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SAMENA TRENDS

EXCLUSIVELY FOR SAMENA TELECOMMUNICATIONS COUNCIL'S MEMBERS

BUILDING DIGITAL ECONOMIES

A SAMENA Telecommunications Council Newsletter



Eng. Tariq Hamzah Zein Elabdein

President & CEO

Sudatel Telecom Group

Exploring the potential of mobile broadband technologies

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Exploring the potential of mobile broadband technologies



Mobile broadband is an emerging area for the telecom industry worldwide. This has proved to be one of the key starting places to overcome the bandwidth starvation. Spectrum is being auctioned in various markets world over and 4G LTE commitments are being made globally and in the region. In the meantime 3G networks are also being rolled out making mobile broadband very significant to the telecom industry as a key contributor to mobile data activity that is considered to be the key driver behind the widely discussed IoT and M2M and is resulting in additional revenue streams for the service providers.

Mobile operators are considering broadband as a key prospect for revenues generation and increasing their APRU as well as APPU by offering innovative mobile content. Mobile Broadband is growing at a considerable rate in terms of business and consumers. In early 2010 there were over 200 million subscribers worldwide using HSPA, and there were around 100 LTE commitments worldwide. During the past few years, mobile broadband grasped the attention of industry leaders. Keeping in view the lively growth of mobile broadband, it appears that adoption will quickly exceed fixed mobile and in the next five years. Middle East is expected to lead in terms of growth in adoption of mobile broadband technologies. The SAMENA region's higher

income countries, such as UAE, Saudi Arabia, Bahrain, and Qatar among others will be driven mainly by mobile broadband technologies.

The SAMENA region now has markets where HSPA/LTE, EvDO and WiMAX networks exist what needs to be done is to offer valuable content and innovative services. Mobile broadband is becoming a great resource people rely on, not only for communication, but also for information, entertainment, and learning on the go. Though, it is easy to focus on the region-wide need for digital content, more specifically mobile content, service providers cannot disdain the escalating significance of high-end, localized content in the mushrooming souk within the SAMENA region.

The region's mobile market continues its remarkable progression; broadband proliferation is progressively becoming the nexus of mobile content and applications. Growth in the mobile broadband space- which is especially evidenced in the Middle East shows a strong demand for content and introduces challenges that the industry stakeholders must address to accomplish comprehensive triumph in the emerging markets of this high growth region.

Yours truly,



Bocar A. BA
Chief Executive Officer
SAMENA Telecommunications Council



**Eng. Tariq Hamzah
Zein Elabdein**
President & CEO
Sudatel Telecom Group



He obtained his Bachelor Degree with Honors in Electrical Engineering from Khartoum University and his Master of Engineering Management (MEM) degree from Old Dominion University in Virginia, USA. He has more than 20 years of experience in Telecommunication. Before joining STG, he spent the last decade in different administrative and leading positions in international companies including Cingular Wireless, WFI, Lucent Technologies and AT&T.

Eng. Zein Alabedein received academic awards in the Operation Research field such as VMASC and published papers in scientific periodicals in the System Modeling field in the USA.

He is a member in many scientific and engineering organizations such as IEEE; ASQ, USA; Golden Key International Honor Society, USA; Phi Kappa Phi, USA; Engineering Honor Society – ODU, USA; and PMI, USA.

STG is one of the leading telecom companies in the region serving the needs of customers in Sudan and Africa. Since its foundation on 13th September 1993, STG has steadily progressed from local to regional markets. STG is the bridge for telecommunication movement between the Arab world, Africa and the rest of the world. STG links Sudan to the Kingdom of Saudi Arabia via a submarine cable and links Sudan to Egypt and Ethiopia via a network of fiber cables. Sudan participates in a cable in Central and West Africa extended from Sudan through Africa until South Africa. STG offers various telecom services and preserves its competitive edge with other companies. STG's main services include provision of mobile services, fixed-line services, as well as carrier and wholesales services. STG provides services in 2G, 3G, and NGN technology levels.

Q. Please tell us about Sudatel Group operations in the region? What are the core areas of services that Sudatel Group is presently focusing?

A. Since 2006 Sudatel Group has made steady investments into West Africa. There are great synergies with these markets, in terms of both economic and social development. We are currently operating and managing three operations in Guinea Conakry, Mauritania and Senegal. We have a combination of CDMA and GSM networks. We are going to consolidate our focus in these countries and strengthen our presence and market shares.

Sudatel Group is adopting a transformational strategy moving from a traditional mobile telecom operator towards an integrated ICT services and solutions enabler across all markets serving Business, Consumers segments and other operators. We are strategically focusing on enhancing performance through maximizing operations efficiency and delivering a better customer experience to provide convenient services across all touch points throughout the whole customer life cycle. Through the investments made on Submarine cables and capacities in SAS-I, SAS-II, EASSY, ACE, and Data Centre Sudatel Group is continuing to grow its wholesale and corporate solutions businesses.



Q. Please tell us about your recently established data center? How do you think it will help bolster your service offerings?

A. Sudatel Data Center provides the whole set of Data Center Services from IaaS (Infrastructure as a Service), PaaS (Platform as a Service) and SaaS (Software as a Service). The first stage of our Strategy is to provide IaaS to our corporate customers, the services include Colocation, Dedicated and Virtual Services, SAN Storage, backup and restoration, with a set of additional services as load balancing, monitoring, Anti-Virus, Intrusion Detection and firewall provisioning.

These Data Center Services accompanied with Sudatel Corporate Portfolio, will be able to satisfy corporate turn-key Solutions, to enable corporate to focus on main business, to reduce TCO and CAPEX. Corporates in a one-stop-shop will be able to rent their IT needs via Data Center, connect their sites, and plug into the Internet. Enjoy fixed and mobile data and voice packages, as well as M2M services.

Our customers in Africa will also benefit from Data Center services. As they will be able to access Infrastructure services which are reliable and of the highest standard "Tier IV", as well as cost efficient. The Sudatel Data Center Specifications are designed of the highest, most

secure and reliable in all of North, East and West Africa. Our African subsidiaries can benefit from these services introduced to broaden its corporate portfolio and create higher penetration to satisfy needs in our existing as well as new African Markets.

Q. How corporate players in Sudan and other African countries can benefit from harnessing the data center?

A. Sudatel Data Center will satisfy the growing market needs and create new revenue streams, which will be part of Sudatel Group's diversified, varied Service Portfolio. Sudatel Group provides its services



to both consumer and corporate markets, with its 11,000 kilometers of local fiber connected with Egypt, Ethiopia, Saudi Arabia and East Africa. As well as its CDMA, GSM/WCDMA, IPBB and NGN network. Sudatel Group will be representing itself as an ICT provider in addition to its main role as a telecom provider. Data Center Services create new market opportunities in both Corporate and Consumer markets. The market in Sudan and Africa is in its introductory phases, which is very promising. Sudatel Group Data Center will be officially launched in September, after the period of Soft Launch. The main sectors benefiting from the service in Sudan include the Banking sector, VAS and content providers, Government, Companies and SMEs.

Q. Are you planning to explore new markets in other regions or are there any plans for new investments?

A. Currently Sudatel is studying new opportunities in alignment with its future plan for geographical expansions. In addition, our business strategy is based on strengthening current position in the markets in which we are operating.

Q. Do you share the thought that customer experience has a direct impact on churn rate in today's telecom market?

A. Sudatel is using NPS for measuring and benchmarking the customer experience in our operations. Broadly speaking, all other things being equal, there is a direct relationship between NPS and churn figures.

The overarching objective of pro-actively managing customer experience is much more than just managing churn metrics. In fact, it has a direct relationship with our topline. Customer experience is the sum of all experiences a customer has with the service provider over the lifetime. This includes knowledge, awareness, discovery, interactions, usage, payments, and advocacy. Today these are the elements that define our battleground in the competitive markets.

Q. What steps have you taken to expand your mobile and Wi-Fi networks?

A. There is exponential growth in data utilization, mobile based applications and services which needs a certain level of network readiness from the operators side. Sudatel Group is up to this challenge to utilize its full potential, network resources and abilities to satisfy the growing customer demands. Sudatel Group will expand its local Fiber roll-out to the corporate premises, Mobile Coverage, Wi-Fi network. Data will be provided via fixed network or its 3.75 G network. The Data Center Services will be a great complement to the data services offered by creating a suitable, easier, more secure, cost efficient environment to manage the growing data management needs.

Q. How critical regulatory environment is for Public Private Partnerships to proactively facilitate, promote and expedite the growth of ICT?

A. Thinking for the short-term and focusing only on bottom-lines will leave us with regrets in the long run. To deliver on the full promise of ICT and the new digital world we need active participation of governments in PPP programs. Building the future requires us to collaborate and act now in establishing effective governance, empowering legal frameworks and a sound economic policy. These will provide the foundations for successful PPP initiatives.

Q. How have you managed to expand your business to West African markets? What were the major challenges that you have faced?

A. There is great potential in West African markets and the economy is set to flourish over the coming years. We have a major role to play in such economic development by enabling the digital economy and providing key tools for growth, such as data and increased coverage to ensure all customers can stay in touch.

In all the markets Sudatel Group is currently operating in, we were never there first or second. A commercial strategy of "build it and they will come" doesn't apply to late comers. Over the years we have built up significant market shares with a commercial strategy that is focused on winning with creative value propositions, customer experience, life-time value development, and extensive distribution networks.

Q. What are some of the major areas where the operators of the SAMENA region need to consider when it comes to expansion strategy, compared to other parts of the world?

A. Our industry is undergoing a massive transformation. It is so fundamental; it will affect every person and every business in every corner of this planet. When the Internet emerged as a mass medium in the 1990s, it paved the way for the digital revolution. We need to build the infrastructure not only for quad play (fixed voice- mobile voice- internet access- IPTV), but also swiftly deploy financial services, and digital applications (for example in health, transportation, government administration).

As operators we need to get more creative to be more profitable in sustainable ways.



Mobile broadband penetration vs Mobile penetration rank (Regional Rank)

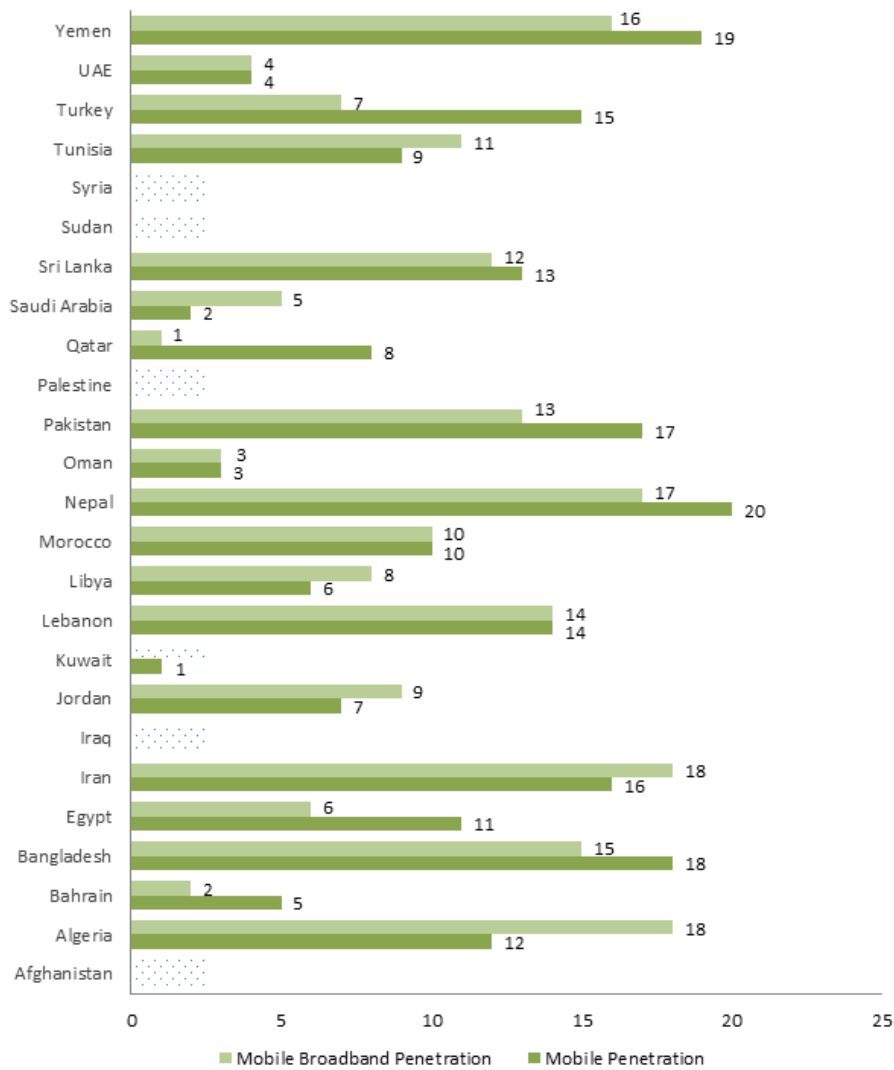


Image Source: SAMENA Telecommunications Council
 Data Source: WEF Global Competitiveness Report



Mobile broadband penetration vs Mobile penetration rank (Global Rank)

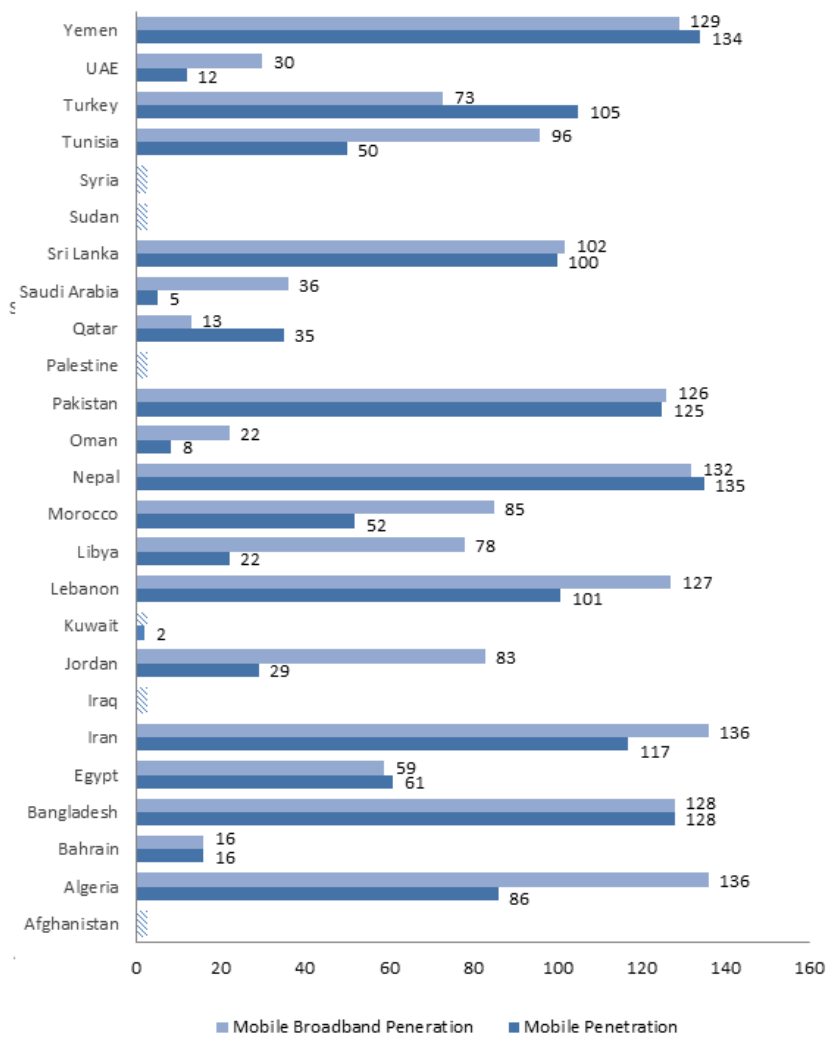


Image Source: SAMENA Telecommunications Council
 Data Source: WEF Global Competitiveness Report



MEMBERS NEWS

MEMBERS UPDATES

OIFC gets 2 years extension for Omantel contract

Oman Investment and Finance Company (OIFC) announced on Monday that Omantel has confirmed the extension of the contract for factoring services of Omantel's accounts receivables for a period of two years. OIFC has received the extension for Omantel contract from January 1 2015 to December 31, 2016 at the same commission rate, the company said in its filing to Muscat Securities Market.

Huawei sales revenue hit \$46 billion in 2014

Thanks to advances in cloud computing and higher demand for smart devices, Chinese manufacturer Huawei is expecting its 2014 sales revenue to rise by 15% to \$46 billion. That was mentioned by CEO Ken Hu, who made the announcement in a New Year's message on the company's website. The announcement comes just a few months after the company revealed that it is working to boost its sales to \$70 billion by 2018, which translates to around 10% growth each year. A few days ago, there were reports that Huawei's Smartphone revenue increased by around 33% to over \$11.8 billion last year. While the company shipped around 75 million Smartphones in 2014, up 40% year-on-year, it fell short of the previously stated sales target of 80 million units.

Mobily provides 4G Roaming Services in 35 countries worldwide

Mobily provides 4G LTE international roaming services in 35 countries, including 61 leading, most popular and global telecommunications operators. Mobily explained that the coverage include UAE, Qatar, Kuwait, Bahrain, USA, UK, Australia, France, Switzerland, Germany, Italy, Spain, Netherlands, Belgium, Greece, China, Canada, Hong Kong, Indonesia, South Korea, Malaysia, Philippines, Russia, Singapore, and other countries. This achievement reflects Mobily's capability to provide exceptional customer experiences for its subscribers, and the company's ability to put the Kingdom in an advanced position on the global map of communications services. Currently the Kingdom competes strongly the developed countries in providing many advanced telecommunication services. Mobily announced in the first quarter of last year the provision of 4G international roaming services covering 15 countries around the world, and declared the company's plans to stay in the lead, which was already managed and achieved. Mobily's strategy relies to maintain its subscribers enjoying the best services, and will not spare any effort to achieve this important goal. Therefore, Mobily receives invitations from specialized organizations in telecommunications and information technology to display



its successful experiences in providing many of the services that have achieved global precedence. Mobily announced at the end of 2012 its success in the technical tests in the first roaming process through data sim card, as the first company in the region, where the company conducted a bonding process with Hong Kong. It is noteworthy that the values of Mobily are the most important motives for development, and the company is keen always to implant the value of pioneering in their employees, making them eager for continuous development. Moreover, innovation comes in forefront of the company's strategic goals to provide exceptional customer experiences to subscribers.

Batelco solution for SME sector

Batelco has introduced a converged infrastructure solution, designed to meet the needs of the Small and Medium Enterprise (SME) segment. The new solution can be customized to suit a wide range of customer requirements. Due to the competitive nature of most industries today, the SME sector depends on the availability of cost-effective and flexible solutions that are both scalable and affordable. Batelco's new solution meets these requirements by bundling a number of core solutions that are crucial within any organization. The new solutions offer operating systems, server and storage, networking solutions, virtualization, backup and antivirus solutions " all bundled in one consolidated solution for customers' convenience. Batelco general manager business division Adel Daylami said that with the launch of this solution, Batelco was expanding its existing information and communications technology products' portfolio and addressing the needs of the SME business segment," he said. 'The Bahrain market continues to see greater demand for solutions that can offer businesses increased efficiency and reduced costs. 'We understand the IT requirements of the SME businesses and with the launch of these customized solutions we are addressing the key market needs of cost-effectiveness and product reliability,' he added. Batelco's converged infrastructure solutions are available on flexible payment terms for both rental and purchase options, allowing customers to manage their operational costs more efficiently. Additionally, the service is backed up by support 24 hours a day, seven days

a week, 365 days a year and ensure that issues that arise are resolved without delay.

Accenture acquires energy consulting firm Structure

Systems integration and outsourcing giant Accenture has acquired the Texas-based consulting firm Structure for an undisclosed sum. Structure, a Houston-based company founded in 1998, focuses solely on the energy and utility industries -- giving it knowhow that Accenture plans to use to beef up its portfolio of smart grid solutions. Omar Abbosh, senior director of the Accenture Resources operating group, detailed further plans for the acquisition that include the development and deployment of advanced distribution management



systems and automation tools. Structure's market operations and commodities trading services will also be combined with Accenture's capabilities in digital asset management. "Joining forces with Accenture will provide our clients and our employees with a unique opportunity to extend our capabilities to offer critical business solutions on a global scale," added LeLon Winstead, Structure managing partner, in a statement. "We believe Structure's end-to-end expertise in smart grid, commodities trading and market operations align well with Accenture's grid operations and energy commodities trading businesses." Accenture serves clients in more than 120 countries and generated net revenues of \$28.6 billion in the last fiscal year. Structure's more than 190 employees will join Abbosh as part of the Accenture Resources operating group.

SLA Mobile signs partnership agreement with Blue Turtle Technologies

SLA Mobile, a global mobile solutions provider, announced an agreement with Blue Turtle Technologies (Blue Turtle), a leading IT management solutions company, to bring together managed Digital Services to the African market. Blue Turtle is a South African Enterprise Technology company focused on optimizing, enhancing and leveraging existing IT investment. Their expertise within the IT, mobile and service management markets has given them the status of industry leaders in South Africa. SLA Mobile, a white labeled mobile solutions provider working with both global operators and merchants,

will leverage their relationship with Blue Turtle to bring a host of managed Digital Services including Direct Operator Billing and Identity Management to the African and LATAM markets. Amelia Power, Head of Sales and Marketing at SLA Mobile commented, "Partnering with Blue Turtle further enhances our delivery capabilities to the rapidly growing African market." Amelia added, "By working in partnership with Blue Turtle and pooling our years of expertise together, we can provide a seamless and secure mobile experience to African subscribers." The explosion of new applications, devices and content in the mobile environment has opened new challenges for enterprises of all sizes. Justin Arnoldi, Operations Manager of Blue Turtle's Application Management, explained "Blue Turtle continues to search for partners that have a unique competitive advantage which solves real challenges for our



clients. In the last year, we have seen the market demand for Direct Operator Billing grow at a staggering rate, as operators start to see the revenue opportunities. These new revenue opportunities are critical for operators as margins from traditional services (especially voice) are starting to decline. From both a technology and thought leadership perspective, SLA Mobile is the clear leader in the market and we are very excited to be partnering”.

BlackBerry Turns Its Focus to IoT, Wearable Devices

At CES, the company rolled out its cloud-based IoT platform while announcing its BBM messaging technology will support Android-based smartwatches. The Internet of things and wearable devices were on center stage at last week's 2015 Consumer Electronics Show, with vendors of all sizes rolling out new products and road maps as they look to gain traction in the rapidly growing markets. Trying to rise above the din was struggling mobile company BlackBerry, which unveiled a cloud-based platform for the Internet of things (IoT) that leverages its QNX software solutions and other assets—including its secure network resources and device lifecycle management software, according to company officials. BlackBerry's global network currently manages about 35 petabytes of mobile data every month in the company's data centers around the world, and works with more than 300 mobile operators and 400 partner networks, they said. Making the move into the IoT is a natural step, according to the company. “By combining the BlackBerry global network and device lifecycle management proficiency with the embedded software experience of QNX, we have built a modular, cloud-based platform that gives customers the chance to build IoT applications in a secure, efficient and scalable way,” Matt Hoffman, vice president of strategy and marketing for BlackBerry Technology Solutions, said in a statement, adding that the company in the future will extend the BlackBerry IoT Platform to other of the

company's technologies. Also at CES, BlackBerry officials announced that its BMM messaging service will support Android Wear smartwatches, and that QNX embedded software will help power NantHealth's HBox, a smart portable medical device that can gather and send medical data between patients, doctors and hospitals. It's clear why tech vendors are putting so much effort behind the Internet of things and wearable devices. Cisco Systems officials have said there are 25 billion connected devices worldwide today, and that number will grow to 50 billion by 2020. IDC analysts have predicted that IoT revenues could hit more than \$3 trillion by the end of the decade. They also are forecasting that wearable device shipments will grow from more than 19 million in 2014 to 111.9 million in 2018

Huawei to Focus on Higher-End Smartphones

Huawei Technologies Co. is focusing on selling more higher-end Smartphones,

Tuesday. Huawei expects more than 30% of its consumer devices shipped this year will be priced above 2,000 yuan (\$320), up from 18% last year. Competition in the global Smartphone market is intensifying and while Apple Inc. dominates the high-end segment globally, most vendors selling Smartphones that use Google Inc.'s Android operating system are struggling to set themselves apart from rivals. Mr. Yu said most low-cost vendors from China will likely disappear in three to five years because their business models aren't sustainable. “There are too many brands in this industry,” he said. Chinese competitors are also expanding their businesses overseas. Huawei, one of the world's largest suppliers of networking equipment used by telecommunications carriers, is also increasing its presence as a Smartphone brand. The company said it generated 52% of its Smartphone revenue overseas in 2014. Huawei's handsets have particularly strong presence in emerging markets such



a senior executive said Tuesday, as it braces for tougher competition from low-cost Chinese vendors such as Xiaomi Corp. “If we sold more low-end phones, we could even double our shipments...but in the low-end market there is no margin,” said Richard Yu, who heads Huawei's consumer business group, at a briefing at the company's headquarters in Shenzhen

as Colombia, Venezuela and Pakistan, according to the company. In Myanmar, where the Smartphone market is still in the early stage of development, Huawei holds a dominant share of about 50%, the company said. Mr. Yu said Huawei expects revenue from its consumer business, which consists mostly of mobile phones, to rise about 30% to more than \$16 billion this year.



That would be about the same pace of growth as in 2014, when revenue from the business rose 30% to \$12.2 billion. Huawei, which shipped 75 million Smartphones last year, aims to ship 100 million units this year.

Accenture Enables Mobile Workforce with Accenture CAS Software for Windows 8.1 Devices

To better enable the mobile workforce, Accenture (NYSE:ACN) has made its Accenture CAS software available on Windows 8.1 devices, starting with tablets and followed by mobile phones, providing clients with access to a single platform that spans sales processes and operations for integrated and efficient management – all from their mobile devices. Successful consumer goods companies harness technology to create a bond between their field teams and core business. By extending the functionality of Accenture CAS to include devices powered by Windows 8.1, the sales team is equipped with a single device that can meet day-to-day needs. Accenture CAS allows for all aspects of sales – including retail execution and direct store delivery – to be managed through the same interface on a mobile device, helping to optimize performance and minimize costs. Specific functionality for Windows 8.1 devices includes full interoperation with Microsoft Office and maintaining the native interface of the device. This extends the strategy of Accenture CAS, already available on iOS® and Android® devices, to provide a mobile workforce with a software platform that spans sales processes and operations. With a single universal repository for all devices, Accenture CAS is based on a “write once, deploy to many” model that accelerates deployment of programs to multiple mobile devices. This can free up time and resources that would be spent on writing numerous versions of the same programs, helping to lower total cost of ownership. “Today’s workforce needs technology to work from anywhere, at any time, without any loss of performance,” said Henning Fromme, managing director, Accenture CAS. “Expanding Accenture CAS to interoperate with Windows 8.1 devices will allow our consumer goods clients to harness the capabilities of an end-to-end sales platform on their mobile devices, increasing flexibility and efficiency.” “Accenture CAS on Windows 8.1 will enable consumer goods companies to provide sales teams with the ability to stay connected, collaborate with

team members and customers - and perform all necessary functions more securely from mobile devices,” said Doug Caywood, director, Worldwide Consumer Goods at Microsoft Corp. “The interoperation with Microsoft Office delivers the enterprise-grade capabilities clients need to empower a mobile workforce.” Accenture CAS with Accenture NewsPage is a leading integrated sales platform for the consumer goods industry with a suite of retail execution, trade promotion management and distributor management software, including direct store delivery, field service and trade promotion optimization. Both are part of the Accenture Software portfolio of products. Accenture CAS is also a key component within Accenture Route to Market Services, a business service that helps companies increase sales and margins through an end-to-end offering of management consulting, technology, and business process outsourcing that improves interactions with customers, channels, and consumers through innovative analytical, multi-channel and operational capabilities.

Orange Rolls Out 3G Network to 14 More Areas in the Country

by the Orange high-speed 3G service. This comes at a time when the company is moving to consolidate its data services business in the new financial year, with mobile Internet being viewed as the next growth area in the country’s telecommunication industry. The company is already recording impressive results from its data business, with the unit growing by 50 per cent in the last quarter of 2014. This performance has been propelled by the provision of the Orange high-speed broadband to 35 county governments and through the improvement of the company’s network across the country. Company CEO Vincent Lobry says that the endorsement by the industry regulator, the Communications Commission of Kenya, as having the best 3G network in terms of quality of service is enough motivation to maintain the same standard and expand the same quality to new areas in the country. “Part of our KSh2.5 billion investment last year was dedicated to the rolling out of 3G network across the country, and the transformation of our operations to enhance service delivery,” says Lobry. He adds that the business is strengthening its national broadband reach with the laying of transport cables across the country. By the end



Orange has added 14 more urban centers to its 3G network. Isiolo, Othaya, Kerugoya, Kenol, Mwingi, Loitokitok, Namanga, Mai Mahiu, Gilgil, Bomet, Eldama Ravine, Siaya, Webuye and Kilgoris are now covered

of Q1, 2015, an additional 27 urban areas will be linked onto the Orange 3G network bringing the number of new 3G locations to 41.



▼ REGIONAL NEWS

REGIONAL UPDATES

Ooredoo Kuwait wins appeal against US\$125m fine

Ooredoo Kuwait has won a court appeal against a previous court judgment in favor of the Ministry of Communications (MoC), Reuters reports. According to Ooredoo's 2013 annual report, the ministry claimed Ooredoo Kuwait had been unlawfully using government network infrastructure since 1999 and launched legal proceedings (Case No. 2948/2012) against the operator. On February 18, 2014, Kuwait's Court of Appeal ordered Ooredoo Kuwait to pay KWD36.69 million (US\$124.97 million) to the MoC. However, a new court ruling issued on 5 January 2015 dismissed the case and cancelled the February 2014 judgment.

Zain, Asiacell launch 3G in quick succession

Zain Iraq, the country's largest mobile operator by subscribers, reportedly turned on its 3G network on 31 December, making it the first cellco in the country to achieve a commercial 3G launch. The development follows a series of preview announcements on the company's Facebook page, which culminated with Zain claiming that it had performed Iraq's first ever video call over a 3G network. Meanwhile, a

day after Zain's announcement, Iraq's second largest cellco Asiacell announced its own 3G network switch-on, following a US\$1 billion cash investment, which included 'system modernization' and license fees. Asiacell chairman Faruk Mustafa Rasool commented: 'Iraq has been underserved for far too long, it's time to bring 21st century wireless service to this important economic hub in the world'. As previously reported by TeleGeography's CommsUpdate, in November 2014 Asiacell paid US\$307 million for a 2100MHz 3G license. Both mobile operators are marketing their respective 3G tariff plans as '3.9G'.

Bahrain one the best sales and marketing hubs in the ME, BITEX participants say

The Bahrain International Technology Exhibition (BITEX), which was recently held alongside with the MEET ICT conference, brought all ICT companies under one roof to display the latest trends in their field. It also brought together the ICT community for business building as well as researching for more powerful solutions in the sector. Hence, the expo aims to strengthen innovative potentials and boost the process of technical restoration of ICT industry. On the sidelines of the event, a number of participants explained why they chose to take part in BITEX Bahrain in particular. Manager of International Operations



in Tally Solutions Pvt. Ltd Company, Baradhwanj R, said "First of all, thanks for giving us the opportunity to exhibit here in BITEK. The reason we choose Bahrain to exhibit is that we have been operating in here for the past ten years at least. We are a global company providing solutions to primary and small skill businesses and to large audience as well. We have been in Bahrain for a long time now and our primary objective is to help businesses grow. That is what we have been trying to achieve and we are helping Indian economy to grow and similarly we are trying to improve the economy of other governments in the region as well. So that is one of the primary reasons for us to exhibit in Bahrain and the Middle East," "In regards of why Bahraini market is that we have a good presence in the Middle East starting from UAE, Oman Bahrain, and Qatar. Bahrain is a primary market for us," he explained. Milko LLari, Carrier Relations & Network Manager of the Italian "Enter" explained why an Italian company decided to participate in an exhibition that is happening in Bahrain. "This is an important and central market for Europe and Italy. We think that there a lot of opportunities here. I believe it is very important for every company in the world to have a presence in the Middle East," he said. "Because we met in GITEK in October and your business proposals were interesting. In general, the overall picture of the market is interesting," he added. Fabio Castronuovo, CEO of We Like CRM of Italy stated "We think that all the GCC countries are a potential market for all of our activities and to expand our sales activities. So we joined in the exhibition to find partners to increase our market in the area in general and in Bahrain in particular as we believe that Bahrain's market is very interesting and important. I am sure that by next year, we can expand our services," explaining why choosing Bahrain in specific. In is comment, the Country manager of "Procons-4IT" company, Sumeet Chowdhry, said "We have been in the Middle East region for two years. Our corporate office is based in Dubai. We have been looking at Bahrain for the last 6 months now. We feel that Bahrain has a big potential to grow and compete with other regional markets in the Middle East. We started with our first customer (Bahrain Islamic Bank) and we feel that we can really add values to the small and medium businesses in Bahrain. We are in the process of establishing a local office and we already have partners. We feel that we will see a great growth and potential next year," he said "Mainly because Bahrain's market is a huge potential

in terms of the small businesses, a lot of international businesses operate here and local business is now coming back after the stabilization of the political scenario," he explained the reason for choosing Bahrain.

Dubai Smart Government to develop software development kit to measure public's level of happiness with government services

As part of the 'Smart Government' initiative and efforts to transform Dubai into the world's smartest city, a team from Dubai Smart Government Department (DSG) has begun developing a smart, interactive software development kit (SDK) to be connected to a central database that measures the public's happiness index and satisfaction with Dubai's



government services. The project is being done in coordination and cooperation with the Executive Office of H.H. Sheikh Mohammed Bin Rashid Al Maktoum, UAE Vice President and Prime Minister and Ruler of Dubai. DSG will hold a workshop on January 19, 2015 for various government departments and authorities in Dubai to introduce the SDK project as well as discuss the technical mechanisms that will connect the system to a central database and the technical support that will be provided to achieve the leadership's vision. Ahmed Bin Humaidan, Director General, DSG, said: "The workshop will be held to start the implementation process of the 'Happiness Index' initiative launched by H.H. Sheikh Mohammed bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and Ruler of Dubai, in order to measure the public's level of happiness and satisfaction towards government services provided to them on a daily basis in consideration of the rapid changes in people's expectations. The measurements will be done via

smart devices or e-devices installed in the headquarters of government authorities and connected to a central database network. Daily reports will be sent to decision makers to see which area has the highest happiness and satisfaction rating to serve as a basis for further improvement of services and enhance public experience." Bin Humaidan added: "We are creating this SDK to recognize the importance of concerted efforts among Dubai's government entities to realize the leadership's vision of meeting all the necessary requirements of our country's citizens and residents. We aim to enhance their experience by raising the efficiency of all government agencies and strengthening the necessary infrastructure. I am confident that this dashboard will effectively promote Dubai's competitiveness globally to become the smartest regional and global government. Additionally, we strive to maintain the UAE's top position at the

regional 'International Happiness Index' in 2014." DSG will provide and develop the SDK for all government entities and will oversee its dissemination across the emirate. It will be an addition to the current common services provided by the Department to all public entities in Dubai. The aim of the workshop is to prepare for the implementation of the

first phase of the project by introducing the initiative to government departments and entities and studying the necessary procedures to interconnect the needed systems. The first phase of the project will include providing the index application on tablets and other smart devices, and tool websites with a mechanism to connect the systems with the central happiness index database. It will also provide technical support to connect government authorities to a central system to receive public satisfaction results about government services. Afterwards, the results will be analyzed, enhanced and developed in a bid to promote transparency between the government and the public. This system will also allow decision makers to review the happiness index results. The initiative is in line with efforts to make Dubai the world's first city that interactively measures the happiness of its people, tourists and visitors on a daily basis. ameinfo.com



Middle East investment in space continues to grow as region marches towards its' vision for science and knowledge based economy

National investment in space technology is continuing to grow, as the UAE seeks to develop a long-term strategic plan for a

and Technology. H.E Dr Mohammed Naser Al Ahbabi – Director General of the UAE Space Agency, said: “We look forward to taking part in debating the key developments in space technology at the Global Space & Satellite Forum 2015. We expect this forum to provide an arena that will showcase the competing commercially self-sustaining space programs which are emerging as a direct result of new space technology trends, leading a new era of space utilization similar to the one which paved the way for

space programs including Satellite Communications Companies Yahsat, Thuraya and the Emirates Institution for Advanced Science and Technology (EIAST) who lead the DubaiSAT 1 and 2 programs.

H.E. Yousuf Hamad AlShaibani, Director General of EIAST said: “It gives me great pleasure to welcome the Global Space & Satellite Forum to Dubai in 2015 and also announce our participation at the forum as a Host Partner. The forum has grown significantly in strength, attendance and importance since it first launched in 2008. We have also been extremely fortunate to have active and generous support from the UAE leadership and UAE Space Agency.” “Under the guidance of His Highness Mohammed bin Rashid Al Maktoum, EIAST has continued to fulfil its high level objectives and play a major role in space and satellite technology. This forum will explore a wide range of issues facing the global space and satellite sector, which is what makes it THE industry event to attend. Everything from Earth Observation, Remote Sensing and Small Satellites to Launch Systems, Space Exploration and the latest Research,” added Al Shaibani. Developing solid space foundations and applications has proven its positive impact on improving the quality of life worldwide and on global economic growth, with benefits that extend beyond the borders of the space faring nations. Biju Saith, Project Director from SMG said: “We have witnessed great success stories in the past which have emerged as a result of healthy informative discussions and debates by leading experts and decision makers in the Space sector during our previous GSSF events. The most important and challenging of which were the panel sessions on the value and benefits of having a regional Space Agency. That we hope has contributed toward providing an honest and realistic picture of what should be the expectations from having such a high profile Space organization and the advantages that it can bring to the region. A major theme in our forthcoming GSSF event will be to provide a platform for the UAE Space Agency to showcase its aspirations and ambitious plans for developing the UAE Space sector. The Forum will also facilitate the gathering of space experts from specialist scientists and engineers who will present the latest scientific and technological achievements



solid and sustainable foundation for advanced space innovation and exploration. All of which is expected to aid the growth of science and knowledge based economy. Compared to the \$300bn international space industry, the UAE's investment in space technology is already substantial exceeding Dhs20bn (\$5.44bn). Leading industry experts from around the world will meet in Dubai at the Global Space & Satellite Forum (GSSF) in May to discuss how commercial space and satellite technology is creating new economic, social and educational benefits for nations globally. The forum will discuss topics such as space technology applications, innovative solutions; low-cost satellite developments such as macro and nano satellites; and how satellite systems are improving lives – ranging from life-saving developments in the field of disaster management to the delivery of entertainment media via handheld consumer devices. Taking place from 26 – 28 May 2015, the forum, which is organized by Streamline Marketing Group (SMG), is a result of the close collaboration with the UAE Space Agency and Emirates Institution for Advance Science

commercial aviation in the first half of the last century. Key to this, we believe, is the development of innovative space technologies and applications, some of which will enable low cost access to space and the emergence of affordable space exploration and human presence in space.”

“The UAE Space Agency was established in July 2014 with an aim to develop the UAE's technical and intellectual capabilities in space technology and leading the region's entry into the era of space exploration. The UAE leadership has made the bold decision and firm commitment to keep our country at the forefront of this new space revolution by announcing the establishment of the UAE Space Agency and the UAE's own mission to explore Mars. The newly set-up UAE Space Agency will send a clear message to the world affirming our status as a space-faring nation in which the space sector is playing a major role in the country's sustainable economic development and growth,” concluded AlAhbabi. With an investment exceeding \$5.44bn in commercial and scientific space projects the UAE is steadily progressing towards becoming a truly international player within the space sector. The investment in space technologies are shared among several companies and



that humankind has made in its endeavours to understand the Red Planet, hence, we are looking forward to understanding the future plans that lie ahead, including those of the human exploration of Mars.”

Etisalat spent USD680m on domestic networks in 2015

United Arab Emirates (UAE) telco Etisalat spent around AED2.5 billion (US\$680 million) in 2014 on the deployment of new 4G Long Term Evolution (LTE) networks and fiber-optic infrastructure. According to a report from The National, the investment brings the company's total spend over the past five years to AED21 billion. Etisalat added around 2,500 3G and 4G base stations during 2014, taking its total to 19,000. There are plans to increase this to 22,000 by end-2015, providing network coverage to 99.5% of populated areas for 2G and 3G, and 90% for 4G. Etisalat is the dominant provider of fixed and wireless services in the UAE, where it competes against second national operator Du.

SyriaTel, MTN secure 20-year operating licenses in Syria

Cellcos MTN Syria and SyriaTel, which operate in the country under Build, Operate and Transfer (BOT) arrangements, have been awarded long-term freehold licenses by the Syrian Telecommunications Establishment (STE). According to The Syria Report, the 20-year operating concessions take effect on January 1, 2015. No information was disclosed on the license fees, however. According to TeleGeography's GlobalComms Database, the previous BOT arrangements provided for revenue sharing between the cellcos and STE and stipulated that the two companies must hand over the networks to the regulator at the end of the arrangement period. In August 2014 MTN Syria revealed 'significant progress' in converting the BOT contract to a cellular license, with parent company MTN Group saying at that date that it anticipated 'the awarding of the license and termination of the related BOT contract' before the

end of 2014, with an initial license fee expected to be between SYP18 billion and SYP25 billion (USD99.6 million and US\$138.3 million). Previously, in September 2010 Communication and Technology Minister Imad Sabbouni said that SyriaTel and MTN were each expected to pay SYP25 billion for converting their BOT concessions.

Ooredoo targeting '100%' fiber and national LTE-coverage this year

Ooredoo Qatar intends to complete a national 4G LTE network coverage footprint this year whilst aiming for a target of '100%' fiber penetration among its fixed broadband customers, the company told the Gulf Times at a press conference. As previously reported by CommsUpdate, Ooredoo Qatar reached the milestone of 200,000 customers connected to its fiber broadband network in December 2014, around three years after launching the high speed triple-play connectivity service, with the lion's share of its existing fixed broadband customers having been transferred from lower-bandwidth ADSL connections. Also that month, Ooredoo launched the country's first commercial LTE-Advanced (LTE-A) service under the '4G+' banner, boosting its mobile network's peak mobile downlink data speeds to 225Mbps from its previous limit of 150Mbps, and covering parts of Doha – including Corniche, West Bay lagoon, Katara, Souq Waqif, Al Rayyan, Shahaniya and Sealine – for devices supporting LTE-A on either 800MHz or 2600MHz frequency bands. Ooredoo's new chief business officer Sheikh Nasser bin Hamad al-Thani told Gulf Times yesterday that 4G+ services were now available in additional major areas such as Al Wakrah, Al Gharafa and Education City, but the LTE-A technology was 'still pending in some highways along the northern and southern parts of Qatar' while the goal was to 'provide the entire country with 4G+ services'. Sheikh Nasser also said Ooredoo was in 'constant talks' with Samsung, Huawei and Apple for the manufacture of LTE-A-capable smart devices, noting: 'Our challenge to mobile phone manufacturers is to keep up with the technology that is now available in

the market because not many smart devices are capable of using 4G+'. To address the compatibility demand, Ooredoo has launched the Samsung Alpha, Huawei Ascend Mate 7 and Huawei (Mi-Fi) E5786 devices.

ANRT orders Maroc Telecom to revise terms for sharing copper and fibre infrastructure

Moroccan telecoms watchdog Agence Nationale de Reglementation de Telecom (ANRT) has published its Decision ANRT/DG/No.19 (dated December 26, 2014), which establishes the technical requirements and tariffs for access to Maroc Telecom's (IAM's) copper local loop and passive fiber infrastructure. The incumbent was given until January 20, 2015 to incorporate of the regulator's recommendations and publish a new wholesale offer. The new offer will be accessed by ANRT and an external consultancy, with Maroc Telecom given a deadline of January 30 to make the necessary amendments. As previously reported by TeleGeography's CommsUpdate, in June 2014 the ANRT published the



rules governing local loop unbundling (LLU) in Morocco. Under the new regulations, Maroc Telecom is required to provide colocation for third-party operators' equipment in its existing cabinets, install multi-operator cabinets for part of their future nodes and establish an active wholesale offer for third-party operators under a virtual unbundled local access (VULA) model. Although the incumbent telco was initially required to provide a technical and tariff wholesale offer for passive access to its fixed local loop by August 1, it was accused of failing to publish wholesale offers that cover

shared cabinet access, full and partial unbundling and bitstream access on several occasions.

Smartphones make up 75% of GCC mobile market

According to the latest figures from the International Data Corporation (IDC), Gulf



Cooperation Council (GCC) shipments of 4G LTE handsets have increased more than four times over the last year and are now close to accounting for one half of all Smartphones sold in the region. The market intelligence firm's Worldwide Mobile Phone Tracker shows that Smartphones now make up 75% of the phones shipped in the GCC, with buyers increasingly moving toward 4G handsets as the market matures. "The GCC is less than a year behind the market development already seen in Western Europe," says Simon Baker, program manager for IDC's handset research in Central Europe, Middle East, and Africa. "However, the market is further behind the U.S., where 4G already makes up three quarters of the Smartphone market." Competition and falling prices are playing their part in boosting the uptake of 4G LTE in the GCC. "All Apple handsets from the iPhone 5C and 5S now offer LTE, but there is much greater choice when it comes to 4G Android models," says Nabila Popal, research manager

for IDC's handset research in Middle East, Africa, and Turkey. "Samsung is now the region's largest vendor of LTE-enabled devices, and while the average price that a Gulf consumer currently pays for a 4G handset is close to \$600 and has not fallen much over the last 12 months, cheaper models are arriving, most notably from Lenovo and Huawei." According to the IDC, elsewhere in the Middle East and Africa, the overall Smartphone market is rapidly expanding, with growth rates picking up over the last two quarters. IDC research shows that in Africa as a whole and in the wider Middle East beyond the GCC and Turkey, the number of Smartphones sold in Q3 2014 was up 300% year on year. "We are in the midst of a boom," says

Isaac Ngatia, a research analyst at IDC Middle East, Africa, and Turkey. "The technology levels are more basic than those seen in the GCC and 4G phones remain relatively uncommon, but many consumers are now getting their hands on a Smartphone for the first time." "It is a very different kind of market from the Gulf," adds Baker. "Cheaper phones are the ones selling in high volumes, and prices are tumbling; the average price paid is not much more than half that in the GCC. The brand situation is different too; beyond Samsung and Chinese brands like Lenovo, Huawei, and ZTE that are making a push in the region, many of the bigger players just focus on single countries or sub-region and aren't well known beyond them." There are also a number of brands in this market that typically focus only on distribution and marketing, and mainly source their phones from the production catalogues of independent manufacturers in China. "It is a different sort of brand from the international names the handset industry is usually associated with, and as a model it is working very well at the moment,"

says Popal. "These regional brands are able to offer Android phones sourced from China that have the larger screen sizes and functions of models from the big international names but at much lower prices." Key examples include Tecno in Nigeria and Kenya, whose Smartphone shipments were up 269% year on year in Q3 2014, and Q-mobile in Pakistan, which has more than half the national market and posted growth of healthy 42%. "Brands such as these will continue to perform well over the coming quarters," concludes Popal. "Smartphone shipments in these poorer countries will expand a lot further in the next couple of years, as they still account for less than half the total handset market."

Algerie Telecom in spat with its own Mobilis unit over fiber rollout

Agence Ecofin reports that a feud is brewing between incumbent operator Algerie Telecom and its own mobile subsidiary Mobilis, over the latter's desire to 'stand on its own feet' through the acquisition of its own fibred-optic network infrastructure that will enable it to go head-to-head with competitors Ooredoo and Djezzy in the provision of integrated telecoms services. Since November 2014, the pair have reportedly locked horns over Mobilis' plans which stemmed from the wireless operator's launch of a tender for the 'supply, installation and commissioning of advanced, high speed transmissions next generation dense wavelength division multiplexing (NG-DWDM) equipment, including the supply of fiber-optic cable and passive equipment'. Mobilis' quest for independence has not, however, carried favor with its parent, which currently provides it with fiber capacity on its own infrastructure and stands to lose up to USD8 million in revenue per day if Mobilis goes ahead with its plan. Indeed, Algerie Telecom chairman and CEO Azouaou Mehmel has warned that the loss of such an important revenue stream could result in it being forced to shed 'several thousands' of its workforce. The government of Algeria has reportedly called a number of meetings in a bid to resolve the silent impasse, although it appears likely that market forces will prevail, given that both companies are simply looking to protect the interests of the firms they run.



ARPT authorises Mobilis, Ooredoo to launch 3G in additional provinces

Algeria's telecoms watchdog the Autorite de Regulation de la Poste et des Telecoms (ARPT) has certified domestic mobile operators Algeria Telecom Mobile (Mobilis) and Ooredoo Algeria (Wataniya) to deploy commercial 3G services in additional 'wilayas' (provinces), following evaluations of their respective coverage and quality of service (QoS) obligations. Under Decision No. 03/SP/PC/ARPT/2015, dated January 21, 2015, Mobilis has met its obligations to provide 3G services in Boumerdes, M'Sila, Tamanrasset, Medea, El Tarf and Souk Ahras and could now launch 3G services in Chlef, Bejaia, Skikda, Ghardaia, Bechar, Adrar, Guelma, Relizane, Bouira and Oum el Bouaghi. For its part, Ooredoo has achieved its required coverage and QoS obligations in Tizi Ouzou, Mascara, Naama, Relizane, Tiaret and Oum el Bouaghi, according to Decision No.02/SP/PC/ARPT/2015 of January 19, 2015. The cello is now authorised to deploy 3G networks in seven optional wilayas: Annaba, Batna, Laghouat, El Bayadh, Ain Temouchent, El Tarf and Guelma. As previously reported by TeleGeography's CommsUpdate, in October 2013 the ARPT issued 3G concessions to Mobilis, Nedjma and Djezzy.

operators' 3G networks went live in late December 2013 and currently offer 3G services in 25 wilayas.

Zain Saudi narrows net loss by 23% in 2014

Zain Saudi Arabia, a subsidiary of Kuwait-based telco Zain Group, has reported gross profit of SAR3.223 billion (US\$858 million) in the twelve months to end-December 2014, a 2.81% annual increase on the SAR3.135 billion reported in 2013. The operator attributed the positive result to 'the rising demand for internet services, the decline in repair and maintenance

subscribers increased by 147% in the twelve months under review, while internet data traffic also increased, by 621% year-on-year.

Batelco extends 150Mbps fiber speeds to Riffa

Bahrain Telecommunications Company (Batelco) has expanded its fiber-optic network to the city of Riffa, offering end-users down/uplink speeds of up to 150Mbps/15Mbps. Connectivity has been extended to the following locations in Riffa:



expenses and the adjustment of the useful life of some of the company's assets'. Zain Saudi incurred net losses of SAR1.270 billion during the period under review, a figure which represents a 23.08% annual improvement on the SAR1.651 billion loss reported for 2013. Earnings before interest, taxation, depreciation and amortization (EBITDA) for the twelve-month period also increased, by SAR210 million (or 24.0% year-on-year), to SAR1.100 billion. The company disclosed that its performance in 2014 fell short of its approved business plan and that it was also below one of its loan covenants; Zain Saudi stated, however, that it has secured a waiver for the breach and has agreed to revise covenant calculations for December 31, 2014 and March 31, 2015. In addition, the management has approved a revised business plan on 20 January 2015, subject to final approval. In operational terms, Zain Saudi reported that its internet service

Saar, Riffa Views, Reef Islands, Juffair, Sanad, Khaleej, Tubli, Ishbiliya and Busaitain, while new locations are expected to be added during 2015. Existing broadband customers will be automatically migrated onto the new fiber network, the telco notes. Riffa is the second largest city in the Kingdom of Bahrain.



Mobilis received 2x15MHz paired blocks in the 1920MHz-1935MHz/2135MHz-2150MHz frequency bands, while Ooredoo was assigned 2x15MHz paired blocks in the 1900MHz/2100MHz frequency bands. The two



REGULATORY NEWS

Regulatory News

Overall telecom indicators remain positive, revenues reach Rs465bn in 2014

The year 2014 has witnessed a positive overall telecom sector growth with its total revenues reached more than Rs465.5 billion as compared to Rs439.5 billion registered during previous year. In term of total telecom revenues, each passing year saw increasing trend but Rs465.5 registered in 2014 was the highest in last 11 years. The telecom revenues registered during 2003-04 were Rs116.8 billion. During the above mentioned year, the revenue registered from cellular mobile phone were Rs322 billion, Local Loop Rs88.8 billion, Long Distance International (LDI) Rs43.6 billion, Wireless Local Loop (WLL) Rs6.2 billion and Value Added Services (VAS) Rs4.1 billion, the latest provisional stats issued by Pakistan Telecommunication Authority (PTA) revealed here on Wednesday. The other indicators for Pakistan's telecom industry during the year 2014 showed that teledensity increased to 79.8 percent, telecom investment crossed US\$ 1.816 billion including US\$ 903 million Foreign Direct Investment (FDI) inflows and broadband penetration crossed 2 percent mark. It is expected that introduction of next generation telecom services in the country will further boost the growth of telecom sector in Pakistan. At the end of 2014, total teledensity in the country

reached 79.6 percent, registering a healthy annual growth of 5.8 percent as compared to 4.9 percent in 2013. Cellular mobile segment was the main contributor towards overall growth in teledensity as Wireless Local Loop (WLL) segment continued with its declining trend and Fixed Local Loop (FLL) teledensity showed slight improvement during the year. Cellular mobile penetration reached 76.5 percent with its increasing share of 96.1 percent in total teledensity. The combined teledensity of FLL and WLL has reached 3.1 percent at the end of 2014. Considering the anticipated regulations for re-verification of cellular SIMs, teledensity for cellular industry may decrease during 2015. With regard to telecom contribution to national exchequer, the stats revealed that this sector is a significant source of revenue generation as during the last three years, telecom sector was contributing an average of Rs124.8 billion annually to the national exchequer in terms of taxes, regulatory fees, initial and annual license fees, activation tax, and other charges. During 2014, telecom sector has contributed an all time high Rs243.5 billion, registering a growth of 95.8 percent over the last year. This jump in contribution is due to auction of 3G and 4G cellular mobile licenses in April 2014. PTA has deposited to the government Rs96.5 billion out of the total value of US\$ 1.11 billion of the Next Generation Mobile Services



spectrum auction and the remaining amount of US\$ 147.5 million along with markup @ LIBOR+3 percent per annum will be paid by the operators in equal annual installments in the next five years. Effective from July 1, 2014, Federal government reduced GST/FED on telecom services from 19.5 percent to 18.5 percent and Withholding Tax (WHT) from 15 percent to 14 percent. This tax reduction is applicable to Islamabad, Balochistan, FATA, AJK and Gilgit Baltistan regions. The provincial tax departments of Punjab, Sindh and Khyber Pakhtunkhwa did not reduce taxes. In term of telecom investments, in year 2014, cellular mobile operators invested US\$ 1.790 billion on account of acquiring 3G and 4G spectrum and deployment of advanced telecommunication networks. The overall telecom investment reached US\$ 1.815 billion in 2014. Almost half of telecom investment was in form of FDI i.e. telecom sector attracted over US\$ 903 million of FDI in 2014, 34.2 percent of the total FDI received by Pakistan in that period. PTA auctioned spectrum in April 2014 for 3G and 4G cellular mobile services from which significant further FDI was received. The auction concluded with a total value of US\$ 1.11 billion. During year 2014, record imports of US\$ 544 million of cellular mobile handsets and US\$ 682 million worth of telecom equipment was witnessed, registering growth of 20.7 percent and 30.3 percent respectively. Overall, the telecom imports crossed the mark of US\$ 1.23 billion, of which 44.4 percent is for the imports of consumer items i.e. cellular mobile handsets.

French court rules in favor of Bouygues on 4G license fees

France's highest administrative court, the Conseil d'Etat, has ruled in favor of Bouygues Telecom in its appeal against the Autorite de Regulation des Communications Electroniques et des Postes (ARCEP) in regards to the annual license fees the telecoms regulator charges for reformed spectrum in the 1800MHz band. TeleGeography notes that in March 2013 ARCEP authorized Bouygues to recycle its 2G mobile spectrum in the aforementioned band for 4G mobile data use on the condition that the tariffs payable for utilizing the frequencies are amended. With its Decree No. 2013-238 of March 22, 2013, the regulator increased the annual levy from EUR571 (US\$687) per 1kHz of spectrum to EUR3,231.

Bouygues Telecom subsequently appealed against the way the tariff was calculated however and on December 29, 2014 the Conseil d'Etat annulled the March 2013 decree; the court said in a press release that fees could still be charged 'on the condition that they are not set at a clearly disproportionate level'. The telecoms regulator is now likely to revise the spectrum charges, which could lead to Bouygues paying less than the EUR70 million it previously earmarked for the license tariff.

Ofcom imposes £8,000 penalty on Sambora for abandoned calls

British telecom regulator Ofcom said it has fined Sambora Communications £8,000 for making silent and abandoned calls. During an abandoned call, one hears an information message and not a live call from the organization trying to call you. They often occur when automated dialing systems used by call centers dial too many numbers and there are not enough call centre agents to handle those calls. As per Ofcom's current persistent misuse policy, the recorded message should include information on who the call has come from and details on how to call back and opt out of future calls. An Ofcom investigation into Sambora found that the company made an estimated 4,320 abandoned calls between September 1 and October 19, 2013. It also generated more than 2,500 silent calls over a six day period in October 2013 by failing to include a recorded information message. On 36 individual days between September 1, 2013 and October 19, 2013, Sambora failed to include an appropriate phone number in the recorded information message played.

700MHz licenses due in next six months

Chile's Transport and Telecommunications Minister Andres Gomez-Lobo expects the winners of last year's 700MHz spectrum auction to be allocated their frequencies in the

next four to six months, now that the legal opposition to the award of the concessions has been quashed, the official said in an interview with news site Diario Financiero. Mr Gomez-Lobo explained that once the three winners – Entel, Claro and Movistar – pay the initial fees to the treasury it should take less than six months for the government to draw up and publish the necessary documents. Under the terms of the licenses the trio has 18 months to launch services using the 700MHz band, and the official expects the frequencies to be in use by 2017.

GlobeTel secures license to operate in Singapore

The Singaporean unit of Globe Telecom Inc. has secured a facilities-



based operations (FBO) license to provide international cable and other telecommunications services in the city-state, in line with its Southeast Asian expansion ahead of an Asian-wide expansion. GlobeTel Singapore Pte. Ltd. is a wholly owned subsidiary of GTI Business Holdings Inc., in turn a wholly-owned subsidiary of Globe. Globe aims to serve Philippine customers – individuals, household or companies, who are in Singapore, COO Gil Genio said in a text message to GMA News Online. "This particular license given to a Globe subsidiary in Singapore allows us to have our own network facilities, improving quality of service and lowers our costs to operate there," he said. Globe said GlobeTel Singapore's offer to provide international cable services will help strengthen connectivity between Singapore and the Philippines and provide support for businesses



operating in the two countries. Service offers by GlobeTel Singapore will also provide alternate and redundant cable paths from Singapore to Hong Kong and Japan, transiting the Philippines, to further strengthen regional connectivity. This year, the ASEAN Economic Community sets in motion the creation of single market and production base for the 10-nation bloc fostering free flow of goods, services, skilled labor, investments and capital. ASEAN members include Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam.

India confirms February 25 spectrum auction

India's Department of Telecommunications (DoT) on Friday confirmed February 25 as the start date for its latest spectrum auction, a process from which it hopes to raise as much as 648.4 billion rupees (€8.6 billion). The government has published a notice inviting application (NIA) calling on potential bidders to signal their interest no later than 6 February. A final list of qualified applicants is due to be published on February 20, which will be followed

MHz spectrum, and 25% in the case of 800-MHz and 900-MHz. Licenses will be valid for 20 years. The volume of spectrum on the block amounts to 380.75 MHz. It consists of 103.75 MHz of 800-MHz spectrum covering all 22 telecom circles; 177.8 MHz of 900-MHz spectrum in 17 circles; and 99.2 MHz of 1800-MHz spectrum in 15 circles. The DoT also intends to auction frequencies in the 2.1-GHz band but has yet to provide further details. The DoT has set a reserve price of INR36.46 billion (€480 million) per MHz for pan-India frequencies in the 800 MHz band. For pan-India 900-MHz spectrum excluding Delhi, Mumbai, Kolkata, and Jammu and Kashmir, the reserve is INR39.8 billion. Finally, a reserve of INR21.91 billion has been established for pan-India 1800-MHz spectrum excluding Maharashtra and West Bengal.

Etisalat refuses to budge on eight-year dispute

UAE-based telecoms group Etisalat has refused to hand over an outstanding USD800 million payment relating to the privatization of Pakistan Telecommunication Company Ltd

was withholding the last USD799 million until the state had transferred a number of properties included in the acquisition to it. Although the government has announced on several occasions that it is close to completing its end of the deal, Etisalat has refused to make the final payment until 100% of the properties have been transferred. Speaking to a sub-committee of the Senate Standing Committee on Finance and Revenue earlier this week, Chairman of the Privatization Commission, Mohammad Zubair, revealed that the government could not transfer the last 34 (of a total of 3,500) PTCL properties to Etisalat for a number of reasons, chief amongst which was the vast disparity in valuations from Islamabad and Etisalat. Whilst the government valuation of the outstanding properties was USD92 million, Etisalat has assessed their value to be closer to USD400 million. The official added that the Privatization Commission has written a letter to Etisalat seeking to end the eight-year dispute.

NCC to probe telecoms partnership

National Communications Commission (NCC) Chairperson Howard Shyr on Wednesday said that the commission would soon hold an administrative hearing regarding the roaming partnership agreement between Asia-Pacific Telecom Co and Taiwan Mobile Co, adding that the partnership might have infringed both the Telecommunications Act and the Fair Trade Act. The commission launched an investigation into the roaming deal between the two fourth-generation (4G) telecom operators after three other 4G operators — Chunghwa Telecom Co, Far EasTone Telecommunications Co and Taiwan Star Telecom Corp — filed a collective complaint against the alliance. Chunghwa, Far EasTone and Taiwan Star also said that the partnership is not permissible according to the Telecommunications Act. Taiwan Mobile said that the partnership allows Asia-Pacific Telecom's customers to connect to their service in areas that would otherwise not provide coverage. A source with one of the three complainants told the Taipei Times that they have evidence proving that Asia-Pacific Telecom shares Taiwan Mobile's network instead of building its own. Questions over the partnership were also raised by lawmakers at the legislature's Transportation



by a mock auction on February 23-24. Bidding proper is scheduled to get underway the following day. Once the dust settles, winning bidders will have 10 calendar days to pay up. Applicants that opt for deferred payment will need to pay 33% of the final bid amount in the case of 1800-

(PTCL), the Nation writes. Etisalat had agreed in January 2006 to purchase a 26% stake in PTCL from the government for US\$2.6 billion, settling on a staggered five-year payment plan for the operator. Etisalat stopped the payments in September 2007, however, explaining that it

Committee meeting on Wednesday. Democratic Progressive Party (DPP) Legislator Lee Kun-tse said that Taiwan Mobile customers pay NT\$1,399 per month for unlimited access to 4G services, whereas Asia-Pacific Telecom customers pay only NT\$898 to access the same network. Consumers are being charged unequally, Lee said. Lee said 4G services would slow down with so many people sharing the same network, which would decrease the quality of the service. Though Asia-Pacific Telecom acquired a 4G license, it did not build its own base stations and simply uses those set up by other operators, Lee said. In response, Shyr said that roaming should theoretically increase an operator's costs, because it would have to depend on networks owned by other operators to provide its services. However, Asia-Pacific Telecom can charge consumers a relatively lower rate, he said, adding that the rates could be a violation of Article 24 of the Fair Trade Act. If two operators use the same network to provide the same service, but consumers experience a difference in charges exceeding 50 percent, consumers could become confused over their choices among telecom

hold an administrative hearing after we complete the investigation," Shyr said, adding that the hearing would be held in the first half of the year. Shyr said the regulations did not ban roaming alliances among operators, but this does not mean that any form of roaming partnership is permissible. He said that both Taiwan Mobile and Asia-Pacific Telecom have submitted business plans, in which they have listed the number of base stations they aim to build in a certain number of years.

OFCOM to create regulatory guidelines to support IoT

UK telecom regulator OFCOM said it wants to create a regulatory environment to support the emerging Internet of Things (IoT) segment. The new development stems the fact that UK has more than 40 million devices connected via the IoT. This is forecast to grow more than 8-fold by 2022, with devices carrying out more than a billion daily data transactions. IoT services can cover industries from agriculture and energy to

activities on security and resilience of the UK's communications networks can include the IoT. OFCOM will continue to monitor the progress already being made by internet service providers in supporting IPv6 connectivity. It is expected that globally up to 50 billion smart devices, ranging from cars and parking meters to coffee machines and combine harvesters could be connected to the internet by 2020, each using tiny slivers of spectrum to get online. OFCOM will ensure that UK has the tools and infrastructure to allow the IoT to develop unhindered. To support this, OFCOM has already released spectrum for machine to machine uses – making the UK among the first countries in Europe to do so. "The Internet of Things will bring benefits to a range of sectors and could change the way we live our lives," said Steve Unger, Acting OFCOM Chief Executive.



operators, Shyr said, adding that the dynamics of market competition would change. The partnership could potentially constitute elements of "deceptive or obviously unfair conduct that is able to affect trading order," he said, referring to the Fair Trade Act article, adding that the Fair Trade Commission would have to determine if there has been any violation. Meanwhile, Shyr said that the Asia-Pacific-Taiwan Telecom partnership could be in violation of several articles in the Telecommunication Act if the accusations made by the other telecom carriers are true. "We will

transport, healthcare and much more. Recently, OFCOM said it would consult with the telecom operators and the related eco-system to draft 5G technology guidelines. OFCOM today said its analysis has shown much of the IoT's short to medium-term spectrum demands are met with current initiatives. OFCOM will monitor the IoT's spectrum needs to identify additional spectrum needed. This apart, OFCOM will work with Information Commissioner's Office, government, other regulators and industry to explore solutions to data privacy issues in the IoT. The telecom regulator will also investigate how its



A SNAPSHOT OF REGULATORY ACTIVITIES IN SAMENA REGION

Algeria



President: Mr. Toufik Bessai
 [Regulatory Authority for Post & Telecommunication (ARPT)]

Regulatory Updates

Telecoms watchdog ARPT has certified domestic mobile operators Algerie Telecom Mobile (Mobilis) and Ooredoo Algeria (Wataniya) to deploy commercial 3G services in additional 'wilayas' (provinces), following evaluations of their respective coverage and quality of service (QoS) obligations. Mobilis has met its obligations to provide 3G services in Boumerdes, M'Sila, Tamanrasset, Medea, El Tarf and Souk Ahras and could now launch 3G services in Chlef, Bejaia, Skikda, Ghardaia, Bechar, Adrar, Guelma, Relizane, Bouira and Oum el Bouaghi. For its part, Ooredoo has achieved its required coverage and QoS obligations in Tizi Ouzou, Mascara, Naama, Relizane, Tiaret and Oum el Bouaghi. The cellco is now authorized to deploy 3G networks in seven optional wilayas: Annaba, Batna, Laghouat, El Bayadh, Ain Temouchent, El Tarf and Guelma. In October 2013 the ARPT issued 3G concessions to Mobilis, Nedjma and Djezzy. Mobilis received 2x15MHz paired blocks in the 1920MHz-1935MHz/2135MHz-2150MHz frequency bands, while Ooredoo was

assigned 2x15MHz paired blocks in the 1900MHz/2100MHz frequency bands. The two operators' 3G networks went live in late December 2013 and currently offer 3G services in 25 wilayas. (January 23, 2015) telegeography.com

Azouaou Mehmel, President and CEO of state-owned Algeria Telecom, has given a brief update on the first phase of deployment of the telco's fixed-wireless 4G Long Term Evolution (LTE) broadband service which was launched commercially in May last year. Mehmel stated: 'the results are very satisfactory: we deployed a solution for 100,000 customers and [the active user base] is already over 86,000 [up from 80,000 reported earlier this month]. There is a demand, but we do not want to overload the network so that there is no problem [with] quality later ... We do not rely solely on LTE. For us it is a complementary internet access technology [to] wired technologies – optical fiber, DSL.' The CEO continued that in the first half of 2015 the second phase of fixed wireless LTE network deployment will begin, to 'densify the LTE access in areas where the network and demand exists,' adding that 'we will [also] cover areas not [reached by broadband services] so far'. The operator had at least two 4G-enabled base transceiver stations (BTS) in each of the country's 48 wilayas



(provinces), and a total of 250 LTE BTS, with plans to expand to 'remote areas' this year, while the company previously revealed plans to install 2,000 LTE-enabled BTS by end-2015. Zohra Derdouri, Algeria's Minister of Posts and ICT, speaking at the same event alongside Azouaou Mehmel, declared that mobile 4G LTE services will be launched in the country before the end of 2015, but that 'we will go more slowly compared to 3G. We will offer this service to those who need it as the populations of large cities and businesses.' Algeria Telecom's cellular division Mobilis is a 100%-owned subsidiary of the state-run telco. (January 21, 2015) Agence Ecofin

Bahrain



Chairman: Dr. Mohammed Al Amer
[Telecommunication Regulatory Authority (TRA)]

The Telecommunications Regulatory Authority (TRA) pursuant to the Telecommunications Law with effect from December 25, 2014 has revoked the telecommunications Licenses granted to the following companies.

Bahrain Call
First International Network Company (Foreign Branch)
Mobilink Co. W.L.L
OSS Telecommunication W.L.L
Callforeign Middle East S.P.C
Star Telemedia W.L.L
Fusion Bahrain W.L.L

TRA has also received requests from Access Telecommunication to revoke its Individual License for International Telecommunications Services (ISL) and Value Added Services Class License (VAS); from Icol Plus to revoke its Class License for Value Added Services (VAS) and Internet Services Provider Class License (ISP) and a request from Hawar Telecommunications to revoke its Individual License for International Telecommunications Services (ISL). (January 18, 2015) tra.org.bh

Plans have been unveiled by Zain Bahrain, the second largest mobile service provider in the country, to enhance its network coverage in order to 'meet customer demand'. The expansion will form part of a US\$100 million network transformation program put in place by Swedish technology vendor Ericsson, which itself extends a 2G/3G/4G partnership between the two companies which was initiated in October 2013. Having launched its 4G Long Term Evolution (LTE) network in April 2013, the operator aims to keep expanding 4G services, with Zain Bahrain network director Hamad Al Romaihi saying: 'The second phase of the network transformation program will aim to enhance capacity ... and roll out new sites across the Kingdom.'

(January 2, 2015) telegeography.com

Bangladesh



Chairman: Sunil Kanti Bose
[Bangladesh Telecommunication Regulatory Commission (BTRC)]

The Bangladesh Telecommunication Regulatory Commission (BTRC) has proposed a US\$30 million per

MHz floor bid price for 1800MHz band LTE-suitable mobile spectrum up for grabs in the country's auction of spare frequencies penciled in for March this year. the regulator also proposed a US\$22 million per MHz starting price for leftover 2100MHz band 3G/4G frequencies being offered in the same auction, and the suggested prices have been sent to the telecoms ministry for approval. During 2G license renewal over three years ago, the government charged mobile market leader GrameenPhone US\$28.2 million per MHz of 1800MHz spectrum, using a methodology which charged a lower rate for operators with smaller user bases – Banglalink, Robi and CityCell. Referencing the previously levied spectrum fees, a BTRC official was quoted by the Star as saying: 'So the US\$30 million floor price for the upcoming auction is rational,' adding that 'the floor price for the 2100MHz band has been set at US\$22 million on the basis of the prices at the 3G auction in 2013 when the price for each megahertz spectrum in the same band was US\$21 million'. However, a representative of the Association of Mobile Telecom Operators of Bangladesh called the auction pricing 'very high' and not conducive to operators expanding their businesses, stating: 'The government is selling its additional spectrum, so the price should not be so high.' The BTRC announced in early December 2014 that the frequencies up for grabs 'by March' comprise 2x10.6MHz in the 1800MHz band and 2x15MHz in the 2100MHz range. Telenor subsidiary GrameenPhone and Bangladeshi state-owned Teletalk currently operate 3G W-CDMA/HSPA+ services over 2x10MHz of 2100MHz bandwidth each, while rivals Robi, Banglalink and Airtel all operate 3G with just 2x5MHz of 2100MHz spectrum each under 3G/4G licenses auctioned in September 2013, and the additional frequency auction should go some way to leveling the playing field. The private cellcos' existing 1800MHz GSM licenses do not yet permit 4G services.

(January 22, 2015) The Daily Star

According to the annual report of the Bangladesh Telecommunication Regulatory Commission (BTRC) for 2013/14, the country's four privately owned mobile operators – Grameenphone, Banglalink, Robi and Airtel – collectively invested BDT98 billion (US\$1.24 billion) in the development of their networks and services. The telecoms regulator told that another private operator, CityCell, and state-backed Teletalk 'did not invest during the year' although this has been disputed by Teletalk with its MD saying that his firm had committed CAPEX in the period under review, but that 'BTRC did not seek any information from us on our investment'. However, he declined to say how much the firm had actually spent. In September 2013 the four cellcos each acquired 2x5MHz of bandwidth in the 2100MHz band for the rollout of 3G/4G services, agreeing to pay a total of BDT40 billion in installments. Teletalk also bought a 2x10MHz block of spectrum but it is yet to clear the payment — around BDT16 billion. The state-run operator has been using the spectrum since 2012. CityCell, meanwhile, did not buy any 3G spectrum and is struggling to pay off its 2G license renewal fees and the portion of its revenue it is required to share with the government. The BTRC's annual report goes on to say that the six mobile network operators generated total (gross) revenue of BDT207.65 billion through voice, data and other value added services (VAS). Additionally, the Association of Mobile Telecom Operators of Bangladesh notes that between



1997 and 2013, the cellcos invested more than BDT718.7 billion in their networks. (January 5, 2015) The Daily Star

Egypt



Executive President: Eng. Hesham El Alaily
[National Telecommunication Regulatory Authority (NTRA)]

Egypt's telecoms market is poised for a new phase of competition following the award of a mobile virtual network operator license to wireline incumbent operator Telecom Egypt. Telecom Egypt's is expected entry into the mobile market to boost the Egyptian mobile market, which posted considerably slower growth in 2013 than in 2012, as the company is expected to target the low-end of the market. However, steepened competition is likely to result in further downward pressure on ARPU, which, compounded with Egypt's fragile political and economic situation, may dampen operators' willingness to invest in much needed network development. Over the long term, though, BMI believes mobile operators Mobinil, Vodacom and Etisalat may use unified licenses to offer converged telecoms services for business and residential customers. The mobile market shrunk by 1.1% quarter-on-quarter (q-o-q) in Q214, lowering the total number of subscriptions back under the 100mn mark. The wireline market contracted by 20.3% year-on-year in FY13, against a decline of 1.8% in FY12, owing to the disconnection of lines over unpaid bills in Q213. It shrunk another 0.4% q-o-q in Q114.

(January 2015) marketresearch.com

Telecom Egypt (TE) has reportedly inked deals worth a total of EGP15 billion (US\$2.1 billion) with local cellcos Mobinil and Vodafone Egypt for infrastructure and international communications services. Both infrastructure agreements are understood to be taking affect from this month, with the Mobinil deal lasting for five years, while the one with Vodafone Egypt is slightly shorter, at three years. The agreements related to the provision of international telecommunications services will be valid for four years with each company, with TE taking 35% of the revenues generated. Over the duration of the agreements TE has reportedly said it expects to generate a minimum profit of EGP3 billion.

(January 14, 2015) Daily News Egypt

Iran



**Minister of Communication & Information Technology:
Mr. Mahmoud Vaezi**
[Communication regulatory Commission (CRC)]

Iranian Minister of Communications and Information Technology Mahmoud Vaezi announced that Tehran and Baghdad have a plan to boost their cooperation and run a joint telecommunications operator. In a meeting with his Iraqi counterpart Kazzem Hassan al-Rashid in Tehran, Vaezi voiced his ministry's readiness for establishing a joint telecommunications operator with Iraq to improve roaming quality. He further added that Iran and Iraq share five sound and data connection points because of their long shared borders. The two sides also discussed ways for the further expansion of bilateral cooperation on post, post bank, internet, satellite, cell phone and phone.

Last week, a senior Iranian trade official announced that Tehran and Baghdad have considerably increased the volume of their trade exchanges in recent years. "The value of trade exchanges between Iran and Iraq has reached \$12bln now," Head of Iran-Iraq Joint Chamber of Commerce Yahya Al-e Eshaq said, addressing a conference titled 'Iran-Iraq Special Economic and Trade Opportunities' in Tehran at the time. (January 26, 2015) english.farsnews.com

Iraq



CEO: Dr. Buhan Shawi
[Communication & Media Commission (CMC)]

An Iraqi court has dismissed a US\$4.5 billion lawsuit against Kuwaiti telecoms group Zain, relating to its 2007 acquisition of Iraqi telco Iraqna. The unnamed claimants argued that Zain's takeover of the operator had prevented them from purchasing the company, causing them to suffer a US\$4.5 billion loss. Zain had purchased Iraqna from Orascom Telecom for US\$1.2 billion after the latter was unable to secure a mobile concession. Iraqna was subsequently merged with Zain's local mobile arm Atheer and the enlarged company was rebranded Zain Iraq. The case had previously been thrown out of court, but the claimants – identified by unnamed industry sources as being shareholders in third-placed cellco Korek Telecom – successfully appealed the decision, prompting Zain to launch its own appeal with a higher court. The higher court ruled in favor of Zain and ordered that the previous decision be reconsidered. Upon review the lower court found that it had indeed, made a mistake in its verdict and reversed the decision in favor of the Kuwaiti group. Reuters adds that the claimants now have 30 days to launch a final appeal or the case will be closed once and for all.

(January 27, 2015) reuters.com

Zain Iraq reportedly turned on its 3G network on December 31, making it the first cellco in the country to achieve a commercial 3G launch. The development follows a series of preview announcements on the company's Facebook page, which culminated with Zain claiming that it had performed Iraq's first ever video call over a 3G network. Meanwhile, a day after Zain's announcement, Iraq's second largest cellco Asiacell announced its own 3G network switch-on, following a US\$1 billion cash investment, which included 'system modernization' and license fees. In November 2014 Asiacell paid US\$307 million for a 2100MHz 3G license. Both mobile operators are marketing their respective 3G tariff plans as '3.9G'. (January 2, 2015) telegeography.com

Jordan



**Chairman of the Board of Commissioners/
CEO:
Mr. Mohammad Al Taani**
[Telecommunication Regulatory Commission (TRC)]

Orange Jordan expects investment in 4G technology to reach US\$250 million in 2014 and 2015, The Jordan Times cites senior officials as saying at a press conference yesterday. The cellco last week secured the nation's second 4G license, paying JOD71 million (US\$99.93 million) for 2x10MHz in the 1800MHz range. Orange



plans to launch Long Term Evolution (LTE) services in the capital in the first half of the year, before gradually extending coverage to the rest of the Kingdom by the end of 2015. To that end, the cellco is close to finalizing a supplier for its 4G network and expects to announce the winning vendor soon. (January 26, 2015) The Jordan Times

Kuwait



Minister of Communication: Salem Muthayeb Ahmed Al-Utheina
[Ministry of Communication (MOC)]

Ooredoo Kuwait has won a court appeal against a 36.69 million dinars (US\$124.97 million) judgment in favor of the Ministry of Communications, the telecom operator said in a bourse statement. The ministry claimed Ooredoo Kuwait had been unlawfully using government network infrastructure since 1999, according to the company's 2013 annual report. Last February, a Kuwaiti court ordered Ooredoo Kuwait to pay 36.69 million dinars to the ministry. But a new court ruling overturned that decision, according to the bourse statement.

(January 6, 2015) zawya.com

Morocco



Director General: M. Azdine El MountassirBillah
[Agence Nationale de Reglementation des Telecommunications (ANRT)]

Telecoms watchdog ANRT has published its Decision ANRT/DG/No.19 (dated December 26, 2014), which establishes the technical requirements and tariffs for access to Maroc Telecom's (IAM's) copper local loop and passive fiber infrastructure. The incumbent was given until January 20, 2015 to incorporate of the regulator's recommendations and publish a new wholesale offer. The new offer will be accessed by ANRT and an external consultancy, with Maroc Telecom given a deadline of January 30 to make the necessary amendments. In June 2014 the ANRT published the rules governing local loop unbundling (LLU) in Morocco. Under the new regulations, Maroc Telecom is required to provide colocation for third-party operators' equipment in its existing cabinets, install multi-operator cabinets for part of their future nodes and establish an active wholesale offer for third-party operators under a virtual unbundled local access (VULA) model. Although the incumbent telco was initially required to provide a technical and tariff wholesale offer for passive access to its fixed local loop by August 1, it was accused of failing to publish wholesale offers that cover shared cabinet access, full and partial unbundling and bitstream access on several occasions. (January 14, 2015) telegeography.com

Nepal



Acting Chairman: Mr. AnandaRaj Khanal
[Nepal Telecommunication Authority (NTR)]

The government of Nepal has formed a committee to carry out a feasibility study into the possible launch of the country's own communications satellite. Nepal was allocated an orbital slot by the International Telecommunication Union (ITU) as far back as 1984, and the ITU is now calling for the country to make a decision on the use of the slot by the end of 2015. The committee includes representatives from the Ministry

of Information and Communications (MoIC), the Nepal Telecommunications Authority (NTA) and Nepal Telecom (NT). The government plans to hire an outside consultant to examine the potential costs and likely business model for a new satellite platform. The MoIC has estimated that the satellite project will cost around NPR35-40 billion (US\$350-400 million) and that it will take around ten years to bring the satellite into operation after its launch. Meanwhile, the government has formed a taskforce to help create an overall ICT policy to bring together the numerous pieces of legislation currently regulating the sector. The study group brings together representatives from the MoIC, NTA and NT. There have been complaints that the sector has too many separate laws, which often overlap; these include the Telecommunication Act, Telecommunications Regulation and Broadband Policy, all formulated by the MoIC, plus the IT Policy 2011, Electronic Transaction Act and Electronic Transaction Regulation 2008, which were introduced by the Ministry of Science, Technology and Environment (MoSTE). Ananda Raj Khanal, director of the NTA said that once the ICT policy is drafted, the ministry will either replace or remove the irrelevant aspects of the existing policy and add up new points in the existing acts.

(January 21, 2015) Republica

Oman



Executive President: Dr. Hamed Al-Rawahi
[Telecommunication Regulatory Authority (TRA)]

Oman Broadband Company (OBC) has launched in cooperation with Oman Electricity Transmission Company (OETC) and the Telecommunications Regulatory Authority (TRA) a pilot project to provide high speed internet services using the fiber-optic cable infrastructure of electricity companies. Oman Tribune quotes Said bin Abdullah Al Mantheri, CEO of OBC, as saying that the project is being carried out in Hamam Al Sunub in the wilayat of Bausher, and involves the extension of fiber-optic cables between an Omantel mobile phone tower and an electricity transmission station. The network provides an internet connection of up to 40Mbps, compared to the previous speed of 3Mbps. State-owned OBC has been licensed by the TRA to provide the infrastructure in accordance with the plans and objectives of a new National Broadband Strategy (NBS), which was formally approved by the government in September 2013. (January 2, 2015) Oman Tribune

Pakistan



Chairman: Dr. Syed Ismail Shah
[Pakistan Telecommunication Authority (PTA)]

The national traffic from cellular to cellular mobile networks have witnessed 40 percent increase during last year and touched 345.7 billion minutes mark. The traffic from cellular to fixed networks remained the same at 2.9 billion minutes during the mentioned period and thanks to bundled packages and unlimited talk time offers from all operators. Similarly, the international traffic originating from cellular mobile networks has also increased to 2.8 billion minutes as compared to 1.9 billion minutes last year, registering 47 per cent growth during 2014. However, International incoming traffic on cellular mobile networks dropped to 5.6 billion



estimated minutes as compared to 9.7 billion minutes last year, depicting decline of 42 percent during 2014, a statistics issued by Pakistan Telecommunication Authority (PTA) revealed. As per details, cellular mobile operators remained actively involved in aggressive media campaigns to promote irrespective packages and introducing lower tariffs while telecom consumers remained ultimate beneficiaries of competition as they eventually got more minutes and SMS for a given amount of credit as a result of reduced tariff and lucrative offers. With regard to trend of national and international traffic to fix and mobile networks on cellular mobile networks, the data further revealed that this was due to introduction of International Clearing House (ICH) which increased the call rates to Pakistan due to upward revision of Access Promotion Contribution (APC) from 2.5 US cents per minute to 8.8 cents per minute, resulting into higher tariffs for calls to Pakistan and ultimately reducing the international incoming traffic on the cellular networks. While on the other hand, more outgoing calls from cellular networks translated into higher average outgoing minutes per subscriber per month which was 217 minutes at the end of 2014 as compared to 203 minutes at end of corresponding period last year with growth of 7 per cent. The total number of SMS exchanged over cellular mobile networks dropped to 301.7 billion during 2014 as compared to 315.7 billion last year, showing a decline of 4 percent. Similarly, the average SMS per cellular subscriber in a month also reduced to 180 as compared to 214 last year. The rising influx of smartphones coupled with use of mobile internet, Over the Top (OTT) and social media applications such as Whatsapp, Viber, Facebook messenger etc. which allow free messaging and calls has reduced the dependence of a subscriber on traditional mode of SMS resulting into reduced number of SMS exchanges over cellular mobile networks. (January 26, 2015) nation.com.pk

Pakistan's telecoms regulator has started looking for consultants to help sell two blocks of spectrum that were not sold in last year's auction, which raised US\$1.1 billion for the government. The Pakistan Telecommunications Authority (PTA) has invited request for proposals from consultants, which would be responsible for evaluating market demand for spectrum and determining the base price and timeframe, The Express Tribune said. The two slots – in the 850MHz and 1.8GHz bands — were not sold in last April's auction of 50MHz of 3G and 4G spectrum and a block of 850MHz airwaves from Instaphone, which went out of business. The 850MHz block had a reserve price of \$291 million and was only available to new operators, a restriction by the PTA. It didn't sell, nor did 10MHz of 1.8GHz spectrum, with a US\$210 million base price per 10MHz. The 2.1GHz frequency had a reserve price of US\$295 million per 10MHz, and all 30MHz were sold. The consultants also should assess what spectrum will be required in the future and when to hold new auctions. With the last auction less than a year ago, some operators said they have sufficient spectrum and that the market isn't yet prepared for another auction, which can be time consuming and costly. However, a number of foreign operators reportedly have expressed interest in the Pakistan market, and number five operator Warid Telecom will likely need additional spectrum since it's rolling out LTE service on its existing spectrum, the Express said. (January 23, 2015) mobileworldlive.com

Pakistan's mobile providers have begun the gargantuan process of re-verifying around 103 million pre-paid SIM cards under the government's National Action Plan to combat terrorism. Under the plan, Mobilink, Telenor Pakistan, Ufone, Zong and Warid have 90 days to re-verify all pre-paid SIMs using the Biometric Verification System (BVS) introduced last year, which uses a thumbprint scanner to confirm the identity of customers, and any un-verified SIMs left at the end of that period will be blocked. The interior ministry ordered the re-verification after it was discovered that terrorists involved in the December attack on a school in Peshawar had used biometric-verified SIMs for communication. Although the initial plan called for a 28-day deadline, the interior ministry compromised on 90 days, the industry having requested a 'realistic' eleven months to carry out the task. A joint statement from the nation's mobile providers noted that the industry has invested USD25 million in the provision of 60,000 BVS devices, as well as more than PKR22 billion (US\$215.35 million) spent on the government's previous SIM registration and verification programs, the '668' and '789' processes in 2009 and 2011 respectively. The statement also called for the government to support the operator's efforts to complete their 'extremely challenging task', requesting the 'cooperation of law enforcement agencies... [and the] provision of security at services centers and BVS retailers across the country where [the] re-verification process is underway.' Under the schedule set out by the Pakistan Telecommunication Authority (PTA), customers with three or more numbers registered to their Computerized National Identity Card (CNIC) must re-verify their SIMs by February 26, 2015 with any unverified SIMs from this category to be blocked on February 27. Users with fewer than three numbers registered to their CNIC have until April 13 to complete the process. (January 22, 2015) The Nation

The Pakistan Electronic Media Regulatory Authority (PEMRA) in a bid to promote latest trends and technologies for growth of private electronic media in Pakistan has approved relaxation of licensing regime for Mobile TV. The Authority in a press release said that opening up of private electronic media for new technologies would result in socioeconomic uplift of the country. The Authority has, therefore, approved Mobile TV (Content Provision Service) licensing on a case-to-case basis for five years' tenure, based on a PEMRA study report, by considering Mobile TV (Content Provision Service) as Value Added Service (VAS). Mobile TV License fee would be Rs 500,000/-. Scope of Mobile TV licensees would be delivery of PEMRA licensed TV channels and FM radio content. Companies registered with Securities and Exchange Commission of Pakistan (SECP) with minimum paid-up capital of Rs 3 million, having prior PTA (CVAS) registration and fulfilling other PEMRA legal formalities/eligibility criteria would be eligible to apply. PEMRA has decided that half of the gross revenue earned every year through this service shall be allocated for establishment of PEMRA Electronic Media Research & Development fund. Objectives of this fund would be: electronic media growth and development; funding research projects relating to electronic media; employment facilitation for electronic media students; internship stipends for electronic media students; organising electronic media workshops and seminars; facilitating industry for achieving digitalisation objectives and provision of loans for dissemination of electronic media services in remote



and under-developed parts of the country.

(January 19, 2015) dailytimes.com.pk

In what reflects a growing demand, conventional retailers and ecommerce portals have witnessed a significant jump in their smartphone sales in recent months. The retailers attribute the surge to the launch of third-generation (3G) and 4G mobile broadband services. Though the smart device market was already growing, industry sources said the recent launch of Long Term Evolution (LTE) or 4G services by China Mobile (Zong) and Warid Telecom further triggered sales as the number of people demanding and buying LTE-enabled handsets were increasing. "If we look at our post-3G statistics, there has been a significant jump in the sale of smartphones," said Saad Jangda, founder of Symbios.pk, one of the country's major ecommerce portals. The smartphone market had been growing for the last three years mainly because of Wifi services, said Jangda, adding that some vendors were selling 3G-enabled phones even before the auction. However, the demand for LTE phones increased significantly after Warid announced to launch its 4G services three months ago, according to Jangda. "About half of our customers who have LTE handsets were on Warid's network," said Jangda, without sharing the exact numbers. Though official data gives some idea about the increasing number of 3G users, it is not updated to reflect the current user base of the 4G network. Cellular mobile operators sold a combined total of 4.96 million 3G connections during the five-month period ending in November, 2014, but there were merely 1,500 LTE or 4G subscribers. This is partly because 4G services were just launched around the same time. "There are about 30,000 to 50,000 LTE subscribers as of now," said an official who requested anonymity – stating the figure as an unofficial estimate. Even the data compiled by the Pakistan Bureau of Statistics does not break down mobile phone imports by volume or type. However, it reflects the recent increase in shipments. The country's mobile phone imports increased to \$283 million during the five-month period ending in November, 2014, translating to a year-on-year increase of 6.15% compared to \$266 million of the corresponding period of last year. However, industry sources estimate that the country imports around 2 to 3 million handsets every month. According to them, smartphones account for more than 20% of the total shipment and this may increase with greater penetration of 3G and LTE services. "Customers demanding LTE handsets is the latest market trend, something that didn't exist six months ago," said Arsalan Siddiqui, a mobile phone retailer at Feroz Electronic Market, Saddar – Karachi's largest mobile phone market situated in the heart of the city's commercial hub. Siddiqui added it was not only LTE handsets since sales were growing in general, a view echoed by Kashif Faridi, another retailer in the same market. "The market is not just constricted to top-of-the-line phones," said Faridi. "The sheer size of the market produces customers for every phone." Revealing details about current trends, retailers at Karachi's electronic market said a bulk of the sales came from low-end devices with prices ranging from Rs10,000 to Rs20,000. Even new players, such as Lenovo, have earned a fair share in the market, they say. "Our high-end phones are mostly sold to the corporate clients," said Siddiqui. "But low-end mobile phones and local brands – such as Qmobile, Huawei, Voice and G5 to name a few – are selling like a hot cake, while Samsung, Sony and Apple are the main players of the

high-end market – a global statistic." While electronic market is dominated by mid to low price mobile phones, online retailers say their smartphone sales have gone up mainly in branded category. Those interested in buying new handsets are shifting to online purchase, according to Shayaan Tahir of Homeshopping.pk, a major ecommerce player in Pakistan. "The number of people who accessed our website through mobile phones increased from 20% of the total traffic to the current 35% in three months," he said. Tahir, however, added their customers are different from those who visit conventional markets that also deal in used handsets. Responding to a question, he said it was hard to estimate the size of the actual smartphone market or the actual growth in its size because of a huge grey market of used phones. In fact, the growing market of smartphones including the grey business is only a small chunk of the country's overall mobile phone market, according to Samsung Pakistan Head of Corporate Marketing Saadul Hassan. Our basic phones, including those that sell for \$20 are still selling very well because 70% of our mobile phone market is outside Karachi, Lahore and Islamabad," said Hassan.

(January 19, 2015) tribune.com.pk

Pakistan's cellular providers are unable to meet the 28-day deadline for the re-verification of the nation's pre-paid SIMs. The interior ministry ordered the re-verification after it was discovered that terrorists involved in the attack on a school in Peshawar last month had used biometric-verified SIMs for communication. With more than 140 million active SIMs in Pakistan, around 90% of which are pre-paid, the country's cellcos are expected to call for an extension of 150-200 days to carry out the order, saying that they will be unable to meet the current deadline without disconnecting vast numbers of innocent mobile users. Representatives from Mobilink, Ufone, Telenor, Warid and Zong are due to meet with the Interior Minister, the Minister of State for IT and Telecommunications and the head of the Pakistan Telecommunication Authority (PTA) to discuss the problem. An unnamed telecom official was quoted by the paper as saying: 'The operators will apprise the government of their inability to re-verify over 100 million pre-paid SIMs in such a short time. We will seek a realistic period for the purpose.' (January 5, 2015) dawn.com

Qatar



Executive Director: Mr. Graeme Gordon
[Communications Regulatory Authority (CRA)]

Pre-paid mobile service in Qatar is the lowest in the GCC, says an International Telecommunication Union (ITU) report. The monthly pre-paid mobile phone service in Qatar costs 0.26 percent of the gross national per capita income (GNI). In the index of most affordable countries, Qatar ranks fifth among 166 countries. The UAE ranks sixth where monthly pre-paid mobile phone service costs 0.28 percent of GNI. Kuwait (0.39 percent), Oman (0.43 percent), Saudi Arabia (0.65 percent) and Bahrain (0.73 percent) also were in the top 26 countries. The lowest mobile costs in the world were in Sri Lanka, at 95 cents, while the most affordable, according to GNI per capita, was in Macau. (January 12, 2015) thepeninsulaqatar.com



Saudi Arabia



Governor: Eng. Abdullah A. Al Darrab
[Communication & Information Technology
Commission (CITC)]

Saudi Telecom Co, the biggest phone operator in the oil-rich kingdom, plans to acquire companies to help expand data services in Saudi Arabia, according to its chairman Abdulaziz Alsugair. The Riyadh-based company plans to partner with or acquire at least five information and communication technology firms in the kingdom or abroad, he said in an interview at the World Economic Forum in Davos. STC has no plans to acquire other telecommunications companies, he said. "As for acquisitions, we will be proactive as it relates to the strategy to grow our ICT business both for commercial companies and government," Alsugair said, declining to give details about possible targets. "We expect that by the end of this year we will be probably acquiring some companies in Saudi Arabia and maybe smaller companies outside." Saudi Telecom earlier this week appointed Khalid bin Hussain Biyari as chief executive officer, a position that was left vacant since 2013. During this period, the company "was transformed from a slow moving organization, with lots of silos focusing on their departments, into an organization focused on customers," said Alsugair, who oversaw the change as chairman. The phone operator reported an 11% increase in 2014 profit to 11bn riyals (\$2.93bn). The mean estimate of 11 analysts was for a profit of 11.7bn riyals, according to data compiled by Bloomberg. (January 25, 2015) [gulfbase.com](#)

Etihad Etisalat (Mobily), Saudi Arabia's second largest mobile operator by subscribers, has announced its financial results for the twelve months ended December 31, 2014, reporting a 96.3% slump in net profit to SAR220 million (US\$58.6 million), down from SAR5.937 billion in 2013. According to a press release on the Saudi Stock Exchange's (Tadawul's) website, the negative development was mainly attributed to a decrease in revenues, in addition to 'an increase in operating expenses, higher depreciation and finance expenses and exceptional (one-off) items'. Further, the operator has highlighted that following a change in the timing of revenue recognition in respect to a promotional program, net income for previous quarters has had to be restated. In the twelve months to end-December 2014 revenues decreased to SAR15.824billion, down by 17.5% year-on-year, while gross profit was down by 27.0% to SAR8.903 billion from SAR12.193 billion in 2013. Earnings before interest, tax, depreciation and amortization (EBITDA) for 2014 amounted to SAR3.915 billion, a 53.7% slump on an annualized basis, when compared to the SAR8.450 billion reported in December 2013. CEO Serkan Okandan commented: 'During the fourth quarter of 2014, Mobily continued to be very active in consumer and business segments through the launch of various new products, services and tariffs enhancing customer experience. In 2015, and in line with our long term growth strategy, we will continue to invest in our mobile and fiber infrastructure, and focus on consumer and business segments.' (January 22, 2015) [telegeography.com](#)

Zain Saudi Arabia, a subsidiary of Kuwait-based telco Zain Group, has reported gross profit of SAR3.223 billion (US\$858 million) in the twelve months to end-December 2014, a 2.81% annual increase on the SAR3.135 billion

reported in 2013. The operator attributed the positive result to 'the rising demand for internet services, the decline in repair and maintenance expenses and the adjustment of the useful life of some of the company's assets'. Zain Saudi incurred net losses of SAR1.270 billion during the period under review, a figure which represents a 23.08% annual improvement on the SAR1.651billion loss reported for 2013. Earnings before interest, taxation, depreciation and amortization (EBITDA) for the twelve-month period also increased, by SAR210 million (or 24.0% year-on-year), to SAR1.100 billion. The company disclosed that its performance in 2014 fell short of its approved business plan and that it was also below one of its loan covenants; Zain Saudi stated, however, that it has secured a waiver for the breach and has agreed to revise covenant calculations for December 31, 2014 and March 31, 2015. In addition, the management has approved a revised business plan on January 20, 2015, subject to final approval. In operational terms, Zain Saudi reported that its internet service subscribers increased by 147% in the twelve months under review, while internet data traffic also increased, by 621% year-on-year.

(January 22, 2015) [telegeography.com](#)

Saudi Arabian fixed line and broadband operator Etihad Athleeb Telecom (GO Telecom) has published its financial results for the nine months ended December 31, 2014 (9M 2014), announcing a net loss of SAR22.52 million (US\$6 million), up from a reported net loss of SAR179.82million in the corresponding period of 2013; the telco said the improvement was due to a SAR117 million marketing agreement signed with domestic operator Saudi Telecom Company (STC) and rise in profits from the sale of international call cards. GO's gross profit however decreased by 32.2% year-on-year to SAR19.19 million, down from SAR28.31 million in 9M13, while operating loss was down by 29.4% to SAR228.58 million. Meanwhile, GO's revenues declined by 2% year-on-year to SAR13.7 million in 9M 2014, mainly due to a decline in broadband service revenues which was partly offset by 39% increase y-o-y in retail service revenues. Business sector revenues increased by 42% to SAR17.2 million in the nine months to end-December 2014, while interconnection revenues reached SAR15.9million, up 37.1% y-o-y. (January 22, 2015) [telegeography.com](#)

Saudi Telecom Company (STC) has posted a net profit of SAR2.442 billion (US\$650.1 million) for the three months ended December 31, 2014, a decrease of 32.6% from SAR3.623 billion in the year-ago period, despite the firm booking a SAR595 million gain from the transfer of land and buildings in the Al Faisaliah area of Riyadh to the government. STC attributed the decline in net profit to a 19% increase in operating expenses during the fourth quarter, mainly due to: the booking of a SAR399 million one-time impairment on its investments in Oger Telecom; a SAR164 million (10%) increase in depreciation and amortisation; and a 19.5% rise in general and administrative expenses. STC also booked a separate SAR164 million loss because of an accounting method change for its investment in India's Aircel Group. Net profit for the twelve-month period totalled SAR11.008 billion, up 11.2% from SAR9.897 billion in 2013. Revenue from services rose 5.2% year-on-year in the fourth quarter of 2014 to reach SAR11.848 billion, and for the twelve-month period turnover amounted to SAR46.108 billion, an increase of 1.1% from SAR45.605



billion the previous year. Earnings before interest, tax, zakat, depreciation and amortisation (EBITDA) for 4Q14 decreased 6.7% year-on-year to SAR4.201 billion, but for full-year 2014 rose 7.0% to SAR18.581 billion.

(January 20, 2015) telegeography.com

Syria



Minister: Imad Sabbouni

[Minister of Communications and Technology]

Cellcos MTN Syria and SyriaTel, which operate in the country under Build, Operate and Transfer (BOT) arrangements, have been awarded long-term freehold licenses by the Syrian Telecommunications Establishment (STE). According to report, the 20-year operating concessions take effect on January 1, 2015. No information was disclosed on the license fees, however. The previous BOT arrangements provided for revenue sharing between the cellcos and STE and stipulated that the two companies must hand over the networks to the regulator at the end of the arrangement period. In August 2014 MTN Syria revealed 'significant progress' in converting the BOT contract to a cellular license, with parent company MTN Group saying at that date that it anticipated 'the awarding of the license and termination of the related BOT contract' before the end of 2014, with an initial license fee expected to be between SYP18 billion and SYP25 billion (US\$99.6 million and US\$138.3 million). Previously, in September 2010 Communication and Technology Minister Imad Sabbouni said that SyriaTel and MTN were each expected to pay SYP25 billion for converting their BOT concessions. (January 9, 2015) The Syria

Tunisia



President: Mr. Hassoumi Zitoune

[National Telecommunication Commission (INTT)]

Stephane Richard, CEO of French telecoms giant Orange Group, has revealed that Moroccan cellco Medi Telecom (Meditel) will be rebranded to Orange in 2015, once the group acquires the controlling stake in the operator. Meditel is 40%-owned by Orange, while state-controlled financial institution Caisse de Depots et de Gestion (CDG) and Moroccan investment firm FinanceCom both have 30% stakes. However, according to a shareholder's agreement signed in 2012, both CDG and FinanceCom must transfer a 4.5% stake each to Orange, thus bringing the French telco's holding in the Moroccan network provider to 49%. Stephane Richard reportedly said that the procedure is still ongoing due to, among other things, the strained diplomatic relations between France and Morocco. Further, the CEO disclosed that the 'situation [in Tunisia] is not about to be settled', although he highlighted that the group would like to continue operating in the country and eventually take control of Orange Tunisia. Orange Tunisia is currently owned by the Tunisian state (51%) and Orange Group (49%), after the interim government of Tunisia confiscated the 51% stake in the operator held by members of overthrown president Ben Ali's family via the Investec Group in March 2011. A sale of the stake to Orange Group was blocked by the terms of Orange Tunisia's license, which prevented the French parent from taking full control of the company. In addition, Stephane Richard said that

Iraqi unit Korek Telecom is performing well although 'it is very unlikely that the group [will] increase its involvement and exposure in Iraq'. Orange Group holds an indirect 20.2% in the Iraqi cellco via a joint venture with logistics company Agility; Orange has the opportunity to exercise an option to increase its indirect stake in Korek to 27% in order to gain indirect control of the company. Meanwhile, the group's five-year business plan, which will replace 'Conquests 2015', will be presented to the public on 17 March 2015, La Tribune reports. The executive disclosed that the company fell short of achieving the 'Conquests 2015' objective of signing up 300 million subscribers (the group had 240 million users on its books at end-September 2014) by stating: 'we set the bar too high, the goal was ambitious.' (January 16, 2015) L'Usine Digitale

Turkey



Chairman & CEO: Dr. Tayfun Acarer

[Information & Communication Technologies Authority (BTK)]

Turkcell has confirmed that it has successfully integrated three-carrier HSDPA (3C-HSDPA) technology across its 3G network in 81 cities. The introduction of 3C-HSDPA technology, which the cellco claims is a world first, allows Turkcell users to experience downlink transmission speeds of up to 63.3Mbps over a 3G connection. Meanwhile, the network upgrade has also seen Turkcell deploy Dual Carrier (DC)-HSUPA technology, allowing for peak upload speeds of 11.5Mbps, twice the current transmission rate. CEO of Turkcell, commented: 'We are also getting ready for 4G as Turkey prepares to introduce this technology in 2015.' (January 2, 2015) telegeography.com

United Arab Emirates



Director General: Mr.

Mohamed Nasser Al Ghanim

[Telecommunication Regulatory Authority (TRA)]

The Telecommunications Regulatory Authority (TRA) has revealed statistics for the third quarter of 2014 on the nation's most popular mobile phone handsets, social networking platforms and applications websites. Investigating the current state of the market, the report reveals the market share of mobile phones in the UAE by manufacturer and model. According to the report, during the period between 1 July 2013 and 30 September 2014, 59% of handsets registered on the UAE's networks were Smartphones, a figure that has been constantly increasing overtime. In terms of Smartphone models, the iPhone 5s was the most commonly used Smartphone in the UAE comprising 3.7% of total handsets registered on UAE networks, a figure that increased by 22% during Q2 2014 and by 6% in Q3 2014. The report illustrates that the iPhone 5 was the second most popular Smartphone with 2.5% of the market share. The third most commonly used Smartphone was the Samsung S III (2.4%), followed by iPhone 4S (1.7%), Samsung S4 LTE (1.7%), Galaxy S Duos (1.5%), iPhone 4 (1.4%), Samsung Note 3 (1.2%), BlackBerry Bold 9900 (1.2%); Samsung S5 (0.7%). Commenting on the review, Mohamed Nasser Al Ghanim, Director General, TRA said, "The report illustrates a number of interesting trends emerging in the UAE's mobile handset market. It also demonstrates the dynamic nature of consumer patterns in relation to

handset choices. In relation to Smartphones, the iPhone 5s recorded an increased in market share during the third quarter of 2014, continues to be the most famous handset in the UAE on Q3-2014. The market shares of the, Samsung S5 LTE and Samsung Note 3 increased whereas the iPhone 4s, iPhone 4, Samsung S3, Galaxy S Duos, and BlackBerry Bold 9900 fell. The report indicates that 45% of all handsets registered on UAE networks were manufactured by Nokia, although this figure has been declining over time. This figure decreased by 5% during the last two quarters. This was followed by Samsung (22.6%), Apple (10%), BlackBerry (6.1%), Sony (1.1%), HTC (1%), then the newly emerged manufacturer Lenovo (0.9%) and Huawei (0.8%). Although the growth has shrunk, Samsung and Apple recorded increases in their market shares in Q3 2014. In terms of specific handset models, the iPhone 5s was the most popular mobile handset in UAE in Q3. The Nokia 105/1050 (3.4%) was the second most popular handset followed by the Nokia 101/1010 (2.9%), both iPhone 5 and Nokia 1280/1282 at (2.5%), the Samsung S III (2.4%), Nokia E5 (2%), Nokia X1 (1.9%), both iPhone 4S and Samsung S4 LTE at (1.7%), Galaxy S Duos (1.5%), iPhone 4 (1.4%), Samsung Note 3 (1.2%), both BlackBerry Bold 9900 (0.8%) and Samsung S4 at (0.8%); and Samsung S5 LTE (0.7%). Without exception, all the feature phones market shares such as Nokia X1, E5 and 1280/1282 have declined in Q3 2014. The report also provides information on the most popular mobile operating systems used in the UAE. The use of Symbian is declining over time and the Android was the most commonly used operating system in the UAE as of Q3-2014. The market share of iOS is steadily increasing while RIMs (the operating system for Blackberry) is continuously decreasing. During the period from July 1, 2014 to September 30, 2014, users of Smartphones and fixed Internet services in the UAE visited various applications websites. Apple iTunes was by far the most commonly visited applications website, followed by Samsung Apps, Android Applications, Nokia OVI while Blackberry App came last. The number of visits to BlackBerry and Nokia applications websites has been declining over time while the volume of visits to Apple iTunes and Samsung is progressively increasing. In terms of social media, UAE Smartphone and fixed Internet users made a total of 28 billion visits to social networking websites during the period July 1, 2014 to September 30, 2014. Visits to Facebook accounted for 88% of total visits to social networking sites, followed by Twitter with 9% of visits, then LinkedIn, Maktoob and MySpace. (January 5, 2015) tra.gov.ae



REGULATORY ACTIVITIES BEYOND THE SAMENA REGION

Regulatory Updates

Australia



Australia's two largest cellcos by subscribers, Telstra and Optus, have started the New Year by detailing their plans for 4G rollouts using the 700MHz spectrum band, with such frequencies now available to both on a nationwide basis; the two operators secured spectrum in the band via auction back in May 2013. For its part Optus announced that, following the official release of 700MHz spectrum by the Australian Communications and Media Authority (ACMA), it has begun an 'aggressive expansion program', with more than 270 LTE-700 mobile sites across capital cities and regional centers having been switched on yesterday. Looking ahead, the cellco has said it aims to switch on more than 1,500 additional LTE-700 base stations in metropolitan and regional locations during January 2015. As a result of such expansion, Optus has said it expects to broaden the reach of its existing 4G network, and aims to have 90% of the Australian population within its LTE footprint by April 2015. Meanwhile, mobile market leader Telstra has said some 600 towns and suburbs around the country will benefit from the higher speeds offered by its LTE-Advanced (LTE-A) network. Such expansion is in addition to the operator's previously announced plans to expand coverage

of its '4GX'-branded LTE-A services, with it having revealed last November that it would extend coverage to all capital Central Business Districts (CBDs) and 50 'regional locations' at the start of January 2015 when 700MHz spectrum was made available to it on a nationwide basis.

(January 2, 2015) Lifehacker Australia

Bahamas



Telecoms watchdog the Utilities Regulation and Competition Authority (URCA) has set out its draft plan for 2015, marking out the liberalization of the wireless sector as its primary focus for the year. To that end, the regulator noted that it would not begin any 'significant' new projects in 2015, except those related to cellular liberalization. The government issued its request for proposals (RFP) in November 2014, and would-be bidders have until February 11 to apply for the Bahamas' second mobile license, with a winner to be selected early in Q2 2015. During the first quarter, URCA plans to develop regulations for infrastructure sharing and review interconnection rules and charges as well as looking into potential national roaming rights for network operators. The watchdog also intends to ensure that mobile number portability (MNP) is available from as soon as the new operator launches and will reconstitute



the Number Portability Working Group to include all the previous participants and the new provider. Following the allocation of the new license, URCA plans to consider whether the incumbent mobile operator, the Bahamas Telecommunication Company (BTC) should be designated as having significant market power (SMP) and have additional pricing regulations imposed upon it. Further, the regulator will review the current Mobile Party Pays (MPP) charging scheme, under which calls from mobile phones are charged on a Calling Party Pays (CPP) basis, whilst calls from a fixed line to a mobile are charged on a Receiving Party Pays (RPP) basis.

(January 15, 2015) telegeography.com

Belarus



Belarus has released a market update on its planned implementation of digital terrestrial television (DTT), saying that it is on course to complete the full switchover to digital broadcasting by May 15, 2015. Further, the country also updated on progress in DVB-T2 take-up, noting that the service is 'growing in popularity'. At a press conference earlier this month, Vadim Vladimirovich Shaybakov, the deputy director general of state-owned incumbent operator Beltelecom, revealed that as of January 1, 2015 DVB-T coverage had been extended to 98.1% of the country, while DVB-T2 – which was launched by Beltelecom in October 2013 – now reaches over 40% of Belarus. The telco has so far installed 95 DTT transmitters and is set to add another 70 this year. Beltelecom's service is branded 'Zala' and offers packages ranging from 26 channels up to 44. The operator had signed up 46,000 Zala subscribers by the start of the year and expects to expand DVB-T2 coverage to around 80%-90% of Belarus by the year end. (January 14, 2015) Broadband TV News

Cameroon



The Ministry of Posts and Telecommunications of Cameroon has revealed that the country's first internet exchange points (IXPs) will be ready in the cities of Yaounde and Douala by June. ICCSOFT has been selected to install the infrastructure under the supervision of the National Agency for Information and Communications Technologies (ANTIC). Minister of Posts and Telecommunications, Jean Pierre Biyiti bi Essam, said that the two IXPs will help to reduce the cost of internet services in Cameroon and reduce the nation's reliance on foreign networks. The cost of the project has not been disclosed. (January 19, 2015) BiztechAfrica

Chile



After a favorable court ruling, the government of Chile will continue the award process for the 700 MHz band for 4G-LTE deployment in the country. The mobile company Telestar had tried to invalidate the tender for the 700 MHz band, which previously awarded frequency blocks to the companies Entel, Movistar and Claro. (January 9, 2015) rcrwireless.com

Transport and Telecommunications Minister expects the winners of last year's 700MHz spectrum auction to be allocated their frequencies in the next four to six months, now that the legal opposition to the award of the concessions has been quashed, the official said in an interview. Minister explained that once the three

winners – Entel, Claro and Movistar – pay the initial fees to the treasury it should take less than six months for the government to draw up and publish the necessary documents. Under the terms of the licenses the trio has 18 months to launch services using the 700MHz band, and the official expects the frequencies to be in use by 2017. (January 8, 2015) Diario Financiero

China



The telecom sector generated revenues of 1.15 trillion yuan (€162 billion) in 2014, up 3.6% on the previous year, according to figures published by the Ministry of Industry and Information Technology (MIIT). Despite the big numbers, growth is slowing. Revenue growth last year was 5.1 percentage points lower than in 2013, the MIIT said. Mobile revenues accounted for almost three quarters of the total at CNY859.94 billion, an increase of 3.3% on 2013. Fixed-line revenues grew by 4.3% to CNY294.17 billion. "In 2014 the industry's reliance on voice services weakened," the MIIT said in a statement. Non-voice revenues accounted for 58.2% of the total, up from 53.2% the previous year. The growth was driven by an increase in mobile broadband users, which now account for 45.3% of all mobile customers, the take-up of fiber-based broadband services, and IPTV growth: 33.64 million households had IPTV services at the end of last year. Mobile subscribers in China reached 1.29 billion last year, taking penetration to 94.5%, the MIIT reported, backing up figures published by the operators themselves. Fixed-line customers fell by 17.6 million during the course of the year to 249 million. As a result, the total number of telephone subscribers across China stood at 1.54 billion at the end of December.

(January 22, 2015) totaltele.com

Cote d'Ivoire



In a document published on December 29, 2014 Ivorian telecoms regulator ARTCI has confirmed that it has approved the sale of Moov Cote d'Ivoire, the country's third largest mobile operator by subscribers, to Maroc Telecom, as part of a larger transaction announced last year (see below). According to the ARTCI document, going forward Maroc Telecom will hold a direct 84.99% stake in Atlantique Telecom Cote d'Ivoire (Moov); the identity of the minority shareholder has not been disclosed. In November 2013 French media group Vivendi signed a definitive agreement to sell its controlling 53% stake Maroc Telecom to UAE-based Etisalat, which owned Moov Cote d'Ivoire via its Atlantique Telecom unit. In May 2014 Etisalat completed the Maroc Telecom takeover, before agreeing to sell its Atlantique Telecom subsidiaries (including Moov) to Maroc Telecom as part of an operational overhaul.

(January 9, 2015) telegeography.com

Ecuador



Ecuadorian President has partially vetoed the country's new Telecommunications Act which was approved by the national assembly on December 17, by lodging a total of 24 objections, notably querying the dominant market share threshold for the imposition of a new tax on telecoms/broadcasting companies. Under the legislature-approved version of the law, private sector companies which exceed 30% market share in their operating sector must pay an additional percentage of their profits to the government, but Correa argued that the threshold should be 35% as



per earlier proposals. America Movil-owned Conecel (Claro) controlled over 68% of the Ecuadorian mobile market at end-September 2014, but Telefonica-backed Movistar Ecuador was also close to the lawmakers' latest proposed 30% tax threshold with a share of nearly 28%; meanwhile, in the pay-TV market DirecTV (which is in the process of being taken over by US giant AT&T) would be subject to the new tax whether or not President Correa's objections are upheld, with a segment market share approaching 40%. According to the wide-ranging telecoms bill, the central government shall be responsible for the administration, regulation, management and control of telecommunications and radio spectrum; the Ministry of Telecommunications & Information Society will act as lead agency, and the newly created Telecommunications Control & Regulation Agency (Agencia de Regulacion y Control) will perform control and management functions (currently handled by the Superintendencia de Telecomunicaciones [Supertel]), replacing an existing regulatory system administered by dual regulators Conatel and Senatel. Other objections to the bill lodged by the President relate to the issuing and length of licenses, the regime for issuing fines and the powers of the Agencia de Regulacion y Control. The national assembly will discuss the President's objections and rule thereon within 30 days. (January 22, 2015) Telecompaper

El Salvador



Telecoms regulator SIGET has awarded a tender for the implementation and operation of number portability (NP) to Mediafon in association with local company imCard. The tender for an NP administrator was launched on 24 November and closed on December 22, with SIGET opening bids on January 6, 2015. After evaluating the legal, economic, technical and financial criteria of the submitted bids, it was determined that Mediafon-imCard met all the necessary requirements to ensure the quality and security of the service, which will be free of charge to the country's consumers. Mediafon is responsible for NP systems in Russia, Moldova, Azerbaijan, Kazakhstan, Lithuania, Tunisia and Georgia. (January 27, 2015) telegeography.com

European Commission



The European Commission denied an application by Spain's competition authorities to review Orange's proposed purchase of Jazztel. In November, the Comision Nacional de los Mercados y la Competencia (CNMC) petitioned Brussels to allow it to assess Orange's €3.4 billion acquisition of Jazztel under Spanish competition law. "In the present case the Commission concluded that, given its extensive experience in assessing cases in this sector, it is better placed to deal with the transaction and ensure consistency in the application of merger control rules in the fixed and mobile telecommunications sectors across the EEA (European Economic Area)," said the European Commission, in a statement. "The Commission will nonetheless continue to cooperate closely with the Spanish competition authority in the assessment of the case." France-based Orange made a €13-per-share offer for Jazztel in September, valuing the Spanish fixed-line provider at €3.4 billion. Integrating Jazztel will strengthen Orange's position in Spain by enabling it to offer multi-play services that rival incumbent operator Telefonica. In December, Brussels opened an in-depth investigation into the deal's potential impact on competition. Last week, the Commission pushed back its deadline to make a decision on the merger after the investigation was temporarily suspended pending receipt of further

information from Orange. It is due to make its decision by April 30. (January 26, 2015) totaltele.com

European legislators are unlikely to support a European Union (EU)-wide ban on positive price discrimination, which allows operators to provide unlimited free access to certain services such as Facebook, Wikipedia and music streaming services. Opinions on the impact on competition of positive pricing discrimination, including zero-rating (the practice of offering toll-free data for certain applications or services), are divided and a blanket ban is unlikely to garner support from all member states. Supporters of zero-rating argue that the practice has a positive impact on competition and innovation, whilst providing greater opportunities for low-income users. Several member states and consumer rights activists, however, claim that positive price discrimination breaches net neutrality by providing privileged access to certain services and hamstringing competitors. Net neutrality proposals put forward by Latvia suggested that the matter be left to member states to handle internally: 'The issue of positive price discrimination could be left outside the scope of this instrument... this would allow each member state to decide whether to ban price discrimination at a national level or leave the assessment of such practices to general competition law.' (January 23, 2015) Reuters.com

The European Commission (EC) has launched a public consultation on finding the most effective future usage strategy for the 700MHz (694MHz-790MHz) frequency band; running until 12 April 2015 in this it seeks views on the options proposed in a September 2014 commissioner's report (the Lamy Report). In a press release yesterday, the EC notes that at present, the 700MHz band is mostly used for broadcasting, but wireless broadband providers are keen to secure the future use of this band. Specifically, the 470MHz-790MHz Ultra High Frequency (UHF) TV broadcasting band is currently used across the European Union (EU) for digital terrestrial television (DTT, mostly via rooftop antennas and free-to-air) and wireless audio equipment, but lower-band frequencies are becoming particularly appropriate to provide wireless broadband at higher speeds and with better geographical coverage. The International Telecommunications Union (ITU) – the United Nations body responsible for ICT issues – agreed in 2012 that the 700MHz band could be used either for broadcasting or for mobile services in the EU as of 2016, depending on Member State choice. The EC's press release states that to further develop the EU Digital Single Market, the EU needs to seize this opportunity and develop a coherent position on the future use of the UHF band. The Commission is seeking views from the industry, academia and users of TV and/or wireless broadband services on two options proposed in the Lamy Report:

Option 1:

- the '2020-2030-2025' formula with the aim of enabling Europe to fulfill Digital Agenda for Europe broadband targets in three steps, while giving broadcasting a clear path to invest and develop further;
 - the 700MHz band should be dedicated to wireless broadband across Europe by 2020 (+/- two years);
 - regulatory security and stability for terrestrial broadcasters in the remaining UHF spectrum below 700MHz to be safeguarded until 2030;
 - a review should be held by 2025 to assess technology and market developments;
- Option 2 is labeled the 'flexibility option', which proposes downlink-only wireless broadband use of UHF broadcasting spectrum in the 470MHz-694MHz band.



Thereby, broadcasting use would always have priority, while specific channels or locations not used for terrestrial broadcasting could be made available for downlink-only wireless broadband applications depending on national circumstances. (January 13, 2015) telegeography.com

France



The competition authority, the Autorite de la Concurrence, has opened ex officio proceedings to review the conditions surrounding the divestiture of Numericable's assets in the French overseas territories of Reunion and Mayotte. In October 2014 the anti-trust authority granted a conditional approval to Numericable's proposed acquisition of French telco SFR. In order to gain the regulator's approval, the combined SFR-Numericable entity has to divest its mobile operations in Reunion and Mayotte, as the overlapping activities of SFR and Numericable in the two territories would give the enlarged entity significant market power in the Indian Ocean (66% market share in Reunion and 90% in Mayotte). While the sale process of Outremer Telecom (Reunion) and Outremer Telecom (Mayotte) is currently underway with several bids for the assets already being placed, the Autorite de la Concurrence has expressed its concerns in regards to the conditions surrounding the divestiture and in particular, the recent increases in the 'RIFE 2h', 'Trio', 'Jeune', 'Next', 'On' and 'Next2 Illimite' mobile tariffs in the two French overseas territories. To that end, the anti-trust regulator decided to assess whether the January 2015 hike in mobile subscription fees is in compliance with Numericable's commitments to 'preserve Outremer Telecom's viability, market value and competitiveness until the divestiture'. If Numericable is found to have failed to meet its obligations, Autorite de la Concurrence could issue fines of up to 5% of the company's turnover in France. (January 23, 2015) telegeography.com

Telecom regulator has asked Free Mobile to prove that its 3G network meets its coverage obligation. In a statement on Monday, ARCEP said it requires the mobile operator to provide a map showing its 3G network coverage. The regulator will carry out field tests over a period of several weeks in order to check the information supplied by Free, it said. Free Mobile, which is owned by broadband provider Iliad, became France's newest mobile network operator when it launched services three years ago. Initially, it provided coverage mainly through a roaming agreement with Orange, but it has been working on the build out of its own network. The spectrum license it acquired in 2010 requires Free to cover at least 75% of the population of metropolitan France with its own 3G network by January 12, 2015; that is, Monday. "ARCEP will verify the accuracy of the coverage map supplied by Free Mobile," the regulator said, adding that it has carried out the same checks on all operators with coverage requirements in the past. "Once these verifications are complete, ARCEP will be able to assess whether Free Mobile is meeting its coverage obligation," it said.

(January 13, 2015) totaltele.com

The government has published its Order No.PRMX1430559A which modifies the National Table of Frequency Distribution (Le Tableau National de Repartition des Bandes de Frequences [TNRBF]) and assigns spectrum in the 700MHz band, hitherto attributed exclusively to Conseil Superieur de l'Audiovisuel (CSA), to telecoms watchdog ARCEP. The two regulators will have equal rights over the spectrum band, which is currently used for Digital Terrestrial Television (DTT) transmission, from December 1, 2015

until June 30, 2019, with transitional provisions guiding the migration of broadcasting services to other bands applicable during that period. From July 1, 2019 ARCEP will become the exclusive assignee of the 703MHz-733MHz/758MHz-788MHz blocks. In June 2013 officials in Elysee, Matignon and Bercy confirmed President Francois Hollande's decision to allocate frequencies in the 700MHz band to telecom services. Addressing the concerns of DTT broadcasters that the spectrum reallocation would interfere with plans to migrate the DTT platform to MPEG-4 AVC by 2015 and DVB-T2 by 2023, President Hollande said in October 2014 that France needed an audiovisual sector that could broadcast broadly, effectively and securely, adding: 'This is the objective of transferring the 700MHz band to the telecom sector. The state will ensure that the available resources are guaranteed for broadcasting'. In December 2014 the government announced that the planned auction for Long Term Evolution (LTE)-suitable frequencies will be initiated in the second half of 2015, with Prime Minister Manuel Valls clarifying: 'The actual transfer will take place between October 1, 2017 and June 30, 2019, with the exception of few areas where [the frequencies] could be used by April 2016'. All four domestic cellcos – Orange France, Numericable-SFR, Bouygues Telecom and Iliad (Free) – are expected to bid in the auction. (January 12, 2015) telegeography.com

Gabon



The government has approved long-rumored plans to merge Gabon Telecom and Moov Gabon the two local subsidiaries of Maroc Telecom and its controlling shareholder Etisalat, paving the way for the creation of a new, enlarged operator. In November 2013 French media group Vivendi signed a definitive agreement to sell its controlling 53% stake in Gabon Telecom's parent Maroc Telecom to UAE-based Etisalat, which already owned Gabon Telecom's cellular market rival Moov Gabon. In May 2014 Etisalat completed the Maroc Telecom takeover, before agreeing to sell its Atlantique Telecom subsidiaries (including Moov Gabon) to Maroc Telecom as part of an operational overhaul. With 35.7% (Gabon Telecom) and 18.6% (Moov) of the market, respectively, the combined entity will leapfrog market leader Airtel Gabon (37.3%) in the subscriber stakes. In addition, the Gabonese authorities are keen to fill the void by licensing a mobile virtual network operator (MVNO), with Communications Minister reportedly endorsing the plans. As such, France's Orange Group has already been approached 'discreetly' with a view to gauging its interest in a virtual operator concession. With a wireless population penetration rate of more than 190%, Gabon is unlikely to see much interest in a tender for the vacant license, potentially making the introduction of an MVNO a more viable option.

(January 8, 2015) Jeune Afrique

Germany



German telecoms regulator, the Federal Network Agency (FNA, also known as Bundesnetzagentur or BNetzA) intends to auction off spectrum in the 700MHz, 900MHz, 1500MHz and 1800MHz bands for electronic communications services (mobile broadband) in the second quarter of 2015, it has been revealed. The federal government and the federal states agreed on the inclusion of the 700MHz spectrum (known as the 'second digital dividend') at the Conference of Minister Presidents on December 11, 2014, but the terms of the auction have reportedly caused consternation for a number of Germany's smaller players. Fourth-placed



mobile operator Telefonica Germany (O2) and Stuttgart-based 2600MHz spectrum holder Airdata are among the interested parties that have criticized the FNA for its 700MHz frequency auction plans, suggesting that the closing-off of the market and financial gain for the government are the watchdog's only concerns. The minimum bid values for the spectrum have increased exponentially since sub-1GHz former broadcast frequencies (800MHz, 'first digital dividend') were last auctioned in 2010, effectively blocking new providers from entering the market. However, rival operators Telekom Deutschland and Vodafone Germany are said to have broadly welcomed the plans. (January 15, 2015) VPRT.de

Georgia



The Georgian National Communications Commission (GNCC) has confirmed that it has sold a 4G spectrum license to Mobitel (Beeline) for around GEL50.782 million (US\$26.9 million). The Vimpelcom-backed cellco has secured 2x10MHz blocks in the 800MHz band, after agreeing to pay the license fee of GEL48.364 million and a GEL2.418 million bidding fee. Under the terms of the concession, Mobitel is required to provide 4G coverage to 30% of settlements with a population of less than 5,000 by February 1, 2016, with this condition rising to 50% by February 1, 2017, 70% twelve months after that and finally 90% of all settlements with less than 5,000 inhabitants by February 1, 2020. The regulator also noted that it has begun to modify radio frequency spectrum licenses that have already been issued and/or are temporarily owned by operators, in order to allow for the provision of 4G services. This includes the permits owned by Magticom, Geocell and Mobitel for the usage of harmonized radio frequency ranges (800MHz/900MHz/1800MHz/2100MHz). The duration for the modified technology and service neutral licenses is 15 years.

(January 7, 2015) telegeography.com

Ghana



The National Communication Authority (NCA) is set to introduce Ghana's first unified access service license onto the market to enable mobile network operators and broadband wireless service providers to participate in the fixed telephony markets. This will make Ghana the fourth country in Africa after Kenya, Nigeria and Uganda to grant converged or unified access service licenses. The authorization fee for the unified access license has been set at GH600,000. The B&FT understands the decision by the NCA to veer into the unified licensing regime is to unlock growth by allowing operators to choose technology most suited to their needs, and thus the NCA allowed mobile phone operators an opportunity to venture into the fixed-line environment as well as value added services. More so, technological advancement has blurred the old distinction between fixed and mobile services, which has informed the regulator to open the market and allow all telecom operators to participate in the different segments of the market in line with the country's National Telecom Policy. Hitherto, the NCA granted separate fixed, mobile and broadband licenses to businesses with an eye on the telecom sector. "The decision to authorize the network operators to provide fixed telephony services in addition to mobile telephony will achieve a number of the objectives outlined in the National Telecom Policy. "An objective of the policy is to fully open competitive markets for all telecommunications services, to ensure Universal Access Service, and to promote efficient and effective regulation of the telecommunications industry on a transparent, technology-neutral and

non-discriminatory basis," the NCA said its statement of intention issued last week. Currently, there are six telephony operators in Ghana's market space, with Airtel and Vodafone as the only fixed-line operators with a combined market of 261,000 subscribers as at October last year. The mobile telephony subscriber market is now more than 30 million in a country with an estimated population of about 26.5 million. The NCA, which has now opened bids for the license, says the authorization will be granted to mobile network operators which express interest in the granting of fixed access services for the unexpired term of the duration of their existing Cellular Mobile License to deploy Fixed Service and other value added services to customers. "Phase Two is where the Authority will renew by way of substituting the existing individual Fixed and Cellular Mobile Licenses with a Unified Access Service License," the NCA added. However, the NCA says broadband wireless providers that want to acquire the unified access license will be granted the authorization after they have met the roll-out conditions contained in their licenses.

(January 26, 2015) ghanaweb.com

Parliamentary Select Committee on Communication has reportedly requested that the National Communication Authority (NCA) re-engage in talks with operators on the award of an Interconnect Clearing House (ICH) license, after several meetings between the operators and the regulator on the proposal have ended inconclusively, Ghana Web reports. According to NCA, the current peer-2-peer interconnect system 'is complex to manage, expensive to implement by new entrants, and prone to link-failure as it has caused major network outages over the last years'. The regulator pointed out that an ICH, set to be established in May 2015, would have a positive effect on wholesale interconnection rates, as it will mitigate the rising trends affecting wholesale interconnection tariffs. However, operators are opposing the award of an ICH concession, which will be granted by 7 February 2015 for a term of ten years subject to renewal, describing it as an 'imposition and interference in their operations'. Conrad Nyur, director of Corporate and Regulatory Affairs division at Wireless Application Services Providers Association of Ghana (WASPAG), disclosed that the potential establishment of an ICH will increase the cost of doing business for value added service (VAS) providers. (January 13, 2015) telegeography.com

GSMA



The GSM Association (GSMA) has issued a statement warning the Indian Telecom Commission of the ramifications of its decision to increase reserve prices for 3G spectrum and to limit the amount of spectrum available. Although likely to yield greater returns for the government in terms of licensing fees, the higher prices will hamper the operators' ability to invest in the deployment and expansion of their networks, reducing the potential impact of the technology as a catalyst for economic growth. GSMA's Chief Regulatory Officer Tom Phillips explains: 'It is well documented that mobile broadband has the potential to deliver substantial socioeconomic benefits. According to GSMA Intelligence, in 2014 alone, the overall economic impact of mobile technology in India amounted to approximately US\$115 billion in value-added terms, representing an economic contribution of around 5.5% of the country's GDP last year. Looking ahead, mobile broadband is set to grow exponentially throughout India, driving digital inclusion and economic growth for India's consumers and businesses. By the end of 2014, 3G coverage reached 61% of India's population and it is set to escalate substantially to 90% by 2020...However,



the GSMA cautions that these forecasts will only become reality if mobile operators have the capacity to make the necessary network investment in India.'

(January 23, 2015) telegeography.com

Haiti



Telecoms regulator CONATEL has announced that the introduction of mobile number portability (MNP) services in the country has been pushed back to November 1, 2015. Jean Marie Guillaume, Director General of CONATEL, disclosed that the move was prompted by delays in delivery of equipment, now scheduled to arrive in Port-au-Prince in May 2015. The official pointed out that the new launch date also takes into account 'the installation time of the platform and the implementation of technical and administrative procedures'. CONATEL has been in consultation with operators since early 2008 to work towards the introduction of MNP services. The regulator held seminars on MNP for operators in January 2009, but it was not until October 2013 that CONATEL awarded a contract for the implementation of the system to PortingXS. The watchdog submitted a draft MNP regulation to establish the technical procedures for the introduction of the MNP service in December that year, and the document was understood to be under discussion until December 25, 2014. (January 8, 2015) Haiti Libre

Hungary



The National Media and Info communications Authority of Hungary (NMHH) has published market data for the month of November 2014, revealing that broadband subscriptions have continued to rise, with the total number of fixed broadband subscriptions reaching 2.42 million at November 30, 2014, up from 2.39 million at the end of September. Fiber uptake continues to rise with connections climbing to 388,528, up from 380,774 at the end of the third quarter, whilst cable subscriptions have reached 1,017,496, of which 543,049 utilize DOCSIS 3.0 cable technology – up from 1,001,955 cable subscriptions at end-September, of which 513,889 were DOCSIS-based. DSL connections increased slightly in the two month period by 2,847 to reach 781,900. The NMHH claims that all data is based upon figures provided by the main broadband market players; Magyar Telekom remains the top-placed provider with an estimated 35.7% market share as at 30 November, followed by UPC (21.9%) and DIGI (14.1%), with various smaller players occupying the remainder of the market.

(January 9, 2015) telegeography.com

India



India has determined spectrum bands to be used by the Ministry of Defense (MoD), paving the way for the refarming of 3G frequencies currently used by national security agencies. After an eight-year dispute, the government has determined nine spectrum bands up to the 40GHz range to be used exclusively by the MoD. Under the re-allocation process, the MoD will vacate 15MHz of 2100MHz spectrum in exchange for airwaves in the 1900MHz band. The government has ruled out any sale of the additional 3G spectrum in 2015, however, with Telecom Minister Ravi Shankar Prasad noting that although the swap has been agreed, the actual process 'will take some time.' Telecom industry stakeholders and, indeed, sector regulator the Telecom Regulatory Authority of India (TRAI) had called

for the spectrum currently occupied by the MoD to be included in next month's sale and allocate it to users at a later date, once it becomes available. However, officials from the Department of Telecommunications (DoT) said that the process would take more than a year: 'If we were to auction airwaves that currently we do not have and the swap with [the] defense [ministry] stretches beyond a year, the industry will start clamoring for refund and pro-rata reduction in prices or even extensions, as they are doing now.' (January 22, 2015) The Economic Times

Telecom Commission has ignored the recommendations and warnings of sector watchdog the Telecom Regulatory Authority of India (TRAI) and set a base price for 3G frequencies at INR37.05 billion (US\$599.7 million) per MHz of pan-India spectrum. The TRAI last week criticized the government's decision to limit the availability of 2100MHz frequencies to just 5MHz across 17 circles as well as its refusal to heed the regulator's recommendations to set the base price much lower, at INR27.2 billion. The government's decisions have also raised the ire of industry stakeholders, which have pointed out that if operators are forced to pay more for spectrum rights, they have fewer funds to invest in rolling out their networks, limiting coverage and negatively impacting quality of service (QoS).

(January 20, 2015) The Economic Times

Indian telecoms minister Ravi Shankar Prasad has ruled out the possibility of merging ailing state-owned telcos Bharat Sanchar Nigam Ltd (BSNL) and Mahanagar Telephone Nigam Ltd (MTNL). Prasad added, however, that the government would continue to work on rebuilding BSNL and MTNL individually, but did not provide details of any immediate plans. Whilst a merger between the two telcos to create a single entity with a pan-Indian footprint has long been considered one of the surest ways to pull the two loss-making operators out of the red, the process of unifying the duo has been considered too complicated. The proposals to combine the two operators first surfaced in 2002, but it was not until 2011 – after BSNL recorded its first ever loss in the year to end-March 2010 – that the scheme was brought to the fore, although difficulties in carrying out the merger have seen the suggestion shelved and re-introduced several times. (January 8, 2015) India Infoline

The Telecom Regulatory Authority of India (TRAI) has recommended that the Universal Service Obligation (USO) levy, which forms part of the annual license fees paid by telecoms operators, should be lowered to 3% of adjusted gross revenue (AGR) from the current 5%. The providers currently pay 8% of their AGR to the government as a license fee with 5% going to the USO Fund and the remaining 3% contributing to state coffers. The TRAI's proposed change will reduce the overall burden on providers to 6% without impacting proceeds to the government. The TRAI has also recommended that earnings from non-telecom activities such as financial investments and property rents should be excluded from calculations of AGR. Under the regulator's proposed policy, the AGR calculations will take into consideration taxes paid by the telco, as well as receipts from the USO Fund and non-telecom revenue streams in an effort to cut the license fee burden on telcos. The methodology for AGR calculation is currently the subject of a major dispute between India's tax authorities and the nation's telecom service providers, after an audit claimed that five operators – Bharti Airtel, Vodafone India, Idea Cellular, Reliance Communications (RCOM) and Tata Teleservices (TTSL) – had under-stated their revenues for the 2006-2007 and 2007-2008 periods. The operators in question



claim that the additional turnover was from non-telecoms sources and therefore not subject to the levy, whilst the Department of Telecommunications holds that the revenue should be included in the AGR, arguing that the turnover would not have been generated without the operators' telecom licenses or spectrum.

(January 7, 2015) Live Mint

India's Telecom Commission has rejected the Telecom Regulatory Authority of India's (TRAI's) price recommendations for 3G spectrum in the upcoming auction. The TRAI had suggested a reserve price of INR27.2 billion (US\$427.5 million) per MHz of pan India spectrum in the 2100MHz range, but this was rejected by the commission, which called for a review of the proposal. Meanwhile, an internal Department of Telecommunications (DoT) committee has suggested fixing the reserve price at INR38.99 billion per MHz, an unspecified source was cited as saying. The base price may prove to be of little importance in the long run however, as with just 5MHz of 2100MHz spectrum available in 17 circles, the competition for 3G spectrum is expected to be fiercely contested.

(January 7, 2015) The Economic Times

India's cabinet has approved plans for the country's largest ever spectrum auction to take place next month, with a total of 465.75MHz of 2G and 3G frequencies due to go under the hammer. The government is hoping to raise at least INR800 billion (US\$12.59 billion) from the sale, the reserve price for the 2G frequencies alone totaling INR648.4 billion whilst the Telecom Commission and cabinet have yet to confirm the proposed base price for 3G spectrum of INR27.2 billion per MHz of pan-India spectrum. The auction will feature 99.2MHz of 1800MHz frequencies across 15 operating areas, 177.8MHz of 900MHz spectrum across 17 circles, 103.75MHz of 800MHz (CDMA) frequencies in all 22 circles and 85MHz of 3G spectrum in the 2100MHz range across 17 circles. Reserve prices of spectrum were set as follows: 800MHz, INR36.46 billion per MHz of pan-India spectrum; 900MHz, INR39.8 billion per MHz of pan-India spectrum excluding Delhi, Kolkata, Mumbai and Jammu & Kashmir; 1800MHz, INR21.91 billion per MHz of pan-India (excluding West Bengal and Maharashtra) spectrum. The reserve price for 3G spectrum is expected to be ratified on 15 January ahead of the auction next month. The competition is expected to be fiercely contested, with Reliance Communications (RCOM), Vodafone India, Bharti Airtel and Idea Cellular facing 'must-win' situations in order to continue operating in areas where their 900MHz concessions are up for renewal. Of the cellcos mentioned above, Idea has licenses in nine circles up for renewal with no other spectrum holdings to fall back on in four of those areas, whilst RCOM and Vodafone must renew in seven circles apiece (four each with no other spectrum) and Airtel has expiring licenses in six areas, two of which are must-win. Further, the additional 3G frequencies are expected to see a great deal of interest as none of the nation's 3G providers currently have pan-India concessions: Airtel, Aircel and RCOM currently have the largest footprints with 3G licenses for 13 circles each.

(January 6, 2015) The Economic Times writes

Italy



The Italian government met this week to explore a EUR4.0 billion (US\$4.6 billion), six-year incentive program designed to encourage the country's major telecoms operators to expand their fiber-optic networks. Around half of the total is expected to be

used for network expansion in rural areas, although as much as EUR2.4 billion in additional funding may be drawn from European regional development funds. In other news, Italian fiber wholesaler Metroweb has reportedly sent out letters of invitation to a number of leading banking firms requesting advisory services over its possible merger with either Telecom Italia (TI) or Vodafone Italy. According to local media reports, letters were sent to Lazard, HSBC, Rothschild and Leonardo & Co, with responses expected by the end of next week. TI and Vodafone have both expressed an interest in bidding for control of Milan-based Metroweb, but infrastructure fund F2i, which owns an indirect stake in the firm, is not expected to make a decision on the future of the company until the two interested parties reveal their investment plans. F2i is looking to offload its 53.8% stake in Metroweb Holding, which in turn holds an 87.7% interest in Metroweb. State-backed holding company Cassa Depositi e Prestiti (CDP) holds the remaining 46.2% of Metroweb Holding, while Italian internet service provider FastWeb has an 11% direct stake in the wholesaler. (January 23, 2015) Bloomberg

Jamaica



Jamaica's Minister of Science, Technology, Energy & Mining, Phillip Paulwell, has approved the proposed merger between the Jamaican subsidiaries of Cable & Wireless Communications (CWC) and Columbus Communications, which comes as part of a wider US\$3 billion regional tie-up which was first announced in November 2014. CWC is active in Jamaica's fixed and mobile markets via its LIME unit, while Columbus offers cable TV, broadband and telephony services as Flow Jamaica. A statement from the ministry has outlined a number of restrictions on the deal, including: existing interconnect termination rates to remain in effect until a new fixed termination rate is established; CWC must comply with any limitations of the licenses being transferred from Flow; customers should have the option to keep their existing package or transfer to a more favorable one; customers opting to terminate their contracts should be allowed to do so without penalties; CWC should provide access to international bandwidth on a non-discriminatory basis; LIME and Flow should be ready to enable the implementation of number portability by 31 May 2015; and CWC should ensure that other licensees are provided with non-discriminatory access to infrastructure such as ducts, poles and landing stations which could act as a competitive bottleneck. Rival operator Digicel, which competes with LIME and Flow in Jamaica and a number of other Caribbean markets, has called for the merger to be blocked on competition grounds, though Paulwell did highlight the fact that advice had been received from the Attorney General in relation to a previous merger between Digicel and Claro, saying that 'the Telecommunications Act did not expressly authorize him to impose conditions in relation to the transaction'. Separately, LIME has revealed that it lost JMD60 million (US\$515,000) in 2014 due to cable theft, with losses over the past decade now totaling JMD400 million. The telco has petitioned the Ministry of Industry, Investment and Commerce to call for stronger punishments for those found guilty of stealing telecoms equipment. The Ministry has said it supports LIME's stance, while adding that it is satisfied with its controls on the export of scrap metals to ensure that stolen materials cannot be traded.

(January 19, 2015) telegeography.com



Kazakhstan



Mobile number portability (MNP) is finally expected to be implemented in Kazakhstan by the middle of this year, with legislation to pave the way for the scheme currently proceeding through parliament. Local website Profit.kz quotes a spokesperson from Tele2 Kazakhstan as saying that the country's larger operators 'will be forced to engage in a real fight for the customer by reducing tariffs and improving the quality of service'. Tele2 sits in third place in the Kazakh mobile sector behind TeliaSonera-backed K'cell and Vimpelcom subsidiary KaR-Tel (Beeline), while the market is rounded out by number four provider Altel, which is owned by Kazakhtelecom. (January 13, 2015) Ecofin Fides

Mexico



In association with Mexican regulator Instituto Federal de Telecomunicaciones (Ifetel), Alcatel-Lucent has conducted a 4G Long Term Evolution (LTE) field trial in the city of Acapulco using the 'APT700' 700MHz band. The internationally standardized APT700 band encompasses frequencies in the 698MHz-806MHz spectrum range. As part of the trial, deputy communications minister Jose Ignacio Peralta took part in an event in the Acapulco Bay, where he achieved downlink transmission speeds of 120Mbps using a mobile device. The planned 700MHz wholesale network will be known as 'Red Compartida' and eventually opened up to existing service providers and new mobile virtual network operators (MVNOs). (January 27, 2015) telegeography.com

AT&T Inc has closed its US\$2.5 billion acquisition of Mexican wireless provider Iusacell from Grupo Salinas. AT&T acquired all of Iusacell's wireless properties, including licenses, network assets, retail stores and approximately 9.2 million subscribers. The Iusacell wireless network currently covers about 70% of Mexico's approximately 120 million citizens. With its takeover of Iusacell, AT&T plans to create the first ever 'North American Mobile Service' area covering more than 400 million consumers and businesses in Mexico and the US. Randall Stephenson, AT&T chairman and CEO, commented: 'It won't matter which country you're in or which country you're calling – it will all be one network, one customer experience.' Stephenson added: 'The quick approval of this deal is one more example of why Mexico is an attractive place to invest'. Iusacell will continue to be headquartered in Mexico City. AT&T has identified a team, to be based in Mexico City, to oversee the Iusacell integration effort. As previously discussed, Grupo Salinas has retained ownership and control of Iusacell's Total Play triple-play business, as well as corporate fixed line provider Enlace. (January 19, 2015) telegeography.com

Mexican telecoms regulator IFETEL has fined America Movil (AM)-backed Telmex and satellite TV provider DISH Mexico for failing to fully disclose a 'commercial relationship' between the two businesses. Telmex has been fined MXN14.4 million (US\$985,694) on the grounds that an alleged merger with DISH was not disclosed back in November 2008. For its part, DISH – which is co-owned by Mexico's MVS Comunicaciones and Colorado-based EchoStar – has been hit with a larger fine of MXN43.0 million. The two companies had a deal to print a single bill for shared services but competitors such as Grupo Televisa complained to the regulator that the relationship violated the terms of Telmex's concession, which prevents the company from offering pay-TV services. AM has indicated that it intends to fight the fine, noting: 'America Movil and Telmex do not agree

with Ifetel's views and conclusions ... and will exercise any and all legal remedies to challenge it.'

(January 12, 2015) reuters.com

Moldova



Watchdog ANRCETI has opened an auction for the allocation of spectrum in the 3400MHz-3600MHz frequency band, suitable for broadband wireless access (BWA) and fixed wireless access (FWA) services. The regulator will award four 15-year licenses, with a total bandwidth of 50MHz each. The public auction is open to domestic and foreign companies; the regulator invited all interested parties to submit their applications for participation in the tender by March 13, along with all relevant documents and a security of EUR100,000 (US\$115,700). The license fee will be determined following the auction, with a starting price of EUR1 million for the concessions. In November 2010 Moldova's Ministry for Information and Communication Technologies (MTIC) adopted a program to develop broadband internet access for 2010/13, including the allocation of frequencies in the 2.5GHz-2.69GHz and 3.4GHz-3.8GHz bands. In December 2012 interested parties were invited to submit their applications by February 18, 2013; however, the sale process of 50MHz of spectrum between 3750MHz and 3800MHz generated no interest. The ANRCETI pledged to re-launch a tender in October-December that year, although the date came and went with no further announcements. It was September 2014 before the watchdog revealed that it would award four BWA licenses, each encompassing 50MHz of spectrum in the 3.4GHz-3.8GHz band; the sale process however failed to attract any bids.

(January 19, 2015) telegeography.com

Netherlands



Dutch telecoms giant KPN has announced that it will roll out Long Range (LoRa) wireless technology in 2015 to meet the high demands of the Internet of Things (IoT) era. LoRa technology is a Low Power Wide Area Network (LPWAN) specification intended for wireless, battery-operated devices that use low bandwidth to occasionally (rather than constantly) send data over long distances; KPN uses real-time street-lighting as an example of a suitable application for the technology, adding that LoRa-based modules can operate on a single AA battery for up to ten years. The telco is one of the founding members of the LoRa Alliance, which aims to 'develop the global standard for Low Power Wide Area Networks'. The IoT is the interconnection of uniquely identifiable embedded computing devices within the existing internet infrastructure. Typically, IoT offers advanced connectivity of devices, systems, and services that goes beyond machine-to-machine (M2M), and covers a variety of protocols, domains and applications. (January 15, 2015) telegeography.com

Nigeria



Bids in the U.S. Federal Communications Ministry of Communications Technology (MCT) is reportedly planning to connect half of the country's population to 3G mobile broadband services in 2015. In order to achieve its ambitious goal, the government is aiming to complete Phase 1 of a wireless broadband infrastructure upgrade and expansion project, which is part of the National Broadband Plan (2013-2018), by year-end. The National



Broadband Plan was approved by President Goodluck Jonathan in June 2013. The main aim of the plan is to increase penetration of fixed broadband services to 20% and mobile broadband to 80% of the population by the end of 2017. It outlines a number of ways to achieve this, including the release of more spectrum for broadband services, facilitating rapid rollout of wireless and wireline infrastructure and providing incentives to encourage a national 3G wireless coverage to at least 80% of the population by 2018. (January 8, 2015) All Africa

Portugal



Telecoms Regulator ANACOM has announced that it has granted permission for Meo Servicos de Comunicacoes e Multimedia (MEO) to transfer its wireless frequencies to sister company Portugal Telecom Comunicacoes (PTC), as part of the ongoing merger between the Portuguese mobile and fixed units. Both divisions were re-branded as MEO in 1Q14, but have continued to be managed independently, posing problems as the telco tries to implement a cohesive quad-play strategy. The internal merger coincides with Altice Group's ongoing EUR7.4 billion (US\$9.2 billion) acquisition of 'PT Portugal Telecom SGPS' ('PT Portugal'), which was agreed last month. The sale of PT Portugal, which is currently wholly owned by Oi SA of Brazil, includes the two domestic units, alongside a 45% stake in Hungarian satellite data transmission company HDT (Hungaro Digitel). However, the deal does not include the Africatel holding company, Timor Telecom or the debts attributed to Rio Forte Investments.

(January 5, 2015) telegeography.com

Russia



Russia's plan to auction off frequencies for advanced mobile communications services is unlikely to take place until at least the third quarter of the year, despite previous government assurances that it would announce the terms and dates of the bidding process before the end of last year. The Ministry of Communications (MinSvyaz) is still in the throes of implementing the methodology for determining the initial prices for the spectrum lots, adding that it will be April-June before it starts accepting offers. In May 2014 the government approved a decree to start the distribution of 4G spectrum in the 2570MHz-2620MHz band before the end of the fourth quarter, but the State Radio Frequency Commission (SRFC) is currently making adjustments to the terms and conditions of the planned auction of Long Term Evolution (LTE) licenses covering the band. Originally, the regulator had intended to auction off two lots of spectrum on a federation-wide basis, but in a change of heart the SRFC now plans to instruct the Federal Service for Supervision of IT & Comms (Roskomnadzor) to auction off all 82 lots of spectrum: one block on a federal basis, and now one block on a regional basis across Russia, which can be purchased as required by network operators to meet their needs. However, the SRFC notes that some areas have been excluded from the region-specific classification, namely: Moscow, Moscow region, the Crimea and Sevastopol. In 1Q15, Roskomnadzor is also expected to announce an auction for 1800MHz frequencies for LTE in ten regions, while in addition at a meeting scheduled for early next month, SRFC is expected to confirm the auction of frequencies in the 1980MHz-2010MHz and 2170MHz-2200MHz bands across the country (excepting Crimea and Sevastopol). (January 16, 2015) regulation.gov.ru

Russia's State Radio Frequency Commission (SRFC) has said it will 'make adjustments' to the terms and conditions of the planned auction of 4G Long Term Evolution (LTE) licenses in the 2570MHz-2620MHz band. Originally, the regulator had intended to auction off two lots of spectrum on a federation-wide basis, but in a change of heart the SRFC now plans to instruct the Federal Service for Supervision of IT & Comms (Roskomnadzor) to auction off all 82 lots of spectrum: one block on a federal basis, and now one block a regional basis across Russia, which can be purchased as required by network operators to meet their needs. However, the SRFC notes that some areas have been excluded from the region-specific classification, namely: Moscow, Moscow region, the Crimea and Sevastopol. In July 2014 the SRFC instructed Roskomnadzor to organize the terms and conditions for the auctioning off of 2.5GHz band 4G licenses no later than Q4 2014 – the first time the country has embarked on a cash auction. Initially, the authorities intended to divide up the bandwidth into blocks of 25MHz each, which would be awarded in two all-Russian bands. However, the industry reacted unfavorably and demanded the right to trade lots between regions (i.e. for areas not seen as strategic to their future business) and/or to conduct regional auctions to allow new entrants to enter the sector.

(January 13, 2015) telegeography.com

Senegal



Telecoms regulator ARTP has extended the testing phase of 4G services by a further three months until March 31, 2015. The trials were launched by Sonatel (Orange) in October 2013 and Tigo Senegal on December 3 last year, and the extension means that users will be able to enjoy free ultra-high speed mobile broadband for another twelve weeks or so. ARTP did not give any reason for the decision to extend the trial phase, although its announcement will be welcome news to Expresso Telecom (Senegal) – the only company yet to launch a 4G pilot. ARTP says that once the trials are complete, it expects all three mobile operators to submit detailed assessments on the quality of service (QoS) achieved. The government is basing its decision on how best to commercialize 4G, and on granting licenses to existing operators or new entrants, on QoS and ability to deliver national coverage. Orange Senegal launched its 4G network trials on the back of a USD240 million investment program to expand and upgrade its overall network capacity. To date, it has deployed more than 40 4G sites in Dakar and Saly, and has plans to add more towns and cities in future. In its most recent expansion, the carrier added the city of Touba to its 4G footprint. Meanwhile, Tigo's Long Term Evolution (LTE) trials are taking place in the capital Dakar, targeted around the areas of Yoff, Almades, Fann Residence, the University, Dakar-Plateau, Abdou Diouf International Conference Centre, Diamniadio and the city of Touba. (January 13, 2015) Ecofin Fides

Industry regulator ARTP says that it now plans to launch a mobile number portability (MNP) regime in the country in February 2015 – despite previous assurances that MNP would go live in October 2014. It was June 2014 when former Director General of ARTP, said that the country was on course to launch MNP by October. In an interview at the time, the former ARTP official said he had signed an edict on MNP guidelines in Senegal, including the process of selecting the firm to manage the running of the single platform for it. This statement followed a similar announcement in October 2013 in



which the watchdog confirmed it was conducting a public consultation on a number portability regime, to help achieve an October 2014 launch. However, ARTP boss Abdou Karim Sall said that following a long consultation process with mobile operators, starting July 2014, to agree matters such as the terms of pricing and assessing customer experience, the testing phase of MNP will now begin this month before moving swiftly to the commercialization phase. In other words, ARTP now has just two months to meet its latest deadline for finally introducing mobile portability in the West African nation. (January 2, 2015) Biztechafrica

Singapore



GlobeTel Singapore, a wholly owned subsidiary of GTI Business Holdings, which is itself 100%-owned by Filipino operator Globe Telecom, has secured a facilities-based operations (FBO) license from the Info-communications Development Authority (IDA) to provide international cable and other telecommunications services in Singapore. GlobeTel Singapore intends to use the FBO license to launch international cable services, strengthening connectivity between the city state and the Philippines, as well as supporting business users in both countries. In a statement, Ayala-led Globe Telecom said that the Singapore unit will also deliver 'alternate and redundant cable paths from Singapore to Hong Kong and Japan transiting the Philippines'. (January 13, 2015) telegeography.com

Slovenia



The Administrative Court has dismissed an appeal by Telekom Slovenije in which it hoped to overturn a 2013 ruling by the country's competition protection agency AVK. The AVK maintains that Telekom abused its dominant position in the wholesale bitstream broadband access market via its copper network in Slovenia during the period December 1, 2002 to September 5, 2005. An initial ruling against Telekom was overturned in 2009 due to faults in legal procedures, but the AVK relaunched its investigation and found the telco guilty in November 2013. Telekom has said it will study the court's decision before deciding on further action.

(January 12, 2015) News Agency Sta

South Korea



South Korean mobile network operator KT Corp has reportedly partnered with Finnish vendor Nokia Networks to complete successful tests of a new technology that can reportedly expand the range of Long Term Evolution (LTE) coverage from a single base station to up to 120km; without requiring the construction of any additional base stations, the 4-transmit-4-receiver (4T4R) antenna technology in question supports a maximum downlink data rate of up to 100Mbps, and will reportedly enable faster coverage expansion in sparsely populated regions. 'Technically, the 4T4R wireless technology doubles the number of antennas that are currently being used in the current LTE networks. This technology could be used in all handsets,' spokesman Ji Young-hoon was cited as saying. Initial trials of the technology were carried out between KT's base station on Jeju Island and a ship near an island some 120km from that location. (January 15, 2015) The Korea Times

Sweden



Swedish regulator Post & Telestyrelsen (PTS) has once again ordered Net4Mobility (N4M), a 50/50 infrastructure joint venture of Telenor Sweden and Tele2 Sweden, to implement overdue rural coverage targets on its shared 800MHz 4G LTE mobile network, having been issued its frequency concession in March 2011. Under its 800MHz digital dividend licensing conditions, by end-2013 N4M was supposed to have covered a list of 471 specific premises addresses in rural/remote areas lacking broadband access, representing 75% of the total list of 628 addresses, representing Sweden's last remaining homes/businesses unserved by broadband at speeds of at least 1Mbps. Having previously issued a directive to complete the belated rollouts, the PTS' latest order says that N4M must cover at least 50 of the listed addresses by 30 June 2015, an additional 50 addresses by 30 September 2015, and a further 65 addresses by 30 November 2015.

(January 16, 2015) telegeography.com

Taiwan



Howard Shyr, the chairman of Taiwan's National Communications Commission (NCC), has said that the telecoms regulator plans to hold an administrative hearing regarding the 4G roaming partnership agreement between Asia Pacific Telecom (APT) and Taiwan Mobile Company soon. Amid suggestions that the partnership may have infringed both the Telecommunications Act and the Fair Trade Act, the NCC launched an investigation into the roaming deal following a collective complaint from rival operators Chunghwa Telecom, Far EasTone and Taiwan Star Cellular. Now, Shyr has been cited as saying that the partnership between APT and Taiwan Mobile could potentially constitute elements of 'deceptive or obviously unfair conduct that is able to affect trading order,' referring to the Fair Trade Act article, while also suggesting that the agreement could be in violation of several articles in the Telecommunication Act if the accusations made by other operators are true. 'We will hold an administrative hearing after we complete the investigation,' Shyr noted, adding that this would likely be held in H1 2015. Meanwhile, questions over the partnership are also said to have been raised by lawmakers at the Transportation Committee meeting held earlier this week. Democratic Progressive Party (DPP) legislator Lee Kun-tse was said to have pointed out that Taiwan Mobile customers pay TWD1,399 (USD44.4) per month for unlimited access to 4G services, while APT subscribers pay only TWD898 to access the same infrastructure. As such, Lee argued that consumers are being charged unequally, while also suggesting that 4G services are likely to see a drop in both speed and quality with so many people sharing the same infrastructure. (January 23, 2015) The Taipei Times

Following confirmation that Taiwanese Personal Handyphone Service (PHS) service provider First International Telecom (Fitel) has been declared bankrupt, the National Communications Commission (NCC) has revealed that telephone numbers assigned to the operator will now be reassigned to some of the nation's 4G providers. The regulator has said it intends to assist those individuals still using Fitel's services to migrate to other providers under the number portability policy. With Fitel having been declared bankrupt at the start of last week by the Taipei District Court, it was also noted that the company only has until today to



appeal the court's ruling, with NCC spokesperson Yu Hsiao-cheng cited as saying: 'If it becomes clear that the company will not be able to continue operations, the commission will have to cancel its license to offer the PHS service, as well as the license to use the frequency.' Meanwhile, around two million mobile numbers that had been earmarked for Fitel will be reclaimed by the authorities and reassigned to five other operators, those being: Chunghwa Telecom, Taiwan Mobile, Far EasTone Telecommunications, Asia Pacific Telecom and Taiwan Star Cellular. (January 5, 2015) The Taipei Times

National Communications Commission (NCC) has revealed that it is investigating whether Asia Pacific Telecom (APT) has violated regulations regarding network roaming. This investigation is said to have been launched on the back of complaints from three of the nation's other mobile providers – Chunghwa Telecom, Far EasTone and Taiwan Star – related to a deal signed between APT and Taiwan Mobile which allows the former to offer its customers 4G service in those areas it does not cover via access to the latter's infrastructure. However, the complainants have argued that such a roaming deal is not a permissible practice, according to existing government regulations. Official at the NCC's telecommunications administration department, was cited as saying that the watchdog was still clarifying some of the details of the case to determine which regulations apply. Further, the commission is also said to be considering whether the actual practice of the two companies in question actually meets the definition for roaming. (January 2, 2015) The Taipei Times

Thailand

ICT minister and telecoms regulator have separately issued statements each asserting that 4G mobile spectrum auctions will go ahead this year as anticipated, despite some reports claiming that the process would be suspended under new draft laws which reorganize responsibilities in frequency policy and authorization. The National Broadcasting and Telecommunications Commission (NBTC) has led a drive towards open auctions for 1800MHz and 900MHz spectrum, although the plan has been delayed under orders of the country's military junta – the National Council for Peace and Order (NCPO) – initially for the purposes of inquiries into levels of transparency in Thai regulation, while this month a raft of legal amendments were approved which redistribute certain spectrum policy responsibilities to a new body, the Digital Policy Committee. ICT Minister stated that the new committee 'will be the sole authority to decide on details of 4G spectrum auctions', although the NBTC 'will be allowed to manage and handle the 4G auction during the formation of the digital economy panel, which is expected to be set up in April'. The minister also affirmed that the ICT Ministry 'does not have the authority to decide on the auctions' details. Minister added that the NBTC would serve as an independent regulatory body as stated in the new NBTC bill, though it would be downgraded to only overseeing the allocation of spectra and governing competition in the telecom and broadcasting industries. Earlier, in a statement from the NBTC insisting that the 4G spectrum auctions will go ahead as planned without violating the draft bills recently endorsed by the cabinet. However, whether the NBTC will have the authority to manage the 4G auction process or manage spectrum in the future is still unclear, added NBTC vice-chairman Settapong Malisuan. The commissioner also said that the NBTC would ask the

NCPO next week if it could start proceeding with the 4G auction process, including revising all the details of the auction design, a process which would take six months to complete. Under the new NBTC bill, the regulator would come under the supervision of the Digital Economy Committee and allocate 50% of its license fees to the digital economy development fund. The NBTC would also be 'downgraded' to overseeing the allocation of spectra for public and industrial benefits and governing competition in the telecom and broadcasting industries. The bill would also scrap the NBTC's twin telecom and broadcast committees, but not the NBTC board. The NBTC bill now passes to the Council of State before submission to the National Legislative Assembly for approval, and could take effect in April.

(January 9, 2015) The Bangkok Post

The cabinet of ministers under Thailand's military-led regime approved eight draft laws which effectively remove the powers of the National Broadcasting & Telecommunications Commission to assign and manage mobile frequencies, instead handing the reins of spectrum policy to the soon-to-be-established Digital Economy Committee. Some of the draft laws – all presented under the 'digital economy' banner – also require the NBTC to merge its existing Broadcasting and Telecom committees into a single regulatory body by amending the existing NBTC law; the NBTC will remain the main regulatory body for broadcasting and telecommunications, but it will have to comply with the government's digital economy policy on spectrum planning. This means that the NBTC's upcoming planned open auctions for 900MHz/1800MHz spectrum are in doubt. ICT Minister confirmed that the Digital Economy Committee would decide on which spectra should be auctioned off for commercial purposes and which should be assigned for public benefit. Furthermore, under the approved drafts the NBTC will no longer oversee the THB20 billion (US\$607 million) budget of the Broadcasting and Telecommunications Research and Development Fund for Public Interest, with this to be managed by the Digital Economy Committee. The government will now hand all eight drafts over to the Council of State to frame the new laws.

(January 7, 2015) The Nation

Togo



The government of Togo has summoned officials from Etisalat and Maroc Telecom to the capital Lome, to discuss how the latter's recent acquisition of the Emirati group's assets in Africa will affect local unit Moov Togo. In November 2013 French media group Vivendi signed a definitive agreement to sell its controlling 53% stake in Maroc Telecom to UAE-based Etisalat, going on to complete the deal in May 2014, at which point Etisalat agreed to sell its Atlantique Telecom subsidiaries (including Moov Togo) to Maroc Telecom as part of a wider operational overhaul. The UAE group submitted a request to the government of Togo on May 12, 2014 to sell Moov Togo to Maroc, and whilst it says a deal is on, it is first seeking assurances from Etisalat concerning the issue of Moov Togo's local ownership before rubber-stamping any deal. The Togolese operator is currently owned by Atlantique Telecom Togo (ATT), a subsidiary of UAE-based Etisalat, but the owner made assurances to the government in 2009 that it would ensure that 30% of Moov Togo would be sold to Togolese investors. Under local law, Etisalat is supposed to hold a maximum 70% in ATT, but it has controlled 95% of the unit since 2010. Industry regulator



the ART&P fined Etisalat US\$2.6 million in September 2014 for failing to comply with the terms of its license award; now both Etisalat and Maroc Telecom have been given five months to resolve Moov's ownership issue if the deal is allowed to go through. (January 12, 2015) BizTech Africa

Ukraine



Telecoms regulator NCCIR received four applications for three 3G UMTS 2100MHz mobile network operating licenses on offer by deadline. Ukraine's three largest mobile operators Kyivstar, MTS Ukraine and Astelit (life:) have all confirmed entering applications to bid in the auction, results of which are scheduled to be announced on February 16. A fourth bid application was reportedly entered by infrastructure operator Ukrtower, a subsidiary of Turkish mobile operator Turkcell, itself the majority shareholder in Astelit, on the basis of the possibility of building a shared 3G network for use by all Ukrainian operators. A rumored UMTS license bid from Ukraine's largest CDMA mobile operator Intertelecom has apparently failed to materialize. Ukrtelecom (TriMob), wholly owned by local conglomerate SCM (also part-owner of Astelit) is currently Ukraine's only UMTS licensee and network operator. (January 16, 2015) capital.ua

United Kingdom



OFCOM has called for industry stakeholders to weigh-in on the potential use of frequencies in spectrum bands above 6GHz for future mobile communication services. OFCOM's Call for Input notes that although fifth-generation (5G) technology is still in the early stages of development, it is understood that in order to provide faster mobile broadband speeds than current 4G networks, 5G platforms will need to use large blocks of spectrum. However, frequency blocks of the necessary size are 'difficult to find' in lower bands and, as such, the regulator is inviting comments from industry stakeholders to help it 'understand the advantages and disadvantages of different bands above 6GHz, taking account of other existing and potential users of the spectrum.' The closing date for responses is February 27 and the results of the consultation will be published in Q2 2015. (January 19, 2015) telegeography.com

U.K. telco watchdog eyes spectrum above 6 GHz for providing data throughput of up to 50 Gbps. OFCOM on Friday called on industry players to provide their considered opinion on the feasibility of using frequencies above 6 GHz for 5G services. The U.K. telco watchdog is seeking answers to 14 questions covering various topics, such as the practicalities of achieving very high data rates using this spectrum; whether operators would seek to cover the whole country or opt for targeted deployments; and whether the bandwidth can be shared between mobile access and wireless backhaul, among others. "We want to explore how high frequency spectrum could potentially offer significant capacity for extremely fast 5G mobile data," said Philip Marnick, director of OFCOM's spectrum group, in a statement. "This could pave the way for innovative new mobile services for U.K. consumers and businesses," he said. The timeframe for launching 5G remains uncertain, OFCOM said, but like many other stakeholders it expects it could emerge by 2020, subject to research and development, and international consensus on frequency bands. "We want the U.K. to be a leader in the next generation of wireless communications. Working with industry, we

want to lay the foundations for the U.K.'s next generation of wireless communications," said Steve Unger, acting CEO of OFCOM. Interested parties have until February 27 to respond. (January 16, 2015) totaltele.com

Telecom regulator OFCOM fined Sambora Communications £8,000 for making silent and abandoned calls. During an abandoned call, one hears an information message and not a live call from the organization trying to call you. They often occur when automated dialing systems used by call centers dial too many numbers and there are not enough call centre agents to handle those calls. As per OFCOM's current persistent misuse policy, the recorded message should include information on where the call has come from and details on how to call back and opt out of future calls. An OFCOM investigation into Sambora found that the company made an estimated 4,320 abandoned calls between September 1 and October 19, 2013. It also generated more than 2,500 silent calls over a six day period in October 2013 by failing to include a recorded information message. On 36 individual days between September 1, 2013 and October 19, 2013, Sambora failed to include an appropriate phone number in the recorded information message played. (January 8, 2015) telecomlead.com

United States



Mizuho Bank, Japan's second largest banking group by assets, is set to lend AT&T Inc USD3 billion to support the US telco's participation in the Federal Communications Commission's (FCC's) planned auction of 600MHz spectrum. Mizuho's the Bank of Tokyo-Mitsubishi UFJ, Mizuho's larger domestic rival, is also looking to extend AT&T a loan of around USD500 million. The FCC's 'Broadcast Television Spectrum Incentive Auction' is scheduled to take place in 2016, marking the first opportunity since January 2008's 700MHz auction for US wireless carriers to buy low-frequency airwaves. (January 14, 2015) The Japan Times

The Federal Communications Commission (FCC's) 'Auction 97' spectrum sale resumed with potential winning bids currently standing at a total of US\$44.5 billion. The online journal notes that the auction eased into the Christmas break amid modest bidding activity, with fewer than 20 new bids placed during the last two rounds. The FCC is currently conducting eight rounds of bidding per day, each lasting 20 minutes. However, that pace is scheduled to increase when the watchdog switches to ten 15-minute rounds. Activity is likely to remain concentrated in second- and third-tier markets, with the priciest concessions – J-block licenses New York City (US\$2.7 billion) and Los Angeles (US\$2.1 billion) – chiefly attracting interest in the early stages of the auction. The FCC is auctioning off 880 licenses for the larger 'Economic Area' franchises alongside 734 concessions for smaller 'Cellular Market Area' franchises. AWS-3 licenses under the hammer include paired spectrum in the 1755MHz-1780MHz (uplink) and 2155MHz-2180MHz (downlink) bands, and unpaired licenses in the 1695MHz-1710MHz range. The identities of the bidders themselves will be disclosed when the auction process concludes later this month.

(January 6, 2015) RCR Wireless

The Federal Communications Commission (FCC) plans to vote in February on new rules regulating how broadband providers treat traffic on their networks. The watchdog has been under pressure to change broadband internet access from a lightly-regulated information service



to a utility-like common carrier service, which would subject providers to more stringent regulation. Amongst other things, such a change would allow the FCC to ban internet service providers (ISPs) from blocking, slowing down or speeding up access to certain websites. Among those pushing for such a change is President Barack Obama, who in November urged the regulator to take the public utility route, prompting widespread consternation among ISPs. In November the WSJ quoted FCC chairman Tom Wheeler as saying: 'The big dogs are going to sue, regardless of what comes out. We need to make sure that we have sustainable rules, and that starts with making sure that we have addressed the multiple issues that come along and are likely to be raised.'

(January 5, 2015) The Wall Street Journal

Zimbabwe



The total number of subscribers in Zimbabwe's telecommunication sector grew by 2.6 percent to 11.4 million in the third quarter of 2014 from 11.1 million in 2013. This is according to the Postal and Telecommunication Regulatory Authority of Zimbabwe (Potraz). The authority stated, in its latest report, that Econet maintained its pole position, recording a 2.1 percent growth to 6.5 million active subscribers. Its total number of subscribers was 8.9 million. The authority also revealed that NetOne had recorded a 13.8 percent increase to 2.7 million subscribers from 2.4 million over the same period in 2013. Its total number of subscribers was 4.3 million subscribers. Telecel recorded a decrease of 7.4 percent to 2.2 million active subscribers from 2.4 million in 2013. Telecel had a total of 4.8 million subscribers. The authority stated that: "Due to the decline in active subscriptions, Telecel's market share fell to 19.5 percent from 21.6 percent in the second quarter of 2014. As a result, Telecel had the smallest market share in the third quarter." According to the Zimbabwe Daily, Prepaid subscriptions constituted 97,5% of total active subscriptions. Telecel was the only mobile operator to register a decline in active subscriptions whereas NetOne registered the largest growth in active subscriptions to 13,8%. Telecel active subscription has shown a declining trend. Subscribers using mobile money transfer services rose by 16,3 percent to reach 4.9 million from 4.2 million in the previous quarter. The total value of transfers and transactions on mobile money services increased by 35,8 percent to 3,2 million from 6,8 million recorded in the previous quarter. In addition to this, the Internet penetration rate increased by 0.5 percent to reach 47.5 percent from 47 percent recorded in the previous quarter. (January 22, 2015) itnewsafrika.com

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WHOLESALE Updates

Using Telstra global roaming for international voice and data

Travelling overseas with your Telstra post-paid mobile phone? Here's what you'll pay for international roaming calls and data, and how to minimize your bill while you're on the road. With a few exceptions for countries seldom visited by Aussies, Telstra offers global roaming in most overseas destinations across Asia, Europe, the Americas, the Middle East and the Pacific: The price you'll pay for using your phone abroad depends on which countries you're visiting and whether or not you've pre-purchased a discounted International Travel Pass. With unlimited calls and SMS overseas plus 50MB of data per day, you'll want to buy a Telstra International Travel Pass before leaving home soil. There are two separate passes, categorized as Zone 1 and Zone 2. New Zealand, Indonesia and Thailand wholly comprise Zone 1, while Zone 2 is more comprehensive and includes Canada, China, Fiji, France, Germany, Hong Kong, India, Ireland, Italy, Japan, Malaysia, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, the UK, UAE, USA and more. Pricing is a little different to competitor Vodafone's flat \$5 per day. You'll first need to choose how long your pass is valid for – either three, seven, 14 or 30 days – and then whether you need to buy Zone 1, Zone 2 or both. A Zone 1 pass sets you back

the equivalent of \$5 per day, while Zone 2 costs \$10 per day for the same inclusions of free and unlimited calls and SMS, plus 50MB of daily data. For example, a three day Zone 1 pass is \$15, a 14 day Zone 2 pass is \$140, and buying seven day passes of both zones totals \$105. The clock starts ticking from the moment you add a pass to your account – so leave it until the day you depart to enjoy connectivity from the moment you touch down, or call Telstra after you've arrived if your flight lands on the following calendar day. Calls to Telstra customer service are free even when overseas, provided you dial the carrier's international number at +61 439 125 109 directly from your mobile handset. The biggest advantage of Telstra's International Travel Passes is that your inclusive data allowance doesn't reset each day: rather, you're given the equivalent of 50MB per day straight up – say, 150MB for a three day pass – and can then download at your leisure. Excess data costs \$0.03/MB if you hold an otherwise-valid pass and are in a country that it covers, and \$3/MB once the pass has expired and in all countries not included by your pass. It's also significantly cheaper than casual roaming (detailed below), where you're charged separately for every minute you're on the phone and for every KB of data you consume. On the downside, you'll likely need to buy a pass that's valid for longer than your trip – yet the cost remains the same. As an example, a simple overnight



business trip to New Zealand would require a three day pass, while an Asian jaunt for the five-day working week needs a seven day pass. There's also no easy option for anything in between – such as ten days – unless you first buy a seven day pass, wait for it to expire and then buy a new three day pass (totaling \$50 rather than \$70 for 14 days in Zone 1), at which time any remaining data from the expiring seven day pass vanishes from your account.

Roaming without an International Travel Pass can be a costly exercise, with each MB of data setting you back \$3 and every SMS sent costing 75c across the globe. It's not a bad way to go if you're only going to send a quick "Hey, I've arrived safely in x" SMS to your boss or partner and leave everything else for the hotel Wi-Fi, but beyond that, avoid where possible. While SMS and data rates are the same across the board, rates for making and receiving calls vary by country. You'll pay only A\$1.50 per minute of talk time in Singapore, New Zealand, Finland and South Africa, and \$2 per minute in the UK, Germany, Italy and Malaysia. It's \$2.50 per minute in Thailand and France, \$3 per minute in the USA, Canada and Austria, \$3.50 per minute in China, India, the UAE and Spain, \$4 per minute in Chile and a whopping \$4.50 per minute in Qatar and the Czech Republic. Prices are the same whether dialing the phone yourself or receiving a call. If you're heading away on your first business trip with a Telstra phone at your side, you'll first need to activate global roaming on the account. That's easily done via Telstra's website or by calling 125 109, but if yours is a work phone, be sure that your corporate travel policy allows roaming and that your employer is willing to foot the bill before heading overseas. Once that's taken care of, the site also provides up-to-date information on casual international roaming rates and the full country list for Telstra's International Travel Passes.

Bulgaria to Introduce Hefty Fines for Breaches of EU Rules on Roaming

Bulgaria's government is to approve Wednesday changes to the Law on Electronic Communications envisaging a fine of up to BGN 2 M for mobile operators who fail to abide by the European Union regulations on wholesale and retail price caps

for roaming charges. The legal amendments are to be discussed on Wednesday during the first sitting of the government for 2015. Under the bill, the minimum penalty in the case of failure to observe the rules on wholesale price caps for roaming charges will amount to BGN 400 000, while the smallest fine in the case of a retail price cap breach will be BGN 50 000, according to reports of Darik radio. Besides, mobile operators will face fines of BGN 10 000 – 100 000 in the case of a breach of their obligation to inform consumers about their rights when using a roaming service.

Uganda Scraps Roaming Charges

Telecom firms in Uganda introduced lower tariffs for subscribers making phone calls to Rwanda, Kenya, and South Sudan. This was after Uganda implemented the Northern Corridor Summit Heads of State decision that required it to operationalize the One Network Area by January 2 this year, joining Rwanda and Kenya which began implementation last year. The One Network Area, one of the several integration projects under the Northern Corridor framework, enables people to make calls across the region free of roaming charges. "This is going to lower the costs of communication and revenue authorities will gain as is the case with Kenya," Uganda's High Commissioner to Rwanda, Richard Kabonero, told The New Times in Kampala yesterday. In a message sent to this reporter, MTN Uganda had also cut roaming charges signaling the beginning of an era of cheaper calls from Uganda to Rwanda, Kenya and South Sudan. "Make calls while roaming in Kenya, Rwanda and South Sudan for only 360 Uganda shillings per minute and receive calls for free. Welcome to One Network," the message read. There has been an outcry in the recent past from residents of the three countries on exorbitant calling and roaming rates that were being charged by telecom companies. "The high calling rates to Kigali and Nairobi have been negatively impacting on profits we make as a business. I thank our leaders for this initiative," said Joy Mutesi, a businesswoman. For John Bosco Karemera, a Rwandan student in Uganda, the decision has "helped a great deal in cutting on airtime costs I have been spending on communicating with my parents in Kigali." Kabonero also said Uganda had also implemented a decision that allows residents of the three countries to enter the country without paying visa charges. The eighth Northern

Corridor Integration Projects Summit, held last month, had underscored the importance of fast-tracking the operationalization of One Network Area in Uganda and directed ministers for Finance and ICT to resolve all outstanding issues on the One Network Area by January.

Uganda implements One Network Area scheme

Mobile operators in Uganda have abolished international roaming charges on calls to Rwanda and Kenya under the 'One Network Area' program. Cellcos in Rwanda and Kenya implemented the scheme last year, acting on a decision by the Northern Corridor Summit Heads of State. 'This is going to lower the costs of communication and revenue authorities will gain as is the case with Kenya,' Uganda's High Commissioner to Rwanda, Richard Kabonero, told Rwandan newspaper The New Times. South Sudan, Tanzania and Burundi are also considering joining the One Network Area initiative. Uganda's mobile market is home to six cellular network operators, a data-only 4G provider and one mobile virtual network operator (MVNO).

BICS offers LTE roaming in 75 markets

Global wholesale carrier services provider BICS has announced that it now offers Long Term Evolution (LTE) roaming capability in 75 countries, up 70% from twelve months ago. The firm says that operators using its IP exchange (IPX) platform can offer customers access to LTE roaming sessions with over 150 operators, through either direct connections or peering agreements. 'The growth in the number of networks offering LTE roaming services last year was astounding,' said Mikael Schachne, VP of Mobile Data Business at BICS. According to the Global mobile Suppliers Association (GSA), there were 360 LTE networks in operation in 124 countries at the end of 2014.

Maroc Telecom publishes wholesale offer for access to its local loop

Maroc Telecom (IAM), the country's incumbent fixed line operator, has published a wholesale offer for passive access to its fixed local loop, which integrates all amendments and



improvements requested by telecoms regulator the Agence Nationale de Reglementation de Telecom (ANRT) with decision ANRT/DG/No.14 (dated 9 December 2014). The new wholesale offer, effective since 1 January 2015, will allow alternative operators to install equipment in Maroc Telecom's cabinets and to connect at any point of its networks. As previously reported by CommsUpdate, in June 2014 the ANRT published the rules governing local loop unbundling (LLU) in Morocco. Under the regulation, Maroc Telecom is required to provide colocation for third-party operators' equipment in its existing cabinets, install multi-operator cabinets for part of their future nodes and establish an active wholesale offer for third-party operators under a virtual unbundled local access (VULA) model. Although the incumbent telco was initially required to provide a technical and tariff wholesale offer for passive access to its fixed local loop by 1 August 2014, it was accused of failing to publish wholesale offers that cover shared cabinet access, full and partial unbundling and bitstream access on several occasions.

Colombia reduces interconnection rates

Colombia's Communications Regulation Commission (CRC) announced a reduction in interconnection rates, the fees that telecom operators pay to connect with each other. ICT Minister Diego Molano Vega said that the move is part of the government's effort to promote competition and benefit consumers. Between 2010 and 2014, prices paid by users fell by 19%. According to the CRC, the interconnection rate decreased 42% during this period. The new regulation is valid until 2017, during which time interconnection rates between mobile operators voice will fall by 80%. After the announcement, Movistar Colombia praised the CRC's decision to implement the rate reduction for three years and emphasized that the government's efforts to reduce this rate has benefited millions of Colombians since early 2013. The company pointed out that because of the rate reduction, mobile phone users have access to more competitive prices and the consumption of calls has increased. In addition, Movistar said that the CRC should take a number of additional measures to control the concentration of the mobile market

and prevent a similar situation in the mobile Internet segment. TIM tries out VoLTE: TIM Brasil has held voice over LTE (VoLTE) laboratory tests with Huawei. According to the Chinese network and telecom equipment maker, TIM is the first carrier in South America to use this solution. TIM noted that its LTE indoor coverage must be improved and expanded, which should happen with the deployment of LTE in the 700 MHz.

Kenya: Safaricom Slashes Roaming Rates for 21 Countries

Safaricom customers will now enjoy lower roaming rates for calls, SMS and Internet in 21 countries, CEO Bob Collymore has said. Making the



announcement, Collymore said the aim is to provide its subscribers with affordable services wherever they go. "We always place the needs of our customers at the forefront of our business. We have aggressively lobbied countries and our partners to ensure our subscribers can enjoy the same reliable communication services they have come to know in Kenya when they travel at significantly reduced rates," he said. The new tariffs will see Kenyans pay Sh200 for up to 10 minutes of talk-time, Sh10 per SMS, and 10MBs of internet data in the countries whose local telecommunication firms have partnerships with Safaricom. They include Albania, Czech Republic, Germany, Greece, Hungary, Ireland, Italy, Malta, New Zealand, Portugal, Romania, Spain, Netherlands, Turkey, United Kingdom, Democratic Republic of Congo, Ghana, Lesotho, and Mozambique. To access information on the charges in specific countries, PostPay customers can dial *200# and PrePay *100#, then select 'Products & Services' followed by 'Safaricom Roaming' and follow the prompts.

BICS LTE Roaming Footprint Grows 70% Year-on-year, Interconnects 150 Operators in 75 Countries

BICS, a global provider of wholesale carrier services, has announced a rapid increase in the number of operators deploying LTE roaming during the last year, with its services now available in 75 countries. According to BICS, operators using BICS' IP exchange (IPX) platform can offer customers access to LTE roaming sessions with over 150 operators, through either direct connections or peering agreements. The global mobile roaming provider said that following its launches in Asia, North America, Europe and Africa during 2013, last year saw widespread adoption of its services in countries across the globe, including Russia, South Africa, the UAE, Saudi Arabia, France, Poland and Rwanda. Following the launch of over

360 commercial LTE networks across 124 countries throughout last year and with more launches including around 49 commercial deployments of LTE-A in the pipeline for this year, BICS said that operators must arrange a whole new set of commercial agreements and technical interconnections to support this all-new IP signaling infrastructure, built on IPX, to replace the SS7 signaling network.

T-Mobile NL slashes European roaming prices

Deutsche Telekom's (DT's) Dutch unit, T-Mobile NL, is cutting the cost of roaming in the European Union (EU), Iceland, Norway and Switzerland to match its domestic prices. From January 19 travelling subscribers will be able to receive incoming calls and send/receive SMS for free – as they do within the Netherlands – as part of their monthly bundle; outgoing calls will be free for the first 120 minutes, with out-of-bundle, per-minute charges applicable thereafter. CEO Mark Klein commented: 'Operators across Europe

keep each other in a stranglehold ... We want an end to this.' Data charges are not affected by the new 'Call Like Home' plan, although T-Mobile claims that its 'Travel & Surf' tariffs offer mobile internet for up to five times less than current EU regulated charges.

OFCOM proposes new pricing rule for BT's wholesale fiber offerings

British telecom regulator OFCOM has unveiled new measures which it says are designed to promote competition and investment in the superfast broadband market. Under a draft decision notified to the European Commission (EC), a new pricing rule



would mean that fixed line incumbent BT would be required to 'maintain a sufficient margin between its wholesale and retail superfast broadband charges in order to allow other providers profitably to match its prices'. This new pricing rule would, however, preserve the telco's existing flexibility to set its wholesale fiber prices, OFCOM noted, saying that this would in turn provide an incentive for future investment by BT in its fiber infrastructure, while ensuring it could not set prices 'in such a way that might prevent other operators from competing profitably for superfast broadband customers'. With BT currently obligated to allow other operators to use its network to sell superfast broadband to consumers under a process known as 'virtual unbundled local access' (VULA), as per the draft regulatory condition notified by OFCOM to the EC the incumbent must ensure that the margin between its wholesale VULA charges and its retail superfast broadband prices is sufficient for rival operators to compete and make a profit. OFCOM's indicative assessment is that BT is currently maintaining a sufficient margin under the new draft rules. In announcing the development, OFCOM noted that

there were just 100,000 customers taking superfast broadband services when it introduced the requirement for BT to allow other operators to use its upgraded fiber network. With there now being some 3.4 million such subscribers, and with uptake expected to increase further in the coming years, the regulator said that the draft decisions are 'aimed at ensuring that different operators can compete in the developing broadband market in years to come, so that consumers benefit from competitive prices, network investment and high-quality, innovative services'. All measures are subject to review by the EC, following which OFCOM expects to publish a final statement in February 2015, with the new regulatory condition to commence from the start of the following month and remain in place until March 2017, when the current regulatory review period ends.

Telecom Egypt does €1.8bn network deals

Egyptian telco brokers national and international wholesale deals with mobile operators. Telecom Egypt has signed wholesale network deals with Mobinil and Vodafone that together are worth 15 billion Egyptian pounds (€1.77 billion). Both telcos have inked four-year international service agreements with Telecom Egypt. Under the terms of these deals, they will have wholesale access to Telecom Egypt's international gateway services, rather than acquiring their own international gateway licenses. In addition, Mobinil has signed a five-year deal for domestic infrastructure services and Vodafone a three-year deal, Telecom Egypt said. The agreements pave the way for Mobinil and Vodafone to offer fixed services in Egypt. Telecom Egypt issued a statement announcing the deals on Tuesday, but it was more concerned with reminding the industry that it is hoping to add full mobile services to its portfolio in the near future. "As soon as we are granted the long awaited mobile license we will be best placed to continue to increase shareholder wealth and levels of customer satisfaction by providing a wide range of high quality and advanced services," Mohamed Elnawawy, Telecom Egypt's CEO and managing director said. The Egyptian government approved the issue of unified telecoms licenses last year, a move that will allow Mobinil and Vodafone to offer services and Telecom Egypt to enter the mobile

market. As it stands, Telecom Egypt's presence in the mobile space is limited to a 45% stake in Vodafone's local unit. It has until the end of 2015 to sell that stake.

German minister hopes to bury EU roaming fees

The European Commission and Parliament have long been pushing for a removal of EU roaming fees. But a recent move by German Transportation Minister Alexander Dobrindt could bring Europe closer to phasing out costs for mobile phone users in other EU member states. EurActiv Germany reports. Germany's Transportation and Digital Infrastructure Minister Alexander Dobrindt is campaigning for the removal of European roaming fees for mobile phones. "It should not make a difference for the consumer, whether he moves beyond national borders while using digital services," the conservative politician told Bild. Dobrindt is calling for EU-wide foreign roaming fees to be phased out for mobile phones. Within the EU, different rules apply for around 200 different telecom companies. Their over 510 million customers pay different fees. Estimates indicate around 0.9% of the EU's GDP are lost in the fragmented telecom market, amounting to €110 billion per year. In April 2014, the European Parliament voted to eliminate roaming fees by mid-December 2015, as a part of the telecommunications package "Connected Continent". But so far, the EU member states have not set a date for agreeing on a common position. Dobrindt's desire to eliminate roaming fees, could now give the measure a boost towards approval in the Council. After much pressure from the EU, fees from telecom providers have fallen drastically in recent years. Since 2007, final prices for calling and texting in other EU countries decreased 80% for consumers, while data roaming prices fell 91%. Nevertheless, 28% of Europeans still turn off their mobile phones when they enter another EU country to avoid roaming fees. Meanwhile, high-tech associations and economic experts are warning against removing roaming fees. Without these additional costs, prices for domestic phone calls and mobile internet use would have to increase. Subsidization of Smartphones, tablet computers and mobile phones by network operators would also suffer reductions, experts say. "Removing roaming fees would

send the entire price structure for mobile communication spinning," Andreas Streim, an expert at the industry association BITKOM said in 2013. "The ones who will suffer are lower income segments of the population, who do not travel much and currently profit most from low fees for domestic calls." The European Consumer Organization (BEUC) considers operators' concerns to be unfounded, even seeing potential economic advantages in an elimination of roaming fees. "Almost three-fourths of Europeans hesitate to use their mobile phones abroad. As a result, a completely untapped market exists here. So operators should not fear the end of 'roaming times,'" said Monique Goyens, the head of the BEUC. Whether the 28 EU member states quickly come to an agreement on roaming fees, also depends on the debate over net neutrality. The issue is also included in the telecommunications package "Connected Continent", along with roaming fees. The European Parliament in April 2014 spoke in favor of the principle of net neutrality.

European Parliament push to end roaming fees

The majority of the EU Parliament MEPs are pushing for an end to roaming fees, Maltese MEP Roberta Metsola told The Malta Independent "For the past 6 or 7 years I have argued that the EU must be on the forefront of telecommunications, to offer our citizens the widest choice at the lowest

on the issue of roaming fees," Dr. Metsola argued. "Unfortunately in the Council of Ministers, where governments are represented, there is a huge reluctance, a lack of energy on the issue as opposed to within the EU Parliament. People cannot keep paying high sums of money when travelling in order to use their mobile phones". Dr. Metsola said that five years ago, fees were much higher than they are now. "In fact we feared turning our mobile phones on due to the bill we would receive when returning home. Today, prices are much lower, indicating that mobile networks make more money from roaming fees now than they did five years ago, as more people make mobile calls while abroad". "A parliamentary report, which was backed by a large majority in the EU Parliament exists, and states that roaming fees must be completely cut out by the end of this year. Now it is up to the Council of Ministers to keep their end of the bargain. Right now there are governments who fear taking this next step. I, as a Maltese representative within the EU Parliament, will continue to exert pressure in order to end roaming fees. Turning to the Transatlantic Trade and Investment Partnership (TTIP), Dr. Metsola believes that whenever an agreement between the EU and a third country is announced, in this case with the USA, justified criticism always exists due to the lack of transparency regarding the discussions. She believes that past agreements less transparency existed than now, where instead of EU citizens waiting for the final agreement, rounds of negotiations are

being published frequently. "This is thanks to movements made by the European public. I receive an email or message daily regarding thoughts on the TTIP. Currently, many tariffs and barriers between the EU and the USA exist and the idea is to end this in order to harmonize standards, increase

business and increase cooperation between the two continents. Justified criticism exists as up until now, there is no guarantee that EU high standards and Maltese businesses will not be

hit by the agreement if certain things aren't done". "My aim is to ensure, as a member of the delegation between the EU and the USA, that if an agreement between the EU and the USA occurs nothing will affect the liberties and standards of Maltese businesses. Our argument is that everything must remain the same when it comes to standards and business liberty, while at the same time recognizing the fact that this agreement would allow our businesses not only operate across the EU, but also in the USA".

EU members unlikely to support blanket ban on zero-rating

European legislators are unlikely to support a European Union (EU)-wide ban on positive price discrimination, which allows operators to provide unlimited free access to certain services such as Facebook, Wikipedia and music streaming services, Reuters reports. Opinions on the impact on competition of positive pricing discrimination, including zero-rating (the practice of offering toll-free data for certain applications or services), are divided and a blanket ban is unlikely to garner support from all member states. Supporters of zero-rating argue that the practice has a positive impact on competition and innovation, whilst providing greater opportunities for low-income users. Several member states and consumer rights activists, however, claim that positive price discrimination breaches net neutrality by providing privileged access to certain services and hamstringing competitors. Net neutrality proposals put forward by Latvia suggested that the matter be left to member states to handle internally: 'The issue of positive price discrimination could be left outside the scope of this instrument... this would allow each member state to decide whether to ban price discrimination at a national level or leave the assessment of such practices to general competition law.'

prices. As part of the committee for internal market and consumer protection, my groups as well as others have always aimed to give consumers the best protection possible, including





HTS in Middle East & Africa

The year 2014 has been good but slightly difficult for the VSAT market. These difficulties has limited the expected growth of the industry. In my opinion, the sources of growth limitation are mainly two, legacy regulations for some countries while the stability and security had challenged the growth for others. GCC markets are still closed for new entrants and still dominated by monopolies. Other countries like Iraq, Syria, Afghanistan, etc. economies were heavily affected by their securities.

The counter argument for my statement is the High throughput Satellite broadband deployment in Syria which some of my colleagues in the industry may say, and consider this as a success story but I believe the opposite, couple of hundreds of Mbs in broadband is not a success story for such potential market, if it wasn't the war and the regulation we would expect two digits of multiples increase in the demand at least from such potential market.

The industry expectation for the growth were much higher after introducing HTS in the region considering their pricing and capabilities, whether its Ka or Ku bands, the HTS has completed the portfolio of the satellite industry; and made it much more mature. On the other hand, the Market need to access data has grown up exponentially

reaching reaching many times more. For example, SkyStream Maritime traditional customer requirement has grown up ten times more than it used to be 6 years ago and this applies to all market verticals.

With HTS, the industry today has different offering for different applications. HTS broadband pricing has repositioned the satellite industry firmly against terrestrial network such as Yahclik, O3B is another example of HTS that is able to compete in performance and pricing against fiber. Epic and Global Express are another form of HTS and the industry are looking forward to welcome their Maritime application.

HTS is a game changer against fiber optics considering the total cost of ownership, it competes in pricing and sometimes in performance such as the case with O3b. The presence of such product side by side with fiber optics will change the prospects of customers, customers will look at connectivity which could be a mix of both instead of looking at particular product, such approach will definitely increase productivity and efficiency of customers businesses.

I believe very soon, and once the security and military challenges are settled, the markets will surprise us with the massive demands and the market will steer the industry not the other way around.



Riyadh Al Adely
CEO
Sky Stream



TECHNOLOGY NEWS

Technology Updates

T-Mobile US to trial LTE on unlicensed spectrum

Ericsson to embed License Assisted Access tech into small cells from Q4 2015. T-Mobile US and Ericsson have announced plans to trial a new technology that combines licensed and unlicensed spectrum to deliver a significant increase in data speed. The technology is called License Assisted Access (LAA), and the Swedish equipment maker plans to integrate it into its small cell products from the fourth quarter. T-Mobile plans to trial the technology using LTE spectrum and unlicensed 5-GHz spectrum, which is used for WiFi. "LAA is one of the technologies we plan to develop and use in our continuing efforts to provide our customers with superior network performance," said Neville Ray, CTO of T-Mobile US, who noted that the U.S. has approximately 550 MHz of underutilized 5-GHz spectrum. A recent Ericsson ConsumerLab survey found that only 41% of mobile users are highly satisfied with their indoor experience when browsing or accessing social networks. This falls to 36% when more data-intensive services are used, such as watching video. Ericsson claimed that by enabling concurrent use of LTE spectrum with just 4% of the available bandwidth in the 5-GHz band, LAA can deliver a speed increase of up to 150 Mbps. The vendor said its technology also ensures equal access to the spectrum, mitigating the impact on WiFi users. "One of the great things about LAA is its 'rising tide' effect, increasing system capacity

and making way for better service to all users in the area, whether they have an LAA-enabled device, or are using WiFi or cellular access," said Thomas Norén, vice president and head of radio product management, Ericsson. The company said it plans to add LAA to its Radio Dot indoor small cell for medium and large buildings, as well as its RBS 6402 indoor picocell for smaller buildings.



ETSI publishes NFV specs

Standards body completes phase one; embarks on development of interoperability, formal testing phase. ETSI's network functions virtualization (NFV) industry specification group (ISG) this week published 11 specifications, heralding the completion of phase

one of its work. The documents include an infrastructure overview, an updated architectural framework, and descriptions of the compute, hypervisor and network domains. They also cover management and orchestration, security and trust, resilience and service quality metrics. These documents lay the foundations for NFV technology, providing industry players with definitions of key concepts and a common language that will help companies collaborate with one another. "I'd like to thank all of the NFV ISG participants for their tremendous dedication through our numerous face-to-face meetings and conference calls to evolve the NFV vision," said Steven Wright, chair of the ETSI NFV ISG.

Phase two is now underway, which sees the NFV ISG turn its attention to developing normative requirements that will encourage interoperability between NFV solutions and aid in the establishment of formal testing methods for NFV. Work on the first 28 documents began in November, and they are due to be published over the coming two years. Phase two will also see ETSI's NFV ISG work more closely with other standards bodies to help focus their work and to avoid duplication. "Achieving and validating interoperability at critical reference points is the key focus for phase two," said Don Clarke, chair of the NFV ISG's network operators council (NOC).

OFCOM seeks advice on high frequencies for 5G

U.K. telco watchdog eyes spectrum above 6 GHz for providing data throughput of up to 50 Gbps. OFCOM on Friday called on industry players to provide their considered opinion on the feasibility of using frequencies above 6 GHz for 5G services. The U.K. telco watchdog is seeking answers to 14 questions covering various topics, such as the practicalities of achieving very high data rates using this spectrum; whether operators would seek to cover the whole country or opt for targeted deployments; and whether the bandwidth can be shared between mobile access and wireless backhaul, among others. "We want to explore how high frequency spectrum could potentially offer significant capacity for extremely fast 5G mobile data," said Philip Marnick, director of OFCOM's spectrum group, in a statement. "This could pave the way for innovative new mobile services

for U.K. consumers and businesses," he said. The timeframe for launching 5G remains uncertain, OFCOM said, but like many other stakeholders it expects it could emerge by 2020, subject to research and development, and international consensus on frequency bands. "We want the U.K. to be a leader in the next generation of wireless communications. Working with industry, we want to lay the foundations for the U.K.'s next generation of wireless communications," said Steve Unger, acting CEO of OFCOM. Interested parties have until February 27 to respond.

New Specification Group on Millimeter Wave Transmission at ETSI

ETSI has created a new Industry Specification Group (ISG) to work on millimeter Wave Transmission (mWT), with the first meeting taking place at ETSI on 14-15 January 2015. There is increasing interest in using millimeter wave spectrum, in the 30GHz to 300GHz range, for radio transmission. There is one order of magnitude of more spectrum available in this band than in lower bands. Larger bandwidth channels are possible, of 2GHz, 4GHz, 10GHz or even 100GHz. This allows radio systems to offer fiber-like capacity. The spectrum can be made available quickly, and can be reused easily with the limited propagation range in this band. Lower spectrum license costs also lead to a lower total cost of ownership and lower cost per bit of radio systems using this spectrum. However there are barriers to using this spectrum. Regulations for millimeter wave radio differ greatly from country to country. There is a lack of key components leading to high equipment costs. There is huge variety in the types of equipment and applications using this spectrum and there is still a lack of confidence in the technology. ETSI's new Industry Specification Group on millimeter Wave Transmission (ISG mWT) will facilitate the use of the V-band (57-66 GHz), the E-band (71-76 & 81-86 GHz) and, in the future, higher frequency bands (up to 300 GHz) for large volume backhaul and fronthaul applications to support mobile network implementation, wireless local loop and any other service benefitting from high speed wireless transmission. The approach is to analyze issues, to exchange

information and to develop common views across the industry, on subjects including regulation and licensing schemes, propagation channel models, simulation results, measurements, semiconductor technology roadmaps, and experiences gained from early roll-outs and trials. Other ISG mWT work will focus on use-cases and requirements and identify the most suitable millimeter wave bands for the most important transmission applications.

Malaysia opens digital library to encourage ICT use

Malaysia has opened up a digital library in Perlis state as part of the government's digital economy agenda. People will be able to use tablets and choose from around 4300 e-books in English, Bahasa Melayu and Chinese. There will also be e-magazines and e-newspapers. A separate Kids Zone will have content for children. The digital library supports the government's Digital Malaysia agenda to improve information access and build an ICT-driven economy by 2020. "Today's launch is part of a series of initiatives by [National Library of Malaysia] and the country's state libraries to widen public access to information, as well as encourage Malaysians to read," said Nafisah Ahmad, Director-General, National Library of Malaysia at the launch this week. "It will inspire the general public, particularly younger Malaysians to read, and simultaneously sharpen their IT skills," she added. The new facility in the National Library of Perlis is the second such in Malaysia, with the first launched last year in Kuala Lumpur (pictured). The library in Perlis gets over 105,000 visitors a year. Both digital libraries were established in partnership with Samsung. Singapore is revamping its libraries to make them digital hubs where people can book pay-per-use workspaces with video conferencing facilities, internet access and photocopiers.

4G LTE handsets demand quadruples in Middle East

GCC shipments of 4G LTE handsets have increased more than four times over the last year and are now close to accounting for one half of all Smartphones sold in the region,

according to the latest figures from International Data Corporation (IDC). The market intelligence firm's Worldwide Mobile Phone Tracker shows that Smartphones now make up 75 per cent of the phones shipped in the GCC, with buyers increasingly moving toward 4G handsets as the market matures. "The GCC is less than a year behind the market development already seen in Western Europe," says Simon Baker, program manager for IDC's handset research in Central Europe, Middle East, and Africa. "However, the market is further behind the U.S., where 4G already makes up three quarters of the Smartphone market," he added. Competition and falling prices are playing their part in boosting the uptake of 4G LTE in the GCC. Nabila Popal, research manager for IDC's handset research in Middle East, Africa, and Turkey, said: "All Apple handsets from the iPhone 5C and 5S now offer LTE, but there is much greater choice when it comes to 4G Android models." "Samsung is now the region's largest vendor of LTE-enabled devices, and while the average price that a Gulf consumer currently pays for a 4G handset is close to \$600 and has not fallen much over the last 12 months, cheaper models are arriving, most notably from Lenovo and Huawei," he added. Elsewhere in the Middle East and Africa, the overall Smartphone market is rapidly expanding, with growth rates picking up over the last two quarters. IDC research shows that in Africa as a whole and in the wider Middle East beyond the GCC and Turkey, the number of Smartphones sold in Q3 2014 was up 300 per cent year on year. "We are in the midst of a boom," says Isaac Ngatia, a research analyst at IDC Middle East, Africa, and Turkey. "The technology levels are more basic than those seen in the GCC and 4G phones remain relatively uncommon, but many consumers are now getting their hands on a Smartphone for the first time," he said. "It is a very different kind of market from the Gulf," added Baker. "Cheaper phones are the ones selling in high volumes, and prices are tumbling; the average price paid is not much more than half that in the GCC. The brand situation is different too; beyond Samsung and Chinese brands like Lenovo, Huawei, and ZTE that are making a push in the region, many of the bigger players just focus on single countries or sub-region and aren't well known beyond them," he added. "It is a different sort of brand from the international names the handset

industry is usually associated with, and as a model it is working very well at the moment," said Popal. "These regional brands are able to offer Android phones sourced from China that have the larger screen sizes and functions of models from the big international names but at much lower prices." Key examples include Tecno in Nigeria and Kenya, whose Smartphone shipments were up 269 per cent year on year in Q3 2014, and Q-mobile in Pakistan, which has more than half the national market and posted growth of healthy 42 per cent. "Brands such as these will continue to perform well over the coming quarters, Smartphone shipments in these poorer countries will expand a lot further in the next couple of years, as they still account for less than half the total handset market," concludes Popal.

5G R&D and trial investments to reach \$5 billion by 2020

4G-Report.scom's latest report indicates that R&D and trial network investments based on 5G wireless technology are expected to reach \$5 Billion annually by 2020. While LTE and LTE-Advanced deployments are still underway, wireless carriers and vendors have already embarked on R&D initiatives to develop so-called "5G" technology, with a vision of commercialization by 2020. 5G is essentially a revolutionary paradigm shift in wireless networking to support the throughput, latency, and scalability requirements of future use cases such as extreme bandwidth augmented reality applications and connectivity management for billions of M2M (Machine to Machine) devices. Although 5G is yet to be standardized, some of the collectively accepted attributes of the technology include new air interface transmission schemes, new spectrum bands, spectrum aggregation, Massive MIMO, beam forming, D2D (Device to Device) communications and self-backhauling, among others. Driven by regional, national government, wireless carrier and vendor initiatives, we expect 5G R&D and trial investments will account for nearly \$5 Billion by 2020, following a CAGR of nearly 40% over the next 5 years. The "5G Wireless Ecosystem: 2015 – 2025 – Technologies, Applications, Verticals, Strategies & Forecasts" report presents an in-depth assessment of the emerging 5G ecosystem including

key market drivers, challenges, enabling technologies, use cases, vertical market applications, spectrum bands, wireless carrier deployment commitments and vendor strategies. The report also presents forecasts for both 5G investments and subscriptions.

Du trials LTE Broadband Trunking

United Arab Emirates (UAE) telco Du is claiming to have completed the first tests of Long Term Evolution (LTE) Broadband Trunking in the Middle East, achieving data transfer speeds of up to 100Mbps. The technology is designed to replace legacy trunking equipment based on Tetra and Project 25 (P25) radio systems, and Du says it will allow for the provision of 'futuristic connectivity solutions' to large enterprises in sectors such as mining, oil and gas, logistics and shipping, as well as government departments, emergency services and public utilities, plus for applications such as traffic monitoring and smart



city solutions. Saleem Al Blooshi, Executive Vice President of Network Development & Operations at Du, said: 'The successful testing of the new LTE broadband trunking services and the evolution of current trunking solutions provides tremendous opportunities in a digitized world, where real-time transfer of information is at the heart of communication. The solution complements our expanding broadband portfolio for the enterprise segment.'



3 ways to win the Internet of Things in the Middle East

Machina Research - one of the foremost providers of strategic advice on M2M, IoT and Big Data - described the difference between Machine-to-machine (M2M) and the Internet of Things (IoT) in this way: "M2M is, effectively, the plumbing for the Internet of Things."

Vodafone's M2M Adoption Barometer 2014, offering detailed insight into the changing world of M2M communications and IoT, found that adoption of M2M technologies in the Middle East,

Africa, and Asia-Pacific has jumped 15 percent since 2013. Europe wasn't far behind, but the Americas saw relatively sluggish growth of just four percentage points during that time. In the Gulf, IDC estimated that total spending on M2M connections would reach roughly \$224 million in 2014 - a nearly 20% increase from the previous year.

One thing is clear: While places like New York and London move at a slower pace, focusing mainly on optimization as IoT takes hold, cities like Doha, Riyadh and Dubai - with unprecedented public backing - are the new IoT frontier.

Right now, mobile money transfers, M2M SIMs and tracking services are the most common M2M services offered in the Arab World's budding Internet of Things. While the commercial opportunities are lucrative, the transition from M2M to IoT won't happen overnight. Here are three ways telcos can remain at the centre of the M2M value chain as IoT takes hold in the Middle East:

Involve future customers from the outset. Whether it's connecting cars to the electricity grid, controlling the temperature in your home or keeping you safe on the drive to work, it doesn't get more personal than the Internet of Things. In one of the most digitally-connected regions in the world, it will be absolutely essential to involve people, especially young people, in the creation of their Smart Society. At Vodafone Qatar, we vowed to do this from the outset, which is why we launched Design My Qatar - a

social initiative designed to engage the citizens of Qatar and encourage them to share their views on what they want their future to look like. We noticed that much of the conversation about IoT has been about technology solutions to problems, but no one had ever asked consumers if it would be helpful for them to know, for example, that they consume 34 kilowatts of energy. We created an innovative online portal in the form of a simulated city which rewards contributions and rates them - creating a community and crowdsourcing ideas.

Think huge about Big Data. The appetite and interest in Big Data globally seems to grow almost as fast as the data itself. In the Gulf Cooperation Council (GCC), some estimates indicate that the Big Data and analytics market is set to grow five-fold - to USD 636 million - by 2020. Market opportunity aside, we as an industry need to think even bigger about Big Data if we want to be masters of IoT. In the telecommunications sector and certainly at Vodafone, the operational opportunities presented by Big Data, across the value chain, have been known for some time. Next, we need to understand the macrotrends that will enable us to unlock these opportunities across infrastructure, power grids and road networks. Without a 15,000-metre view of Big Data, we simply won't be getting the whole picture - damaging our ability to develop solutions and solve problems.

Be an advocate. The Internet of Things is the next evolution of the digital economy. For public and private sector customers in this region, especially with respect to privacy and protection, this evolution will mean a fundamental shift in attitudes and policy. I believe that IoT in this region and around the world is a force for good and can allow an energy supplier, for instance, to install smart meters on cell sites to monitor consumption, change consumption behavior in a manner that still satisfies consumers, yet reduces carbon emissions by a measurable percentage. Telcos need to be a partner in IoT's success, working hand-in-hand with regulators and decision makers. In ictQATAR, we have found a supportive partner with an ambitious and visionary plan for Qatar's digital future. Having a seat at the table and being an advocate for the good IoT can bring our communities, I believe, will pay off sooner than we think



George Galica
Head of Managed Services
Vodafone Qatar



Operators' strengths in M2M and IoT may lie beyond ownership of network or spectrum assets



Tom Rebbeck
Head of Custom Research
Analysys Mason

Operators have spent much effort to establish how they can build on their connectivity services to move up the value chain for M2M and IoT. This focus may be incorrect. Many IoT and M2M services either only need a simple data connection or can bypass traditional telecoms networks altogether. Operators have other strengths on which to build, such as channels to market, billing and support mechanisms, which may be more important than concentrating on connectivity.

Operators have a weaker position in the value chain for M2M and IoT than for traditional telecoms services

An operator's position in providing a service can be examined by looking at the elements in the value chain of a service, and by assessing how strong the operator is in each of these elements.

¹ Figure 1 compares operators' strengths in the value chain for traditional voice services with their strengths for two types of M2M service.

- **Voice services:** Operators are well-placed to provide the service and capture most of the value. We forecast that telecoms operators will provide 76% of voice minutes on smartphones in Western Europe in 2018, and earn more than 95% of voice revenue, despite the threat of over-the-top (OTT) services (for more information see our OTT communication services worldwide: forecasts 2013–2018).

- **M2M services:** Operators are in a weaker position. Much, if not most, of the value of an M2M service is in the provision of the application and the device. Most operators can, at best, resell a device and application provided by a third party. For some services, such as smart metering and smart lighting, traditional operators may be competing against new networks that operate in licence-exempt spectrum.

The risks are not purely theoretical. Some of the larger vehicle-tracking companies, such as Ctrack, require little more than a cellular data connection from an operator. Occasionally, this will be managed connectivity, supported by, for example, Jasper Technologies, Ericsson's Device Connection Platform (DCP) or Vodafone's Global Data Service Platform (GDSP), but overall connectivity will be only a small share of the total value of the service.

Figure 1: Strength of operators in the value chain for voice and M2M services [Source: Analysys Mason, 2014]

	Spectrum	Network	Device	Application	Sales channel	Billing and support
Traditional voice services			Handset can be bought from operator or third-party channel	Taking application to include number, voicemail etc.	Online, stores, for example	
M2M service requiring service assurance^a	Services will require licensed spectrum	Services will probably require managed connectivity	M2M devices can be bought through a variety of channels	Operators typically rely on third parties to develop applications	Operators have strong sales channels into enterprises	Operators have strong support and billing systems
M2M service not requiring service levels^b	Service may not even require licensed spectrum	A range of networks may be suitable (GSM, Wi-Fi, ZigBee, LPWA ^c)	As above	As above	As above	As above

■ Uncertain or weak position ■ Strong position

^a Vehicle tracking, for example.

^b Smart parking, for example.

^c Low-power, wide-area networks, such as SIGFOX, Semtech, LTE-MTC and Neul.

Other services do not even require a connection provided by a traditional operator. For example, Telensa is quietly expanding its smart lighting business in the UK and USA with no reliance on telecoms operators.²

Operators' stores and established customer bases give them significant strengths in M2M and IoT

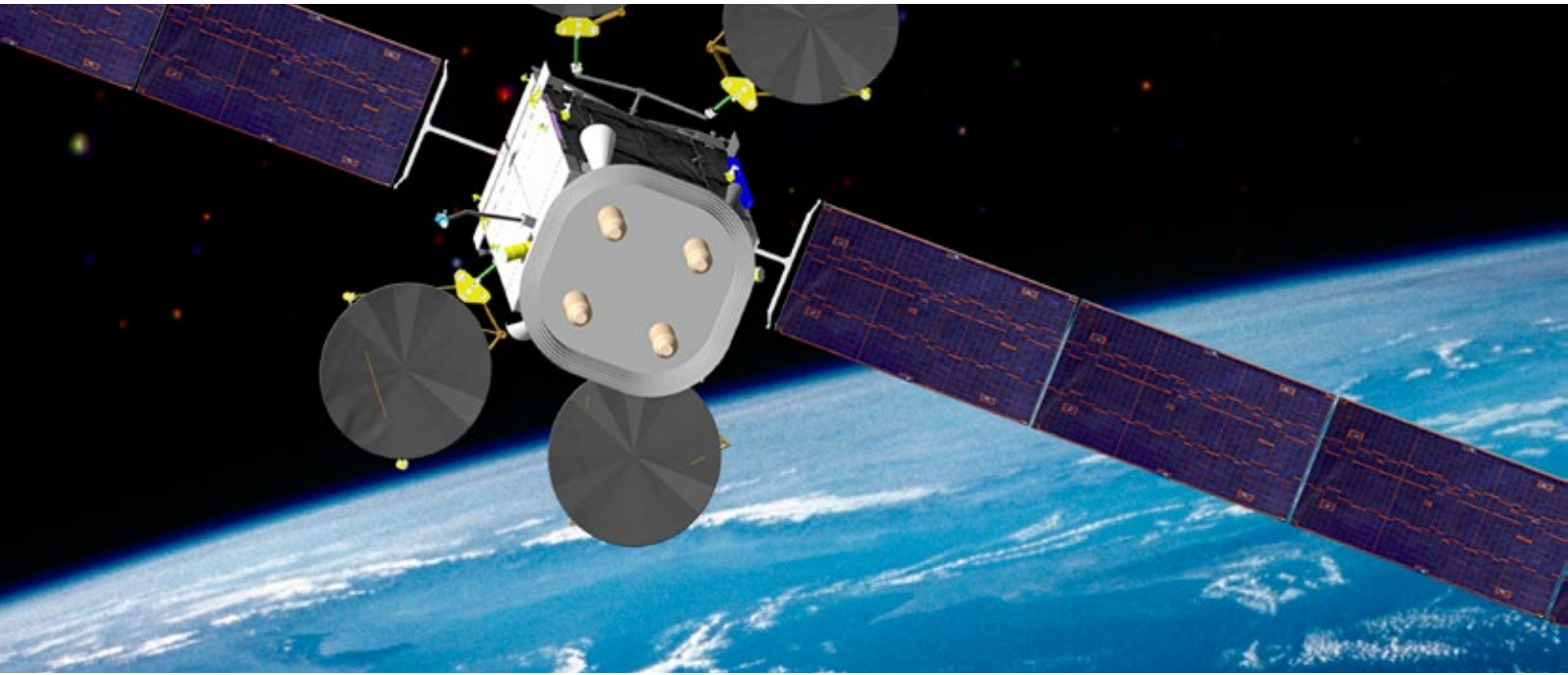
This is not to say that operators have a weak position in IoT or M2M. The strengths that they have are extremely hard to replicate – few other organisations have thousands of stores or an existing customer base of millions and the mechanisms to bill and support them. Some operators are already doing this; Deutsche Telekom and T-Systems are providing first and second-line support for MAN's TeleMatics service. We also know from previous research that enterprises prefer to buy M2M and IoT services

from existing suppliers. However, the strengths that operators have in M2M and IoT may not be where they have traditionally seen their advantages (that is, in the ownership of network or spectrum assets).

Operators face challenges in building on the strengths of sales and support – for example, in training the sales and support teams to deal with new and very different products from traditional telecoms services. However, these are challenges that operators face in entering any new market, and ones that they need to overcome to generate more than connectivity revenue from M2M and IoT services. Furthermore, in each of the areas where their position is weak or uncertain, operators can develop or acquire new solutions. For example, they can deploy low-power, wide-area (LPWA) networks or acquire or partner with companies with vertical market applications and expertise

¹ This is based around concepts developed by Bruce Henderson, founder of the Boston Consulting Group, and Michael Porter, Harvard Business School professor.

² Telensa is using ultra-narrowband technology, licensed from Plextek, its parent company, and operates in licence-exempt 868MHz spectrum.



▼ SATELLITE UPDATES

Satellite Updates

New Zealand ISP raises satellite broadband speeds

New Zealand internet service provider (ISP) Wireless Nation has announced that it has doubled the maximum download speed available via its satellite broadband service. Customers are now being offered peak download rates of 10Mbps, up from 5Mbps previously, at no extra cost. The firm says its satellite-based connections are aimed predominantly at users in rural areas which have not been reached by other forms of internet access. Wireless Nation also offers satellite-based voice-over-internet protocol (VoIP) telephone services.

Nepal government initiates study to launch satellite

The Ministry of Information and Communications (MoIC) has formed a committee to prepare terms of reference (ToR) for selecting a consultant to carry out feasibility study to launch Nepal's own satellite. The government has yet to make a formal claim for the orbital slot allocated to the country by International Telecommunications Union (ITU) in 1984. ITU has asked Nepal to make formal claim for orbital slot within 2015. According to officials of MoIC, ITU has allocated Nepal orbital slot of 50 degree east or 123.3 degree east. After ITU gave Nepal

a deadline of 2015 to make the claim, the government had formed a five-member committee under the leadership of Narayan Sanjel, joint secretary at MoIC, in 2013 to conduct a study on method and workplace for the feasibility study. The new committee has been formed based on the report submitted by the Sanjel-led committee. Kabi Raj Khanal, chief of administration department of MoIC, is the leader of the committee which has Gaurab Giri, under secretary of MoIC, Ananda Raj Khanal, director of Nepal Telecommunications Authority (NTA), and one expert each from Nepal Telecom and NTA as members. The committee has been given three months to submit its report. "The committee has already started its work," Khanal said. "The government will hire a consultant based on the ToR prepared by us."

Etisalat launches 4G LTE and eLife services over VSAT technology

On the sidelines of IBC Content Everywhere MENA event, organized by IBC in Dubai from January 20-22, 2015, Etisalat launched its 4G LTE and eLife services over VSAT technology. Etisalat is the first operator to launch 4G LTE and triple play services (eLife) via VSAT in the Middle East region. It will allow customers in remote, desert and off shore areas to enjoy high-speed data and watch eLife channels over VSAT technology.

Commenting on the launch, Tareq Abdulla AlKharji, Senior Vice President Data Centers and Cloud Solution at Etisalat, said, "VSAT technology provides a powerful and secure connectivity solution for companies that work in remote areas. Etisalat has more than two decades of experience in providing advanced solutions for a wide range of customers, from major oil companies to governmental entities. At the IBC Content Everywhere MENA, Etisalat takes great pleasure in announcing another first in the Middle East by launching 4G LTE and eLife services via the VSAT technology. It falls in line with our commitment to offer high speed broadband connectivity and entertainment experiences to our customers in remote areas, be it in the desert or the sea." IBC Content Everywhere MENA exhibition and conference will see the participation of global technology leaders along with major suppliers, executives and practitioners in broadcast, telecoms, media and IT in the Middle East and North Africa. The event provides a unique platform to build knowledge and understanding the latest trends, strategies and developments in the world of content and electronic media. It facilitates interaction with visionary technology companies and the service providers helping to shape content everywhere. Participants will meet international and regional leaders who are opening up opportunities for online content distribution in the region. Through a host of discussion panels, the event covers the hottest topics across the creation, management and delivery of content across connected devices. IBC Content Everywhere MENA is the second of the event series "IBC Content Everywhere" which has been launched first in Europe by IBC last September 2014 to reflect the very different nature of media connectivity in an IP world. IBC is one of the most prominent events in creation, management and delivery of content in the world, and attracts every year more than 55,000 attendees drawn from more than 170 countries.

Etisalat uses satellite backhaul to expand 4G and triple-play services

United Arab Emirates (UAE) fixed and mobile operator Etisalat has announced the launch of 4G and triple-play services for users in remote areas using very small aperture terminal (VSAT) satellite technology to provide backhaul connectivity. Commenting on the launch, Tareq Abdulla AlKharji, Senior Vice President of Data Centers and Cloud Solutions at Etisalat, said:

'VSAT technology provides a powerful and secure connectivity solution for companies that work in remote areas.' The new VSAT-enabled services will be made available to government entities, oil companies and other firms with locations in remote or offshore areas.

Es'hailSat Targets DTH Market in MENA Region with Es'hail 2

Es'hailSat celebrated the one-year anniversary of its first satellite, Es'hail 1. After entering service on December 18, 2013, the Es'hailSat satellite saw extensive use from beIN Sports for transmitting the 2014 FIFA World Cup from Brazil. Es'hailSat supported the only Free-to-Air (FTA) broadcasting in the Middle East and Northern Africa (MENA) region. Al-Jazeera Media Network is also a major customer on Es'hail 1, prompting a healthy beginning for the company's satellite services. "Es'hail 1 has exceeded our expectations in performance, fill rate and revenue generation, demonstrating that the satellite is very attractive to our customers who value our broadcasting independence, quality of service and market penetration," Ali Ahmed Al-Kuwari, CEO of Es'hailSat told Via Satellite. "Our customers have fully utilized the new features and high performance."

Arianespace to Launch SES 12 All-Electric Satellite in 2017



SES has selected Arianespace to launch the all-electric SES 12 satellite aboard an Ariane 5 rocket in late 2017. The mission will be the 40th SES satellite to launch aboard an Ariane

vehicle. Currently under construction by Airbus Defence and Space, SES 12 is a 5,300-kilogram hybrid satellite designed to replace the NSS 6 satellite and add incremental capacity in the Asia-Pacific region from the 95 degrees East orbital position. The satellite's traditional wide-beam mission carries 54 transponders for Direct to Home (DTH), government and VSAT customers. The second half of the satellite will sport 70 Ku-band spot beams and 11 Ka-band spot beams for more than 14 GHz of capacity to serve VSAT, enterprise, mobility and government customers. This high throughput payload also supports a Digital Transparent Processor (DTP) for improved anti-jamming capabilities and increased payload flexibility.

Inmarsat Selects Globecomms to Supply GX Services to Government Customers

Inmarsat Government has executed a service provider agreement with Globecomms Systems to supply Inmarsat Global Xpress service in support of U.S. government customers. Under the deal, Globecomms will offer comprehensive solutions involving network services, system integration, and end-user products and applications enabling a complete end-to-end solution for these customers. Inmarsat's Global Xpress Ka-band service, designed to complement the U.S. government's military Ka-band Wideband Global Satellite (WGS)

system, offers high-throughput wideband data service. The first Global Xpress satellite, Inmarsat 5 F1 is already serving U.S. government customers in Europe, the Middle East, Africa and Southwestern Asia, and worldwide

coverage is anticipated to be available early in the second half of 2015.

Hughes Adds 'SmartTechnologies' to New Satellite Broadband Plans

Hughes Network Systems has updated its Gen4 satellite Internet plans with Hughes SmartTechnologies, bringing improvements in downloading, browsing and data usage



management. SmartTechnologies is comprised of four tools for improving the company's satellite Internet offerings. SmartFetch reduces the number of "hops" needed to retrieve content, thus increasing speeds, while SmartCompression shrinks web data as much as 30 percent, according to the company. SmartResources provides a status meter that displays monthly data allowance, and SmartBrowsing lets subscribers continue emailing and browsing after exceeding monthly data allowances.

Qualcomm, Virgin Group Join OneWeb on Ambitious 648 SmallSat Constellations

OneWeb, formerly known as WorldVu, announced today its intentions to launch a massive constellation of 648 small satellites to provide broadband and telephony services to the world from Low Earth Orbit (LEO). Greg Wyler, who founded O3b Networks in 2007, started WorldVu in 2012 and is its CEO. The Virgin Group and Qualcomm are initial investors in the gargantuan satellite constellation. Financial

details have not been disclosed, but Qualcomm Executive Chairman Paul Jacobs said the company looks forward to helping fund initial technical feasibility work for the satellite system, and Virgin Group Founder Sir Richard Branson touted the significant role Virgin Galactic's dedicated SmallSat vehicle LauncherOne will play in orbiting the constellation. Both Jacobs and Branson have joined Wyler on OneWeb's board of directors. The

648-satellite OneWeb constellation is designed to integrate with mobile networks. It will act as an extension of a mobile operator's network and it expects to be the equivalent to any terrestrial network. By operating in LEO, the whole system will have more than 8 terabits

in terms of total capacity and will have latency of less than 30 milliseconds, according to a high-level Via Satellite source who requested anonymity. Virgin Group Founder Sir Richard Branson and Qualcomm Executive Chairman Paul Jacobs are the initial investors in the OneWeb constellation and are part of the board of directors.

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Solutions at Etisalat, said: 'VSAT technology provides a powerful and secure connectivity solution for companies that work in remote areas.' The new VSAT-enabled services will be made available to government entities, oil companies and other firms with locations in remote or offshore areas.

Orbital Sciences Completes PDR for Upcoming Yahsat HTS

Orbital Sciences Corporation and UAE-based satellite operator Yahsat, have completed the Preliminary Design Review (PDR) for the Al Yah 3 spacecraft and payload. Al Yah 3, which is based on Orbital's GEOStar 3 platform, is an all Ka-band, High Throughput Satellite (HTS) to be designed, manufactured and tested at Orbital's satellite manufacturing facility in Dulles, Va. The PDR was a comprehensive review that validated Orbital's design approach to the physical and functional requirements of the spacecraft. The review is the first step toward confirming that the satellite will operate effectively on orbit. Once operational, Al Yah 3 will enable the delivery of affordable broadband to more than 600 million users, specifically covering more than 95 percent of the population in Brazil and 60 percent of the population in Africa. "Al Yah 3 will be the first hybrid electric propulsion GEOStar 3-based spacecraft to be launched by Orbital at the end of 2016. It provides the benefits of higher power and greater payload capability while still maintaining advantageous launch costs," said Christopher Richmond, Orbital's senior vice president.





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