice traffic.



2. Growth in Mobile Broadband: An interesting trend which the telecom and particularly mobile companies experienced is the increase in the usage of Internet by the subscribers. Many people who did not use internet services over the traditional computer systems have catapulted generations of technology and are utilizing mobile internet applications. This has

given rise to the users of broadband and emerged as an important revenue stream for operators within the SAMENA region.



3. Boom of Social Media: There has been a boom in the usage of Social Media on a global scale. SAMENA region has seen a similar rise in social media usage. Millions of users access social media websites with intense growth in these users annually since the last few years. Emerging technologies over the broadband such as video conferencing, VoIP services and various file sharing networks have emerged as an influential methodology for the users in different countries to connect, stay in touch and to collaborate on various issues.

“ Emerging technologies over the broadband such as video conferencing, VoIP services and various file sharing networks have emerged as an influential methodology for the users ”

Transformation of Telecom Industry

There are several emerging trends which may play an integral role in the transformation of the telecommunication industry.

Mobile Health: Mobile Health often referred to as mHealth is a term used for the practice of medicine and public health, supported by mobile devices. mHealth applications include the use of mobile devices in collecting community and clinical health data, delivery of healthcare information to practitioners, researchers, and patients, real-time monitoring of patient vital signs, and direct provision of care. The field of mobile health has emerged in recent years as largely an application for developing countries, stemming from the rapid rise of mobile phone penetration in low-income nations. The field, then, largely emerges as a means of providing greater access to larger segments of a population in developing countries, as well as improving the capacity of health systems in such countries to provide quality healthcare.

“The field of mobile health has emerged in recent years as largely an application for developing countries, stemming from the rapid rise of mobile phone penetration in low-income nations”

Mobile Learning: Mobile learning often referred to as M-Learning is the focus of teaching and learning with the help of mobile devices. M-learning is focused on the mobility of the learner, communicating with portable technologies which reflect a focus on how society and its institutions can accommodate and support an increasingly mobile population. Over the past several years mobile learning has grown from a minor research interest to a set of significant projects in schools, workplaces, museums, cities and rural areas around the world.

Mobile Banking: Mobile banking (also known as M-Banking) is a term which is used for performing balance checks, account transactions, payments, credit applications and other similar banking transactions through a mobile device such as a mobile phone or Personal Digital Assistant (PDA). Mobile banking is used in many parts of the world with little or no infrastructure, especially remote and rural areas. This aspect of mobile commerce is also popular in countries where most of their population is unbanked.

Location Based Services: Location-based services are a general class of computer program-level services used to include specific controls for location and time data as control features in computer programs. Location Based Services are used in a variety of contexts, such as health, indoor object search, entertainment, work, personal life, etc.

Tackling Future Challenges

Telecom companies face some internal as well as external challenges. They need to manage and monetize the data and are exposed to risks as well. Regulatory bodies need to be sound and ensure the safety of the new era.

Monetizing Data: As, the global media industry makes the changeover coming from analogue towards digital technology, there exists an essential need to establish a sustainable business model in order to generate income from digital content. Data traffic is certainly thriving, which means that business models ought to establish in a manner

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

in which the significant infrastructure expenditures linked to the boost in data needs to be insured. Infrastructure investments are generally influenced by expected values associated with suitable return which indicates that in cases where more bandwidth is required, operators need to be in a position to profit from their investment for making this kind of extra bandwidth accessible.

Risks: In the new age, telecom operators are likely to be exposed to a number of data security risks such as: ID frauds, unauthorized use of its network, leakage of sensitive information, accounting and Reporting irregularities, lack of oversight and, challenges associated with internal or external misconduct investigations.

The key for success for telecom operators to manage data security lies in building a secure data sensing platform. Operators need to maintain a satisfactory level of security, which may be used for different functions such as revenue assurance, fraud management and business intelligence.

“Operators need to maintain a satisfactory level of security, which may be used for different functions such as revenue assurance, fraud management and business intelligence”

Regulatory Soundness: The industry and the government must prove the new telecom era to be safe. Policy makers will be faced with different questions related to this emerging era related to security, data protection, consumer protection etc. Policy makers and regulators must consider these important questions and thus adjust regulatory guidelines to warrant the growth drive in a progressive trend.

Ali Tahir

Research Analyst

SAMENA Telecommunications Council



SATELLITE NEWS

Astra 2F Set for September Launch

Astrum, Europe's space technology company, is prime contractor for both the Ariane 5 launcher and the Astra 2F satellite scheduled for launch from the European Space Centre in Kourou, French Guiana, on 28 September. Astrum is prime contractor of Ariane 5, the heavy-lift European launcher designed and built to carry out the widest range of missions and which has proved its reliability by achieving 50 consecutive successful launches already. On this particular launch, the ECA version of the Ariane 5 launcher will deliver two telecommunications satellites with a total weight of 10,179 kg, including the adapters and the SYLDA dual launch system. The Ariane 5 launcher is manufactured and adapted to the specific characteristics of each mission by Astrum, its prime contractor. Positioned at the head of a highly qualified European logistics chain, Astrum builds the equipment and stages and integrates them at Kourou. The launcher's main components are the cryogenic main stage (EPC) and its Vulcain 2 engine, the solid boosters, the cryogenic upper stage (ESC-A) and its HM7B engine, and the equipment bay.

Lockheed Martin delivers Propulsion Core for First GPS III Satellite

A team of engineers at Lockheed Martin (NYSE:LMT) delivered the propulsion core module for the first U.S. Air Force Global Positioning System III spacecraft to the company's GPS Processing Facility (GPF) in Denver. It marks the program's first major hardware delivery for GPS III Space Vehicle 1, and kicks off the next-generation satellite's initial Assembly, Integration, and Test activities in the GPF. The propulsion core includes the integrated propulsion system and serves as the structural backbone of the satellite. Developed and tested at Lockheed Martin's Mississippi Space & Technology Center, the propulsion subsystem helps not only to maneuver the GPS III satellite during transfer orbit to its final location, but also to conduct on-orbit repositioning maneuvers throughout its mission life. The GPS III program will replace aging GPS satellites and help meet the evolving demands of military, commercial, and civilian users with better accuracy, improved anti-jamming power, enhanced design life, and a new civil signal designed to be interoperable with international global navigation satellite systems.

GlobeCast and FRANCE 24 Expand HbbTV Trial to the Middle East

GlobeCast and FRANCE 24 announced today that they will expand their exploratory Hybrid Broadband Broadcast Television (HbbTV) service to the Middle East in fall 2012 with the support of Orange and Arabsat. The service, to be offered to satellite viewers of FRANCE 24 in the Middle East, follows a European deployment begun earlier this year with SES. The project will add a layer of interactivity to satellite TV programming by harnessing the capability of connected TVs, allowing satellite TV viewers in the region to use their connected televisions to interact with FRANCE 24's linear and non-linear content. This service will be a robust test of HbbTV's ability to enhance the quality of DTH users' viewing experience. It should also provide valuable insight towards building broadcast offers that combine the power and reliability of traditional broadcast delivery with the new possibilities offered by the latest content delivery networks (CDNs).

Launch of AggieSat Supported Satellites Successful

An Atlas-5 carrying a classified spacecraft and 11 other small satellites, including several satellites supported by Texas A&M University's AggieSat Lab, was successfully launched out of Vandenberg Air Force Base. Four of these other satellites are flying through NASA's Educational Launch of Nanosatellite program that works with schools to give students real-life experience in the space business. Institutions launching CubeSats are the University of California, Berkeley, University of Colorado at Boulder, Cal Poly San Luis Obispo, and Morehead State. In addition, the NRO's Mission Support Directorate is enabling seven satellites to fly from the Army Space and Missile Defense Command, the Aerospace Corporation, the University of Southern California and the Lawrence Livermore National Laboratory. Among these seven small satellites are four that AggieSat Lab has supported directly and indirectly. Three of them are built by The Aerospace Corp. and will use the new ground station unit many AggieSat Lab students helped install these past two months at the Texas A&M's Riverside Campus. This ground station features an articulated two-meter satellite dish and will be networked together with units in California and Florida to provide command and telemetry coverage across the United States.

MTG Launches New Pre-Paid Satellite Pay-TV Service in Ukraine

Modern Times Group ('MTG' or 'the Group') announced that it has launched 'UA.TV', a new pre-paid satellite pay-TV service in Ukraine. UA.TV is now being sold on a monthly pre-paid basis and is available alongside MTG's Viasat Ukraine satellite pay-TV platform, which was launched in 2008. The new service complements Viasat Ukraine's existing premium satellite pay-TV subscription service and will further extend the reach of the Group's channels and services. UA.TV will provide a basic channel package of 58 popular national and international free-TV and pay-TV channels to customers who purchase a satellite dish and receiver. The package includes Viasat's own TV1000 Russian Kino, Viasat Nature and Viasat Explorer channels, as well as third party channels such as Discovery, children's channel Detskiy, and national free-TV channels Pershy Natsionalny, 1+1, Ukraine, STB and ICTV.

Two Satellites Launched for GPS

China successfully launched two satellites into space for its indigenous Beidou-2 global navigation and positioning network, marking another step toward completing the country's Global Positioning System (GPS) by 2020. The 14th and 15th satellites for the Beidou-2 system, which were delivered by a Long March-3B carrier rocket, blasted off from Xichang, Sichuan Province. The system has been used in transportation, weather forecasting, marine fisheries, telecommunications, hydrological monitoring and mapping, said the China Satellite Navigation Office. In its latest public appearance, the Beidou-2 is being used to allocate Chinese fishing boats in waters around the Diaoyu Islands amid China's ongoing territorial row with Japan. Three Beidou satellites, including the 11th, 12th and 13th, were sent into space early this year. China started to build up its own satellite navigation system, Beidou-1, to end its dependence on the US GPS in 2000.

New European Weather Satellite Reaches Orbit

The European Space Agency (ESA) and European Organisation for the Exploitation of Meteorological Satellites (EUMETSAT) have announced the successful launch of a new weather satellite expected to provide a major source of data for weather forecasts. Metop-B, as the bird is known, ascended on a Soyuz rocket from Kazakhstan's Baikonur Cosmodrome and entered its expected orbit 820km above Earth. EUMETSAT says it is now poised to take control of the satellite, before putting it through six months of tests it says are aimed at checking the performance of the satellite in orbit and validating all products extracted from its observations. The new satellite replaces Metop-A, which is now running low on fuel, which makes it hard to make optimal observations.

New NASA Photo Satellite to Join 40-Year Mission

A fleet of picture-snapping NASA satellites that for 40 years has documented forest fires, tsunamis and everyday changes in the Earth's geography will soon get a new member. With Landsat 8 set for a February launch, nearly 140 scientists and engineers from more than 25 countries are scheduled to gather in South Dakota to discuss how to best download, process and distribute the millions of data-rich images used in agriculture, education, business and government. Since 1972, Landsat satellites have been continuously snapping pictures across the globe as part of a 40-year mission to document the planet. Landsat satellites help document calamities, such as forest fires and hurricanes, as well as mapping the world's mangrove forests and tracking ice in the Antarctic. The images differ from programs such as Google Earth, as you can't see individual homes, but are able to see larger things, such as highways, NASA says. Landsat 8, which is about the size of a compact SUV with a 30-foot(9-meter)-long deployable sheet of solar panels, is being built with a 5-year design lifespan but will be stocked with at least a 10-year supply of fuel.



ROAMING NEWS

Swiss Consumers Want Same Roaming Prices as in the European Union

Swiss consumer magazines *Bon a Savoir* and *K-Tipp* have handed out symbolic gold coins to each member of the federal parliament to remind them that mobile phone users were paying for mobile roaming services "at the price of gold". *Tribune de Geneve* writes that Swiss consumers paying around CHF 330 million more a year for roaming than their EU neighbours, the same amount as in September last year. The consumer associations have also asked federal council member Doris Leuthard to intervene quickly to request that the council impose the same roaming prices as in the EU. A motion tabled by PS/BE member Ursula Wyss a year ago was held up by the transport committee of the state council, which decided that it would be impossible to set caps without signing a bilateral agreement between Switzerland and the EU. It encouraged operators Swisscom, Orange Switzerland and Sunrise to lower their roaming fees voluntarily.

NetOne Activates Roaming Deal with MTN

Zimbabwe operator NetOne has partnered with mobile operator MTN to switch on its roaming services in South Africa, *ITWeb* reported. NetOne informed its subscribers that they can now access roaming services in South Africa using MTN's network. When traveling to South Africa, NetOne's prepaid subscribers must recharge their account before departure to activate the roaming service.

Cellhire Launches International SIM Cards for Rental

Cellhire has launched a new range of International iPhone SIM cards designed for use in countries such as the UK, France and Germany. Cellhire's international iPhone SIM cards include an iPhone SIM for France, Germany and the UK. Bundles include both voice and data allowances enabling users to turn data roaming on when traveling abroad and unlock the full potential of their iPhone, keeping their own apps, contacts and personal information in their pocket when abroad. The bundle allowances range from 1GB up to 5GB, enabling downloads and the use of apps and access to everyday features like Facebook and Twitter that would otherwise have to be disabled to avoid large roaming bills. A user roaming in Germany for example using 5GB of data with an AT&T or Verizon SIM card would pay \$1,170 and \$1,250 respectively whereas Cellhire offers 5GB of data in Germany for \$89 a saving of up to 92% on data alone.

Russian Regulator Eyes Further Cut in Roaming Rates

Russian competition regulator FAS still considers the roaming rates applied by Russian mobile operators as too high, reports *RBC Daily*. Calculations made by the regulator indicate that the profit margin on roaming services is near 85 percent, despite recent cuts to roaming rates in the EU and CIS by MTS, Beeline, Megafon and Tele2 Russia. Operators claim that the profit margin is much lower.

Russian Mobile Operators Approve Rule on Emergency Roaming

Russian federal telecommunications regulator Roskomnadzor announced that the major mobile operators have approved the draft regulation on emergency roaming, during a meeting of the coordination group. Representatives of Rostelecom, MTS, Megafon, Vimpelcom and Tele2 Russia participated in the meeting. The service is planned to be switched on in the case of a significant incident on the network of a mobile operator.

ITU Tackles Roaming Costs

In an international agreement that takes action to lower roaming costs, International Telecommunication Union (ITU) members – from private and public sectors – have approved measures aimed at combating high mobile roaming rates. The ITU said on Friday it had initiated a number of measures to empower consumers and encourage operators to lower tariffs. In line with this, the ITU has called on governments and regulators to “explore ways to protect and empower consumers in determining their best choices among the array of options available to them in the rapidly evolving mobile marketplace”. One of the measures, says the ITU, is that of making information on international mobile services clearer and more transparent. “In addition, alerts should be sent to consumers as they approach a certain cost limit for roaming, with a block placed on further usage unless authorised by the user,” says the body. The ITU has advocated market-based solutions, including promoting regional cooperation among operators and regulators, and encouraging them to reach agreements on lowering wholesale roaming tariffs. “Possible regulatory measures are also recommended, such as placing caps on prices charged to consumers for mobile roaming.”

Cell C Inks New Roaming Deal

Cell C has revised its roaming contract with Vodacom, the updated terms of which are effective immediately. The agreement allows Cell C customers to roam on Vodacom’s network where there is limited Cell C coverage. Though neither party is commenting on the specific terms of the new deal, TechCentral has established reliably that the contract now allows Cell C to roam on Vodacom’s third-generation (3G) mobile network. Previously, the deal extended only to the company’s 2G network. Cell C also sought a reduction in the rates Vodacom was charging it for roaming in light of recent reductions in mobile termination rates, the fees operators charge one another to field calls on their networks. These fees will drop to 40c/minute in March 2013 and are likely to fall further from 2014. Cell C said in June that if necessary it would take the matter to the Competition Commission. CEO Alan Knott-Craig told TechCentral at the time that through the process of cutting termination rates, the Independent Communications Authority of SA had effectively determined the cost of carrying a call. A Cell C spokesman confirms the roaming agreement has been revised and that the terms are “much more favorable for Cell C” but adds that terms of the agreement are confidential.

Mach Names 3 Operator Customers as Momentum for Roaming Solution Grows

MACH announced that three new operators and members of the Competitive Carriers Association have selected Inter-Standard Roaming (ISR) solution to enable international roaming for their post-paid subscribers. In doing so, Thumb Cellular, Chat Mobility and NorthwestCell stand to increase revenue levels, subscriber satisfaction and market competitiveness against larger operators. Network operators around the world are striving to deliver worldwide connectivity for their subscribers. By implementing MACH’s ISR solution, Thumb Cellular, Chat Mobility and NorthwestCell will command a greater share of revenues that would otherwise be spent on technologies such as local pre-paid GSM SIM cards or a second mobile handset. The operators will also be able to further enhance customer retention and reduce churn by delivering a full portfolio of voice, SMS and data services and applications to customers wherever they are in the world, through one device and with one bill.

3 Hong Kong Launches Whatsapp Data Pack, Roaming Pass

3 Hong Kong, the mobile telecommunications division of Hutchison Telecommunications Hong Kong, has tied up with WhatsApp, the instant messaging application developer. Under the theme banner “Free the World” the two companies will launch a WhatsApp local data pack and roaming pass. From 18 September, customers will be able to buy the WhatsApp Data Pack for HKD 8 per month while the WhatsApp Roaming Pass is priced at HKD 48 per day. The roaming pass includes 5 MB of roaming data usage.

Elisa’s Roaming Service Available in Turkmenistan

Elisa’s roaming service for Elisa subscribers has become available in Turkmenistan in the autumn. Elisa continuously concludes new joint use agreements, and it already has 418 partner operators. Elisa announced that its customers can currently use their mobile phone subscriptions in 200 countries. GPRS connections are possible in more than 146 countries and 3G connections in more than 106 countries. In a number of countries, it is also possible to use Saunalahti’s prepaid subscriptions. Elisa says it has the most comprehensive roaming network in Finland. When abroad, the telephone of Elisa’s mobile phone customer will automatically find Elisa’s partner operator’s network, which ensures an affordable price. In addition, Elisa’s partnership with Vodafone enables 118 directory enquiries and the use of the 777 short number for voicemail, for example. Making and receiving calls and data transfer in the EU area became more affordable on 1 July.

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