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MEET OUR ANALYSTS



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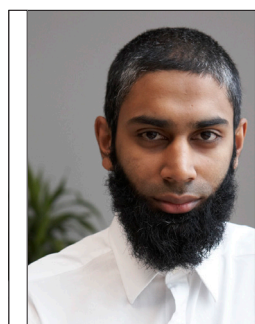
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Informa Telecoms & Media analysts regularly attend industry conferences, either to deliver presentations, chair a session or simply to research a specific topic. Below we list those events that our analysts are due to attend over the coming months.

Please e-mail the relevant analyst directly if you would like to set up a meeting at or around one of the conferences.

Event	City, Country	Date	Website	Analyst
Broadband World Forum MEA	Dubai, UAE	14-15 Mar	www.broadbandworldforum.com/mea	matthew.reed@informa.com ismail.patel@informa.com
VAS Growth Markets	Dubai, UAE	4-5 Apr	www.vas-growthmarkets.com	matthew.reed@informa.com mai.barakat@informa.com
Managed Services Growth Markets	Dubai, UAE	4-5 Apr	www.managedservicesevent.com	matthew.reed@informa.com mai.barakat@informa.com
East Africa Com	Nairobi, Kenya	12-13 Apr	www.comworldseries.com/eafrica	nicholas.jotischky@informa.com thecla.mbongue@informa.com

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Case study: Airtel Africa's real-time charging service

Paul Lambert

- Airtel Africa's real-time charging service is a way for the operator to enhance yield management by maximizing its network by increasing traffic at underused base stations.
- Airtel has seen significant benefits from launching the service, which it says has led to an improvement in KPIs, most notably churn and minutes of use.
- Operators that have decided to offer the service in countries where it hasn't already been launched should offer it as soon as possible to gain a first-mover advantage.

Overview

Airtel Africa's real-time charging service, which offers customers discounted call rates based on how much traffic there is on the base station nearest to them, launched in 2H09 and is one of the most successful initiatives the operating group has introduced.

The service, which Airtel brands Treasure Hunt, was originally launched by Zain – the previous owner of Airtel's African operations – in Zambia, Niger and Uganda, after which Congo Brazzaville was added.

Strategic goals

Airtel's strategic goals in offering the real-time charging service were primarily to improve yield management by making better use of its network to reduce churn without lowering prices and sparking a price war.

It also wanted to increase usage without diluting profitability. Because network operating costs are relatively fixed, all additional traffic is incremental profit if traffic doesn't push utilisation above a level, typically around 80%, at which point additional investment would be required to maintain the overall service/network experience.

Business model

Airtel doesn't charge subscribers to sign up for the Treasure Hunt service, though users have to be registered to use it. The service is open to Airtel's entire user base, which is overwhelmingly prepaid in all the African countries it operates in. The aim is to drive more traffic to underused base stations.

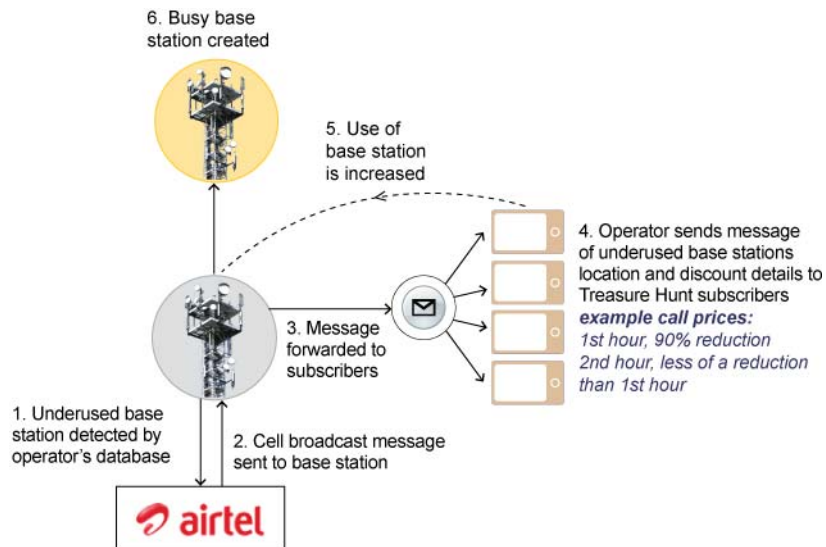
Airtel calculates the discount based on how busy the base station is: If the BTS is 10% used, there is a 90% reduction in the price of a call over the next hour, then a lower reduction over the succeeding hour. The discounts are up to 99% on the advertised rate.

Airtel typically monitors the cell load on an hourly basis, though the operator can monitor it at shorter intervals. If the cell load remains low for several consecutive hours, the discount can continue past the initial hour.

The operator communicates to subscribers the location of the base station where they will receive the discount and how much the discount is at that base station. The discount rate is calculated based on the use of an individual base station and its available capacity.

Airtel communicates the discounts to subscribers using cell-broadcast technology, which isn't widely used but is part of the GSM standard. Cell-broadcast technology enables operators to broadcast messages to many subscribers within reach of a specific base station (see fig. 1).

Fig. 1: Airtel's Real-Time discount service



Notes: The discounts are up to as much as 99% on the advertised rate. The discount rate is based on use of individual base stations based on available capacity.
 Source: Informa Telecoms & Media

Vendor Tango Telecom implemented its network-independent technology to enable the service.

Market positioning

Airtel's key target markets for Treasure Hunt are young people, villages and university campuses. The service was initially aimed at young people (see fig. 2).

Fig. 2: Airtel marketing message



Source: Informa Telecoms & Media

To market the service, Airtel sends caravans to villages and other areas to show people how the system works, and it includes a video show to communicate its message. Airtel undertook what it says was "a very extensive marketing campaign" to educate the market about the service. Airtel also communicates improvements in network coverage and conveys other marketing messages with the caravan.

Airtel tries not to emphasize the low-cost aspect of the service so that it doesn't position itself at the low end of the market. To do this, the operator communicates the amount of the reduction in terms of a percentage rather than the absolute price reduction (see fig. 3).

Fig. 3: Airtel, dynamic-pricing marketing message



Source: Informa Telecoms & Media

Airtel found that it was easy to communicate cheap prices but that the challenge was to communicate it in more interesting ways that engage the user beyond focusing on the low cost.

Results

About 80% of Airtel's prepaid customers have opted into the service in each of the countries where it has been introduced, according to Tango Telecom, which says that the service has had a significant effect on churn, with the operator experiencing about a 6% net increase in its subscription count after the service launched.

Airtel found that users changed their calling behavior to take advantage of the discounts, which led to a significant increase in the number of calls. The operator also saw a 15-28% increase in usage in terms of minutes, depending on the country in which it was launched. It also saw an increase in revenues from the increase in usage, which in part came from the revenues generated from nonusers as well as from users making more calls.

Although it is difficult to single out the effect of Airtel's real-time charging service on its subscription levels, it's nonetheless noteworthy that the operator has, with the exception of Uganda, seen an increase in its subscriptions count in each of the markets in which it has launched the service, according to Informa Telecoms & Media research. Congo Brazzaville is of particular note, because the operator has fended off intensifying competition from MTN to retain market leadership (see fig. 4).

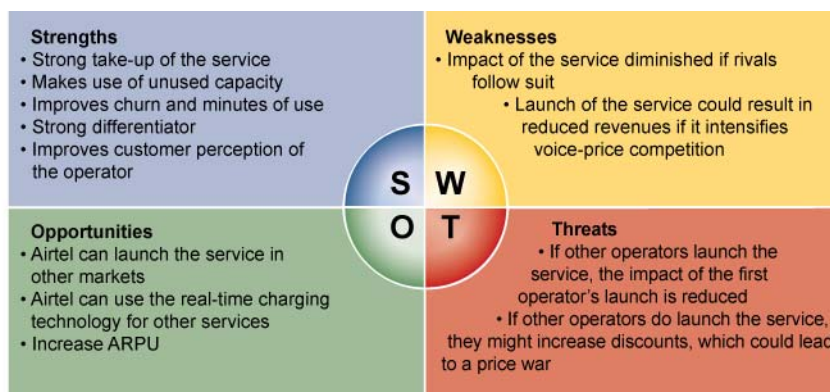
Fig. 4: Zambia, Congo Brazzaville, Niger, Uganda, mobile subs by network, 4Q08-4Q10

Operator	4Q08	1Q09	2Q09	3Q09	4Q09	1Q10	2Q10	3Q10	4Q10
Zambia									
Bharti Airtel	2,669,000	2,719,000	2,824,000	2,940,000	3,076,000	3,178,500	3,281,100	3,383,600	3,486,100
MTN	693,000	778,000	857,000	949,000	1,165,000	1,293,000	1,441,000	1,661,000	1,832,900
Zamtel	177,000	177,000	177,000	177,000	177,000	177,000	177,000	177,000	177,000
Congo Brazzaville									
Bharti Airtel	1,321,000	1,352,000	1,391,000	1,415,000	1,414,000	1,438,100	1,500,000	1,700,000	1,767,000
Equateur Telecom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	10,000	70,000
MTN	823,000	942,000	1,084,000	1,193,000	1,274,000	1,380,000	1,519,000	1,575,000	1,670,300
Warid	212,250	230,000	250,000	277,500	316,200	366,200	427,500	500,000	553,800
Niger									
Bharti Airtel	1,111,000	1,244,000	1,341,000	1,432,000	1,549,000	1,665,100	1,781,200	1,897,400	2,013,500
Orange	166,000	212,000	275,000	347,000	462,000	563,000	693,000	825,000	941,200
Sahelcom	180,000	196,700	208,600	215,500	217,500	227,500	238,300	250,000	258,400
Telecel	286,870	290,200	294,400	300,000	365,000	365,000	365,000	381,600	398,300
Uganda									
Bharti Airtel	2,078,000	2,312,000	2,377,000	2,243,000	1,925,000	1,911,400	1,897,900	1,900,000	1,802,900
i-Tel	2,000	6,000	10,150	14,190	19,100	23,400	27,600	31,900	36,200
MTN	3,417,310	3,827,520	4,206,720	4,649,000	4,960,000	5,334,250	5,623,050	5,904,250	6,230,400
Orange	n/a	55,000	182,000	241,000	350,000	358,000	422,000	529,000	597,450
Smile Telecom	n/a	n/a	n/a	n/a	n/a	5,000	7,000	9,000	11,000
Uganda Telecom	2,002,490	2,401,910	2,002,940	2,181,290	2,312,600	2,404,670	2,496,640	2,588,710	2,680,780
Warid Telecom	1,275,000	1,350,000	1,642,790	1,732,860	1,975,800	2,196,000	2,416,200	2,636,300	2,856,500

Source: Informa Telecoms & Media

Strategic outlook

Fig. 5: Airtel's real-time-charging SWOT



Source: Informa Telecoms & Media

Informa viewpoint

- Airtel's real-time charging service has succeeded in increasing use of underused base stations.
- The operator has found the service to be an effective differentiation tool.

- The service has proved to be an effective way to use network technology to improve KPIs: Airtel says the service has improved KPIs, most notably churn and minutes of use.
- Operators face a challenge in responding to the launch of a real-time charging service and will have to adjust their prices to remain competitive.
- Given the success of Treasure Hunt, Airtel can be expected to launch the service in other countries where it is present.
- Marketing the service is key: Airtel has succeeded in avoiding a price war by focusing on the percentage reduction the service offers rather than the absolute cost services can fall to.

Africa, mobile broadband subscriptions by country, 3Q10

Country	Operator	Technology	3Q09	4Q09	1Q10	2Q10	3Q10
Angola	Movicel	1xEV-DO	32,000	35,000	35,000	35,000	35,000
	Unitel Angola	HSPA	50,000	120,000	150,000	180,000	200,000
Botswana	Mascom Wireless	HSPA	57,000	81,340	92,000	112,500	117,000
	Orange Botswana	HSPA	21,000	35,000	52,000	64,000	85,500
Cameroon	Camtel	1xEV-DO	10,000	12,000	15,000	20,000	25,000
Egypt	ECMS	HSPA	28,080	28,964	30,585	30,982	36,720
	Etisalat Misr	HSPA	217,253	253,506	289,760	327,760	353,060
	Vodafone Egypt	HSPA	123,564	130,620	137,788	155,300	169,800
Equatorial Guinea	GETESA	1xEV-DO Rev A	1,400	1,900	2,400	2,900	3,400
	GETESA	1xEV-DO	100	100	100	100	100
	HiTs Telecom Equatorial Guinea	HSPA	0	7,000	12,000	13,500	17,370
Ethiopia	Ethiopian Telecom	HSPA	9,800	10,150	11,904	12,200	12,504
Gabon	Gabon Telecom	1xEV-DO	1,200	2,000	2,058	2,500	3,000
Gambia	QuantumNet	HSPA	2,500	5,000	9,600	10,720	11,700
Ghana	Bharti Airtel Ghana	HSPA	9,000	12,420	28,500	40,000	45,000
	MTN Ghana	HSPA	18,000	30,000	42,000	50,000	55,000
Kenya	Safaricom	HSPA	209,016	248,760	291,624	298,152	320,830
Lesotho	Vodacom Lesotho	HSPA	4,200	6,000	6,400	8,000	9,900
Libya	Libyana	HSPA	61,089	70,080	79,100	88,047	96,849
Madagascar	Telecom Malagasy	1xEV-DO	4,930	5,525	6,950	8,450	11,750
	Telecom Malagasy	HSPA	0	20	45	75	75
Malawi	Telekom Networks Malawi	HSPA	0	1,500	3,000	16,800	18,900
Mauritania	Mauritel	HSPA	0	0	162	198	225
Mauritius	Emtel Mauritius	HSPA	3,100	4,000	5,000	55,200	63,000
	Orange Mauritius	HSPA	3,900	8,000	10,000	27,200	32,400
Morocco	Ittissalat Al-Maghrib	HSPA	62,580	100,000	140,000	144,400	151,900
	Médi Télécom	HSPA	78,260	131,000	141,300	160,100	181,690
	Wana	1xEV-DO	301,200	336,500	372,500	409,200	446,700
Mozambique	Mocambique Celular	HSPA	25,000	39,000	38,500	52,000	61,110
Namibia	Cell One	HSPA	29,000	45,730	51,200	66,060	72,000
	MTC Namibia	HSPA	60,000	76,720	88,000	93,040	90,080
	Telecom Namibia	1xEV-DO	15,000	17,000	19,000	21,000	23,000
Nigeria	Bharti Airtel Nigeria	HSPA	10,000	40,000	71,400	90,000	100,000
	Globacom Nigeria	HSPA	50,000	75,760	152,000	200,000	300,000
	MTN Nigeria	HSPA	300,000	354,800	544,000	650,000	700,000
	Multi-Links	1xEV-DO Rev A	15,140	25,000	36,300	45,000	65,180
	Multi-Links	1xEV-DO	3,780	7,000	9,040	13,000	7,240
	Reliance Telecom	1xEV-DO		4,000	5,000	7,000	10,000
	Starcomms	1xEV-DO Rev A	40,000	59,500	70,000	91,500	110,000
	Starcomms	1xEV-DO	13,000	5,500	5,000	4,500	4,000
Réunion	Outremer Telecom Reunion	HSPA	0	9,300	11,400	13,560	22,080
	SFR Reunion	HSPA	53,000	55,000	60,000	81,480	100,380
Rwanda	RwandaTel	1xEV-DO	5,000	5,000	6,000	7,000	8,000
	RwandaTel	HSPA	0	14,350	15,000	24,710	28,420
Senegal	Orange Senegal	HSPA	9,500	12,500	15,000	20,000	20,000
	Sudatel Senegal	HSPA	0	0	0		20,000
Seychelles	Telecom Seychelles	HSPA	3,906	4,300	4,800	5,520	7,280
Sierra Leone	Sierra Leone Telecommunications Company	1xEV-DO	15,000	18,000	23,316	25,000	27,000
South Africa	Cell C	HSPA					5,000
	MTN	HSPA	667,000	700,000	750,000	800,000	900,000
	Neotel South Africa	1xEV-DO Rev A	2,500	6,100	10,100	15,000	19,000
	Telkom South Africa	HSPA	6,992	8,700	13,040	16,000	20,640
	Vodacom South Africa	HSPA	964,000	1,070,000	1,138,000	1,200,000	1,482,000
Sudan	MTN Sudan	HSPA	5,742	6,363	7,164	5,965	5,526
	Sudatel Sudan	HSPA	0	90	135	180	225
	Zain Sudan	HSPA	10,714	12,600	14,400	15,100	13,990

Country	Operator	Technology	3Q09	4Q09	1Q10	2Q10	3Q10
Tanzania	Bharti Airtel Tanzania B.V	HSPA	1,588	2,035	1,948	2,270	2,280
	TTCL	1xEV-DO	11,050	12,400	13,800	15,300	16,900
	Vodacom Tanzania	HSPA	14,665	17,715	20,800	23,900	25,111
Tunisia	Orange Tunisie	HSPA	0	0	0	1,782	3,754
Uganda	Orange Uganda	HSPA	0	40	100	119	174
	Uganda Telecom	HSPA	821	884	914	943	972
Zimbabwe	Econet Wireless Zimbabwe	HSPA	2,500	5,000	3,000	4,472	5,397

Note: Data includes some estimates

Source: Informa Telecoms & Media

Middle East, mobile broadband subscriptions by country, 3Q10

Country	Operator	Technology	3Q09	4Q09	1Q10	2Q10	3Q10
Bahrain	Batelco Bahrain	HSPA	67,216	70,926	74,405	74,980	72,243
	Viva Bahrain	HSPA	0	0	17,500	35,000	52,500
	Zain Bahrain	HSPA	116,657	119,063	112,989	101,675	99,431
Iraq	Kalimat	1xEV-DO Rev A	300	500	800	1,100	1,300
Jordan	Orange Jordan	HSPA	0	0	10,200	21,000	22,000
Kuwait	Kuwait Telecom Company	HSPA	25,000	65,789	75,000	85,000	91,604
	Wataniya Telecom	HSPA	26,000	23,022	24,322	25,004	25,738
	Zain Kuwait	HSPA	39,569	39,941	43,073	41,864	41,509
Oman	Nawras	HSPA	326,043	339,434	353,455	358,464	368,953
	Omantel	HSPA	48,549	50,000	52,139	100,000	120,470
Qatar	Q-TEL	HSPA	73,220	65,480	57,740	50,000	51,216
Saudi Arabia	Etihad Etisalat	HSPA	800,000	1,000,000	1,200,000	1,500,000	1,570,100
	Saudi Telecom Company	HSPA	53,937	280,000	1,000,000	1,200,000	1,400,000
	SMTC Saudi Arabia	HSPA	11,177	15,238	15,484	18,416	19,485
Syria	MTN Syria	HSPA	0	0	1,000	2,210	3,522
	Syriatel	HSPA	5,000	7,000	9,000	10,000	12,700
UAE	Emirates Integrated Telecommunications Company	HSPA	50,233	55,641	59,833	62,747	65,304
	Etisalat UAE	HSPA	86,304	89,784	92,520	93,600	93,720

Note: Data includes some estimates

Source: Informa Telecoms & Media

News

Africa

Airtel Africa, Oberthur deploy NFC

Oberthur Technologies and Airtel Africa launched NFC services in Kenya, Tanzania and Gabon. The solution will gradually be deployed in Airtel other African markets during 2011. Oberthur Technologies developed both the NFC SIM and M-Commerce security solutions enabling mobile subscribers to pay for goods and services using their mobile phones.

IFC invests in IHS to expand telecoms in Sub-Saharan Africa

IFC, a member of the World Bank Group, along with co-investors Investec and FMO, has made a US\$79 million equity investment in IHS Africa to expand access to telecommunications in Sub-Saharan Africa. IHS is the largest telecommunications infrastructure provider in West Africa with more than 2,700 towers under management. The investment will aid in building and acquiring mobile phone towers in sub-Saharan Africa, increasing mobile phone coverage and reducing communication costs in the region. As part of the plan, IHS is expanding its ownership and leasing operations throughout Africa to assist operators in accelerating network expansion into rural areas. IHS is currently working with many of the region's leading operators to upgrade existing tower sites and facilitate the roll-out of new technologies, including 3G and WiMAX.

Mi-Fone launches BlackBerry-like devices

Handset manufacturer Mi-Fone has launched the Mi-Q200 range of devices in Africa. The devices are powered with Synchronica's Mobile Gateway next-generation mobile messaging technology. The QWERTY handsets have BlackBerry-like features such as Push Email, Data Synchronization, Instant Messaging and access to Social Networks. The devices are available at a retail cost of around US\$80.

Maroc Telecom revenues up 4.3% to US\$3.83 bil.

Maroc Telecom ended 2010 with consolidated revenues of MAD31.65 billion (US\$3.83 billion), up 4.3% year-on-year. The Group's fourth quarter revenues amounted to MAD7.94 billion, and its customer base stood at 25.8 million, quarter-on-quarter growth of 19% as a result of the sustained growth in the in Morocco. Group EBITDA stood at MAD18.61 billion, up 2.5% year-on-year due to the increased income and the continuation of a very proactive cost optimization policy both in Morocco and in the subsidiaries. Mobile gross revenues in Morocco stood at MAD19.67 billion, up 4.3% year-on-year, due to the continuing active customer base growth and usage stimulation through new marketing offers. The mobile customer base in Morocco reached 16.89 million customers, spurred by the success of the customer loyalty programs, and the blended churn rate dropped by 4.5 pts to 29%. There were 100,000 mobile money subscribers in Morocco. Blended ARPU in 4Q10 was MAD93, down by only 4.7% year-on-year given the strong growth of the customer base. By end 2010, operations in Mauritania generated net revenues of MAD1.18 billion, operations in Onatel posted net revenues of MAD1.80 billion, Gabon generated net revenues of MAD1.04 billion and Mali's revenues stood at MAD 1.57 billion. The operating group has also applied for 3G license in Gabon.

Orange money tops 1.5 million users

The number of Orange Money one-month active accounts exceeded 1.5 million at end-January 2011. The service was first launched in Cote d'Ivoire at end-2008. The service is available in Cote d'Ivoire, Kenya, Madagascar, Mali, Niger and Senegal. Cote d'Ivoire is the largest Orange Money market and accounted for about 50% of the number of users. According to Orange, challenges to mobile money deployment include regulatory hurdles and educating potential customers on the product. Regulatory constraints have delayed launches in Cameroon and Egypt. Orange targets 2 million by end 2011.

Safaricom and Tata deliver Cisco Telepresence solutions in East Africa

Safaricom and Tata Communications unveiled the "Cisco TelePresence Suites" in Kenya and Uganda. Two public Cisco TelePresence rooms are hosted in Serena Hotels' luxury city hotels in Nairobi and Kampala and a third will be at Safaricom's Michael Joseph Center in Nairobi. Connectivity and management of the TelePresence rooms will be led by Tata Communications, linking Kenya and Uganda to public and private rooms throughout Tata Communications' network and partner networks, which spread across 32 locations globally.

Botswana

Botswana to decrease call rates

The Botswana Telecommunications Authority (BTA) has ordered Mascom, Orange and Be Mobile to reduce their tariffs with immediate effect. Some calls might be cut by up to 40%. BTA has also ordered termination rates to be reduced by BWPO.30 (US\$ 0.043) from the current BWPO.75 charge. This is a result of a 2010 study on the costing of calls which concluded that a reduction should be implemented. Some reductions will be immediate and some will be reduced gradually from 1st April 2011.

Burundi

Burundi to complete Onatel privatisation

100% state-owned Onatel will be privatised by the end of the year. The government started the privatisation process in 2009 and plans to complete it this year. Onatel is facing severe competition from private telecommunication companies which has seen it lose over 50,000 subscribers since December 2009. There are currently five mobile telecom companies competing with Onatel in Burundi. The Burundian government has identified privatisation as the way forward to increase the company's competitiveness. This privatisation is being handled by Projet de Development des Secteurs Financier et Prive (PDSFP), a world bank funded project.

Comoros Islands

Comoros Telecom staff strike over international calls

Staff at Comoros Telecom embarked on a 24-hour strike to protest the decision by the government to grant the management of international calls to Vocalpad, a foreign operator. The staff is looking for a withdrawal of the decree that granted the management of international calls to Vocalpad. Comoros Telecom is saying that it was not consulted over this decision by the government. It also believes there was no reason to change management of internal calls because it had the required capacity to handle international calls.

Egypt

Mobinil Egypt 4Q10 revenues fall

Mobinil ended 2010 with 30.2 million mobile customers, showing an increase of 19.2% year on year. The Egyptian operator's mobile revenues for 4Q10 reached EGP2.67 billion (US\$451.96 million) resulting in a year to date consolidated net revenues of EGP10.45 billion, a 3.3% year on year decline. 4Q10 EBITDA margin was 40.7%, representing a slight improvement when compared to Q3 2010 and leading to an EBITDA margin of 41.1% for the year 2010 and 4Q10 capex excluding licences reached EGP846 million.

Ghana

Alcatel signs Togo and Ghana contracts

Alcatel-Lucent was awarded contracts by TogoCel and Tigo Ghana. In Togo, Alcatel-Lucent will expand GSM and its soon-to-be-launched WCDMA network for TogoCel. This is the second phase of a US\$31 million contract signed in 2010 with the operator via Alcatel Shanghai Bell. In Ghana, Alcatel-Lucent provided its Optism™ tool to Tigo. The VAS solution enabled Tigo to launch "Tigo Ads", a permission-based advertising service.

Ghana Tigo and Vodafone 3G imminent

Ghana mobile and incumbent operators Tigo and Vodafone announced 3G launch dates, with both planning to unveil a 3G/HSPA offering in 2Q10 although Tigo initially announced a launch in March 2011. Tigo's GSM infrastructure has so far been supplied by Ericsson and Huawei. The operator has not commented on its 3G network supplier. Vodafone on the other hand signed a US\$120 million 2G/3G infrastructure contract with Huawei in 2009. Competitors Airtel and MTN respectively launched 3G/HSPA in Ghana in December 2008 and January 2009. Espresso Telecom has been offering 3G over CDMA EV-DO since December 2010.

MTN Ghana launches international remittance service

MTN Ghana and Belgium carrier BICS will launch International Remittances services with MTN Ghana, utilizing HomeSend, a mobile centric remittance hub operated by BICS and powered by its technology partner eServGlobal. The service will enable Ghanaians living in the UK and Belgium to send funds directly to their relatives' mobile money accounts. MTN had 760,000 mobile money registered accounts in 2Q10. Competitor Tigo launched a similar offering in December 2010.

Guinea Republic

MTN refutes Government charges in Guinea

MTN's unit in Guinea Republic, Areeba, has contested the Government's decision to fine it US\$21 million in early February. The Guinea authorities accused Areeba of not following the country's procedure following the acquisition of Investcom by MTN group in 2006. In a press statement, Areeba commented that the Government's presentation of the situation was incorrect. Areeba stated that they have no outstanding debts with Guinea and since its launch in 2006 it paid over GNF800 billion (US\$105 million) in taxes and various rights. In 2010, the company paid GNF175 billion in taxes. Areeba says it is at the authorities' disposal in order to resolve the dispute in an amicable and transparent manner.

Iraq

Zain Iraq fined US\$262 million

Zain Iraq has been fined US\$262 million by Iraq's Communications and Media Commission (CMC) for the distribution of five million new SIM cards without prior approval from the CMC. The operator has been given a three month deadline to pay the fine. Zain will be appealing against the fine.

Israel

Pelephone signs another MVNO agreement

Bezeq's Pelephone is the first operator in Israel to sign an MVNO agreement with Rami Levi to allow the MVNO to use Pelephones' infrastructure to provide mobile services. Rami Levi will launch services by end 3Q11. In 4Q10 Pelephone has also signed another MVNO agreement with Free Telecom; however no launch date was announced.

Kenya

Essar cuts ties with Kenyan partner

Mobile operator Essar Telecom Kenya has terminated its contract with its call center firm Aegis Services Kenya. They have instead opted for Horizon Contact Centre to handle its call centre services. This comes at a time when heightened competition in Kenya telecoms has seen operators drop mobile tariffs to KES1 (US\$ 0.012) per minute to stay competitive.

Kenya bans SMS lottery

Kenya Government temporarily has banned the SMS-based lottery. The decision was made after Kenya Anti-Corruption Commission (KACC) launched investigations into the activities of the Betting Control and Licensing Board (BCLB) following complaints from industry players. There are no indications yet on how long the investigations, and therefore the ban, would last.

Kenyans to recycle mobile phones

Safaricom has launched Kenya's first mobile phone recycling scheme. Safaricom has also deployed over 50 base stations on a combination of solar-wind-diesel-battery hybrid system; over 30 sites are on enhanced battery-diesel hybrid system and two sites on pure green energy (solar-wind-battery-hybrid). All these reduce the running hours of diesel generators by about 67% which proportionately reduces the carbon emission. Safaricom plans to undertake a carbon footprint analysis and carbon trading whose end result will be a sustainability report.

Safaricom freeze hiring to cut costs

Safaricom is freezing any new staff hiring for the rest of the year. This cost cutting strategy comes at a time when the telecoms industry in Kenya is experiencing stiff competition which threatens to eat into its revenues. Safaricom CEO Bob Collymore said it was currently implementing a new strategy to respond more effectively to market changes in the sector. Safaricom has ruled out outsourcing and shutting down certain departments.

Safaricom selects Alepo for BSS/OSS

Kenya mobile market leader Safaricom contracted Alepo Technologies to provide an integrated BSS/OSS solution for WiMAX and Wi-Fi, including Alepo's 16e AAA Server and DHCP Server. The solution will help Safaricom to enhance its policy control, QoS granularity, and IP address management. In 3Q08, Safaricom acquired local ISP One Communication and used its infrastructure and spectrum to launch WiMAX services in 4Q08.

Safaricom takes price wars to Parliament

Kenya's mobile operator Safaricom held a meeting with Parliament's Energy and Communication Committee in a bid to have its rivals' cheaper call rates tamed. Safaricom argued that the low calling rates to other networks meant it would have to slow down its expansion plans. The Committee chairman said they already met with Airtel Kenya to hear a presentation on the rationale for their low prices. The committee will now meet the Communications Commission of Kenya (CCK) and other operators to find the way forward in the on-going price wars.

Kuwait**Zain Kuwait selects NSN's customer management application**

Zain Kuwait has implemented a range of Nokia Siemens Networks' customer experience management applications that will allow for personalized services. The operator has unified its customer data that was previously distributed across the network into a single database based on Nokia Siemens Networks' One-NDS platform. The deployment allows for better insights into customer preferences, savings in capital and operating costs, and up to six months reduction in time to launch new services. The deployment also includes Serve atOnce Activation Manager, which will help Zain unify and automate access to the centralized data base independent of the application used. This will speed up the provisioning process of the multi-application data base and hence reduce the time-to-market for service launches.

Liberia**LoneStar launches raffle draw**

Liberian mobile operator LoneStar Communication Corporation launched its second raffle draw for its subscribers. Users need to recharge continuously with any denomination of US \$1.00 upward. A LoneStar subscriber needs to recharge up to US\$10 a week to qualify for prizes such as cars; motorcycles and TV's.

Madagascar**Airtel Madagascar partners with Movirtu for virtual SIM**

Provider of Mobile Identity Management (MIM) solutions, Movirtu, has been selected by Airtel Madagascar to implement cloud phone services nationwide in Madagascar. The main channel for purchase will be the Village Phone Operators (VPOs). The service provides a user with a unique and permanent mobile number for sending and receiving calls and SMS. The number is accessed through any mobile phone and is used for payment and information services as well as making or receiving voice calls.

Malawi**TNM announce 2010 results**

Mobile operator Telekom Networks Malawi (TNM) had a 21% year-on-year increase in 2010 revenue to MWK9.93 billion (US\$64.8 million). EBITDA for 2010 totalled MWK3.647 billion, up 25% compared to the MWK2.91 billion reported in the previous year. TNM attributed the rise in turnover and EBITDA to aggressive investment in infrastructure and related marketing activities. TNM says they increased its market share from 33% to 37% but did not release any subscriber figures. However, rising investment increased the depreciation charge by MWK571 million in 2010 to MWK1.61 billion and, which resulted in a rise in borrowing costs by MWK273 million. Its net profit declined from MWK1.21 billion in FY 2009 to MWK1.06 billion in 2010 due to increased levels of short-term debt. Its key achievements in 2010 included the commissioning of a new pre-paid billing platform, the construction of 70 new base stations to boost coverage, and the launch of new voice and data tariff bundles for pre-paid users.

Middle East**Q-tel introduces M-health services**

Qtel has launched a strategic partnership with The Mobile Health Company to offer M-health services across its Middle East and Africa footprint. The service will provide information on diet, obesity, diabetes, and personal health via mobile phones. Medical consultations via private M-health accounts will also be available. Customers will be able to subscribe directly to the services, and personalize the package of applications. Qtel is targeting the service to customers living in rural communities with limited access to conventional health services.

Wataniya 2010 revenues reach US\$1.9 bil.

At end 2010, Wataniya's total customer base reached 16.6 million, a year on year growth of 9.5%. Revenues for 2010 were KWD539.4 million (US\$1.9 billion), compared with KWD475.5 million at end 2009 and EBITDA reached KWD216.6. The company's consolidated net Profit was KWD78 million for 2010, compared to the KWD108.3 million in the same period in 2009. However, excluding the one-off gain in 2009 which resulted from the positive outcome of the MOC license fee legal case, net profit grew by KWD21.8 million. Wataniya Kuwait's customer base increased to 1.78 million at the end of 2010, and its revenues for the year were KWD221.6 million. The Tunisiana customer base at the end of 2010 stood at 5.93 million and revenues for 2010 were KWD101 million. Nedjma's revenues at end-2010 were KWD174.7 million (US \$622.1 million) an increase of 23.5% year on year while its subscribers exceeded 8 million. Bravo, Wataniya Palestine and Wataniya Maldives all ended 2010 with revenues of KWD22.1 million, KWD9.2 million and KWD10.9 million respectively.

Nigeria**Etisalat Nigeria unveils new data plans**

Mobile operator Etisalat Nigeria introduced new bundles on its Easynet data package. As a result, 1.5GB and 6GB bundles were added to the existing 100MB, 500MB and 3GB. Subscribers are offered a 500MB bonus when buying a 1.5GB bundle and 1GB for 3GB and 6GB bundles. The bonus is valid for 30 days.

Palestine**Paltel revenues reach US\$497 mil.**

Palestinian operator, Paltel, ended the year 2010 with net revenues of US\$ \$479Million, a year on year growth of 7.88%. The operator's EBITDA reached US\$202 million and operating income was US\$158 million. Total fixed and mobile subscriptions reached 2.7 million and net income increased year on year by 22.75% to reach US\$122million at end 2010.

Rwanda**Rwanda delays MNP**

Rwanda Utilities Regulatory Agency (RURA) decided to postpone the launch of mobile number portability (MNP) from 2011 to 2012. According to RURA, the country is not yet ready and they would like to wait until the country's penetration rate reach 60%. According to Informa Telecoms & Media, Rwanda's penetration was 36% in 4Q10.

Rwandatel receives performance warning by regulator

Rwandan mobile operator Rwandatel could lose its operating license or be fined for failing to meet performance targets. The Rwanda Utilities and Regulatory Agency (RURA) issued a warning notice to the company. Every licensed operator in Rwanda has binding performance targets in terms of investment, coverage, network rollout and quality of service to comply with in a timeframe. Rwandatel first failed to meet its targets in 2009 and has been closely watched by RURA. Rwandatel feels the decision to issue this notice is unfair and is going to appeal. Rwandatel has seven days to appeal the notice and the rest of this month to fulfil the license obligations.

Saudi Arabia**Alcatel-Lucent selected by Zain Saudi for small cells trial**

Zain has partnered with Alcatel Lucent to trial Femto-based small cells in Saudi Arabia. The operator views this option as a cost effective way to fill in gaps in mobile coverage, combat network congestion due to increasing mobile data traffic and create new value-added services. Alcatel-Lucent will be deploying its end-to-end Femto-based 9360 Small Cells portfolio, including the 9361 Home Cell, the 9362 Enterprise Cell, the 9366 Small Cell Gateway, and its network management solution. Alcatel-Lucent will provide Zain Saudi a full range of comprehensive professional services including consulting and design, installation and software integration.

Zain declines all bids for Saudi stake

Zain has declined all three offers it received for its stake in Zain Saudi Arabia. Though Kingdom Holding was seen as a favourite by Zain over Batelco for the 25% stake, no agreement was reached before the offer expired. Zain declined Al Riyadh Groups offer on the basis that no price was stated and the consortiums' backers remain unknown.

Bridgewater to provide PCRF for Mobily's 3G network

Mobily has selected Bridgewater Systems to implement a Policy Controller (PCRF solution) for its 3G/HSPA mobile broadband network. Bridgewater will be the service controller, policy controller and subscriber data broker for Mobily's Wi-Fi, 3G, and WiMAX Wave 2 networks. By optimising the network through fair usage policies, the new partnership will allow for Mobily to offer flexible and more dynamic mobile broadband promotions.

Mobily to carry out LTE infrastructure rollout

Etihad Etisalat (Mobily) has awarded two contracts, with Samsung and Huawei, worth SAR450 million (US\$120 million) for the construction and rollout of its long term evolved (LTE) infrastructure in over 30 cities in Saudi Arabia. The operator is also going to upgrade Bayanat Al Oula's existing WiMAX infrastructure. Mobily would be the first company in the region to operate an LTE and WiMax network using the same towers, both of which will be used to provide broadband service to densely populated areas.

Senegal**Sonatel revenues up 6% over 2010, subs up 23%**

Senegal group Sonatel saw its revenues increasing by 6.46% over 2010 to reach XOF599 billion (US\$1.2 billion). The group's EBITDA grew by 5.7% to XOF322 billion but the margin declined slightly from 56.2% in 2009 to 54.1% in 2010. Profit declined slightly from XOF185 billion to XOF184.7 billion. Subscriptions increased by 23% to 11.3 million including 10.9 million mobile subscriptions. Part of Orange group, Sonatel operates the Orange brand in Senegal, Mali, Guinea rep. and Guinea-Bissau.

South Africa**Cell C implements Aircom's customer experience monitoring tool**

South Africa mobile operator Cell C selected network optimisation specialist Aircom to provide Cell C with Aircom's Customer Experience Monitoring tool. The solution will allow Cell C customers to have the capability to report dropped calls, poor network signal and other issues to the operator directly through a dedicated web page. The new monitoring system also integrates with other existing Aircom tools, which Cell C has been using since 2004.

MTN launches InternetOnTV

Less than a week after market leader and competitor Vodacom launched its Webbox, MTN South Africa responded with a similar product branded "InternetOnTV". The product comes as a package including a keyboard, an RCA cable and a mouse. The device is equipped with the Opera Mini browser. It can also be used to make and receive phone calls and SMS at the same time. The InternetOnTV package is sold at ZAR999 (US\$137) including a ZAR60 airtime voucher, which can be converted to a 75MB internet bundle. In comparison, Vodacom's Webbox is priced at ZAR749 including 100MB worth of data. While the Webbox is currently GRPS/EDGE enabled, InternetOnTV is 3G/HSPA capable. The Webbox operating system is Android and InternetOnTV's BREW.

Vodacom enables Internet over TV

South Africa mobile market leader Vodacom launched the "Webbox", a plug and play keyboard enabling users to surf the Internet on their TV screens. The Webbox is a Vodafone branded product (Vodafone being Vodacom's majority shareholder) developed specifically for customers in emerging markets. The Webbox is a black 14 x 25cm QWERTY keyboard, which uses standard RCA connectors to plug into the television.

Vodacom to launch low-cost Vodafone handsets

Vodacom will be launching a range of new low cost handsets in South Africa, most likely priced below ZAR100 (US\$13.94) each. Vodacom, a subsidiary of Vodafone will launch Vodafone branded low-cost handsets. These phones will extend access to a range of mobile and data services in emerging markets, including money transfer, mobile internet and a localised content offering. Vodafone will launch three new handsets in April 2011, the Vodafone 252, the Vodafone 351 mobile internet phone and the Vodafone 455 entry-level touchscreen phone. Pricing has not been finalised.

Swaziland

SPTC re-launches fixed wireless and mobile services

Swazi incumbent telecom operator SPTC re-launched its fixed wireless and mobile services. Branded as "One", the CDMA network offers fixed wireless and limited mobility services. One was initially launched in January 2010, but was suspended in the following March due to regulatory issues. One does not interconnect with GSM market leader and sole mobile phone operator MTN yet but SPTC is promoting a dual GSM/CDMA ZTE SIM phone.

Syria

Syriatel to provide mobile money service

Syriatel is trialling eServGlobal's mobile money solution. The new service provides recharge options, access to domestic money transfers and bill payments. The operator is waiting for government approval before commercially launching the service.

Tanzania

Sasatel to offer unlimited Internet

Tanzania's Sasatel has launched a new campaign to reward internet customers with free unlimited internet access. New Sasatel customers will get free unlimited Sasatel internet for one month if they purchase selected Internet enabled phones. Mobile subscribers will qualify if they purchase a Sasatel Smartphone or the FM Radio Mobile phone. The phones are priced at TZS29,000 (US\$18.83) for the FM Radio mobile phone and TZS99,000 for the smartphone.

Zantel to roll out 3G Network

Tanzania's Zantel is planning to launch its 3G network in 2011. Zantel's CEO Norman Moyo, has confirmed it will roll out its 3G network in April 2010. Zantel's strategy will be a converged service provider providing data, wholesale and voice services, with the planned network set to offer high speed mobile internet access, mobile video conferencing and videophone, among other services which it cannot provide with its 2.5G system. It is hoping that the technology will boost its client base including corporate organisations. Currently, Zantel has a GPRS/EDGE network.

UAE

Alcatel-Lucent to deploy LTE for Etisalat

Alcatel-Lucent has been selected to deploy LTE for Etisalat UAE. The operator aims to commercially launch LTE by end 1Q11. Alcatel-Lucent will provide Etisalat with a complete end-to-end High Leverage Network solution – including LTE base stations (eNodeBs), all-IP wireless Evolved Packet Core (EPC), a converged end-to-end network management solution.

Etisalat UAE launches mobile health service

Etisalat has partnered with Ericsson to provide mobile health services in the UAE. The new service will allow for medical professionals to provide consultation services remotely. Ericsson will use a Remote Patient Monitoring System that measures patient parameters such as blood pressure, pulse rate and oxygen saturation. The Patient Unit then collects measurements which are made available to medical professionals through web based applications. The service is aimed at those who are recovering at home after hospitalisation.

Uganda

MTN partners with government for mobile money

MTN Uganda has entered a partnership with the National Water and Sewerage Corporation (NWSC) where NWSC customers will pay their water bills using MTN's mobile money services. The payment of water bills in future will not be by cash at its offices but through communication devices such as cell phones and other ICT modules. The new service will see about 1.5 million customers pay bills using MTN Mobile Money.

MTN Uganda to monitor SMS

MTN Uganda will check and block SMS sent via its network during the country's presidential and parliamentary election if necessary. The Uganda Communications Commission (UCC) wants all SMS service providers to scrutinise and block messages with words that are likely to incite violence during the country's elections.

Ugandan regulator to put brakes on price cuts

The Uganda Communications Commission (UCC) will issue new guidelines in March where they will establish minimum rates below which players will not be allowed to offer services, even under promotions. The guidelines are intended to curb anti-competitive practices, encourage new investments, enhance tariff transparency and protect consumers. Operators will also be required to notify the regulator five days before offering any new call tariffs and to limit promotions to not more than ninety days, and only once every 12 months. These guidelines come in the wake of aggressive promotional tariff cuts in the market that have led to a dramatic increase in telephone usage and subscription on one hand, as well as deterioration in service quality, due to network congestion and reduced capital investments.

Yemen

fSONA to support MTN Yemen's network infrastructure

Canadian vendor fSONA has been selected by MTN Yemen to install free space optical (FSO) technology in the capital city of Sana in order to support network infrastructure. The wireless link will connect two of MTN Yemen's Mobile Switching Centers (MSC) and requires no frequency management. The operator aims to use this technology to increase backhaul bandwidth capacity.

TeleYemen looks for new management

With its current management contract due to expire in June 2011, TeleYemen has announced a new management tender. The operator has received 10 bids for the management tender; with France Telecom looking to renew their contract. The selected company will be responsible for the management and operation of TeleYemen for a 5 year period.

Zambia

Airtel Zambia launches free calling service

Airtel Zambia has launched the K0 campaign, Zambia's first free calling on mobile phones. The promotion will offer customers the opportunity to talk for free for 15 days or one day depending on the customer's choice. The operator is also planning to invest US\$150 million for the development of the infrastructure mainly focusing on enhancing connectivity in rural areas. So far they have installed 146 base stations and would increase the mobile network strength in some parts of the country. Zambia is expecting to double their size in terms of the network in order to improve their capacity.

Zambia stock exchange declines Airtel's application to delist

Lusaka Stock Exchange (LuSE) turned down Airtel's application to delist. The company, which trades on LuSE as Celtel Zambia, applied to delist in November 2010 following Bharti's takeover of Airtel Africa (then Zain Africa) in 3Q10. LuSE is now working on reopening trading of the Celtel shares which was suspended in December 2010.

Zimbabwe

Telecel reduces cost of calls to other networks

Telecel Zimbabwe has reduced its call rates to all local mobile phone networks. It will now cost Telecel subscribers the same to call a Net One or Econet number as it does to call another Telecel number during peak hours. Telecel previously charged calls to other networks at US \$0.25 per minute, they now charge US\$0.23. Calls from a Telecel number to a landline costs US\$0.21 per minute. The reduction in the rate for calls to other networks is one of several promotions Telecel has introduced in recent weeks.

Zimbabwe launches Rural Project

The Postal and Telecommunications Regulatory Authority of Zimbabwe (Potraz) will spend US\$10 million on the installation of passive telecommunication infrastructure in rural areas. This is shared support infrastructure to provide ICT services and it consists of towers, power back-up and equipment rooms, among other equipment. The funds are part of US\$24 million under the Universal Services Fund's Connecting Rural Communities project aimed at promoting development of telecommunication services in rural areas. The project is still at the tendering stage. The project is expected to boost Zimbabwe's low penetration rate. The passive telecommunication project will likely be the first arrangement under which Econet Wireless, Telecel Zimbabwe and NetOne will share infrastructure.

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