

SAMENA TRENDS

EXCLUSIVELY TO SAMENA TELECOMMUNICATIONS COUNCIL'S MEMBERS

BUILDING DIGITAL ECONOMIES

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TELECOM BUSINESS MODEL TRANSFORMATION

Karim Daoud
Chief Executive Officer
INTIGRAL

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EDITORIAL

Sustaining the Opportunity

As this month's Trends is specializing on the topic of Sustainability and the New Internet Business model, it is important to note how we have arrived at this point. We have essentially gone from the horse drawn buggy to the ultra fast Bugatti Veyron Super Sport, which tops out at 267 miles per hour. This speed does cost and would set you back a cool \$1,400,00 but does give you 1200 horsepower. This is the same argument the Internet makes with the available capacity and the related CAPEX costs to go with it. The consumer obviously loves it, with growth on the use of smart phones has been just off the charts in many categories along with growing high speed uptake taking place on both a mobile and fixed basis. This has had a cause and effect bearing on the challenges that face the operator community in today's ever changing landscape.

The facts are fairly simple to understand. The revenue generation of data services products and services currently have not kept up with the revenue decreases seen from lower SMS and traditional voice services. This has caused a depression of sorts, where one service usage type (Skype, and other VoIP services, along with data based messaging services such as What's App, i-message, Yahoo IM and others) has cannibalized the revenue streams of the before mentioned traditional services.

What's interesting to note is that the Internet has brought new opportunity to countless people in so many ways and means that it is useless to list them here, even the major applications. The Internet is a panacea of success. If the round wheel was the early aboriginal catalyst for the current land transportation vehicle, what is the Internet to society and GDP? Broadband development has been shown by research to have a direct effect on the growth of both major and smaller economic bases. The Internet truly is an opportunity and the operators realize this very clearly.

The question is how is this best addressed? Is the solution based in pricing schemes that bring together voice and data services under one rate umbrella. Is the solution involving the use of quality of service elements, other than the typical constant, which is referred to as best effort services on the Internet. Will content delivery mechanisms allow the accounting for QoS in the network? Is the answer a mixture of these and more?

The answer most definitely must be balanced with the acquisition costs of technology through the application of CAPEX, with considerations given closely to ROCE (return on capital employed). The average research number we are seeing for global CAPEX is around 350 Billion USD for the year 2012. The operators must be able to gain cost of capital at a reasonable rate (between 8 and 12% on average), where such CAPEX expenditures are economically warranted. This is why the new sustainable Internet business model must be strong enough to support what the consumers' want. That ultra high speed broadband you buy through your operator of choice comes at a very high investment and as such, the whole equation must add up. That is why the stakes are so high presently with regard to capturing the most of the Internet opportunity that is available. If an equitable model is not arrived at, with all stakeholders involved, massive consolidation will occur and with that, choice and investment will only be hindered.

Several activities are most certain to be a part of the quotient and they involve building relationships and partnering with the OTTPs that are delivering the terrific new media that is causing much of the current chaotic environment that most are facing. Additionally, the operators need to have strong policy that supports the investment that is needed to support the new age network and deployment. This new policy has to warrant all stakeholders to work together toward a brighter future, that broadband and all the millions of applications that are available through and from the use of it, to deliver on the opportunity that is most important to users worldwide, the ability to grow and prosper and bring a better tomorrow for our children and their children's children.

In closing, we have to act now. The time is now. The global stage is being set, what with the WCIT in December coming upon us now, along with so many other pertinent issues that have so much cause and effect on the industry's ability to grow and prosper. There is no one single stakeholder that lays claim to the single answer by them selves. It will take a monumental effort on the part of all, to deliver the promise that the Internet has to offer. It not only is our job to make it work, it merits the best in human interests to do so. If not, its the opportunity that we as a collective group, can only blame ourselves.

Truly Yours,

Thomas Wilson
CEO & Managing Director
SAMENA Telecommunications Council



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EDITORIAL





TOP REGIONAL & MEMBER NEWS

Thuraya MediaComms Soars to New Streaming Heights of 512 Kbps

In an exciting development for the broadcast industry, Thuraya Telecommunications Company, the leading international mobile satellite operator has once again confirmed heightened streaming speeds of 512 Kbps standard IP. This enhanced performance proves that IP bonding is very effective over media broadcast solutions and simple to execute. The new streaming speeds were successfully recorded at a recent roadshow in Paris organized by Thuraya's media broadcasting partner, Geolink Satellite Services.

At the event, media customers from prominent news channels, news gatherers and radio stations witnessed live video transmission by coupling two Thuraya IP terminals using the ClipWay Software aggregating function. This resulted in registering speeds of up to 512 Kbps. IP bonding is done by linking two IP terminals together with a USB cable. Furthermore, Thuraya IP's Asymmetric Streaming capability allows users to adjust speeds according to bandwidth usage, ensuring instant savings of up to 40% in comparison with other broadband solutions.

His Highness Sheikh Maktoum bin Mohammed bin Rashid Al Maktoum Recognizes du's Ongoing Contributions to the UAE Community

du is proud to have received recognition from Dubai Cares for its ongoing efforts to add life to life for the residents of the UAE during its fifth anniversary celebration. His Highness Sheikh Maktoum bin Mohammed bin Rashid Al Maktoum, Deputy Ruler of Dubai felicitated Ahmad bin Byat, Chairman, du, who was present on behalf of the company along with members of du executive management.

"It is a privilege and an honor to receive this outstanding recognition from an organization as admirable as Dubai Cares. As a responsible Emirati company, our customers and fellow citizens come first, in-line with the directives and vision of the country's leadership. When individuals come together to assist one another, they have the power to uplift their community, both societally and economically. There are myriad benefits to volunteerism, and we aim to foster a culture of community contribution within the UAE," said Ahmad Bin Byat, Chairman, du.

Nawras Goodwill Journey Touches the Lives of Over 7000 Individuals and Families during the Past 8 Years

Nawras, Oman's customer friendly communications provider has reached out to more than 7,000 individuals and families through its Goodwill Journey since it first began in 2005. Over the past eight years, fasting volunteers of the Nawras Goodwill Journey have visited over 150 charitable organizations and non-Government organizations in the Sultanate and travelled over 48,000 kilometers across the country to bring joy to the people of Oman during the holy month of Ramadhan. Every year, Nawras Goodwill Messengers ensure that the journey is tailored to the different needs and requirements of the chosen associations. Donations range from basic household items including cooking utensils, refrigerators and washing machines to water coolers and air conditioners. Nawras also donates special needs equipment such as wheelchairs and headsets and the latest technological devices including laptops, monitors, printers, televisions and iPads.

STC Reduces MMS Rate to 25 Halalas per Message

STC continues to offer the best services and products for the lowest prices through its major discounts to postpaid and SAWA customers. The company announced new discounts on multimedia messages (MMS) service; the new price is equivalent to that of a normal text message (SMS), which is 25 halalas for messages sent within the network. The discount pulled the price down from 55 halalas per message. The offer lasts for 3 months beginning from Wednesday the 15th of August, 2012, until Wednesday the 14th of November, 2012. MMS service allows customers to send visual and audio messages, in addition to video files and text files to any cellphone or email address across the world, with a capacity 4 times as large as was previously possible, up to 600KB per message, even while roaming outside the kingdom.

Mobily Cuts 4G Bundles Prices

Etihaad Etisalat "Mobily", through its subsidiary "Bayanat Alula" announced that it has reduced the prices of the connect laptop 4G bundle to start from SAR 150 per month in a move that reflects the company's eagerness not only to offer the latest services with high quality, but also at affordable prices. Mobily announced that the new prices starting from SAR 150 are considered to be the best and the lowest in the region, making the 4G services available to all its customers. The company added that the new connect laptop 4G bundle includes a Modem and a 5GB of data. Bayanat Alula has customized the connect 4G bundle with different and flexible data bundles that suit the needs of customers by offering data bundle packages (2GB, 5GB, 10GB and the unlimited). Customers will have the advantage of choosing their subscription periods whether for a month, 3 months, 6 months or for a whole year.

Batelco Introduces Huawei Ascend P1

Batelco, Bahrain's leading Telecommunications Company has announced the launch of Huawei Ascend bundled with unlimited data, free voice minutes and text messages, for only BD18 per month. The Huawei Ascend P1 is one of the slimmest android devices on the market, and it is packed with fantastic in-demand technical benefits including a dual-core 1.5GHz processor, 1GB RAM and PowerVR SGX540 graphics ensuring the smoothest operation imaginable. The Huawei Ascend P1 is now available from all Batelco Retail Shops as part of a BD18 per month Super Smart package on an 18 month contract with no down payment. With zero down payment required and BD5 free credit each month, the Huawei Ascend P1 deal represents the best value for money at only BD18 per month, for 18 months.

Etisalat Recognized for its Support of International Holy Quran Award Contest

Etisalat, the UAE's leading telecommunications operator, was recognized by His Highness Sheikh Maktoum bin Mohammed bin Rashid Al Maktoum, Deputy Ruler of Dubai, for its support of the 16th Dubai International Holy Quran Award Contest. The Contest, which concluded on August 8, was held at the Dubai Chamber of Commerce and Industry building in Deira. While receiving the Dubai International Holy Quran Award on behalf of Etisalat, Ali Al Ahmed, Chief Corporate Communications Officer, Etisalat, stated that the Corporation is proud to receive the award, which highlights the Corporation's commitment to remain integrated with the cultural fabric of the UAE and the wider Arab region. He also mentioned that Etisalat is a keen supporter of activities and events that are in line with the nation's efforts towards nurturing Islamic values amongst its people. The contest, which began on July 27, featured 79 participants who represented Arab, Western and Islamic countries as well as Islamic communities abroad.

Omantel Net Profit Rises By 11.8 Percent to R.O 61.2 Million

Oman Telecommunications Company, the Sultanate's pioneer telecom company, has announced its preliminary financial results showing an increase in the net profit after tax by 11.8% to R.O 61.2 Million. The Company's first half revenue witnessed an increase of 5% to R.O 234.5 Million from R.O 223.3 Million for the corresponding period of 2011. The increase in Omantel revenue is mainly attributed to the impressive growth in mobile broadband subscribers by 63% which contributed to an increase in the mobile revenue by 7.4% year on year. Both service revenues and wholesale revenues have recorded a growth of 4.2% and 8.4% respectively. The increase in wholesale revenue is mainly contributed by increase in revenues from external administration and Capacity sales. Commenting on this inspiring consistent performance, Omantel's Chief Executive Officer, Dr. Amer Awadh Al Rawas said: "Our Company has continued to make outstanding growth despite many challenging conditions and increased competition in the domestic market".



Operator Leader's Vision

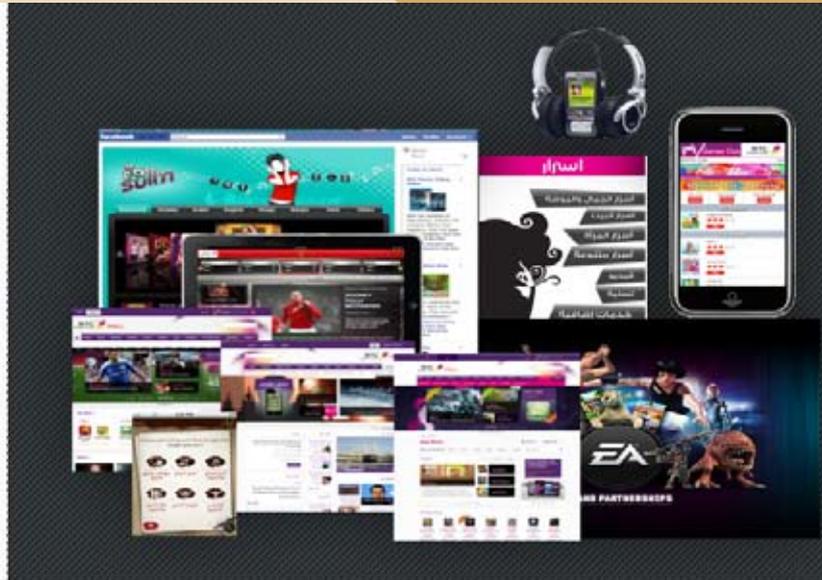


INTIGRAL

Karim Daoud
Chief Executive Officer
INTIGRAL

Upon stepping into Intigral's office in Dubai Studio City, we could feel the hustle and bustle of this dynamic, fast-paced and vibrant organization. From the Media Control Room with hundreds of flashing mini screens, the dark creative room with soundproof voice-over booths, the reflection of young professionals in the windows of meeting rooms, to the small crowd taking a break and playing foosball in the office's Media Lounge.

We met with Intigral's CEO, Karim Daoud, and the group of Vice Presidents that support him in directing and running what can only be described as a well-oiled digital solutions machine – Intigral.


www.intigral.net

Q. Karim, please tell us about Intigral and its operations in the region. What is the market gap you are looking to fill?

A. Karim: well, Intigral is an integrated digital media service provider born in October 2009 as a one stop shop for providing a comprehensive and converged digital content experience. This includes content aggregation, acquisition, enhancement, localization, enablement, management, delivery, and promotion of digital experiences (content and services) across multiple platforms, with an overlay of digital advertising solutions and other monetization models. Simply put, we offer turn-key digital solutions to regional telecom operators, and bridge the gap between content providers, ISPs, operators and the end consumer. Our solutions are based on analytics and a deep understanding of the consumers' growing appetite for enhanced digital experiences.

We are single-mindedly focused on digital content in all forms and view technology as the crucial enabler of our business. Back in 2009, our shareholders had the vision of creating an independent service provider positioned to serve all telecom operators and ISPs in the Middle East, by providing them with turn-key, white label digital media solutions. Looking at the competitive landscape, you will find many regional and international players providing mobile value added services, video content solutions, managed web services, as well as captive digital services within the telcos' operations. Our value proposition is our ability to provide those comprehensive digital services from our converged technology platforms with a strong focus on content "localization and adaptation", thereby enabling a seamless and personalized digital experience on all screens (IPTV, OTT, Web, and Mobile). This has led to Intigral becoming the number 1 independent digital media company in the Middle East, and amongst the top 20 in the world in the relatively short time since our inception!

Q. Ismaeel Makdisi, VP of Corporate Affairs and Development and a founding member - explained the company's business relationship with Saudi Telecom (STC) and All Asia Networks (ASTRO) a prominent media company in East Asia.

A. Ismaeel: Intigral is a joint venture and investment between STC and ASTRO who saw the opportunity and value of creating an independent and fully integrated digital media provider serving all telecom companies and content/service providers in the MENA region. Both shareholders have been instrumental in articulating and enabling Intigral's value proposition by transferring know-how and expertise from their own domains.

STC is one of our clients, benefitting from our comprehensive digital service offering. The content that we aggregate and create for our clients is licensed to us, and is repurposed and tailored to meet the specific need of each of our clients in the MENA region.

Juan Jose de la Torre, who recently joined Intigral's management team as the Vice President of Strategy and Corporate Development answered a few of our questions...

Q. Juan Jose, which category of clients are you targeting and what core services are offered by Intigral to its clientele?

A. Juan Jose: Our mandate is regional. We are primarily targeting the GCC and other Middle Eastern and North African telecom operators and ISPs. We view ourselves as a distribution and marketing partner to content owners, allowing their content to be consumed on all devices including mobile, PCs, tablets, and TV screens. Today, we have signed up most major regional and international rights owners for linear channels and Video-on-Demand content (reaching 180 channels on our set-top box, some of which are HD), and continue to add more content partners as we expand our channel and studio offering. On the mobile content front, we have agreements with more than 350 local, regional and global content providers across key categories such as health, religion, poetry, sports, news, finance, utilities, and others.

Having secured content rights for the leading market in the region, it is possible for us to extend those rights to smaller territories and approach other telcos with our portfolio, be it for IPTV, managed web services, or mobile digital content and applications. Our objective is to become the partner of choice of telecom operators for all their digital content needs, and contribute to their customer retention and churn reduction efforts by providing them with the most attractive content offering for their subscriber base.

As Karim mentioned earlier, in a matter of 3 years, we have succeeded in becoming the number 1 digital media company in the region with operations in five countries, and our plan is to continue to grow and expand our operations in the MENA region. We are also currently exploring organic and inorganic expansion opportunities, which you will be hearing about within the next few months. So, stay tuned.

Q. Karim, can you share with us some of Intigral's key projects or upcoming ventures that are under the spotlight?

A. Karim: Intigral is developing its long term strategy which focuses on providing comprehensive turn-key digital solutions for its partners and clients. One of the key initiatives we are currently working on and which I am personally very excited about is cross-platform video distribution strategies to leverage the explosion in video consumption in the region. We aim to transform operators into providers of personal and home entertainment by bringing to market a white-label multiscreen solution encompassing content acquisition, head-end operations, encoding, metadata, technical platforms, marketing and distribution of global and regional VoD programming over our OTT streaming video platform. You'll be hearing more about this soon.

We have also been supporting STC in its mission to place 'Sports' at the forefront of its key initiatives for the year 2012 by spearheading the process from end-to-end and defining the digital content strategy for the initiative. We have been working on impactful brand awareness activities to maximize our clients' reach within key customer segments, while rolling out a large array of digital products, with exclusive access to sport-related content and innovative user experiences such as the Manchester United application, the first of its kind globally.

Juan Jose: We are fully aware that digital media companies are becoming more intelligent in terms of assimilating analytics and developing product and service offerings tailored to customer demands. Such customized offerings are at the core of our business, as we continue to upgrade and improve our analytics and business intelligence efforts. Through our Customer Value Management, and as part of our long-term plan, we will be better equipped to manage churn, increase upselling and cross selling, identify advanced products and services for our customer base and develop targeted retention campaigns resulting in tangible revenue enhancement. Very exciting times ahead of us!

Q. Sebastien Marteau, Vice President of Mobile Services at Intigral, sees the value of collaborating with SAMENA Council to tackle the industry's key challenges in the region

A. Sebastien: I believe that it is the mutual responsibility of the government, regulators, telecom operators, broadcasters, aggregators and other stakeholders in the digital media ecosystem to ensure the continued traction of this rapidly evolving sector. Collectively, we have a vital role to play in making available the equipment, policies, tools and incentives needed to foster innovation and new technologies. Intigral, with its fact-based understanding of consumer segments and content genres, focuses much of its attention on staying ahead of the market and contributing to its continuous growth. Our aim is to create a platform that enables innovation across the MENA region to reach both operators and consumers.

Karim: The SAMENA council offers an invaluable platform and the tools for all stakeholders to share knowledge and collectively contribute to the advancement of customized and value added digital services. Intigral's role as an independent digital solutions provider offers the SAMENA council network unique consumer and market insights through its proven track record of supporting operators in successfully entering the new era of convergence.

Intigral's CFO, Roland Sfeir, had a lot to say about the deteriorating revenues that operators are currently facing...

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

A. Roland: One of the answers is content and digital services. Customers everywhere are becoming more demanding, expecting digital services on the go, requiring operators to boost network capacity and access. By offering our clients customized and compelling multiplatform packages, we are essentially assisting operators in monetizing their offering, and recouping some of the investment made. In addition, convergence presents a strong opportunity to boost share of the communications and entertainment spend, and enhance customer loyalty. Subscribers will consequently benefit from price reductions and discounts that operators will be able to offer owing to better economies of scale with such service bundling.

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

A. Sebastien: The significance is quite evident. The shift of the industry towards data has resulted in major declines in the value and importance of traditional services such as voice and messaging. And while this has greatly affected margins, there is much room for growth in new services like mobile broadband, Cloud and ICT services, M2M, social media and mobile advertising. By the end of 2010, the number of broadband internet subscriptions over mobile technologies surpassed the number of broadband subscriptions over fixed technologies. This clearly indicates that mobile is in the lead, possibly because it is the only way people in emerging regions such as SAMENA access the

internet. It also implies that the internet is shifting from a desktop experience to a 'mobile' experience for developing and developed nations alike .

Juan Jose: Today, in this region, data traffic surpasses voice over mobile network. Global mobile data traffic continues to grow at a staggering pace, compelling operators to build and acquire a number of tools to help them meet this rapidly growing data demand. These new tools include migrating subscribers to the most efficient 3G and 4G technologies and rolling out technologies that reduce interference.

Q. Ismaeel, do you agree that digitization would be the key driver of sustainable economic growth for telecom operators?

A. Ismaeel: Yes, very much so! Telecom operators and service providers are looking for cost-effective methods to enter the bundled services market and capture a greater share of subscribers' communication and entertainment expenditures across all screens through a single interface. By enabling services to be accessed across multiple devices anytime anywhere, operators in the Middle East have the opportunity to provide cloud-enabled services now that convergence is evolving. It also provides them with an opportunity to bundle content with direct plans resulting in attractive deals for the end consumer.

We believe that telecom operators must respond and keep up with the advancements in the field of convergence and increasing market demand for single sign-on and unified billing point of multiple plays – broadband, voice, video, and mobile services bundled in one package. Through this model, economies of scale can be achieved through repurposing content on multiple devices; thus, taking content consumption to the next level.

Sami Baramki, one of Intigral's first employees and the Vice President of Human Capital and Corporate Services, talked to us about the importance of building a strong corporate culture in finding and keeping the right talent, and the emphasis on accountability in all levels of the organization...

Q. Sami, with all of this growth in a fast paced environment, how does Intigral attract and retain the best talent?

A. Sami: Indeed, in this knowledge worker era it really is the key talent we have that differentiates us and has enabled us to grow at such an effective pace. We have grown to over 250 employees, 75 of which joined the team during 2012. People come to work at Intigral because it is exciting – being at the forefront of something so innovative in the region. As well as developing the business over these three years, we are also building a strong corporate culture underpinned by our 5 values including "Great Place to Work". As you can see in our offices, there is a vibrancy and buzz as our colleagues collaborate – combining an element of creative freedom with some core behavioral expectations on which we measure everyone (including all of us) in our annual performance management process. We focus on goals, accountability and delivery. People enjoy working here because they are challenged... there is a lot to do and we deliver the best for our clients; at the same time our people are learning. We have an active Learning & Development function which reinforces our corporate norms from the first month's Induction, to several development programs, and a world class approach to leadership development.

SAMENA: Telecom Sector Revenues (US\$ Million)

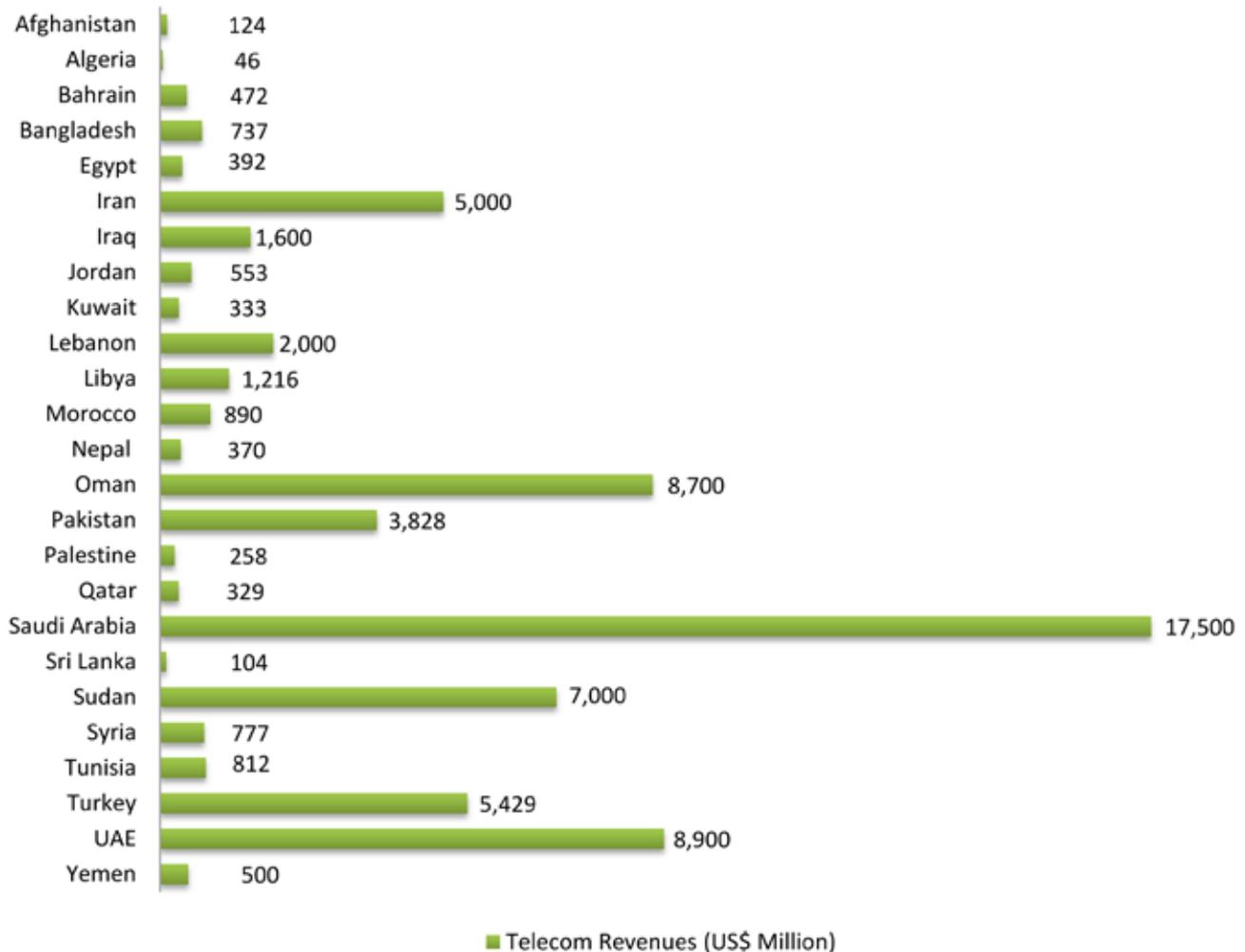


Image Source: SAMENA Telecommunications Council

Data Source: NRAs, Operators' websites, CIA World Factbook

Resource Note: The kingdom of Saudi Arabia has the highest revenue generation followed by United Arab Emirates and Oman. These markets appear to have invested huge amounts in infrastructure development over the past several years resulting in improved QoS and increased subscription as well as usage. Pakistan has the highest telecom sector revenues in South Asia compared to Bangladesh, Nepal, Afghanistan and Sri Lanka. Similarly, KSA has the highest telecom sector revenues in the Middle East and Sudan in North Africa. On the other hand, Sri Lanka has the lowest telecom sector revenue in South Asia, Palestine in the Middle East and Algeria in North Africa.

SAMENA: South Asia-Middle East-North Africa in terms of Telecom Sector Revenue (Percentage)



Image Source: SAMENA Telecommunications Council

Data Source: NRAs, Operators' websites, CIA World Factbook

SAMENA: South Asia-Middle East-North Africa in terms of Telecom Sector Revenue (US\$ Million)



Image Source: SAMENA Telecommunications Council

Data Source: NRAs, Operators' websites, CIA World Factbook

Resource Note: The Middle East has higher telecom sector revenue compared to South Asia and North Africa. South Asia, even though has some of the largest markets of the overall SAMENA region, but the revenues of the sector are less compared to North Africa. A comparative analysis of the 3 Regions tells that Middle East generates the highest amount of revenue from telecom services which is followed by North Africa with South Asia generating the lowest amount of revenue from telecom services. This can be attributed to the fact they South Asian markets have high completion resulting in reduced service charges that ultimately leads to reduced revenues.



REGULATORY NEWS

US Government Agency Updates Guidelines for Mobile Device Security

The USA's National Institute of Standards and Technology (NIST) has released a proposed update to its guidelines for securing mobile devices -- such as smartphones and tablets -- that are used by the federal government. NIST is asking for public comment on the draft document. Mobile devices allow workers, including government employees, to work in multiple locations and to improve their efficiency. But the same features that make these devices desirable make them a security challenge. Mobile devices can easily be lost or stolen, and users may be tempted to download nonsecure apps that might conceal "malware" that could be used to steal confidential data. Since security is minimal for mobile devices, a thief can retrieve sensitive data directly from the device, or use the phone or tablet to access an organization's computer network remotely. The revised guidelines recommend using a software technology that centralizes device management at the organization level to secure both agency-issued and personally owned devices that are used for government business. Centralized programs manage the configuration and security of mobile devices and provide secure access to an organization's computer network. They are typically used to manage the smart phones that many agencies issue to staff. The new NIST guidelines offer recommendations for selecting, implementing, and using centralized management technologies for securing mobile devices.

Britain to Get 4G Internet By End of Year

Britain will have access to superfast 4G mobile Internet services by the end of the year, communications watchdog Ofcom said August 21 after approving its launch by telecoms providers Orange and T-Mobile. Regulator Ofcom said Everything Everywhere - formed by the merger of the Orange and T-Mobile brands in Britain - has controversially been given a six-months headstart over rivals, triggering a hostile reaction from Vodafone. "Ofcom has today approved an application by the mobile phone operator Everything Everywhere (EE) to use its existing 1800 MHz spectrum to deliver 4G services," the regulator said in a statement. "Following a consultation, Ofcom has concluded that varying EE's 1800 MHz licences now will deliver significant benefits to consumers, and that there is no material risk that those benefits will be outweighed by a distortion of competition. "Delaying doing so would therefore be to the detriment of consumers," Ofcom added. But Vodafone hit back, saying in a statement: "We are frankly shocked that Ofcom has reached this decision. "The regulator has shown a careless disregard for the best interests of consumers, businesses and the wider economy through its refusal to properly regard the competitive distortion created by allowing one operator to run services before the ground has been laid for a fully competitive 4G market."

Romania Picks Developer of Tariff Comparison Web Application

Romania's telecom regulator Ancom designated Romanian IT&C company UTI Systems as the winner of the tender for the development of the online application that will enable end-users to compare communications offers. The value of the contract is RON 1.068 million (without VAT) and the application is to be finalized during the first half of the next year. The project, entitled 'Online application for comparing the communications offers intended for the end-users', is implemented by Ancom and co-funded by the European Regional Development Fund. The value of the non-reimbursable assistance financed from public funds amounts to nearly RON 0.9 million. During the auction, eight applications from six economic operators and two economic operators associations were submitted. After analyzing the offers in terms of the qualification documents and the technical and financial proposal as well as after applying the criterion for awarding 'the most advantageous offer as far as the economic criterion is concerned', the company UTI Systems obtained the maximum score.

Upon the project's completion, Ancom will make available to the end-users an interactive application on its website. This application will provide comparative information regarding the tariffs and the conditions offered by the providers of publicly available electronic communications services.

Based on the end-users' options, the application will make a comparative analysis of the tariff plans available on the Romanian market for three categories of electronic communications services, namely fixed telephony, mobile telephony and broadband internet services, as well as combinations of these services, and then display the 25 most advantageous offers ranked in order of cost (calculated per month). When displaying the results, other relevant details about offers will also be published (e.g. number of included minutes or SMS, billing period, minimum contract duration, and customer care details).

Three-year Telecoms Plan Approved

Bahrain's Council of Ministers has approved the country's Third National Telecommunications Plan, devised by the government in consultation with national regulator the Telecommunications Regulatory Authority (TRA), covering sector developments over the next three years. The policy's stated aims are 'economic and social advancement', and the scope of the plan attempts to modernize and develop the scope of the previous national plan (published 2008) taking into account new technologies and convergent trends. The policy abstract states: 'In the context of the digital economy, government policy must recognize not only convergence factors but also addressable global market dimensions, technology trends, changes in demand and consumption influences, and the impact of such areas on the well-being of citizens. Within that context the relative competitiveness and readiness of Bahrain to exploit opportunities and meet challenges must be a primary concern for government.' The policy can be viewed at www.tra.org.bh/en/pdf/ThirdNationalTelecommunicationsPlanEnglish.pdf.

October Date Confirmed For 3G Auction

Thailand's National Broadcasting and Telecommunications Commission (NBTC) has officially confirmed the schedule for holding the country's 2100MHz 3G mobile operating license auction as 15-20 October 2012. The market's three private sector cellcos, Advanced Info Service (AIS), Digital Total Access Communication (DTAC) and True Move are expected to be the only participants, and are expected to each gain equal 2x15MHz concessions at minimum bid prices.

ARCEP Tightens Up Sim Registration Measures

Burkina Faso's Regulatory Authority for Electronic Communications and Posts (ARCEP) has said it has met with the country's three mobile operators to discuss the revival of SIM registration to help tighten up security. The process was first carried out in 2010, but according to the regulator the results were 'unsatisfactory', with a high level of unregistered SIM cards still on the market, some of which are being used to commit offenses. As such, ARCEP has said that from October 2012, mobile operators Telmob, Airtel Burkina Faso and Telecel Faso will no longer be able to sell unregistered or part-registered SIM cards. From that date, a mobile line will only be activated 60 minutes after a customer's details have been captured.

Potraz Unveils USD 24 Million Tender for 43 Base Stations

The Postal and Telecommunications Regulatory Authority of Zimbabwe (Potraz) has announced a tender for the erection of more base stations to improve mobile network penetration into the countryside, IT News reported. The tender will close at the end of October. The successful bidders are expected to install 43 base stations to improve voice and data quality. According to Potraz, the erection of the base stations will be funded to the tune of USD 24 million from the Universal Services Fund (USF). Tenders are invited from established and qualified civil and structural engineering companies for the design and installation of passive telecommunications infrastructure in designated rural areas of Zimbabwe under the USF, the statement read.

Ofcom Consults on Fibrowave Network License

UK communications regulator Ofcom has proposed apply the electronic communications code to Fibrowave Networks. A consultation on the proposals runs until 10 September. Ofcom is proposing to apply the Code for the Applicant's electronic communications network throughout the UK. Fibrowave aims to bring superfast broadband to rural areas by deploying a number of technological solutions over a phased process, ranging from point to point microwave links, installation of cabinets and fibre optic cabling, Fibre to the Home (FTTH) as well as having access to the BT network via their Physical Infrastructure Access (PIA) offering, with a focus on East Anglia and the East Midlands. Fibrowave intends to operate as an ISP and ultimately as a wholesale connectivity provider offering broadband services with last-mile connectivity to other ISPs.



A SNAPSHOT OF REGULATORY ACTIVITIES IN SAMENA REGION

Active Consultations & Invitations for Feedback

Bahrain

The Telecommunications Regulatory Authority (TRA) has released for public consultation a draft Reference Offer Order setting fair, reasonable, non-discriminatory terms and

conditions to Batelco's proposed Wholesale Local Access service (an Ethernet-based wholesale leased line). The consultation period closes on August 23, 2012.

(July 12, 2012) www.tra.org.bh

Country-Wise Policy & Regulatory Developments

Afghanistan

Board Chairman: Mr. Abdul Wakil Shergul

[Afghanistan Telecommunication Regulatory Authority (ATRA)]

Afghanistan Telecommunication Regulatory Authority announced that in response to its EOI for Afghanistan's allotted satellite orbital slot at 50 degrees East, the following international companies have shown their interest: Eutelsat, SupremeSAT, APT Satellite company Ltd, Afghan Global Connect (AGC), NewSat, Supernet Ltd and BasicDefense.

(July 7, 2012) www.atra.gov.af

Algeria

Chairperson: Ms. Zohra Derdouri

[Regulatory Authority for Post & Telecommunication (ARPT)]

CEO of Mobilis said that his company will invest DZD142 billion (US\$1.7 billion) over the next five years in order to upgrade its infrastructure and increase its share of the Algerian mobile subscriber market to 45%. At the end of March 2012 the cellco claimed a 26.8% share, some way behind market leader Djezzy with 49.4%. Mobilis will provide 87% of the finance required from its own funds, while the rest will be funded through bank credits. The spending will see a move to an all-IP network, as well as boosting the

number of base stations from 5,200 to 9,000 within five years. The company's backhaul network will meanwhile be expanded to support increased data services, and a new customer support centre will be opened.

(July 24, 2012) www.telegeography.com

Bahrain

Chairman & General Director: Mr. Mohamed Bubashait

[Telecommunication Regulatory Authority (TRA)]

Bahrain is preparing to award as many as two super-fast 4G licenses, with the winners set to be announced as early as the first quarter of 2013. Bids have already been invited for Bahrain's long-term evolution (LTE) radio frequencies, which can be used to provide mobile-internet services marketed as 4G. Bahrain's Telecommunications Regulatory Authority (TRA) said this week that it will "license appropriate radio frequencies to enable the provisioning of high-speed broadband services over the mobile networks". Mohammed Al Amer, chairman of the TRA, said it was too early to say whether one or two licenses will be awarded, according to Bloomberg News. Mr. Al Amer added that it was not yet decided whether new operators would be invited to enter the Bahrain telecommunications market in order to

run the 4G services. Even faster 4G licenses — which run on frequencies known as LTE Advanced — could also be awarded within two years, Bloomberg News reported. (July 30, 2012) www.thenational.ae

The Bahrain Telecommunications Regulatory Authority (TRA) has launched a new service that empowers consumers to stop unwanted commercial messages from reaching their mobiles and also submit complaints electronically. The TRA move comes as part of its initiative to promote consumer privacy and also to remind them of their ability to stop receiving unwanted commercial messages, said a statement from the telecom regulator. According to the Bulk Commercial Messages Regulation issued by TRA last year, licensed operators are obliged to provide a mechanism for consumers to block unwanted commercial messages. (July 28, 2012) www.tradearabia.com

Bahrain's Council of Ministers has approved the country's Third National Telecommunications Plan, devised by the government in consultation with national regulator the Telecommunications Regulatory Authority (TRA), covering sector developments over the next three years. The policy's stated aims are 'economic and social advancement', and the scope of the plan attempts to modernize and develop the scope of the previous national plan (published 2008) taking into account new technologies and convergent trends. The policy abstract states: 'In the context of the digital economy, government policy must recognize not only convergence factors but also addressable global market dimensions, technology trends, changes in demand and consumption influences, and the impact of such areas on the wellbeing of citizens. Within that context the relative competitiveness and readiness of Bahrain to exploit opportunities and meet challenges must be a primary concern for government.' (July 12, 2012) www.telegeography.com

Bangladesh

Chairman: Maj. Gen. Zia Ahmed

[Bangladesh Telecommunication Regulatory Commission (BTRC)] Finance Minister has announced that the ongoing dispute between the government and the mobile networks over the imposition of sales taxes on their mobile license fees has been resolved. The networks were supposed to renew their GSM licenses in April, but a dispute between the National Board of Revenue (NBR) meant that the licenses were not renewed, and the operators have been functioning under an emergency license from the regulator pending the dispute settlement. The mobile networks took the regulator to court when it sought to apply a 15% sales tax on spectrum that had already been allocated, and while the networks won the court case, both the regulator and the Revenue Board appealed. Under the settlement, the license fees will be paid, but then in accounting fudge, the regulator will pass 15% of the fee to the Finance Board as a sales tax. "Both the government and the [telecom] operators have been asked to withdraw cases filed over 2G license renewal. The licenses will be renewed once the cases are withdrawn," the Finance Minister said. Once the legal processes are terminated, then the licenses will be formally renewed. This is expected to take place within a couple of weeks. The resolution also paves the way for the delayed 3G licenses to be tendered. (July 30, 2012) www.cellular-news.com

The mobile base in Bangladesh grew to 93.79 million in June, from 92.12 million in May. Grameenphone led with 39.29 million, up from 38.41 million a month earlier, followed by Banglalink with 25.49 million customers, compared with

25.25 million in May, according to data from the Bangladesh Telecommunication Regulatory Commission (BTRC). Robi Axiata raised its subscriber base to 19.21 million from 18.73 million and Airtel Bangladesh ended June with 6.73 million subscribers, up from 6.67 million. However, Citycell saw its subscriber base slip to 1.70 million from 1.71 million. Teletalk, meanwhile, ended June with 1.36 million customers, growing from 1.34 million in the previous month. (July 31, 2012) www.telecompaper.com

Telecom Ministry has posted the draft 3G auction guidelines on its website and asked interested stakeholders to submit their opinion by August 22. On the basis of feedback from the industry, the final regulations will be decided. The government has said it aims to issue the licenses by the end of this year. (July 24, 2012) *Daily Samakal*

The Ministry of Posts and Telecommunications (MoPT) in Bangladesh has released a draft outline of its planned auction of licenses to offer six combined 3G and 4G/LTE licenses in the country. Under the proposals, the MoPT intends to reserve a sole license for a new market entrant, while a second will be set aside for state-owned Teletalk, which will have to pay the equivalent sum of the spectrum fees paid by other participants in the auction proper. Given that Bangladesh is home to six mobile network operators, it is feasible that one could lose out in the state's tender for new 3G/4G frequencies. The concessions on offer will each have duration of 15 years (renewable in five year blocks thereafter). The ministry is ring-fencing a total 50MHz of bandwidth, with a reserve price set at US\$30 million per MHz block of spectrum. As per the ministry's announcement, any newcomer winning spectrum will be able to apply for a GSM license at a later date. It will also benefit from a discount of 30% on the most recent license prices, it said. The deadline for submitting applications is August 22 and the government hopes to issue the licenses by the end of this year. (July 24, 2012) www.telegeography.com

The Bangladesh Telecommunication Regulatory Commission (BTRC) is inviting applications for VoIP termination licenses. The licenses will be valid for five years and cover international incoming VoIP calls only. Furthermore, mobile operators and gateway operators cannot apply for the VoIP license. (July 23, 2012) www.telecompaper.com

Bangladesh's prospective mobile customers will have to go through a verification process to activate SIMs from October 12. The Bangladesh Telecommunication Regulatory Commission (BTRC) has asked telecom operators to implement the decision within the next three months, after its meeting with law enforcement officials. Mobile operator officials said it was a challenge as there is no national database to verify a person's identity. The National Identity card server of the Election Commission was not ready for use, claimed the officials. Chief Corporate Officer of Grameenphone, said SIM sales would dip but registration would be confirmed. He said the operators have taken this issue positively. (July 12, 2012) *The Daily Star*

Egypt

Executive President: Dr. Amr Badawi

[National Telecommunication Regulatory Authority (NTRA)]

Telecom Egypt fell the most in almost two weeks after its chief executive officer became the second official to leave the post in six months. Shares of the Cairo-based company dropped 1.5%, the most since June 21, to 13.45 Egyptian

pounds at the close in Cairo. That valued the company at 23 billion pounds (US\$3.8 billion). The benchmark EGX 30 Index (EGX30) rose 0.8%. CEO and Managing Director Tarek Aboualam will step down as of August 11, the company said in a Regulatory News Service release, citing "personal reasons" for the decision. Aboualam was appointed in January to replace the retiring Mohamed Abdel Rehim, who assumed the position in April 2011. The company has maintained "operational performance" because of stability in "core positions such as chief financial officer, chief strategy officer and the heads of retail and wholesale units. Telecom Egypt's first-quarter profit advanced 1.7% from a year earlier on growth of its wholesale business, which generated 57% of revenue. The company didn't say when it would name a new CEO. (July 3, 2012) www.businessweek.com

Iraq

CEO: Dr. Buhan Shawi

[Communication & Media Commission (CMC)]

The Communications and Media Commission (CMC) will fine mobile operator Zain Iraq for its failure to list on the Iraq Stock Exchange (ISX), as required under a condition of its operating license. Reuters cites a CMC senior official as saying that Zain, a unit of Kuwaiti firm Zain Group, will be fined US\$12,864 per day since September 1, 2011, after last August missing an initial deadline to list on the local bourse. Asiacell and Korek Telecom also failed to meet the August 31, 2011 deadline, and were last week issued with respective fines of US\$8,500 and US\$2,500 per day since September 1, 2011. 'The hearing committee was of the view that all operators had enough time, more than four years, to prepare for the initial public offering (IPO), so there's no excuse. Zain Iraq had been handed a larger fine because it had more subscribers than Asiacell and Korek. A second fine of IQD200 million (US\$170,000) has also been issued to Zain for using a new mobile phone number range without the CMC's permission, the CMC official said. Zain Iraq, Asiacell and Korek were all required to list 25% of their shares on the ISX by August 31, 2011, under the terms of their 15-year national mobile concessions, which were awarded in August 2007 for US\$1.25 billion apiece. All three mobile operators have previously said they are working towards a listing, with Zain last week stating that it had invested around US\$20 million in its proposed IPO, appointing BNP Paribas, Citigroup and the National Bank of Kuwait to handle the offering. (July 5, 2012) Reuters

Jordan

Chairman & CEO: Mr. Fadi Kawar

[Telecommunication Regulatory Commission (TRC)]

Jordan is the second most competitive cellular market in the Arab world, according to a study by the Arab Advisers Group. The "Cellular Competition Intensity Index 2012" ranked Saudi Arabia as the most competitive cellular market in the Arab world, while the Palestinian territories ranked third. In Jordan, mobile users no longer pay per minute of the phone calls they make. All telecom companies offer users unlimited minutes of calls and SMSs in return for a monthly or weekly subscription and this is not common in many telecom markets in the Arab world. Mobile penetration in Jordan reached 123% by the end of March, according to figures released by the Telecommunications Regulatory Commission, which indicated on its website that there were 7.758 million mobile subscriptions in the country. Of the total, 2.909 million were Zain Jordan subscribers, followed by 2.811 million with Orange Jordan and 2.037 million with Umniah. Prices of telecom services in Jordan are much

cheaper than those in Saudi Arabia and the Gulf states. (July 23, 2012) The Jordan Times

The Ministry of Information and Communications Technology (MoICT) said a new tender will be floated soon to complete the implementation of the National Broadband Network project. MoICT told that they are waiting for the Cabinet's approval to start a new tender. The government wanted to complete the project on its own but could not because of the lack of funds. In February, the government announced that it would establish a company to complete the implementation of the network, work on which was halted in 2008 when the country was affected by the global financial crisis. In April, the MoICT gave mobile operators and ISPs a month to apply to be partners in the projected company. Several companies showed interest in having a stake in the company, but no requests were officially submitted to the ministry. According to the ministry, about 35% of the project has been completed so far at a total cost of US\$ 36 million. Work on the project started in 2003 with the aim of connecting all public schools and universities to a nationwide fiber-optic network. The project was expanded in 2007 to include government agencies, healthcare centers and hospitals. (July 11, 2012) The Jordan Times

Kuwait

Minister of Communication: Dr. Mohammed Al-Baseeri

[Ministry of Communication (MOC)]

Wataniya Telecom has posted revenues of KWD368 million (US\$1.3 billion) for the first six months of 2012, up 4.5% year-on-year, on the back of total subscriber growth of 8.3% to 18.3 million. Earnings before interest, tax, depreciation and amortization (EBITDA) stood at KWD154 million, down 1%, while consolidated net income came in at KWD47.4 million compared with KWD322 million last year. However, last year's net profit included a one-time fair value gain of KWD266 million due to the revaluation of its interest in Tunisiana after Wataniya increased its stake in the subsidiary from 50% to 75%. (July 25, 2012) <http://www.telegeography.com>

Lebanon

Acting Chairman & CEO: Dr. Imad Hoballah

[Telecommunication Regulatory Authority (TRA)]

Lebanon's telecoms market holds a unique position in the Middle East given the level of government involvement. While most incumbents in the region are government owned, within Lebanon government ownership extends to the country's two mobile operators. Privatization seems unlikely for some time given the telecoms sector is a significant generator of government revenue. However this same structure has fostered a lack of political will to make the changes necessary to free up the market in order for it to reach its potential. Consequently, despite a higher GDP per capita, Lebanon languishes well behind neighboring Jordan in ITC development, with the inevitable consequences of lower economic and social outcomes than would otherwise be the case. The broadband market is now almost entirely comprised of ADSL services, which is widely available from a number of ISPs. The relative late entrance of ADSL promoted development of alternative access platforms including cable and wireless. All ADSL connections are obtained on a wholesale basis from the incumbent, Ogero. Most significantly, broadband affordability improved drastically in August 2011 when a decree was passed that slashed tariffs and increased speeds, with tariffs reductions of up to 80%. The improved affordability has been made possible due to increased international bandwidth following

the commissioning of submarine cable I-ME-WE. Lebanon has two government-owned networks, operated by Orascom Telecom of Egypt and Zain of Kuwait in return for a management fee, with all revenue going to the government. Lebanon's mobile market recorded a growth spurt in 2009 when the government took the radical step of lowering tariffs and increasing the maximum number of subscribers for each operator, demonstrating the amount of pent up demand in the market. The market is set to enter a new growth phase centered on mobile data services after both mobile network operators were awarded 3G licenses in 2011 and commenced deploying 3G network infrastructure. (July 19, 2012) www.businesswire.com

Morocco

Director General: Mr. M. Azdine El MountassirBillah

[Agence Nationale de Reglementation des Telecommunications (ANRT)]

Telecommunications Regulatory National Agency (ANRT) has started preparations for its planned auction of at least one 4G license by the end of the year, launching a tender to select an adviser for the process. An August 23 deadline has been set by the ANRT for submission of bids as Morocco continues its 10-year plan to provide high-speed Internet access for the whole population. The selected adviser will help ANRT to set the terms and conditions of 4G licensing and to organize deployment of the technology, and also assist in making decisions on how many licenses will be made available for use in the tender, set for the fourth quarter. ANRT officials said it planned to award the licenses at the start of 2013 and expects they will be operational by the end of that year at least. Morocco's telecommunications market is dominated by Vivendi's Maroc Telecom, France Telecom affiliate Medi Telecom, and Wana, owned by a holding company controlled by the Moroccan monarchy and Kuwait's Zain. While mobile penetration floats around 110 percent of Morocco's 33 million population. There were only 3.2 million subscribers to the Internet by the end of 2011, up 70% from the previous year. (July 20, 2012) www.ventures-africa.com

Nepal

Chairman: Mr. Bhesh Raj Kanel

[Nepal Telecommunication Authority (NTR)]

The number of fixed telephony users in Nepal rose to 851,317 in mid-May, from 850,607 in mid-April. Of the total, 631,866 were PSTN users and 219,451 were WLL users, according to figures from the Nepal Telecommunications Authority (NTA). Nepal Telecom grew its PSTN base to 626,079 from 623,381 a month earlier, while STM Telecom Sanchar's base inched up to 5,189 from 5,181 customers. Smart had 598 PSTN subscribers in public phone centers, similar to a month earlier. Nepal Telecom also had 145,552 WLL users, down from 147,589 a month earlier, while United Telecom had 71,288 WLL subscribers, versus 71,247 in March. Nepal Satellite Telecom had 2,611 WLL subscribers, similar to month earlier. Also, the number of limited mobility subscribers totaled 1.05 million. UTL served 552,581 limited mobility subscribers, STM had 155 customers, Nepal Satellite had 143,708 subscribers, and Smart had 355,316 limited mobility service customers. (July 26, 2012) www.telecompaper.com

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The Nepal Telecommunications Authority (NTA) has recommended the Ministry of Information and Communications (MoIC) to endorse its new 2012 interim frequency policy, adding that it has suggested the adoption of a plan to auction GSM mobile frequencies, and an administrative pricing system to allocate link frequencies or microwave frequency. Under the NTA's draft proposal, it is recommended that the ministry set aside 2x6 MHz of 900 MHz spectrum for mobile services, 2x2.5 MHz for CDMA (limited-mobility) services and 2x2.4 MHz for limited-mobility under the GSM standard. Further, the NTA proposes that the MoIC charge operators 0.4% of their total annual income as an interim frequency fee. The charge for additional frequency will be fixed through an auction, the draft policy says. It also proposes charging operators NPR10 million (US\$114,070) for a 1 MHz block in the 800 MHz band, NPR5 million for 1 MHz in the 1800 MHz band, and NPR7 million per megahertz in the 2100 MHz band. Finally, the watchdog has promoted the idea of charging NPR5 million per megahertz for frequencies in the 2300 MHz and 2600 MHz band, and NPR250,000 for 1 MHz of 3.3 GHz spectrum. (July 23, 2012) [The Himalayan Times](http://TheHimalayanTimes.com)

Nepal Telecom (NTC) has connected all the seventy five districts with a local calling area. With this provision, now customers could call across the country at a local rate on a landline, CDMA, and mobile phone. NTC co-spokesperson said that the new provision is meant for providing more facility to customers and make the services competitive. (July 17, 2012) www.thehimalayantimes.com

The Nepal Telecommunications Authority (NTA) has reportedly fined Global Internet Service Ltd NPR374.4 million (US\$4.37 million) for its illegal involvement in a voice-over-internet protocol (VoIP) scam, and revoked the operator's license. NTA spokesperson said that of the total fine, NPR187.2 million is the actual loss caused by the internet service provider [ISP] through illicit VoIP. The remaining NPR187.2 million is the fine equal to the actual fraud. Not content to rest there, the NTA has also seized all of Global Internet's equipment but has given the ISP a 35-day ultimatum to appeal and provide it with a justification against the decision. The move follows a February 2012 announcement that the Department of Revenue Investigation (DRI) was seeking a penalty of NPR2.59 billion against 'responsible officials' and the owners of Global Internet. The DRI's fines include NPR865 million in losses to the government and a fine of NPR1.73 billion under the Revenue Leakage Investigation and Penalty Act. (July 11, 2012) [The Himalayan Times](http://TheHimalayanTimes.com)

Nepal Telecommunications Authority (NTA) will finalize the much awaited broadband policy within the next week. The authority will forward the draft policy to the Ministry

of Information and Communications for the ministry to endorse it. According to the draft policy, broadband will identify the minimum speed in Kbps — uplink and downlink — wherever the service is offered. It will also guarantee the quality of service — throughout on a shared or dedicated basis — on services that a service provider offers. Broadband has nothing to do with speed or quality at present, according to the telecom regulatory body. Broadband in the country is, irrespective of the access technology used, an always-on internet connection with minimum upload and download speeds of 64 Kbps and 256 Kbps, respectively, according to the recommendations provided by a working committee formed in December 2008. These speeds shall not be on a shared basis, and the telecom service provider should guarantee these minimum speeds to qualify as a broadband service provider, the committee had suggested. Broadband needs to be considered a basic national infrastructure as it will fundamentally reshape the world in the 21st century and change the way services are delivered — from e-health to e-education to e-commerce — Nepal Telecommunications Authority said, adding that the soon to be formed broadband policy will provide a clear headway for the development of the broadband sector in the country. (July 4, 2012) www.thehimalayantimes.com

Oman

Chief Executive Officer: Dr. Hamed Al-Rawahi

[Telecommunication Regulatory Authority (TRA)]

According to market data published by Telecommunications Regulatory Authority (TRA) of Oman and the country's two biggest telecoms operators, BMI calculates there were 4.787mn mobile subscribers in Oman at the end of December 2011. This was a market penetration rate of 168.2%, slightly up from 165.5% at the end of December 2010. The mobile market in Oman experienced mixed fortunes in 2011, with net losses during the first three months of the year followed by a steady but muted growth in the last nine months. As a result, the market grew by just 3.9%, or net additions of around 180,000 subscribers in 2011, compared to growth of 16.2%, or net additions of 641,000 subscribers, in 2010. BMI attributes the market's relatively weak performance in 2011 to the effects of inactive SIM discounting and market saturation, factors we expect to rein in growth during our forecast period, through to 2016. We therefore envisage slower growth over the next five years, with the mobile subscriber base forecast to reach 5.297mn, equivalent to a penetration rate of 170.4%, by 2016. (July 24, 2012) www.sbwire.com

Nawras is partnering with Tata Communications to offer a full suite of international services including the first Global Virtual Private Network (GVPN) in Oman, the company has announced. By connecting to Tata Communications' global network, including the world's first wholly-owned fiber optic sub-sea network ring around the globe, corporate customers will have immediate access to all of Tata Communications' international carrier partners. (July 24, 2012) www.ptinews.com

Omantel announced the commercial launch of the first 4G LTE network in Oman. The launch of 4G LTE network comes after a series of trials which successfully delivered speeds of up to 100 Mbps. The launch follows the awarding of Omantel's 4G LTE network contracts to Huawei and Ericsson end of last May. (July 16, 2012) www.lightreading.com

Pakistan

Chairman:

[Pakistan Telecommunication Authority (PTA)]

Legal international incoming traffic in Pakistan rose from 500 million minutes to 1.35 million minutes per month as "grey" call termination is decreasing. The Pakistan Telecommunication Authority (PTA) has taken steps to curb grey telephony such as international traffic monitoring systems, raids, and a revision of international traffic termination rates. Over the last three years, the PTA has identified over 150 illegal operators and has carried out 45 raids in collaboration with Federal Investigation Agency (FIA) throughout the country. A number of licensed operators involved in illegal telephony have been notified and fined as well. Fines totaling PKR 955 million were imposed on seven operators. (July 25, 2012) The Associated Press of Pakistan

There were two million broadband users in Pakistan by the end of April 2012, according to recent figures from the country's telecoms regulator. The Pakistan Telecommunication Authority adds that the number of DSL connections had reached 849,228 by the end of April, followed by WiMax and EvDo with 575,572 and 537,908 respectively. The number of internet users with fibre-to-the-home (FTTH) connections had reached 8,052, while HFC connections continue to decline, reaching 35,993. The PTA predicts that the number of internet users is likely to grow in the coming months as operators continue to explore untapped urban markets. Interestingly, Internet traffic actually saw a 30% decrease since October 2011, when the Pakistani government blocked access to pornographic websites, but has now begun to recover again. (July 17, 2012) www.telecoms.com

Pakistan ended May with 119.86 million mobile subscribers, up from 119.51 million in April, while mobile teledensity remained at 68.6%, according to figures from the Pakistan Telecommunication Authority (PTA). Mobilink led the market with 36.05 million subscribers, up from 36 million a month earlier, followed by Telenor which had 29.90 million customers, compared with 29.72 million in April. Ufone's subscriber base grew to 23.55 million from 23.50 million, and Warid ended the month with 13.80 million customers, down from 14.10 million a month earlier. Zong grew its customer base to 16.57 million from 16.18 million customers in the previous month. (July 17, 2012) www.telecompaper.com

The Pakistan Telecommunication Authority (PTA) has revised the limit for purchase of SIMs from 50 to five for one individual in its amended Subscribers Antecedents Verification Regulations. According to the new rule an individual can get subscription of five SIMs — prepaid or postpaid—on one Computerized National Identity Card (CNIC) from different or one cellular phone companies. The authority has issued its new orders following the direction of Chief Justice, who asked the authority to stop illegal sale in Balochistan and restrict one subscriber to five SIMs. Previously an individual could purchase 10 SIMs of one subscriber, that is, 50 from five different cellular phone companies in total. Officials of the cellular phone companies feared of blocking millions of SIMs if the orders will be implemented on overall subscribers' base as there are scores of individuals having many SIMs registered on their CNICs. However, they will be happy complying with the new directives for the sale of new subscribers as soon as the authority formulates the mechanism or Standard Operating Procedures (SOPs). On the contrast, analysts of the telecom sector said the cleansing of illegal and unregistered SIMs must be vital for existing subscribers' base totaling 112

million. The new regulations will have a negative impact for cellular phone companies though it will help authorities to stop the illegal sale and misuse of mobile phone particularly in criminal activities. They said that the telecom authority along with the operator may embark on a drive to implement these new regulations in the cellular sector and on the other hand, there will be no targets to be achieved if the directives are issued for new subscribers. (July 11, 2012) www.dailytimes.com.pk

The National Accountability Bureau (NAB) has taken legal action against five of the nation's telcos for allegedly evading tax and excise duties amounting to PKR47 billion (US\$489.95 million). The NAB has accused the National Telecommunications Corporation (NTC), Pakistan Telecommunications Mobile Company Ltd (PTML), Telenor Pakistan, Warid Pakistan and Mobilink (previously known as Pakistan Mobile Communications Ltd, PMCL) of evading taxes since 2007. The Federal Board of Revenue (FBR) noticed the evasion of tax earlier this year and brought a case against the operators to reclaim the funds. In an appeal to the Chief Commissioner of the Large Tax Unit, however, the telcos sought a reprieve from the earlier taxes, claiming that the evasion was inadvertent, but stating that they were prepared to pay the correct amount from July 1, 2012 onwards. With the FBR reportedly planning to allow the back-taxes to be waived, the NAB intervened to prevent the loss of funds to the state coffers and safeguard national interests. (July 9, 2012) *The Business Recorder*

The Pakistan Telecommunication Authority (PTA) is encouraging the development of local content based mobile solutions for farmers in the country. While addressing a workshop titled "What Can Telecommunication Do for Agriculture" Chairman PTA Dr Mohammad Yaseen said "the PTA is now encouraging the development of local content-based mobile/ICT applications and is willing to extend all kinds of support to help farmers through the provision of reliable and timely information, local content-based applications and the automation of agriculture production processes using specialized applications of mobile phones and ICT." During the workshop it was stressed that there has been need for ICT access for emergency and disaster management, use of interactive media, automated data collection and an out-of-the-box approach for telecom usage in the agriculture sector. The event was organized in collaboration with LIRNEasia, a regional ICT policy think tank, based in Sri Lanka. The main theme of this joint initiative of the PTA and LIRNEasia was to share international experiences and research with Pakistan, to learn from successful telecom-agriculture models and improve agricultural productivity through increased usage of the ICT. The event was attended by representatives from agriculture organizations, international experts, agriculture consultants, policy makers, government officials, farmers associations, telecom operators, value added service providers, agriculture credit departments and donor agencies including the World Bank, ADB, USAID and DFID working in the agriculture sector. In his opening remarks, Chairman PTA Dr. Mohammed Yaseen said that agriculture is the backbone of Pakistan's economy as it accounts for 21 percent of national income, employs 45 percent of the country's total workforce and provides a livelihood to 60 percent of our rural community. He said that farmers access to relevant information and adoption of ICT and telecom value added services by the rural community can bring about a revolution in agriculture production. Similarly, the Pakistan telecom sector is considered an exemplary growth model around the globe and our agriculture sector can also

be a model by adopting telecom and acquiring its benefits. Today, we have a total teledensity in excess of 72 percent with 119.9 million mobile subscribers. The chairman said that after success in e-commerce and branchless banking initiatives, Dr. Rohan Samarjiva, CEO & Chair LIRNEasia presented research carried out by the organization on the subject of how the underprivileged make use of ICTs and findings from worldwide studies of Teleuse at the bottom of the pyramid. He said that mobiles are the preeminent communication technology among the poor, among smallholders and those who interact with them. Yet, the use of mobiles for livelihood-related purposes is moderate in the agriculture sector. "More mobile-based applications are needed for better diffusion of telecom in agriculture," he said. (July 5, 2012) www.thenews.com.pk

Qatar

Executive Director: Ms. Christa Cramer

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

Qatar has retained its position as the Middle East's most innovative economy in the annual Global Innovation Index 2012 (GII). The index ranked the future host of FIFA World Cup 2022 33rd globally; one place ahead of powerhouse China, the world's largest emerging economy. The gas-rich state fell seven places compared to last year but was still ahead of the UAE which was placed 37th, down three positions over 2011. The study, commissioned by leading business school INSEAD in partnership with other firms, scored 141 countries based on the degree to which their economic environment enables innovation, as well as actual innovative outputs. In the Gulf, Bahrain rose five places to 41st while Oman was the fastest climbing economy in the Middle East, rising 10 places to 47th. Saudi Arabia was ranked 48th (up six places on 2011) while Kuwait was the lowest ranked GCC nation at 55th, down from 52nd last year. Globally, the list of top 10 performers was changed little from last year with Switzerland, Sweden and Singapore ranked in the top three. The top ten was completed by Finland, United Kingdom, Netherlands, Denmark, Hong Kong, Ireland, and the US. Where most MENA countries trailed innovation leaders was in innovation outputs, the index showed. Qatar, Jordan and the UAE lead the regional ranking, but they all scored below the top 40. (July 7, 2012) www.arabianbusiness.com

Saudi Arabia

Governor: Eng. Abdullah A. Al Darrab

[Communication & Information Technology Commission (CITC)]

The new regulation for recharging mobile phones has been postponed to September 28, the Saudi Communications and Information Technology Commission (CITC) announced. According to the new regulation, a user will need to key in his ID number along with the prepaid coupon number in order to top up cell phone credit or transfer credit to another user. The measure was taken to prevent the illegal use of cell phones. The regulation, originally to be in effect from July 31 was postponed by the CITC after Saudi telecom firms requested an extension to give time for their more than 10 million customers to update their information. Abdullah Al-Dharrab, governor of CITC, said fines of SR 5 million would be imposed on companies which sell SIM cards to people without recording their ID information. Telecom companies estimate the number of cell phone SIM cards previously issued without ID or under fake names to be more than 12 million. (July 26, 2012) *Arab News 2012*

The new regulation by the Communication and Information Technology Commission (CITC) on SIM cards coming into force on July 31 has unnecessarily confused some customers of the three Saudi telecom companies. Through a number of advertisements in newspapers the companies had repeated how easy and simple it was to get the SIM registered. The new system requires consumers to enter their national identification or iqama number immediately following the prepaid card number to recharge SIM cards. The ID entered must match the ID provided to the service provider at the time of the original SIM card purchase. Otherwise the charging, recharging or transferring of balances will be prohibited. (July 19, 2012) Arab News 2012

Saudi Arabia retained its status as the most competitive Arab cellular market with a 74.56% mark, the 2012 Cellular Competition Intensity Index revealed. Jordan came in second at 70.67%, followed by Palestine at 70.43%. Saudi Arabia hosts four operational and licensed operators. Consumers have a choice of 24 prepaid plans and 26 postpaid plans. Saudi Arabia's score benefited from the availability of smart phone plans, corporate offers, 3G services and 4G competition. The Cellular Competition Intensity Index is relative in nature as it compares the state of every market relative to other markets. (July 17, 2012) www.zawya.com

The GSMA has announced that greater allocation of spectrum for Mobile Broadband is vital for the economic and social development of Saudi Arabia. New findings from a report by Analysys Mason, commissioned by the GSMA, reveal that if the Saudi government was to release internationally harmonized spectrum in the 800 MHz and 2.6 GHz bands, the Kingdom would stand to benefit substantially. Peter Lyons, director of spectrum policy, Africa and Middle East, told Arab News that the release of harmonized spectrum would generate an additional SR 358 billion (US\$95.5 billion) in Saudi GDP and create 425,000 jobs between 2013 and 2025. "This sum could fall to just US\$26 billion if the release of the necessary spectrum is delayed to 2018, and the number of jobs created could be reduced to just 75,000. Furthermore, failure to use harmonized spectrum would consequently stop the Kingdom from deriving economies of scale and would require equipment to be specially designed for that market. Equipment vendors may be unwilling to develop such equipment, or may charge very high prices for it, as they will not be able to spread their fixed costs over a very large user base, and ultimately this would translate into higher prices for consumers," Lyons added. He said Saudi subscribers could face a significant reduction in the variety of devices available. "In particular, many of the most desired smart phones that support Long Term Evolution (LTE) and available internationally would simply not be available in the Saudi market," he said. He confirmed the current spectrum allocation for LTE in the Kingdom, in the 2.3G Hz and 2.6 GHz bands, follows a completely non-harmonized arrangement, and as a result, will not deliver the benefits made possible by allocating harmonized spectrum in the 800 MHz and the 2.6 GHz bands. "The continuation of the current arrangement will have a detrimental impact on coverage across rural areas, in-building penetration and high-capacity connectivity for Kingdom's largest cities," he said. Broadband coverage to Kingdom's large rural areas, providing education and information benefits to the poorer areas of the Kingdom is vital. "There is a large spread of population density across the Kingdom's regions as shown in figure. The large spread in density suggests that mobile broadband services in the Kingdom need to have both 800

MHz spectrum (which is best for coverage in rural areas) and spectrum over 2.6 GHz spectrum (which is good for capacity in urban areas)," he said. Lyons confirmed that the Kingdom's government continues to shift its focus from creating public sector jobs, and focus instead on enabling environment for entrepreneurs to create companies. "Saudi job market is concentrated around public services with 37.1 percent of employment deriving. However, while the share from public services is marginally falling, trade and tourism, communications and financial services are increasing in importance, indicating growth in the private sector. We believe the Saudi government should continue to shift its focus from creating public sector jobs, and focus instead on creating an enabling environment for entrepreneurs to create companies, which in turn create higher skill and better paying jobs for citizens in the Kingdom. One of the most important factors in creating such an enabling environment is the access to reliable, cheap, high speed broadband connectivity across the country; the release of harmonized spectrum for LTE will be absolutely critical to achieve these goals," he said. GSMA report confirmed that international spectrum harmonization is critical in ensuring that new devices, such as tablets, smart phones and ultra books, will be able to work in the Kingdom. "Failure to harmonize spectrum with the international community will result in the Kingdom being forced to use higher-cost and poorly-performing devices for LTE. In addition, people from neighboring Gulf Cooperation Council (GCC) countries would not be able to roam with their devices in the Kingdom," he said. Since the launch of mobile broadband services in mid-2006 in the Kingdom, the adoption of this technology has been very successful. With three competitive players in the market - STC, Mobily, and Zain - opportunities for growth are significant, he said. "However, the examples of regional leaders in broadband development, such as Qatar, the UAE or Kuwait, as shown in our figure, indicate that broadband in Saudi Arabia may have the potential to go much further than the current 48 percent population penetration. The growth in mobile broadband in the Kingdom to date has been fuelled by the availability of spectrum supporting 3G technologies such as HSPA. What is at stake now, is the availability of harmonized spectrum in the Kingdom for the next generation mobile broadband technology, LTE," he said. He stated that it is possible the 2.6GHz band will be cleared of government users by 2015 or 2016. "We believe this is a step in the right direction, but there is a significant cost to delay from 2013 to 2016 in terms of good jobs that could have been created. Actually, no progress has yet been identified for the 800MHz band. Clearing this spectrum for mobile broadband should be at the top of economic policy-makers agendas," he added. He said: "As a key market in the region, we encourage the Saudi government to make the necessary spectrum available to support the growth of LTE services," Lyons continued. "The benefits of widespread next-generation Mobile Broadband connectivity can help the Kingdom diversify its strengths and transition, over time, to a knowledge-based economy. This will create a solid foundation for continued growth, prosperity and security." (July 5, 2012) www.zawya.com

The Communications and Information Technology Commission (CITC) has announced that entering a user's ID number, together with a prepaid card number, would be mandatory to charge a cell phone's credit or transfer money from the user's credit to that of another subscriber starting July 31. The CITC said the new procedure aims to end the practice of anonymous persons misusing SIM

cards. In the new system, a consumer should enter his ID or Iqama number immediately after entering the prepaid card number to recharge the phone's credit. It would not be possible to recharge without entering the ID number. The telecom regulator warned citizens and expatriates against using any prepaid SIM card with an unknown identity. The new procedure is part of the commission's efforts to contain the spread of illegal prepaid cards. The commission disclosed that it has completed all the necessary procedures and arrangements to enforce this decision. A few months ago governor of CITC reiterated the commission's resolve to go ahead with introducing this system. He also noted that the telecommunications companies in the Kingdom had asked for a time period to introduce the system in order to make the necessary changes in their system to support the regulation. The CITC chief said that anonymous SIM cards were posing a severe threat to the security of the nation and the society as well. (July 4, 2012) www.zawya.com

South Sudan

Under Secretary: Stephen Lugga JUMA

[Ministry of Telecommunications and Postal Services]

The Ministry of Telecommunications and Postal Services has set up a committee to review the operation of telecommunication (mobile phone) companies and come up with an annual fee. The Undersecretary in the Ministry of Telecommunications, Eng. Juma Stephen Lugga told Radio Miraya that an initial figure of \$70 million US dollars per year is being considered. There are five companies operating in South Sudan: Gemtel, MTN, Sudani, Vivacel and Zain.

(July 19, 2012) www.mirayafm.com

Sri Lanka

Director General: Mr. Anusha Palpita

[Telecommunication Regulatory Commission (TRC)]

ITU's annual Global Symposium for Regulators will take place in Sri Lanka from October 2-4, 2012. The Global Symposium will look in-depth at the challenge of meeting new national broadband goals, promoting affordable access and ensuring safe and secure digital opportunities for all. The meeting, which has earned a reputation as the pre-eminent global gathering of the information and communication technology (ICT) regulatory and policy-making community, is designed to foster cross-stakeholder dialogue between regulators, policy makers, industry leaders and other key ICT stakeholders. Participants will engage in stimulating discussions on a wide range of compelling issues, including net neutrality, spectrum policy, international roaming, cloud computing, data protection and privacy, international and regional IP interconnection, and public-private-partnerships to foster network investment. The event is being organized by ITU in collaboration with the Telecommunications Regulatory Commission of Sri Lanka. The program will begin with an interactive High-Level Segment focusing on transnational regulatory issues in a converged digital era. The first two days of the symposium will comprise the Global Regulators-Industry Dialogue, and are open to regulators, policy makers and members of ITU's Development Sector. The third day is a closed session open to regulators and policy makers only. (July 12, 2012) www.trc.gov.lk

Tunisia

President: Mr. Hassoumi Zitoune

[National Telecommunication Commission (INTT)]

The Tunisian government announced an auction to sell its 25% share in the mobile operator Tunisiana, which is majority-owned by Qtel. Offers must come only from financial companies and investment funds and the deadline is November 2. The 25% stake was previously owned by Princesse Holding. Materi's 25% holding was confiscated by the new Tunisian government after the revolution. Qtel earlier planned to float the business on the Tunis stock exchange but the plans were delayed after the uprising disrupted the investment climate. In May, Tunisiana won a license to offer 3G and fixed-line services. (July 27, 2012) www.telecompaper.com

Tunisiana has announced the launch of its 3G network, becoming the last of the nation's trio of providers to offer the service. The network's footprint currently covers 48% of the population but the cellco expects to have completed work expanding the network to 71% of the population by the end of the year and reach 87% in early 2013. The HSPA+ network operates in the 900 MHz and 2100 MHz frequency bands. Tunisiana received its 3G concession in early May 2012, after a bid in late April was deemed to be too low by the Tunisian ICT ministry. (July 24, 2012) www.telegeography.com

Turkey

Chairman & CEO: Dr. Tayfun Acarer

[Information & Communication Technologies Authority (BTK)]

The Russian competition regulator FAS plans to carry out negotiations with Turkey on reducing roaming rates, reports Tass-Telecom citing Anatoly Golomolzin, the deputy head of the regulator. The countries have recently carried out initial discussions on the issue. (July 24, 2012) www.telecompaper.com

Turk Telekom is mulling merger and acquisition opportunities and is optimistic about growth, according to Turk Telekom group chief executive Hakam Kanafani, despite a recent consumer spending slowdown in Turkey. In a recent interview with Dow Jones Newswires, the Turk Telekom Group CEO refused to be drawn on which companies the telecoms giant was eyeing, but offered a bullish outlook of the company's prospects following strong growth so far this year. The optimistic outlook of the group CEO, who has held the top job at Turk Telekom for two years, comes in the face of a dramatic consumer slowdown in Turkey, where spending stagnated in the first quarter from 3.4% growth in the previous three months. Turkey's economy, which grew at the fastest rate of any G20 country save China last year, contracted 0.4% in the first quarter, marking the first quarterly contraction since the first quarter of 2009, according to revised national accounts data published on Tuesday. Economists, however, expect spending to pick up in the months ahead. Turkey's government is targeting 4% growth this year. Kanafani said that he expected growth in the group's fixed-line and mobile businesses to continue in the second quarter after first-quarter revenue increased 3% from the same period a year earlier to nearly 3 billion Turkish lira (US\$1.65 billion), despite a sharp slowdown in the Turkish economy. Mr. Kanafani struck a particularly optimistic tone on Turk Telekom's mobile unit Avea, which has seen strong growth in smart phone and tablet devices in Turkey's rapidly growing market. Avea is Turkey's third-largest mobile operator in Turkey, behind Turkcell Iletisim Hizmetleri AS and Vodafone Group PLC's local unit.

(July 6, 2012) [Dow Jones Newswires](http://www.dowjones.com)

United Arab Emirates

Director General: Mr. Mohamed Nasser Al Ghanim

[Telecommunication Regulatory Authority (TRA)]

Du has announced that it will shortly launch a SIM registration campaign for its mobile customers, in line with the Telecommunications Regulatory Authority's (TRA's) 'My Number, My Identity' initiative. Du customers will be notified individually by SMS, only after which will they be required to visit one of 250 locations across the UAE for registration. The TRA announced last week that mobile subscribers will have approximately 18 months to register their SIM cards. In collaboration with the two licensed telecoms operators, Emirates Telecommunications Corporation (Etisalat) and Du, the regulator's 'My Number, My Identity' campaign aims to increase awareness of the new registration procedures, which aim to organize registration processes and requirements for mobile phone services. Subscribers are expected to fully update their data and ensure that their SIM cards are registered under their names. (July 10, 2012) www.telegeography.com

The Telecommunication Regulatory authority (TRA) has given a timeframe of 18 months for subscribers to reregister their SIM cards under its 'My Number, My Identity' program. The process is divided into six stages to ensure that all users successfully complete their registration. Everyone with a mobile phone must go to a Du or Etisalat shop with their passport or national ID card to identify the person owning each phone line. The operators Etisalat and Du will conduct their own awareness campaigns to further announce details of the process of registering SIM cards. (July 5, 2012) www.telecompaper.com

The UAE may end the monopoly of mobile operators Etisalat and Du in the country's telecom sector and admit new operators from 2016, in line with an international agreement. Etisalat and Du will continue to be the sole service providers until the government in 2016 offers the World Trade Organization an official commitment to open its market from end 2015. Once TRA has finished its study of the market, it will present it to the federal government for a final decision. The UAE has one of the largest telecom sectors in the Middle East, with a total of nearly 15.1 million subscribers at the end of May, including 12.3 million mobile phone users. (July 2, 2012) [Emarat Al Youm](http://EmaratAlYoum)

Regulatory Activities Beyond the SAMENA Region

ITU

ITU-T Study Group 13 – Future Networks including Cloud Computing and NGN – has approved new standards offering a definition of the Internet of Things (IoT), characterizing the emerging IoT environment, and outlining the functional requirements of machine-oriented communication applications in an NGN context:

- Recommendation ITU-T Y.2060, Overview of the Internet of Things
- Recommendation ITU-T Y.2061, Requirements for support of machine-oriented communication applications in the NGN environment

ITU-T Y.2060 marks ITU members' approval of a definition of IoT, terming it: "A global infrastructure for the Information Society, enabling advanced services by interconnecting (physical and virtual) things based on, existing and evolving, interoperable information and communication technologies." Recommendation ITU-T Y.2060 provides an overview of the Internet of Things (IoT), clarifying the concept and scope of IoT, identifying its fundamental characteristics and high-level requirements, and offering detailed description of the IoT reference model. Additionally, the standard presents an informative appendix discussing the IoT ecosystem and the business models of which it will be composed. The definition is accompanied by a qualification which notes that, from a broad perspective, IoT can be perceived as a vision with technological and societal implications; which will, through the exploitation of identification, data capture, processing and communication capabilities, make full use of

"Things" to offer services to all kinds of applications, whilst ensuring that security and privacy requirements are fulfilled. Recommendation ITU-T Y.2061 provides an overview of machine-oriented communication (MOC) applications in next-generation network (NGN) environments; covering the NGN extensions, additions and device capabilities required to support MOC applications. Additionally, the standard's appendices describe the actors in an MOC ecosystem and the roles they are to play, as well as a number of use cases relevant to the study of MOC applications in an NGN environment. SG 13 has also approved Recommendation ITU-T Y.2080, Functional architecture of distributed service networking, and has consented the approval of another fourteen new standards, the most noteworthy being Recommendations ITU-T Y.2069, Terms and definitions of the Internet of Things; Y.2705, Minimum Security Requirements for Interconnection of Emergency Telecommunications Service (ETS); Y.2027, Functional Architecture of Multi-connection; and Y.2063, Framework of Web of Things. (July 4, 2012) www.itu.int

ETNO

The ITU Secretary General, Hamadoun Touré, and the ETNO Executive Board Chair, Luigi Gambardella, reiterated the importance of the WCIT to lay the framework that will facilitate the further growth of an innovative, and sustainable future for the telecom and information and communication technology sector (including the Internet). Dr Hamadoun Touré, ITU Secretary General, says: "The 1988 ITRs opened the door for the telecommunications revolution of the

1990s – and notably privatization, liberalization, and new technologies such as mobile and the Internet. Now it's time to take the next step and open the door for the broadband revolution of the next decade – so that all the world's people can gain access – affordable, equitable, high-speed fixed or mobile access – to voice, video and data." Luigi Gambardella, ETNO Executive Board Chair, says: "The WCIT is an opportunity to address the need for a new eco-system for the Internet enabling operators and service providers to meet the huge challenges driven by rapid data increase and allowing users to continue enjoying the benefits and opportunities brought about by the Internet". The ITRs, which will be revised at WCIT, set the basic principles for interconnection ensuring that networks can connect smoothly. However, the environment has changed dramatically since the latest revision of the ITRs. The growth in traffic puts a strain on network resources and risks to worsen the user experience. ITRs need to reflect changes in markets and technologies, while allowing Internet innovation to continue developing. The ITU membership, which includes ETNO, believes that the WCIT is an opportunity to improve the current basis that has, to date, facilitated the growth of telecommunications (including the Internet) and the information society. There are opportunities to agree on a new sustainable economic model favoring innovation, openness and consumer choice. In this context, ETNO has submitted an innovative proposal for the revision of the ITRs ensuring the future proofness of the current model. By allowing commercial agreements between undertakings on end to end quality of service delivery ETNO believes that innovation and improved user experience would be encouraged. (July 12, 2012) www.etno.be

United States

According to the Federal Communications Commission, the Federal Appeals Court for the D.C. Circuit upheld the commission's decision last fall to plow Universal Service funds reclaimed -- primarily from wireless carriers -- into the fertile field of broadband via the newly created Connect America fund. The Rural Cellular Association and the Universal Service for America Coalition had challenged the FCC's order. The FCC is migrating phone subsidies to broadband, a transition it has recognized will be hard on some incumbents -- including smaller rural carriers -- who relied on those funds. "I am pleased that the court of appeals upheld the FCC's ruling, an important victory for our universal service reforms," said FCC chairman Julius Genachowski. "The Commission's once-in-a-generation overhaul of the universal service fund created the Connect America Fund to deliver broadband access to unserved rural communities, which lack access to the benefits of broadband, including jobs, opportunities for small businesses, better education and quality healthcare. Funding previously relinquished by some carriers has been used as a fiscally responsible down payment on those reforms. The Court's opinion ensures that the FCC will continue to be able to use funds on hand to rapidly implement the Connect America Fund and spur billions of dollars in private investment, without increasing contributions paid by consumers and businesses." (July 13, 2012) www.multichannel.com

The Federal Communications Commission (FCC) has confirmed that four separate T-Mobile USA subsidiaries will be allowed to participate in its forthcoming 'Mobility Fund Phase One' auction, which seeks to spread mobile broadband coverage to rural parts of the country. The decision follows a petition filed by T-Mobile on behalf of four of its wholly

owned subsidiaries, requesting that they be conditionally designated with eligible telecommunications carrier (ETC) status. The companies in question are PowerTel/Memphis (covering Alabama and Tennessee), T-Mobile Central (covering Alabama), T-Mobile South (covering Florida and North Carolina), and T-Mobile Northeast (covering New Hampshire, New York and Virginia). Summing up its decision, the FCC commented: 'We find that T-Mobile's participating in universal service programs in areas in which it becomes authorized to receive Mobility Fund Phase One support should provide a variety of benefits to consumers including mobile voice and current or next generation broadband access ... Enabling otherwise qualified parties to participate in this process may encourage more aggressive auction competition, thus lowering bids and permitting greater mobile coverage with the limited amount of support available in Phase One of the Mobility Fund. We further find T-Mobile has deployed an advanced communications network that should make it capable of delivering supported services thought any area for which it becomes authorized to receive Mobility Fund support, consistent with the goals of Mobility Fund Phase One'. Applications to participate in the initiative were opened on 27 June, with the final deadline for applicants set at 11 July. Under the terms of the Mobility Fund, the FCC will distribute up to USD300 million in one-time support fees to carriers that agree to provide 3G or Long Term Evolution (LTE) services in areas that do not currently have mobile voice and broadband coverage. The fund is part of the Connect America Fund (CAF) that the FCC introduced in November 2011 as a way of overhauling its outdated universal service and intercarrier compensation systems. Phase Two of the Mobility Fund is expected to provide an additional US\$500 million for the ongoing support of rural mobile services.

(July 6, 2012) www.telegeography.com

Brazil

Brazil ended June with 256.13 million mobile lines in operation, up 0.46% from May, according to regulator ANATEL. A total of 1.2 million new subscribers were signed up in June, down from the nearly 2 million new subscriptions seen in May. Prepaid users were responsible for 81.68% of the total, while the remaining 18.32% were postpaid. Telefonica/Vivo was the largest operator and saw its market share steady in the period, at 29.6% or 75.71 million customers. TIM Brasil was second with 26.9% (68.87 million), followed by Claro with 24.6% share (62.97 million) and Oi in fourth place with 18.6% (47.77 million). 3G mobile accesses totaled 48.89 million in June, compared with 56.39 million in May. (July 20, 2012) www.telecompaper.com

Ministry of Communications has announced a project to allow free access to certain web pages on mobile phones. The government hopes to create a specific domain - 0800.br - that would allow access to selected pages even for individuals who do not pay for a data plan. The costs would be carried by the operators. The service would include government pages with free information about jobs, cultural events, public transport and also news of general interest. Around 80 people in the city of San Sebastiao, near the capital Brasilia, will participate in a test of the service from July 14. The project is an initiative by the federal government and the state government of the Federal District in partnership with the operators Vivo, Tim, Claro and Oi.

(July 13, 2012) www.telecompaper.com

Colombia

The government's planned 4G spectrum auction, previously slated for June this year, is now expected to take place on September 5. 225 MHz of spectrum is up for grabs, with the government hoping to auction between four and six new licenses. At present the only operator offering 4G services is state-owned Une-EPM, which launched commercial service over its Long Term Evolution (LTE) network in June, though the trio of other operators – Claro Colombia (previously known as Comcel), Movistar Colombia and Tigo Colombia – are all interested in acquiring 4G spectrum. Also expected to weigh-in for the concessions are Chile's Entel, NII Holdings, DirecTV and International Communications Network. (July 6, 2012) [BNAmericas](#)

Ministry of Information Technology and Communications (MinTIC) has launched a program with the Ministry of Housing, Cities and Territory (MVCT) to subsidize internet access for the country's poorest people. The project will see the government spend COP300 billion (US\$165.5 million) per annum over the next two years on purchasing computers and subsidizing internet access for families in the lowest two 'strata' – Colombia operates a system that gives areas a designation between one and six depending on its level of poverty or wealth, strata one being the poorest areas and strata six the most affluent. Under the scheme 100,000 families that will receive free housing from the government will also receive computers and free internet access. Further, families in strata one and two that purchase broadband access from the beginning of August will not be charged VAT on the service. ICT Minister Diego Molano Vega said in a statement: 'It has been proven that internet access and good use is reflected in improved rates of economic growth and job creation.' Vega added that one of the largest barriers to increasing broadband penetration was the comparatively high price of computers, and called on manufacturers to create strategies to improve accessibility to the disadvantaged population. The minister added: 'If we want a prosperous Colombia and greater opportunities for all, we must work together to provide the families of strata one and two the opportunity to grow through the use of the internet.' (July 4, 2012) [www.telegeography.com](#)

Peru

Ministry of Transport and Communications (MTC) will auction spectrum in the 900 MHz band in an effort to attract a fifth wireless operator to the market. The ministry is inviting bidders to operate a public telecommunication service using the 889 MHz-915 MHz and 944 MHz-960 MHz frequency bands in the capital and the Callao province and 902 MHz-915 MHz and 947 MHz-960 MHz in the rest of the country. The auction will be supervised by telecoms regulator Osiptel, and is due to begin on 24 July this year; the reserve price has been set at US\$39.8 million. A fourth operator was licensed in 2011 though the new entrant, Vietnam's Viettel, is not expected to launch commercial services until next year. Viettel will compete with US-backed Nextel Peru as well as the local subsidiaries of Latam giants America Movil and Telefonica. (July 6, 2012) [www.telegeography.com](#)

European Union

The European Union (EU) regulators are willing to allow Hutchison Whampoa's H3G Austria unit to take over France Telecom-Orange's Austrian subsidiary, as long as the combined entity allows other local operators to access its network as mobile virtual network operators (MVNOs). The news, which cites 'EU insiders', offers the first indication that there is a light at the end of the tunnel for the Hong Kong-based firm. However, the EU solution fails to address the chief objection from Austria's federal competition authority, Bundeswettbewerbsbehörde (BWB), which objects to a clause in the EUR1.40 billion (US\$1.87 billion) deal which would see H3G sell MVNO Yesss! to A1 Telekom Austria immediately after the transaction; the transfer of 750,000 Yesss! subscribers would allow Telekom to boost its market share to around 47%. If the anti-monopoly agency decides to formally block the transfer of the FT-Orange assets to Telekom, Hutch is understood to be prepared to walk away from the deal. The Austrian wireless market is currently home to more than a dozen well known MVNOs and airtime resellers, including Schwarzfunk, Yesss!, eety and Red Bull Mobile (formerly aonMobil). (July 24, 2012) [Wirtschaftsblatt](#)

The European Commission has sent a formal letter to Italy warning it to respect the independence of the telecommunications regulator after Italy's parliament recently passed a law opening up maintenance of the network, a spokesman said Thursday. "Independence of national regulatory authorities is a fundamental principle of EU telecom rules," Ryan Heath, spokesman for European Union Commissioner for the digital agenda Neelie Kroes, said in a statement. "This means that regulators should not seek or take instructions from any other body in relation to market regulation." The law was put in place by Italian Premier Mario Monti's government as part of a range of measures to spur competition. The controversial telecom law is intended to open up the market for maintenance of infrastructure, so that third parties can repair faults on the network. Telecom Italia SpA Chief Executive Franco Bernabe said earlier this year the law is unconstitutional. "The law in question would prescribe one particular solution and thus pre-empt the discretion of AGCOM," the Italian telecoms regulator," Mr. Heath said. "According to the European Commission AGCOM should be able to address any potential competition issue independently." Italy now has two months to submit its observations. If the response isn't satisfactory, the commission can send a letter of reasoned opinion, the first stage in legal proceedings which can ultimately take the case to the European Court of Justice, Europe's highest court. An Italian government official said that they are aware of the problem and are working with AGCOM to find a solution. AGCOM declined to comment on the decision; the regulator is currently in a transition phase ahead of the new board taking over. ETNO, the trade association representing mainly former state-owned incumbent operators including Telecom Italia, who tend to own existing copper telecoms networks called on Kroes to intervene, saying the "high level of uncertainty" due to direct government intervention is a concern, in a letter when the law was adopted in April. (July 19, 2012) [Dow Jones Newswires](#)

The European Commission has introduced a new set of calls for proposals for research under its Seventh Framework Program (FP7). The calls support the Digital Agenda's ICT research funding targets, with almost EUR 1.5 billion going to the thematic area of information and communication technologies. Around EUR 365 million will be dedicated to

research on technologies that will transform urban areas into sustainable 'Smart Cities and Communities'. In total, EUR 8.1 billion is available to support projects and ideas that will boost Europe's competitiveness. The funding, which is open to organizations and businesses in all EU Member States and partner countries, makes up the lion's share of the EU's proposed EUR 10.8 billion research budget for 2013. (July 10, 2012) www.telecompaper.com

Mobile phone and internet roaming charges have dropped again, making it a step closer for the European Commission to reach its goal of reducing the gap between domestic and "foreign" call rates to virtually nothing by 2015. For the first time, price caps were introduced on EU data roaming charges for customers using mobile internet-based services while abroad. The maximum price of voice calls made (per minute) went down from 35 cents to 29 cents while the maximum tariff for voice calls received (per minute) dropped from 11 cents to eight cents. Tariffs for SMS have also fallen from 11 cents to nine cents while accessing the internet will cost no more than 70 cents per megabyte. The new tariffs were fixed last March after nine months of intense negotiations, between the European Commission, European Parliament and the Council. They are exclusive of VAT or any other applicable charges. Mobile operators are obliged to actively offer the new "Euro Tariff" prices to all their subscribers. Meanwhile, the agreement is that the caps will continue to drop year-on-year until 2014, as indicated in the table. Obviously, mobile phone operators can set prices which are lower than the EU-imposed cap, but in practice, operators which charged significantly higher prices before the caps were introduced largely will stick to charging the maximum. The regulation confirms transparency measures currently in force for voice and SMS roaming, whereby, upon entering a European member state the customer is notified with basic pricing information on voice and SMS roaming services. (July 3, 2012) www.independent.com.mt

United Kingdom

OFCOM has confirmed that the auction of 4G mobile spectrum will get under way by end-2012. To ensure that the market remains competitive, OFCOM will reserve some of the available spectrum for a fourth national wholesaler other than the three largest mobile operators. This could be either Hutchison 3G or a new market player. The 4G auction will offer at least two spectrum bands – 800 MHz and 2.6 GHz. The lower frequency 800 MHz band is part of the 'digital dividend', which is ideal for widespread mobile coverage. These two bands add up to 250 MHz of additional mobile spectrum, compared to 333 MHz in use today. The spectrum bands will be auctioned to bidders as a series of lots. One of the 800 MHz lots of spectrum will carry an obligation to provide a mobile broadband service for indoor reception to at least 98 percent of the UK population by end-2017 at the latest. OFCOM believes that by imposing the obligation on one operator, this will drive other operators to extend their own coverage in response. OFCOM has also decided to require that this same operator provides the same indoor service to at least 95% of the population of each of the UK nations. Outdoor coverage for a network meeting this obligation is likely to be 98-99% of the population of each nation. A consultation on the plans closes on September 11. The auction process will start by end-2012, with prospective bidders required formally to apply to take part. Once these applications have been assessed, the bidding phase will commence in early-2013. OFCOM expects mobile operators

to start rolling out 4G networks using the auctioned spectrum from mid-2013, and to start offering 4G services to customers later in 2013. (July 24, 2012) www.telecompaper.com

OFCOM has proposed controls on the wholesale prices BT charges for products using leased telecoms lines, which provide vital high-speed links for businesses and providers of superfast broadband and mobile services. In the Business Connectivity Market Review¹ published last month, OFCOM proposed that BT has significant market power in a number of wholesale leased line services, and that charge controls should be imposed in the relevant markets to protect purchasers of these products. The consultation published today identifies the proposed level for those price controls. OFCOM expects the proposed controls will lead to real-terms price reductions for most customers of the £2bn leased lines market, such as businesses, schools, universities and libraries. Consumer mobile and broadband operators, which use leased lines to transfer data on their networks, would also see savings which could be passed on to customers. OFCOM is proposing overall caps linked to inflation (measured under the retail price index, or RPI), designed to align the prices of these BT products with their cost by 2015. (July 5, 2012) media.ofcom.org.uk

Telecom regulator OFCOM has confirmed the proposals set in the July 2011 Consultation on its Premium Rate Service (PRS) Review statement. In light of the consultation process, the regulator has proposed own portal services should be removed from the scope of PRS regulation and that Payforit (PFI) services should remain within PRS regulation. OFCOM also said it would ask PhonepayPlus to consider how it would regulate those services in a manner that takes into account the reduced potential for consumer harm in comparison with other forms of PRS. The modification to the PRS Condition will be effective from 1 September. (July 3, 2012) www.telecompaper.com

France

French regulator ARCEP has started a public consultation on a proposed reduction in mobile termination rates in overseas departments. This would see rates drop to EUR 0.01 per minute in the Antilles, Guyana, Reunion and Mayotte from 01 January 2013. The decision is based on the European Commission's recommended LRIC model for calculating the costs of an efficient operator. ARCEP expects the new tariff will encourage more unlimited offers and cheaper fixed-to-mobile calls, similar to mainland France. It also reduces the difference in termination rates between the overseas departments and mainland France to EUR 0.002, which should encourage calls overseas to be included more often in service bundles in mainland France. The consultation is open until September 14. (July 31, 2012) www.telecompaper.com

Netherlands

The number of mobile connections in the Netherlands fell slightly in the first quarter to 21.7 million from 21.8 million in Q4 2011, due to a fall in the number of prepaid connections and the number of connections via MVNOs, data from OPTA revealed. The Dutch regulator published data covering developments in the field of mobile services, fixed telephony, broadband and television, based on questionnaires completed by providers. The growth in the number of mobile broadband connections slowed compared to the previous quarter to 400,000 connections in Q1 from 800,000 connections in the previous quarter. Mobile phones

are increasingly used to surf the web, with data usage rising 6% in Q1. The growth came at the expense of the number of minutes called and the number of text messages sent. In Q1, 2.3 billion SMS messages were sent, down 11% from the previous quarter. The number of call minutes fell to 5.7 billion from 5.8 billion. (July 20, 2012) www.telecompaper.com

Germany

Telecoms regulator, the Federal Network Agency (BNetzA), has said it intends to withdraw the provisional prohibition it imposed on Telekom Deutschland's (TD's) new price model for marketing VDSL lines to competitors. The move follows significant changes made by TD to its price model in response to concerns raised by the regulator. In mid January 2012 TD had notified the FNA of its price model, which allows carriers that wish to offer VDSL IP bitstream lines to reserve a certain quota of lines in return for an up-front fee, giving them the right to lease the agreed number of lines for the next eleven years for a set monthly charge. The Ruling Chamber had initially concluded that the original price model could pose obstacles to competition for other carriers, as it was tied long-term to TD's existing VDSL infrastructure, which would negatively impact on other carriers' willingness to invest in a new, high-performance broadband infrastructure. Accordingly, on April 2, 2012 the FNA placed a provisional prohibition on TD's price model. The following month, the operator notified the FNA of a number of changes to the model, including an exceptional right to terminate agreements concerning existing lines if carriers switch to new next generation access lines, a reduction in the minimum line quota, and an increase in the monthly rental charge per line. As a result of these changes, investors in broadband infrastructures no longer have to assume that potential wholesale customers will be tied exclusively to TD over a long period, rather they are now able to terminate their customer relationship with TD without penalty whenever they wish to start operating their own or supporting a third-party broadband infrastructure. The FNA has now said that it is satisfied that its previous concerns have been addressed and has decided to withdraw the provisional prohibition. The European Commission and the regulatory authorities of the other EU member states now have one month to produce a statement on the matter, after which the FNA will publish its final decision. (July 9, 2012) www.telegeography.com

New Zealand

The Commerce Commission has released a discussion document on its approach to completing a statutory review of the unbundled bitstream access (UBA) service. The UBA service is a wholesale service provided by Chorus and used by other telecommunications companies to provide retail broadband services to their customers over the copper network. The purpose of the review is to update the prices that will apply from December 1, 2014. This review is being conducted at the same time as the re-benchmarking review of the price of unbundled copper local loop (UCLL) services. As UCLL is a component of the UBA service, the final price of the UBA service will be the UCLL price plus the benchmarked UBA price. Submissions on the discussion document can be lodged until August 24. (July 26, 2012) www.telecompaper.com

Norway

The communications regulator PT has announced it will hold an auction for nationwide spectrum permits for frequencies in the 28, 32 and 38 GHz bands. These bands are intended primarily for fixed services. The deadline to register participation and to submit comments on the auction model is August 24. The allocation will take place via an internet auction. The highest bid will win and the winner must pay the full fee in order to obtain the frequency permit, which will be valid until December 31, 2037. It will be technology-neutral and service-neutral. (July 3, 2012) www.telecompaper.com

Romania

Telecoms regulator, ANCOM has published the details for its planned tender for radio spectrum in the 800 MHz, 900 MHz, 1800 MHz and 2600 MHz bands in the 2013-2029 time frame. The auction is due to take place on the September 10, 2012. ANCOM said that it estimates that the final results will be announced in October. Two types of licenses will be awarded: long-term licenses (15 years, valid until April 2029) and short-term licenses (1 year and three months, valid until April 2014). For the long-term licenses, ANCOM will auction out 42 paired blocks of 5 MHz each, 6 of which in the 800 MHz band, 7 in the 900 MHz band, 15 in the 1800 MHz band and 14 in the 2600 MHz band, as well as 3 unpaired blocks of 15 MHz each in the 2600 MHz band. These licenses will be awarded starting April 6, 2014. With regard to the licenses to be awarded for a shorter period, ANCOM will auction out 10 paired blocks of 2.5 MHz in the 900 MHz band and 6 paired blocks of 5 MHz in the 1800 MHz band, resources which are currently used by Orange and Vodafone. The deadline set for submitting the application file and the initial bid is August 13, 2012. (July 3, 2012) www.cellular-news.com

Czech Republic

The Czech Telecommunication Office (CTU) said it decided to cut by half the termination fee, or the maximum wholesale price that operators charge each other for phone calls made among their networks. The CTU has been gradually decreasing the price in line with EU rules and between years 2005 and 2011 it slashed it by 65.3%. It said it decided to cut the termination fee to 0.55 Czech crown a minute from 1.08 crowns as of July 15 for new contracts, and as of September 15 also for existing contracts. Telecom companies operating on the Czech market are Spanish group Telefonica's unit Telefonica Czech Republic the UK's Vodafone and Deutsche Telekom AG's T-Mobile. (July 5, 2012) www.lse.co.uk

Kenya

Telecom regulator, the Communications Commission of Kenya (CCK) on announced a 16% increase in the number of mobile phone subscribers in Kenya in the first quarter of the year. According to data phone subscribers rose to 29 million during the period; this is as a result of a stiff competition by mobile operators to expand their network coverage across Kenya. "The continued growth in subscriptions is a clear indication of the operators' increasing focus to offer competitive and innovative products and services," the CCK said in its latest quarterly report. Kenya has four telecommunication operators with Safaricom commanding about 70% of the market. (July 13, 2012) www.ventures-africa.com

Ghana

National Communications Authority, the NCA, plans to free up broadband spectrum by 2015 in a move that could triple mobile broadband capacity in the country. The spectrum would become available once Ghana phases out analogue television and moves to digital television. Director of Spectrum Policy for the GSMA Africa and Middle East Region, Peter Lyons, told journalists at a telecoms workshop held in Accra that the digital dividend could lead to the creation of 930,000 jobs and eleven million mobile broadband connections in Ghana by 2020. He urged the NCA to speed up the migration to digital television, saying that 'without the release of spectrum in 2015 Ghana would only have seven million mobile broadband connections by 2020'. Director of Regulatory Administration at the NCA, Joshua Peprah, stated that digital migration is on course to be completed by 2014, a year earlier than the global deadline. (July 11, 2012) www.telegeography.com

Tanzania

Communications Regulatory Authority (TCRA) reports that the African country was home to a total of 26.978 million fixed and mobile subscriptions at the end of March 2012, up from 25.827 million at the start of the year. Of the total subscriptions recorded at March 31, 2012, 26.805 million were cellular connections to one of the country's leading mobile operators. Market leader Vodacom closed out 1Q12 with a total of 12.633 million mobile users (although around 19% are classed as inactive), while second-placed Airtel (formerly Zain) signed up a net 112,232 new users in the three-month period for a total of 7.106 million. Third place operator Tigo boosted its base by 47,067 to almost 5.498 million by end-March 2012, and Zantel Mobile — once the nation's fastest growing cellco — shed roughly 12,000 net customers during the period for a total of 1.511 million. Trailing far behind the big four, the mobile arm of fixed line operator Tanzania Telecommunications Company Limited (TTCL) had an estimated 96,000 subscribers and Benson Informatics Limited (BOL) had 1,221 data-only subscribers, down roughly 5,300 since the start of the 2011. In the fixed line segment, TCRA reported 173,075 fixed lines in service as at 31 March 2012, up from 161,063 at the start of the year. National PSTN operator TTCL claimed the lion's share with 158,348 lines at 1Q12 (its December 2011 figure was 159,364) with Zanzibar Telecommunications' (Zantel's) fixed line division taking the remaining 14,727, up from 1,699 previously. (July 10, 2012) www.telegeography.com

Rwanda

The Rwanda Utilities Regulatory Agency (RURA) has published data on the number of mobile phone subscribers in the country. As at the end of June 2012, Rwanda was home to 4,759,130 wireless subscribers, up from 4,453,711 three months previously. The regulator had previously projected that the number will increase to more than six million by the end of the year, although at the current growth rate this appears unlikely. The country's newest operator, Airtel, added 55,000 customers in May and a further 55,000 in June, outstripping its rivals MTN (46,000 net additions in June) and Tigo (38,800 net additions in June). (July 26, 2012) www.telegeography.com

Russia

The competition regulator FAS plans to carry out negotiations with Turkey on reducing roaming rates, reports Tass-Telecom citing Anatoly Golomolzin, the deputy head of the regulator. The countries have recently carried out initial discussions on the issue. (July 24, 2012) www.telecompaper.com

The telecommunications regulator Roskomnadzor has published maps on its portal showing GSM 900/1800 network coverage across the country. The maps include data from mobile operators MTS, Megafon, Beeline and Tele2 Russia. (July 20, 2012) www.telecompaper.com

Australia

The Australian Communications and Media Authority (ACMA) has made three changes to the Telecommunications Numbering Plan 1997. Under the changes, ACMA will offer digital mobile numbers with a new prefix, '05', as the current supply of numbers starting with '04' is expected to be exhausted in 2017. Furthermore, ACMA will supplement the supply of geographic numbers in regional areas where the existing supply is expected to be exhausted within twenty years and remove the geographic sectors around five capital cities. The regulator estimates an additional 100 million numbers will be needed to provide an adequate supply for more than twenty years. To avoid customer confusion, ACMA is also proposing the removal of a small largely redundant '0550' Location Independent Communications Services (LICS) number range which is located in the middle of the '05' number block. ACMA will consult with the small number of providers and consumers that may be affected over the next five years. (July 18, 2012) www.telecompaper.com

The Communications and Media Authority (ACMA) is seeking feedback on new arrangements in the 2.5 GHz mid-band gap. The communications minister has allowed the ACMA to commence processes to convert existing apparatus licenses held by the free-to-air commercial broadcasters and the ABC in the mid-band gap to spectrum licenses. The regulator is now seeking submissions on the regulatory framework for the conversion as well as on the technical framework. (July 13, 2012) www.telecompaper.com

The Competition and Consumer Commission (ACCC) has revealed its interim access determination (IAD) for the declared local bitstream access service (LBAS), a wholesale access service for fixed line network built or upgraded after January 2011. Having declared the service in February 2012, the new IAD contains both price and non-price terms and conditions for a wholesale non-National Broadband Network (NBN) 25 Mbps/5 Mbps down/uplink service. The regulator has set a price cap of AUD27 (US\$27.7), with the fee set 'by benchmarking against the NBN Co wholesale broadband agreement price for a similar service'. The determination meanwhile also sets out non-price terms and conditions of access 'to provide a base set of terms if parties cannot come to a commercial agreement'. Meanwhile, the regulator has also released its proposals for the final access determination (FAD) for the LBAS. To that end the ACCC has noted that it plans to use the same approach for the FAD as it had for the IAD, with prices to be benchmarked against regulated pricing for NBN Co, the public-private company overseeing the rollout and management of the NBN. (July 6, 2012) www.telegeography.com

The Australian Competition and Consumer Commission (ACCC) has completed its public inquiry into varying the fixed-line services final access determinations. The regulator has decided to temporarily vary the final access determinations and remove the obligation to supply certain regulated fixed voice services over the National Broadband Network (NBN). (July 3, 2012) www.telecompaper.com

Japan

NTT DoCoMo has announced that its Long Term Evolution (LTE) subscriber base passed four million on July 22. The cellco's 'Xi' service, which offers maximum downlink speeds of 75 Mbps, is growing rapidly, having claimed 1.1 million subscribers at the end of 2011, and 2.2 million as at end-March 2012. The pace of new additions has nearly doubled in recent weeks following the introduction of a new Xi-compatible Smartphone range. (July 24, 2012) www.telegeography.com

Malaysia

The Malaysian Communications and Multimedia Commission (MCMC) is launching a nationwide campaign on cyber safety. The ICT Minister said the campaign was necessary in view of issues such as hacking, identity theft, scams, and cyber bullying. The government is concerned that awareness on the matter as well as ethics among our Internet users is still low. (July 2, 2012) *Bername*

Indonesia

The government does not expect 4G based services to become widespread in the country until 2014 at the earliest. The adoption of 4G is not easy and if we are not careful we may be blamed later. Maybe in two years, 4G [nationwide] will be possible the ministry of communication and informatics told. The government needs to study how other countries are allocating 4G radio spectrum before Indonesia can move ahead with its own licensing program. The main issue is which bands are likely to become popular overseas so that handset and roaming compatibility can be maximized. (July 4, 2012) *Jakarta Post*

Hong Kong

Hong Kong's Office of the Communications Authority has issued a statement on auctioning spectrum in the 2.5/2.6 GHz band. A consultation was carried out in December last year and early this year. The regulator said that no spectrum would be reserved for certain existing mobile network operators and that the available spectrum would be auctioned off with bidding open to existing operators and new entrants. The regulator will divide the spectrum in blocks of 2 x 5 MHz and a spectrum cap will not be applied. Furthermore, technical standards on the use of the spectrum will not be imposed. The Communications Authority is planning the auction for the first quarter 2013. (July 5, 2012) www.telecompaper.com

Hong Kong's Communications Authority has begun a consultation on the proposed reduction of license fees for the unified carrier license (UCLs), the services-based operator (SBO) license (Class 3), and the public radiocommunications service (PRS) license (Paging). Under the proposal, the annual license fees for these licenses would be reduced from HKD 8 to 7 for each customer connection/mobile station. Subject to the response to the consultation exercise and the necessary legislative amendments, it is anticipated that the

proposed license fee reductions will take effect from March 1, 2013. Submissions on the proposal can be made until July 30. (July 2, 2012) www.telecompaper.com

Thailand

Thailand's National Broadcasting and Telecommunications Commission (NBTC) has engaged a team from the International Telecom Union (ITU) to value the country's radio and television spectrum ahead of issuing broadcasting licenses. The regulator has also appointed a subcommittee to work on the same task separately, and teams from the Thammasat University and Sukothai Thammatirat University will work out appropriate content ratios for the digital TV licenses. All of the committees are expected to finish their work this year. The regulator plans to publish the information on three classes of digital TV licenses in the Royal Gazette in September while licenses are expected to be awarded from early next year. (July 31, 2012) *The Nation*

NBTC may change the way in which it will auction 2.1 GHz spectrum in October this year. The regulator is considering an option that would auction off three blocks of 15 MHz bandwidth and increase the reserve price. The second option is to auction five blocks of spectrum, three 10 MHz blocks and two 5 MHz blocks. In the earlier published draft licensing terms, the NBTC would auction off nine blocks of spectrum of 5 MHz each with a reserve price of THB 4.5 billion. Each bidder would be limited to 20 MHz maximum. (July 24, 2012) *The Nation*

(July 24, 2012) *The Nation*

NBTC has set a tentative date of October 17, 2012 for the auction of full 3G mobile network operating licenses in the 2100 MHz frequency band. The NBTC will hold a public hearing on its draft spectrum licensing terms and conditions on July 20, while the telecoms committee of the regulator is in the process of selecting an advisor for the 3G auction process. The NBTC's hiring committee has submitted the results of its tender for advisors for the consideration of the telecom committee, and a final selection is now pending the outcome of a review. (July 18, 2012) *Dow Jones Newswires*

National Broadcasting and Telecommunications Commission (NBTC) has established a subcommittee to draft a plan for the upcoming expiry of concessions for TrueMove and Digital Phone Co (DPC). The plan aims to prevent subscribers of the two mobile operators from being adversely affected when the concessions expire in September next year. The plan will be completed within three months. Meanwhile, the regulator's legal committee will work alongside the panel to clarify whether the NBTC can take back CAT Telecom's 1800 MHz spectrum that is currently used for the concessions once they expire. The regulator plans to take back all concession frequencies and then re-allocate them. However, state-owned telecommunications providers CAT Telecom and TOT want to hold on to the spectrum. (July 18, 2012) *The Nation*

Philippine

Philippines based PLDT has handed back the 3G license held by its subsidiary company, Connectivity Unlimited Resource Enterprises (CURE). Surrendering the license was a condition of its takeover of the company last October. All 1.1 million Cure customers have now been transferred to PLDT's other mobile network, Smart Communications. The regulator is now preparing to sell the license and spectrum again, and under current legislation, has until next January to auction

off the spectrum to other bidders. PLDT is barred from bidding for any of the spectrum as it already has substantial radio spectrum holdings. Before the merger, PLDT held 25 MHz of spectrum, through two subsidiaries and gained a further 10 MHz following the acquisition. Following the handover, PLDT will end up with 15 MHz in the 1920-1935 MHz/2110-2125 MHz ranges and a further 10 MHz in the 1925 MHz-1945 MHz and the 2125 MHz-2135 MHz ranges. Any surplus from the sale after PLDT costs are taken out will be split between the company and the regulator. (July 30, 2012) www.cellular-news.com

India

A committee of senior ministers in India, known as the Empowered Group of Ministers (EGoM), has proposed a lower reserve price for the country's 2G spectrum ahead of its auction, due to be held later this year. The reserve price for spectrum had been set by the Telecoms Regulatory Authority of India (TRAI) at Rs36.22bn (\$687m) for every MHz of nationwide spectrum in the 1800 MHz band. This translates to Rs180bn for a pan-India license. The price is almost ten times the reserve price that was set in 2008 for the initial auction. The licenses issued in the 2008 auction were scrapped by the Supreme Court earlier this year, amid allegations of corruption surrounding the auction process. (July 23, 2012) www.telecoms.com

The Telecom Regulatory Authority of India (TRAI) has published its analysis regarding the effects of the controversial reserve prices for spectrum on tariffs and cellcos' profits. The analysis sought to propose the level of tariff increase required to neutralize the increase in cost of spectrum, based on current growth rates of traffic and subscribers. The report claimed that a tariff increase of INR0.05 (US\$0.0009) per minute would allow operators to be profitable within two years, whilst an INR0.10 hike in tariffs would reduce the loss-making period to a single year. (July 16, 2012) www.telegeography.com

India's plan to re-auction 2G spectrum by the end of August is in tatters, after the Department of Telecommunications' (DoT) inter-ministerial group (IMG) concluded it would not be possible to complete the process by the August 31 deadline. Chief among the IMG's concerns, according to a report by the Business Standard, is that the empowered group of ministers (EGoM) charged with defining the auction rules has still yet to agree on a base price, as well as rollout obligations for operators. An initial set of rules setting out the frequencies to be auctioned was released earlier this week. Eight chunks of 1800 MHz spectrum and three chunks of 800 MHz spectrum will be put on the block. However, India's government can only appoint an auctioneer once all the guidelines have been established. (July 6, 2012) www.totaltele.com

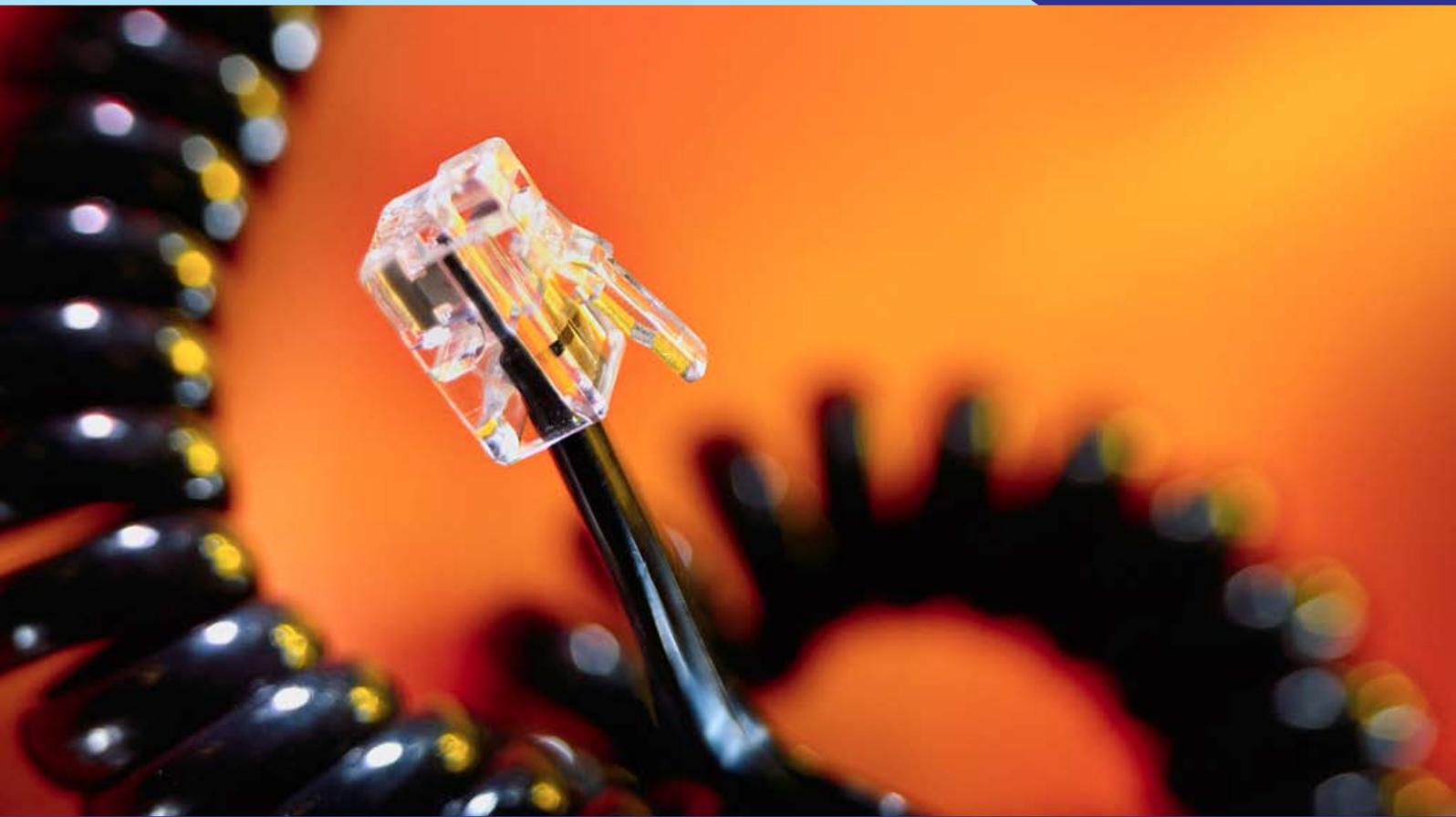
India's Department of Telecom has issued the rules for the auction of the reclaimed radio spectrum from the 2008 GSM licenses that were cancelled earlier this year. The DoT said that it will auction off blocks in both the 1800 MHz and 800 MHz bands. There will be eight blocks of 1800 MHz spectrum of 1.25 MHz (paired) will be offered, while for the 800 MHz band, three similar sized blocks will be offered. Existing operators will be able to bid for up to two blocks of 1800 MHz spectrum and one block of the 800 MHz spectrum. The tender notice also confirmed that the spectrum will be technology neutral - with implies the possibility of the incumbents bidding to boost their 3G coverage in circles

where they missed out on licenses in 2010. The initial notice has however not indicated what the minimum bid prices will be, although previous reports have suggested that the government may set a prohibitively high rate. The rest of the details will be announced later the notice said. (July 4, 2012) www.cellular-news.com

An Indian tribunal has split on its decision over whether the mobile networks had breached their licenses when they allowed 3G roaming between their networks. The Telecom Disputes Settlement Appellate Tribunal (TDSAT) has instructed the mobile networks to send the case to a higher court after the tribunal split in favor of both operators and the government. The Department of Telecom maintains that an operator allowing customers of another to roam onto its network where the other lacks a license is a breach of their license conditions. In the May 2010 auction, Vodafone secured licenses in 9 of the country's 22 circles, while Airtel secured 13 licenses, Idea has 11 and Tata gained 9 licenses. For example, Vodafone and Airtel can provide coverage in Delhi, but Tata and Idea cannot. The situation is reversed in Kerala though. National roaming agreements would widen Vodafone and Airtel's coverage in the more rural areas, while granting Tata and Idea access to the lucrative Metro areas. There is doubt though as to whether the government can block such roaming deals as it permitted them for 2G services, and the networks claim to have been told before the auction that they would be allowed to offer the same facility with 3G services. (July 3, 2012) 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
Director Regulatory Affairs
SAMENA Telecommunications Council



SAMENA ITRs Roundtable 17th Sep, 2012

SAMENA Council to Convene Regional Telecom Industry for a ITRs Roundtable in Dubai

SAMENA Telecommunications Council, the tri-regional consortium of telecom operators has announced that it will be organizing an International Telecoms Regulations (ITRs) Roundtable discussion on September 17th in Dubai. Hosted by Etisalat, the roundtable will provide 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.

In addition, the SAMENA Council attended the 4th Arab WCIT Preparatory Meeting in Dubai on September 8th. Regional and international organizations will have the opportunity to present their opinions and viewpoints on the proposed ITRs amendments.

Wilson further added, "Active and close communications among all stakeholders will aid the understanding of the issues surrounding the ITRs and the amendments that could potentially alter the operator investor community's vision of the future as well as the global regulatory landscape."



TOP TECHNOLOGY UPDATES

China Telecom Acquires 3G Services from China Telecommunications

China Telecom has agreed to purchase 3G network services from parent company China Telecommunications for US\$13.3 billion. The service acquisition is expected to be completed by December 2012 and will allow for increased speeds and service development. China Telecom posted revenue of US\$21.8 billion for the first half of 2012, an increase of 14.8 percent, as higher end mobile user customers' increase in number.

Claro Launches LTE Pilot in Three Brazilian Cities

Claro Brazil has launched a 4G LTE network trial in three Brazilian cities; Campos do Jordao (state of Sao Paulo), Buzios and Parati (state of Rio de Janeiro). The statement was made by Claro Brasil CEO Carlos Zenteno at the Qualcomm IQ 2012 event, Teletime reports. Claro has deployed hotspots in Campos do Jordao, Buzios and Parati, where customers can use modems, smartphones and tablets to test the operator's 4G services. Ericsson is the equipment supplier for the first three cities, while negotiations are underway with other companies for future deployments. Claro has also announced it is investing BRL 3.5 billion by the end of 2012 to upgrade its network, with an additional BRL 2.8 billion to be spent by 2014.

Three UK Selects Samsung to Build its LTE Network

Samsung Electronics will configure its first mobile network in Europe soon, as Three UK has selected the company to build its LTE Radio Access Network (RAN) and 3G/LTE core infrastructure. The two companies reached an agreement for Samsung to deploy LTE base stations throughout the UK, and ready Three's existing 3G network to efficiently work with its upcoming 4G technology. Three hopes to have enough stations to begin field trials later this year, and if successful, complete the network build-out in time for a 2013 commercial launch.

China 3G Subscribers Double to Reach 176 Million

China's 3G subscriber base more than doubled between Q2 2011 and Q2 2012, growing from 81 million to 176 million. Already the world's largest mobile market with over one billion wireless subscribers, the country surpassed the United States in Q1 2012 to become the globe's largest 3G market. China Mobile accounts for the majority of the country's 3G subscribers, with 67 million connections. Despite the increased availability of 3G services, there are still more than 860 million 2G subscribers in China. These unconverted subscribers present an ongoing opportunity for 3G providers. Even with the impending launch of 4G services, the number of 3G subscribers in the country will continue to grow rapidly, reaching an estimated 667 million by 2016.

Anite Invests in TD-LTE

Anite, a supplier of wireless device testing technology, is all prepared to address the testing demands for Voice over LTE (VoLTE) that are growing with the global roll-outs of VoLTE services. The company supplies mobile device and network testing systems for the wireless market. Additionally, the company also provides reservation and e-commerce solutions for the travel market. VoLTE's commercial success is most likely going to be played out over a number of years; as operators are going to need some time in order to work out the best way of monetizing VoLTE services. In the short term, however, it is more important to LTE's general development that any launched VoLTE service is both robust and can deliver high levels of quality. There is no industry consensus as to the best way of monetizing VoLTE services; so the short term priority is undoubtedly to ensure that the technology is up to the required standard.

SIM Plus to Launch 3G-2.1GHz Service in October

Samart i-Mobile Plus (SIM Plus) will start providing third-generation 2.1-GHz cellular broadband service on TOT's network in October under a new contract recently granted by the state agency, aiming to boost subscriber numbers to 400,000 from the present 100,000 within six months of the debut of the service. Watchai Vilailuck, president of Samart Corp, SIM Plus' parent, said it had chosen to debut the service in October as by that the time TOT is scheduled have expanded its 3G base stations to 5,000 nationwide from the present 3,000. TOT's board recently approved a bid from SIM Plus to procure 40 percent of its 3G network capacity for providing the service. The board approved a five-year deal with SIM Plus, to be reviewed every two years. The 40-percent capacity of TOT's network can serve 2.88 million subscribers.

TPG Chases SME Market with new VoIP Offering

TPG is extending its reach into the Small and Medium Enterprise (SME) market with the release of a new VoIP cloud offering for its Broadband On-Net customers. With the new VoIP package, TPG is offering two business plans – a Business VoIP Package for minimum total cost of US\$689.77 over the contract term and a Business VoIP Pay As You Go minimum charge in first month of US\$188.94. For as little as US\$29 extra per month, a small business can get three handsets each with direct dial numbers, Unlimited Local and National Calls plus basic key system features. The introduction of the new Business VoIP plans is a move to further arm TPG's SME unit with a voice solution, and is one of the many products the company plans to launch in the SME market

Telenor and Vodafone Lead in Hosted VoIP Provider Ranking in EMEA

Mobile service providers Telenor and Vodafone lead in hosted VoIP provider ranking in EMEA, ahead of BT. Telenor, Norway's fixed line operator and mobile carrier, leads as the top hosted VoIP provider in EMEA, scoring 30.7 out of 35 in Infonetics' 2012 business VoIP scorecard. Vodafone, which tied BT for the top spot in Infonetics' 2011 EMEA business VoIP scorecard, has been ranked 2nd this year with a high

score of 29.9. A strong and growing group of providers across Western and Eastern Europe and Africa closely follows the top 10 EMEA hosted VoIP service providers Telenor, Vodafone, and TDC offer strong mobile or FMC capabilities as part of their hosted VoIP services. These offerings are particularly compelling to small businesses that rely only on mobile phones without sacrificing business-class features.

BroadSoft Acquires Adaption to Enhance SaaS Offerings

BroadSoft Inc. acquired hosted VoIP solutions provider Adaption Technologies Ventures for an undisclosed sum, adding the company's infrastructure to enhance its BroadCloud software-as-a-service delivery (SaaS) platform. Adaption's assets include and Rialto, a web-based service operating platform service providers can use to sell, provision, activate and bill for hosted unified communications services. The acquisition came as BroadSoft announced its second-quarter results, including a 26 percent increase in year-over-year revenue, to US\$40.5 million. The company's total revenue was US\$78.9 million for the first six months of 2012, compared to US\$61.8 million for the first six months of 2011, reflecting year-over-year growth of 28 percent.

TrustPort Launches Mobile Encryption App

TrustPort has launched a mobile application that encrypts users SMS and email messages. According to the company, 'Skytale' prevents other people from reading sensitive messages and ensures private messages will always be secure during data transfer, both between phones and computers. Using 256-AES encryption in a single click option, Skytale offers the ability to encrypt up to six SMS messages at once (up to 960 characters) and an option to send an encrypted message to more recipients. Free versions are available for Android, iPhone and Mac OS X and support is offered for the most used email clients. The software is also a part of TrustPort Internet Security, TrustPort Total Protection and TrustPort Tools. Skytale can ensure confidentiality for every businessman, who is used to sending sensitive data via SMS or email.

Sesame Seed-sized Antenna Increases WiFi Speed by 200 Times

Researchers from A*STAR's Institute of Microelectronics (IME) have developed the first compact high performance silicon-based cavity-backed slot (CBS) antenna that operates at 135 GHz. The antenna demonstrated a 30 times stronger signal transmission over on-chip antennas at 135 GHz. At just 1.6mm x 1.2mm, approximately the size of a sesame seed, it is the smallest silicon-based CBS antenna reported to date for ready integration with active circuits. IME's innovation will help realize a wireless communication system with very small form factor and almost two-thirds cheaper than a conventional CBS antenna. The antenna, in combination with other millimeter-wave building blocks, can support wireless speed of 20 Gbps—more than 200 times faster than present day WiFi, to allow ultra-fast point-to-point access to rich media content, relevant to online learning and entertainment.

CHANGE

WHEN THINGS TRANSFORM

Current times demand that if operational and financial sustainability is to be had, new telecommunications business models need to be created. Traditional business models—revolving around technology and infrastructure providers, content and value-added service enablers who ready the network for content delivery, the telecom operators themselves, and the end-consumers—are undergoing a test of longevity. The outcome of this test, however, is well-known to all.

The communications industry, once again, is delving into revamping existing methods to do sustainable business, while supporting ambitious broadband and digitization projects that are a materialization of digital agendas in various markets around the globe. Fast growth in high-speed mobile adoption, as shown in Exhibit 1, has significantly and expectedly altered the rules of the game, as many would say.

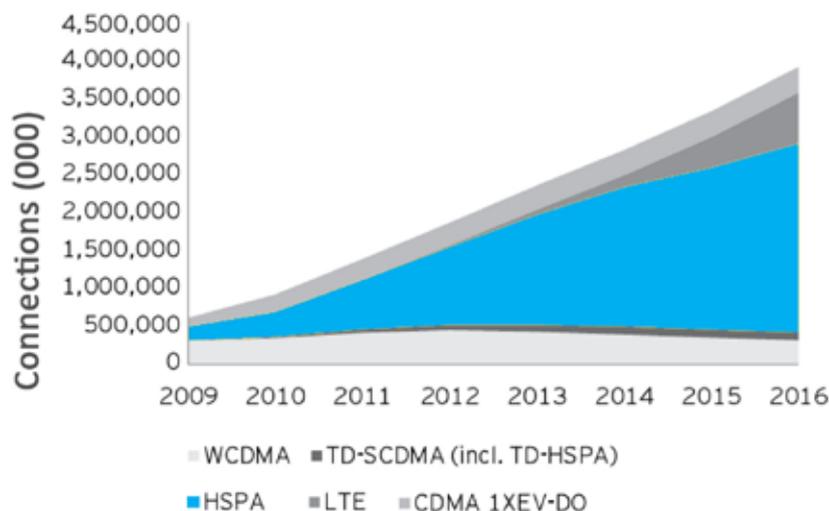


Exhibit 1: Global High-Speed Mobile Adoption Trend vs Technologies¹

Some have been rather prescient in attending to the shift in the business model landscape and have taken steps to align their priorities with change. For such players, innovation has meant combining existing telecoms portfolios with astutely-explored new niche service areas; an approach that challenges existing norms, which dictate what a telecom company can do or cannot do.

What the communications intelligentsia recognizes now without a doubt is that there exists no room for poorly-planned business models. Competition is intense. Regulatory and partnership pressures abound. Capital expenditure and investment returns have begun to shift toward an imbalance, which is pointing toward a range of possible adverse effects—including but not limited to having the sustainability of the current ecosystem compromised. Other effects, in various other contexts and scenarios, may be imminent as well.

The Internet lies at the heart of the present catalysis in business transformation within the telecommunications industry. Thus, as part of the business remodeling efforts, the Internet needs to be seen under an utterly different light. It is no longer just a channel for customer outreach but rather an integral element to business survival and success in the digital realm of the world, and of the South Asia – Middle East – North Africa (SAMENA) region. Over the past two years, this region, particularly its subset, the MENA markets, has witnessed significant developments. Categorized according to area of advancement, the UAE has been a topper in optical fiber infrastructure development; Qatar a leading NGN market; Bahrain a sophisticated regulatory trend setter; Pakistan a mega mobile market; and Saudi Arabia as an ideal competitive market.

Such advancements and market standings point to the facts that new fiber deployments will rise; greater use of the existing copper infrastructure using technologies such as very high-bit-rate DSL will be made; implementation and refinement of effective regulations will remain highly desirable; and policy philosophy development, which directly aids effective policy-making, will remain a matter of supreme urgency.

Various obvious and less obvious pressures (Exhibit 2) are upon telecom operators. The operators are increasingly finding that players from different industries are making it into the telecom market. Traffic on their networks has risen by large multiples. While some operators have begun to manage data deluge on their networks using wireless hotspots, combined with other intelligent investments, overall, most are still operating in the defensive mode. Playing in the offense would require answers to some fundamental questions to the transformation of the business model. For example, how can the profit margins be regained and sustained? Where to focus more: IT services, content, innovation, or communication services? How can policy-making on pricing and taxation tangibly give way to better problem solving, and encourage operators in making tough transitions?

As part of the inevitable transformation of business models underway, currently at the behest of operators' own needs, transformation in ICT policy needs to take place in parallel, and quickly. Transformation of ICT policy may just be what the operators currently need as a major source of support and encouragement, as they continue their forward movement toward fulfilling digital agenda goals they have been entrusted with.

Izhar Ahmad
 Director, Government & External Relations
 SAMENA Telecommunications Council



Exhibit 2: Pressures on Telecom Operators

A BETTER INTERNET FOR A BETTER ARAB WORLD ARAB INTERNET GOVERNANCE FORUM

For over two decades the Internet has been an unprecedented medium for communication and social interaction, and a uniquely open space for sharing information and spurring innovation. With over two billion users online, hundreds of millions of connected computers and devices around the globe, and trillions of dollars of investments, the Internet has become one of the most valuable assets, and one critical infrastructure of today's world. The reason for such phenomenal growth in the Internet goes primarily to the basic principles that characterized its design more than forty years ago. Principles of open, standardized and interoperable protocols, end-to-end connectivity, and decentralization, as well as the collaboration among researchers and engineers is what has made the Internet become the network of networks. In the early 1990's the Internet was ready to take off, and a new era of an online world was about to begin. As the Internet continued to expand with applications and services traversing and reaching almost every place around the world, more questions were raised about its governance, and more voices were calling for addressing Internet governance issues at the highest international level.

Between 2001 and 2005, two phases of the United Nations World Summit on the Information Society (WSIS) took place in Geneva and Tunis respectively. The WSIS process was essential in bringing together all stakeholders, from governments, private sector, civil society, technical community and academia, to agree on the basic definition of Internet governance, identify public policy issues related to Internet Governance, and develop a common understanding of the respective roles and responsibilities of each and every stakeholder in Internet governance. A key outcome of the Tunis phase was the founding of a new forum for multi-stakeholder policy dialogue called the Internet Governance Forum (IGF).

Since its first meeting in Athens in 2006, and throughout six annual meetings to date, the IGF has established itself as able to provide a truly open, and inclusive platform for all stakeholders to participate, and to engage in discussions on Internet public policy issues. It has also enabled participants to share knowledge and best practices, and to further collaborate on other regional and national efforts. The impact of the IGF has gone beyond its annual meetings, and its success over the past few years has stimulated the creation of several national and regional IGFs. Such IGFs, despite being stemmed from the global IGF, they are independent forums and have their own programs based on priorities and interests of the countries and regions they represent.

The Arab IGF (<http://www.igfarba.org>) being one of the fastest growing regions in Internet usage, and with 50% of its population below the age of 25, the Arab region holds enormous potential for entrepreneurial opportunities and new investments in the field of information and communication technology. With new opportunities come new challenges, and with the opportunities and challenges ahead, the Arab IGF can bring significant value to the region by creating a healthy environment that enables all interested parties to collaborate to bring the value of the Internet to the next 100 million users in the region.

Mission

The Arab IGF aims at serving as a multi-stakeholder platform, where all players can have the opportunity to exchange views and share experiences around Internet public policy issues. Embedding the very unique characteristic of a non-decision-making, non-binding global IGF, the Arab IGF shall strive to raise awareness among community members, build bridges across various stakeholder groups, and ensure informed policy making and effective implementation of initiatives that can stimulate investments and cater for end-users needs.

Why it matters?

There is no such a place as the Arab IGF where Internet users and professionals as well as representatives of governments, business, civil society, technical community and academia can get together in a setting that is open to all. The Arab IGF is an opportunity for:

- Internet users to voice interests and concerns with regard to developments that may impact their using of the Internet;
- Governments to hear from all stakeholders and to share vision as to plans and initiatives that may take place at national and regional levels in partnership with other stakeholders;
- Private sector to bring the business perspective to the dialogue and to inform participants of new business models and potential opportunities;
- Civil society to present consumer and public interests and to develop partnerships with other stakeholders in relevant areas;
- Technical community to engage in policy discussions and ensure such discussions are keeping pace with, and not going against, technology developments;
- Academia to highlight relevant research areas, and help with education and capacity building programs in cooperation with other stakeholders.

George Victor Salama

Senior Manager, Public Policy

SAMENA Telecommunications Council



SATELLITE NEWS

UAE Elected Member of International Telecom Satellite Organization Advisory Committee

The United Arab Emirates has been elected as a member of the International Telecommunications Satellite Organization (ITSO) Advisory Committee. The selection came during the 35th Meeting of the Assembly of Parties held in Kampala, Uganda last month. The UAE is among a group of 21 nations to comprise this advisory committee whose objective is to further the ITSO commitment to develop a global satellite communication system. This committee will represent the 150 members of the organization to deliver upon this objective. A member nation to the ITSO, the UAE was represented by Hasan Al Suwaidi, UAE Ambassador in Kampala, who led a delegation that included Eng. Khalid Al Awadhi, Manager, Space Services in the UAE Telecommunications Regulatory Authority (TRA). The 35th ITSO Assembly Meeting discussed several critical issues with relation to developing a global communications satellite system in addition to addressing the importance of providing satellite services to lesser developed nations.

SkyCube to Set Precedent for Future CubeSat Missions

Amateur astronomer Tim DeBenedictis has decided to send a satellite up into space. SkyCube is a 1U CubeSat that will launch on a SpaceX Falcon 9 rocket. SkyCube will take images of the Earth, and broadcast simple 120-byte messages uploaded by sponsors. It will communicate at 915 MHz with a brand new network of CubeSat ground stations. Southern Stars has purchased a launch on SpaceX Falcon 9 rocket in 2013. Currently, the rocket is set to launch in March. SpaceX is the first private company that has flown a cargo capsule to and from the International Space Station. The launch will take place from Cape Canaveral AFS, Florida. After deployment, SkyCube will orbit for about 90 days, taking images of the Earth and broadcasting sponsors' messages. They may go a bit longer, depending, since the FCC license allows up to six months of operation. At the end of that period, they will inflate the balloon, and three weeks after that, SkyCube comes down.

New Satellite Data on Melting of Himalayan Glaciers

A new study using satellite data from NASA's Ice Cloud and land Elevation satellite (ICESat) combined with radar data collected in 2000 from the space shuttle Endeavour, suggests the loss of ice among the approximately 46,000 glaciers in the Himalayas and Tibet averaged 12 billion tonnes annually between 2003 and 2008. This figure is still around a third lower than estimates from field studies in the region. Leader of the new study, Prof. Dr. Andreas Käb, of the University of Oslo in Norway, said that ICESat, launched in 2003, uses a laser altimeter to study the polar ice sheets, which is more suitable for flat terrains than the mountains of the Himalayas. They corrected for this by using measurements of elevation from the space shuttle, and cross-checking elevation measurements of the glaciers against those of adjacent areas to satisfy themselves that reductions in elevation of the glaciers were really caused by loss of ice.

Newsat Australia to Take Part in the China Satellite Conference in Beijing

NewSat Ltd will attend the China Satellite Conference 2012 in Beijing, to be held at the Hotel Nikko New Century from September 19 to September 21. The event will draw key organizations, as well as scientists, equipment suppliers, service operators and providers, and Chinese policy makers in a unique platform for networking and business opportunities with the rest of the satellite industry. NewSat, will be represented by Mr Peter Sim at the conference. NewSat is currently working on the Jabiru Satellite Program, and the Jabiru-1 spacecraft under construction in partnership with Lockheed Martin, is slated for a 2014 launch. The program aims to deliver high-powered Ka band coverage in the Middle East, Asia, and Africa.

Inmarsat Prepaid Available in the US

Inmarsat has announced that it can now offer global prepaid satellite services for both voice and data with the introduction of support for voice calls originating in the US and its territories. Through an agreement with Freedom Wireless Holdings Inc, Inmarsat says it is now the first mobile satellite provider in the world licensed to offer pre-paid voice services from the US. Pre-pay voice will be available from 1st September 2012 for all existing Inmarsat land and maritime services including FleetBroadband, IsatPhone Pro, and FleetPhone. IsatPhone Pro users can now be contacted using a single phone number wherever they are located and use just one device for their global communications, while FleetBroadband customers can now travel in and out of US territorial waters on pre-paid plans.

Russia Plans New Space Satellite Plant

Russia plans to build a space satellite manufacturing plant outside Moscow. The announcement was made just weeks after twin launch failures, which left satellites stranded in low orbit. Moscow Region Governor Sergei Shoigu said the new facility would be located in Shchyolkovo, Ria Novosti reported. The plant will build six communication and observation satellites a year, Shoigu said. It will employ

about 1,000 workers. Russia's space program has struggled over the past several years. Earlier this month, the country failed to launch two multi-million dollar satellites that were intended to provide Indonesia and Russia with telecom services. The Proton-M booster's upper stage switched off prematurely and led to the loss of Indonesia's Telkom-3 and Russia's Express MD2 satellites, according to a statement from Russia's space agency Roscosmos.

NASA Powers Satellite with Google Nexus One Phones

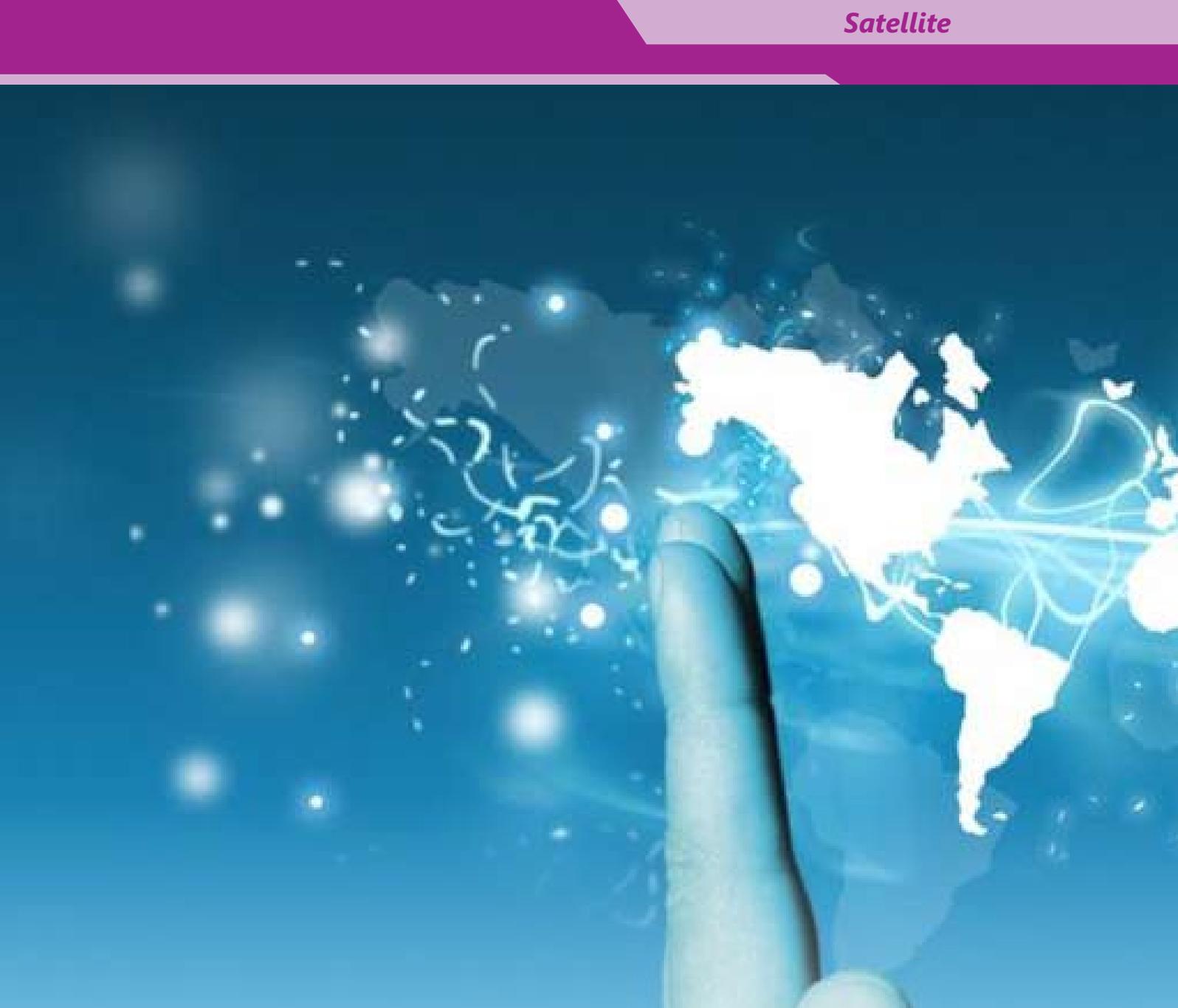
NASA has a thing for shooting things into space. NASA has decided to power its satellite with Google Nexus One Phones. It's a part of the PhoneSat Project, which aims to make extensive use of commercial-off-the-shelf components, such as the smart phone. They also plan to launch these tiny satellites fairly often, considering the ubiquity of power supply and relative low cost of each satellite. They cost \$3,500. Out of the box, smartphones already offer a wealth of capabilities needed for satellite systems, including fast processors, versatile operating systems, multiple miniature sensors, high-resolution cameras, GPS receivers, and several radios. The smartphones will indeed act as the satellites on-board computer.

Fourth Galileo Satellite Reaches French Guiana Launch Site

The next two Galileo satellites are now in place at Europe's Spaceport in French Guiana, being prepared for their shared launch this autumn. The fourth Galileo satellite flight model arrived at Cayenne Airport in French Guiana on Friday 17 August, flown from the Thales Alenia Space facility in Rome aboard an Ilyushin aircraft. Cocooned inside a protective air-conditioned container, the satellite was then transported to the preparation facility at the Guiana Space Center to join the third Galileo satellite, which arrived there 10 days earlier. These third and fourth Galileo 'In-Orbit Validation' (IOV) satellites are due to be launched aboard a Soyuz ST-B vehicle in October. These new satellites will join the first two Galileo satellites - launched last year - in medium Earth orbit at 23 222 km.

MTN Satellite Communications: Maritime Multi-Channel is even More Ship Shape (SATCOM)

MTN Satellite Communications (MTN) has announced that MTN Worldwide TV is now available to commercial shipping, ferry, oil & gas and yacht customers that want access to licensed content including news, entertainment and sports for their crew, guests and owners. MTN Worldwide TV is the first fully-digital, multi-channel television service for the maritime industry. Leveraging MTN's global infrastructure, the service utilizes overlapping satellite beams that integrate seamlessly with a vessel's existing Television Receive-Only (TVRO) antenna and onboard video distribution system. MTN ensures viewers at sea receive reliable, uninterrupted service—regardless of location—by managing the satellite network and content. In addition, MTN Worldwide TV is available in all ocean regions and is a great core TV service to supplement any existing programming that might be lost when the vessel is at sea.

A hand is shown pointing upwards towards a glowing, stylized world map. The map is composed of bright, interconnected lines and dots, suggesting a global network or satellite connectivity. The background is a deep blue with scattered light spots, giving it a futuristic or space-themed appearance.

Emerging Trends in Satellite Broadband and its Future in the SAMENA Region

Today, broadband is not just seen as an economic good or service! Its cultural, educational, social and strategic values are generally seen to be at least as important as its economic value. With the ongoing convergence and innovation in the ICT sector globally, countries have taken strong measures to ensure that prompt broadband proliferation policies are put into effect, supported by regulatory environment and congenial policies. Within the SAMENA region at large, the focus toward broadband is no different; both companies and governments

are showing more willingness to invest in, and expand broadband connectivity in their markets. However, it appears that the state of broadband is comparatively less visible in this part of the world, that is, South Asia-Middle East-North Africa. Nonetheless, markets in the SAMENA region have so far shown strong commitment towards broadband proliferation through a number of initiatives, including infrastructure sharing, universal services obligation/funds, spectrum allocation, local loop unbundling, and a number of other approaches.

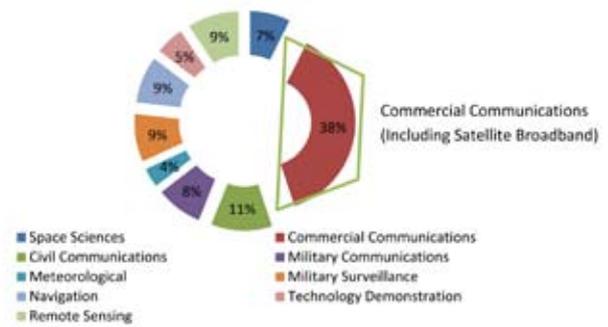


To date, the overall development in the broadband sector and ICT industry in general, has been remarkable but there are still markets in the region where broadband proliferation has so far been very low¹. The Middle East mobile broadband market is expected to reach 50 million subscribers by 2013 from seven million in 2008 as the emerging mobile broadband technologies gain popularity with the passage of time². With just around 7 million mobile broadband subscribers in the region in 2008, and after experiencing an industry project CAGR

rate of over 45%, 50 million subscribers are expected by 2013³. Enterprise, government, military and residential users alike continue to demand for high-speed Internet in areas where traditional broadband services (DSL, Cable, FTTX, etc) are not offered and this is where satellite broadband comes into action. Satellite is one of the cost effective backhaul alternatives for cellular operations in areas traditional mediums of Internet access such as fiber and copper cable are not available. Within the SAMENA region, majority of the markets covering a large geographic

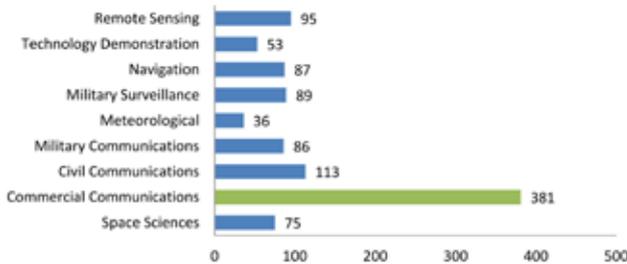
footprint, satellite based communication services appear to be part of the quick and cost effective broadband network rollouts. Additionally, it is also considered as the only consumer broadband option in the areas where traditional broadband networks have not been deployed yet. Satellite broadband is expected to experience significant growth over the next few years with the emergence of Ka-band for it has ample capacity and the capability for broadband services. The growing demand for services such as video-on-demand, Internet TV, data, VoIP and cellular backhaul is also accelerating the need for satellite broadband access. The satellite broadband industry appears to gain momentum as there are now more than one million users worldwide. These subscribers quite often opt for satellite broadband because they cannot get the high speed connectivity from traditional services such as DSL, Cable, FTTx, among others in their respective markets.

Types of Satellites Launched



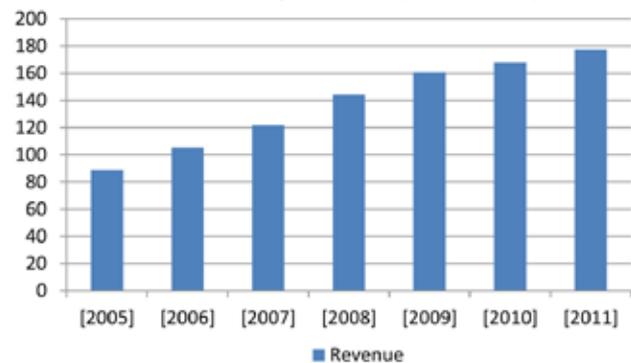
In total, NSR forecasts that broadband VSAT networking, satellite broadband access, and broadband trunking & backhaul services will generate nearly US\$8.8 billion by 2019, which is a 135% increase as compared to the revenues for these services in 2009. Satellite broadband services separately are forecasted to produce around US\$4.1 billion between 2009 and 2019.

Operational Satellites (2012)



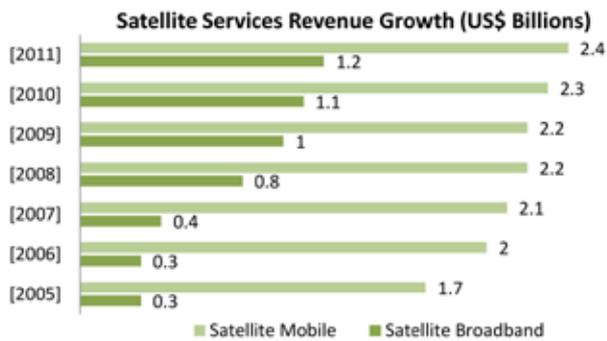
Commercial communications satellites represent 38% of the total number of satellites. With a number of international players looking into the regional markets for investment in satellite industry, the satellite broadband sector is expected experience considerable growth. An increasing number of operators are eyeing the MENA region keeping in view of the growing bandwidth demand in this high growth region.

Satellite Industry Revenues (US\$ Billions)



The global satellite industry revenues were increased by 11.2% during the period 2005 through 2010. Similarly, the industry revenues posted average annual growth of 9% for the period from 2006 through 2011⁴.

According to SIA's recent report, consumer satellite broadband service revenues increased by almost 10% from US\$1 billion in 2009 to US\$1.2 billion in 2011. Similarly, mobile satellite services revenues grew by 5%, from US\$2.2 billion in 2009 to US\$2.4 billion in 2011.



Demand for satellite capacity is evolving and satellite operators are thus exploring new ways to offer satellite broadband services in an efficient and cost effective way. It appears that a number of key applications will quickly adopt Ka band technology over legacy C and Ku band technologies. It is thus important that satellite operators offer the bandwidth that is required in certain regions. The increasing demand of the bandwidth that is resulting from the growth of the internet demand on both fixed and mobile devices (92% CAGR, 2010-2015⁵) appears to result in the shift of LOW demand regions into MEDIUM demand regions in the near future. This rapid transition of ICTs in the regional markets needs to be regulated to provide collective positivity for the general public. It is essential that the growth of the ICT is regulated to ensure that there is no digital divide. Emerging satellite band such as Ka is considered to be scalable, and spectrally efficient that will lead to reduced tariffs and thus increased broadband proliferation and more usage.

The satellite industry this needs to progressively work towards understanding the dynamics of the market and the demands of the end consumer of broadband service. With constantly evolving technologies, increasing consumer demand, emergence of cutting content applications, the need for broadband is growing. Hence, the satellite industry has to play a decisive role in order to ensure continual progress of broadband in the regional markets.

¹Some of the potentially big markets in the SAMENA region, such as Bangladesh, Iran, Syria, Sudan, Libya, and Pakistan still have broadband penetration below 1 percent.

²Value Partners

³Infoma Telecom & Media

⁴SIA – Satellite Industry Association, overall industry revenues grew in 2010, led by Satellite Services at 9% growth rate. Overall, satellite industry's revenue growth was 5% in 2010.

⁵Cisco Visual Networking Index: Global Mobile Data, Traffic Forecast Update, 2010–2015

Bocar A. BA
President
SAMENA Telecommunications Council



INTRODUCING THE CMO COMMITTEE

CMOs around the world are tasked with navigating their organizations through the rapidly changing telecommunications industry. Every day, CMOs make critical commercial decision on topics such as:

- **Real-time Geo Marketing:** Is it a must-have for CVM?
- **Handset Subsidies:** Should you start offering subsidies?
- **LTE:** When is the right time to invest?
- **Net Promoter Score:** Can NPS implementation help track and deliver happy and loyal customers?
- **The Threat of WiMax:** Friend or foe?
- **Mobile Payment:** Hype or hope?

SAMENA's newly formed CMO Committee strives to provide answers to these and many other issues in a private setting that is exclusive to CMOs and select members of the SAMENA community.

Our Mission

SAMENA will organize exclusive events to provide CMOs with the opportunity to:

- **Network with other CMOs** of leading telecommunications operators in a private setting
- **Influence SAMENA's regulatory and commercial agenda**
- **Learn about the latest innovation and global best practices.** Unlike traditional conferences, we will handpick speakers to bring commercial insight on topics relevant to SAMENA's membership.

Join Us

If you are a CMO, or equivalent leader in your organization (e.g. Business Unit Head, VP Marketing, etc.), we would be honored to have you join our committee.

As you may know, SAMENA's last CEO Dinner in Hong Kong was attended by the CEOs of 63 telecommunications operators. We hope to make our CMO community equally as thriving in the years to come.

Our First Invitation-Only Private Event

The first CMO Day is scheduled for 6 November in Istanbul, Turkey.

We hope you accept our invitation to join our committee, and will reach out to you to confirm your participation in the coming weeks.

Andre Popov

Founding Member of the CMO Committee
Partner, Peppers & Rogers Group



ROAMING NEWS

Globus Roaming Services Set to Roll Out Xim Cards

Globus Roaming Services is all set to roll out XIM card, their international sim card for travelers. The card will be launched in a phased manner. The XIM card offers single number global roaming services to customers. Also, it is a life-time card, once availed can be recharged, unused credit can be used during the next travel. According to UNWTO, by 2020 India will account for 50 million outbound tourists, continuing to maintain its growth momentum and 66 per cent of them would be traveling to Asia. The company plans to promote the card through travel agents in the country by offering them an alternative source of revenue. As per the company, once Delhi and Mumbai markets are covered completely, it will expand to other cities in India, including tier II cities. Vikas Mehta, director, Globus Roaming said, "As we all are well aware of the current market situation wherein travel agents are not able to leave margins for themselves. With this card, we are offering them a lifetime revenue model. For every recharge, the agent gets a commission. The XIM Lite, a global prepaid number with six months validity has its incoming free in 62 countries, works in 246 countries and outgoing calls to India as low as Rs 25 per minute leaves a margin of 25-30 per cent approximately."

LTE Roaming Opens Opportunities for Syniverse

Syniverse Technologies believes that interoperability and roaming challenges associated with Long Term Evolution (LTE) will be its key focus areas in the coming two to three years. "The level of complexity of IT (Information Technology) components in LTE is pretty significant, especially around the billing component. Roaming and billing [in LTE] is very complex," Alfredo de Cardenas, Chief Operating Officer, Syniverse told Light Reading India. LTE will lead to many more roaming agreements between operators than what they have done in 3G or 2G. "Today operators have just voice roaming and data roaming but LTE provides up to 13 classes of services. We also have a service which we call Gain but it is basically an outsourcing service. We enable agreements between two operators for roaming but we do not negotiate the price," says Cardenas. While Syniverse does not negotiate the price, it does the testing for operators and ensures that roaming services are running as per the contract. Syniverse's competitor in roaming services, Roamware Inc. believes that LTE roaming opportunity in India is as big as US\$50 million to \$60 million (INR 2.7 billion to INR 3.3 billion) in the next two-to-three years.

Public Mobile Introduces US Data Roaming Service

Canadian mobile operator Public Mobile has launched a US data roaming tariff, allowing customers to access their email and the internet across the US. Public Mobile's data roaming service is available for CAD 1.50 per MB of data traffic when the customer is in the roaming area. Public Mobile's US roaming rates are CAD 0.15 per minute to send or receive a call, incoming SMS are free of charge, while outgoing text messages cost CAD 0.15 per SMS.

Public Mobile's data roaming coverage allows customers to use their Android smartphones for talk, text and data outside of their unlimited coverage area. Customers are assigned a wallet into which they can deposit money so that they maintain control over how much they spend on roaming each month.

Telenor Hungary Launches New Roaming Packages

Telenor Hungary launched 3- and 10-day roaming packages which offer reduced minute charges. Called TravelSure 3 and TravelSure 10, the packages offer respectively 10 and 30 minutes for calls to zone 1 and Croatia (via Croatian operators Tele2 and VipNet) and are priced at HUF 890 and HUF 2,490 (per-minute billing). TravelSure 3 can only be used for making calls, while the alternative can be used for both making as well as receiving calls. Users are warned via SMS if they use all their roaming package's minutes.

Vodafone Ghana Drastically Reduces International Roaming Rates

Mobile operator Vodafone Ghana has introduced a new roaming service enabling Pre-paid & Postpaid customers traveling to the UK to make calls and send SMS at standard local UK rates. This new service enables users to save almost 100 percent on roaming charges in the UK. Postpaid & Pre-paid Vodafone customers are currently enjoying Africa roaming, a product which allows travelers in Vodafone partner countries in Kenya, South Africa, Lesotho, Mozambique, Tanzania and Congo, to receive calls and texts free of charge and make calls at reduced rates. Prepaid customers traveling to the UK should dial *125*40# to opt-in and *125*41# to opt-out of the local pricing offer. Postpaid customers can call 080010000 to opt-in. Travelers in Africa automatically qualify for the reduced roaming rates automatically once they activate their SIM for international roaming by calling 100 or 08001000 to first activate international roaming.

Kar-tel Launches Roaming App

Mobile operator Kar-Tel, working under the Beeline Kazakhstan brand, has introduced its new VeeRoaming mobile application for subscribers traveling abroad. The free application is available for download on Google Play and enables customers to receive information on promotions and tariffs from the operator, as well as to activate additional roaming options.

China Mobile Purported to Set Up Global Network Center

China Mobile Ltd. will construct a global network center in Hong Kong which will provide services including mobile roaming, special international telephone line, special international Ethernet network, private virtual network, international internet access, internet exchange, voice exchange, data center as well as cloud computing for global clients and partners. According to the rankings of Data Center Risk Index released by Cushman and Wakefield, Hong Kong has been deemed as the safest site in the Asia Pacific for establishing data centers for two consecutive years in 2011 and 2012.

Vodafone Australia Welcomes Roaming Discussion

Vodafone Australia has welcomed the publication of the trans-Tasman roaming discussion paper by the Australian and New Zealand governments. The company said it has already implemented roaming alerts to advise customers of the voice and data rates when they land overseas. The operator also said it has reduced roaming rates to New Zealand over the past eighteen months and that it offers the cheapest call and data rates. "We agree with the Government that bill shock is a concern for consumers and we have introduced a range of options that allow customers to have greater visibility and control of their roaming usage. We are looking at introducing further improvements," Edward Goff, executive general manager of postpaid at Vodafone said in a statement. Meanwhile, the Australian Mobile Telecommunications Association (AMTA) said that mobile operators were already implementing measures to increase transparent of roaming cost. "However we hear the Minister's message that we need to do better," the group said.

Indonesia Wants Roaming Free Mobile Phone Coverage In Asean

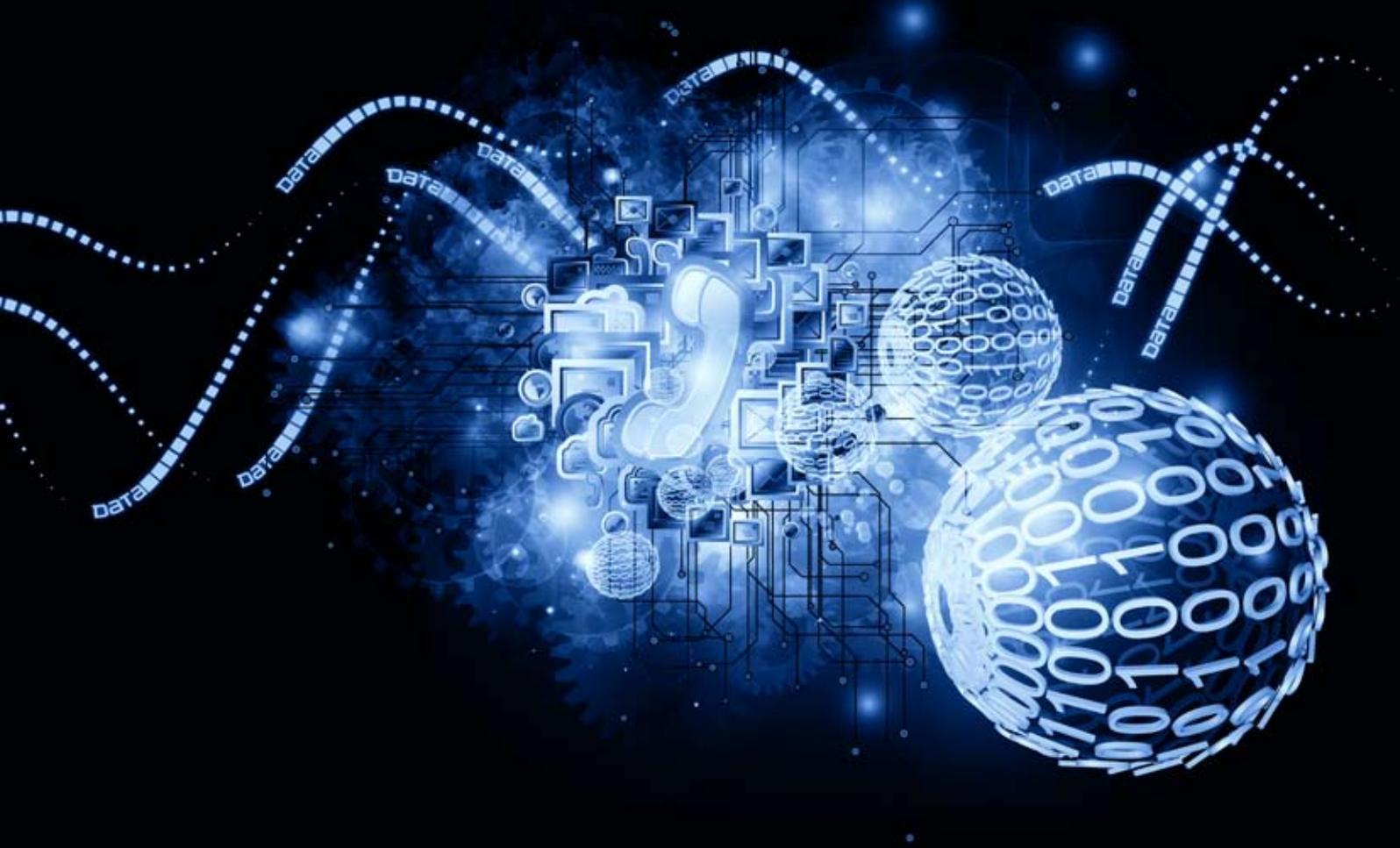
Communication and Information Minister Tifatul Sembiring said Indonesia hopes to make Asean states roaming-free, bringing comprehensive and integrated mobile phone coverage throughout the region by 2014. "I want this [roaming-free Asean] quickly. It may be achieved in the next two years," Tifatul said during an event in Batam on Saturday. He added that roaming-free would not only lower the costs of cell phone conversations between citizens of different Asean member states, but also become a viable solution for Indonesians living in border areas who have difficulty receiving signals from Indonesian mobile operators. As an example, Tifatul said that Indonesians living near Singapore often get signals from Singaporean mobile operators instead of their local carriers, resulting in extra charges. "Singapore raises 3G towers, while ours are only 1G," the minister said. Tifatul said he would ask Indonesian mobile operators to strengthen their signals in border areas so as to protect residents from unnecessary costs. He said 94 percent of Indonesians were now covered by mobile networks.

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