

# South Asia and Middle East Tracker Analysis June-2011

SL NO	Geographies
1	Bangladesh
2	Nepal
3	Sri Lanka
4	Pakistan
5	United Arab Emirates
6	Sultanate of Oman
7	Saudi Arabia
8	Bahrain

# South Asia and Middle East Market Intelligence

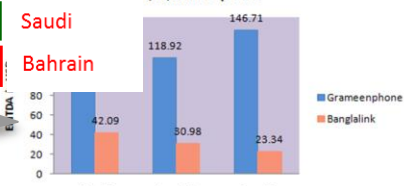
Ready-to-use strategy tool, covering 4 Asian and 4 Mid-East countries.

-  Bangladesh
-  Nepal
-  Sri Lanka
-  Pakistan
-  UAE
-  OMAN
-  Saudi
-  Bahrain

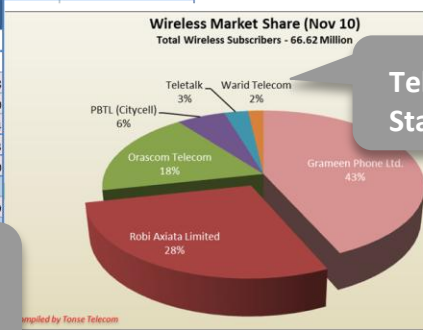
Operator	Operator News	Service Description	Date of announcement
Telenor Pakistan	Telenor Pakistan announced the next phase of its 'Karo Mumkin' initiative	The two winning ideas, out of 25,000 total ideas submitted to Karo Mumkin, will now be turned into real-life projects and will be launched later this year.	10-Feb-11

Major Contracts: Capturing Open Tenders and EOI.

and Banglalink EBITDA(USD mn) QoQ Mar - Sep 2010



Parameters	Unit	Sep 30,2010
<b>Financials</b>		
Total Revenue	USD Mn	76,187.98
Mobile revenue	USD Mn	14,595.30
Fixed line revenue	USD Mn	6,318.54
EBITDA	USD Mn	37911.23
Capex	USD Mn	11,357.70
<b>Operating Details (No. Of Customers)</b>		
Mobile Services	Million	2.49



Telecom Industry Stats.

Comparing Operator Performance

Infrastructure Deployments & Capex Investments

Broadband Market : Cable, ISPs, WiMAX, VSAT, FTTX etc.

Analysis cellular and Broadband Subscriber trends

Extensive analysis on Operator Financials

Capturing Subscriber trends: Technology adoption, Tariff Plans.

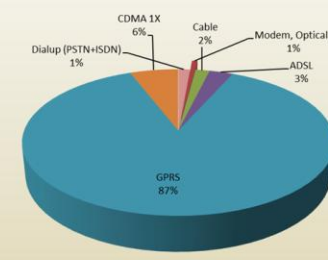
Tonse Analysis Of the Broadband Market .

Country specific demographic analysis

Latest Regulatory and Technology updates

Operator/ Company	Capex Announced	Release Date	Source	Descri
du	Dh1.7 billion (\$463 million)	Mar-11	Media	capital expenditure v

Internet/ Data Subscribers by Technology



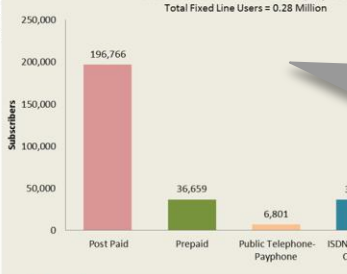
VAS Name	VAS Segment	Special features	Short Code / access
Hot Line with Time Out	Call feature	Dial a number automatically when the handset is lifted. There is a five second delay before the call is made.	*53*(desired numb

Operator	Oct'10	Nov'10	Dec'10
Mobilink	31,453,954	31,544,480	31,794,292
Telenor	24,121,009	24,401,083	24,692,818
Ufone	20,187,309	20,192,949	20,275,002
Warid	17,167,065	17,474,523	17,517,476
Zong	7,785,713	8,028,087	8,497,799
<b>Total</b>	<b>100,715,050</b>	<b>101,641,122</b>	<b>102,777,387</b>

Bahrain: Demographic Statistics

Total Country Area	= 760 sq km
Total Population	= 1,214,705
Total Teledensity	= 121.47
Male/ Female Ratio	= 1 male(s)/female (2011 est.)
GDP-per capita (PPP)	= 10,910 est.
Investment	
Urbanization	

Fixed Line Service Users in (Sep'10)



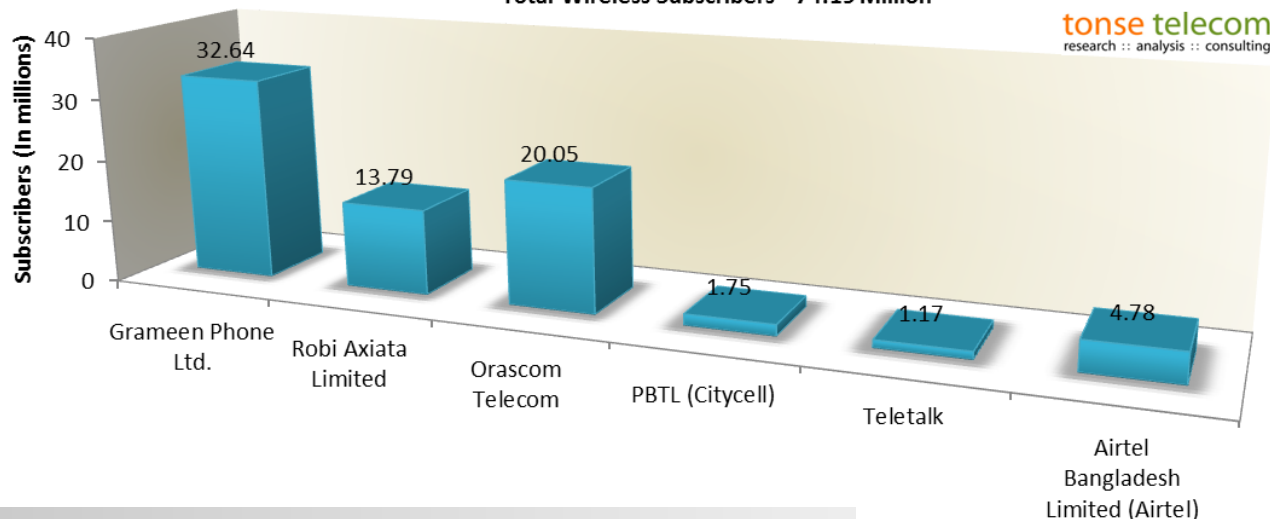
Regulation Title	Regulatory Body	Notific	Summary of the Regulation
TRA to Implement an Online Telecommunications Services Tariffs Comparator	TRA	Jan-11	be a web based comparison tool designed and construct specifically compare the prices of alternative telecommunications services solutions offered within the Kingdom of Bahrain.

**List of Telecom Operators of Bangladesh**

Serial No.	Operator	Service
1	Grameen Phone Ltd.	GSM cellular service
2	Robi Axiata Limited	GSM cellular service
3	Orascom Telecom (Banglalink)	GSM cellular service
4	Pacific Bangladesh Telecom Ltd (PBTL) or Citycell	CDMA Cellular Service
5	Teletalk	GSM cellular service
6	Warid Telecom (Airtel Bangla)	GSM cellular service
7	Bangladesh Telecommunications Company Ltd. ( BTCL)	PSTN service
8	Telebarta Ltd.	PSTN service
9	Jalalabad Telecom	PSTN service
10	Onetel Com	PSTN service
11	Westec Ltd.	PSTN service
12	Sheba Phone Ltd	PSTN service
13	S. A. Telecom	PSTN service
14	Banglaphone Ltd.	PSTN service

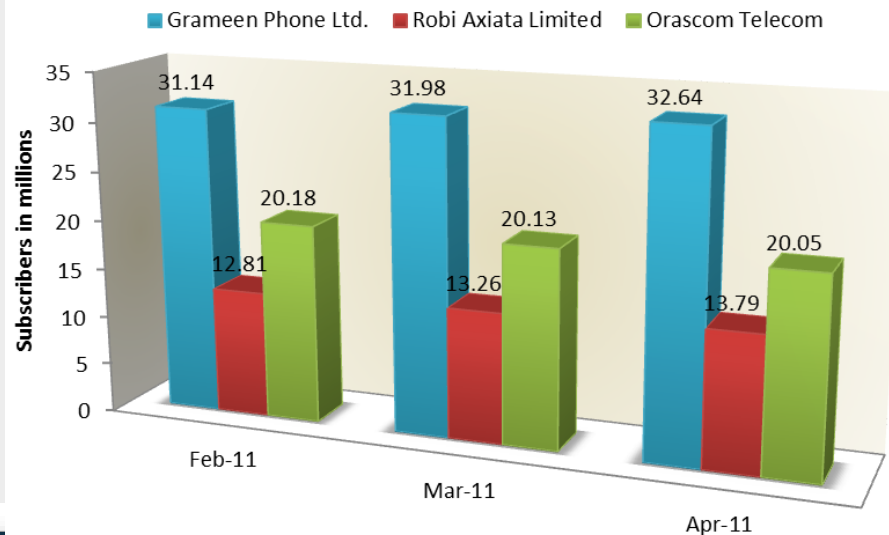
## Wireless Subscribers in April-2011 (In million)

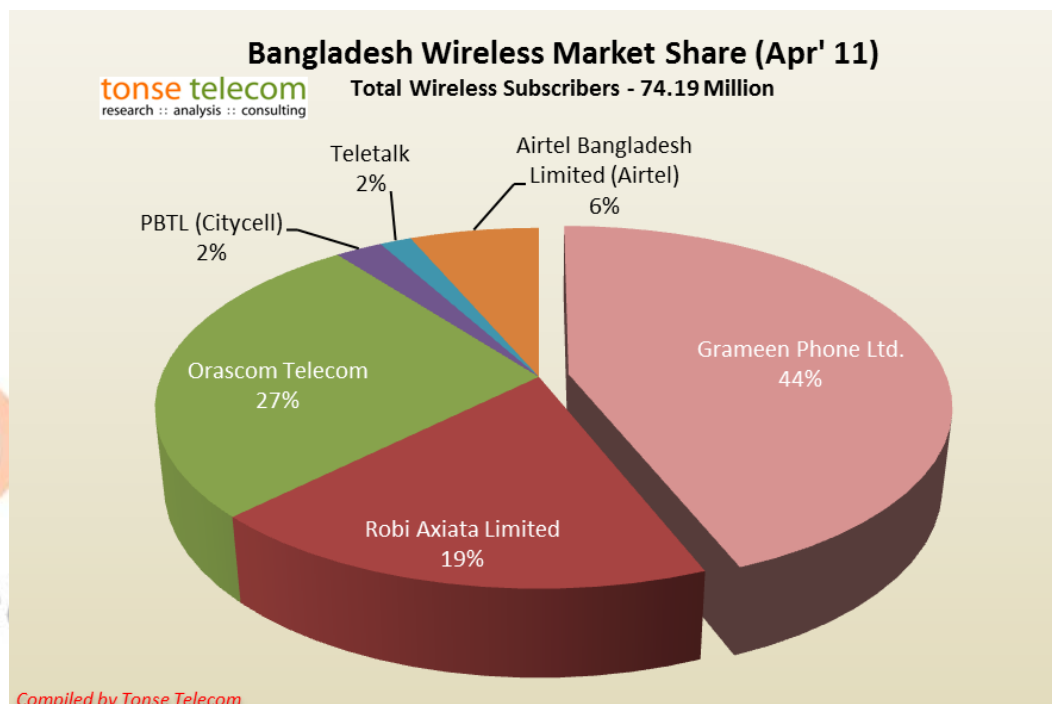
Total Wireless Subscribers - 74.19 Million



- Total subscriber base as of April-2011 was 74.1 Million.
- Top 3 operators together control 90% of the market share.
- Robi Axiata grew 4% in subs from March to April-2011.
- Airtel Bangladesh has launched 200 new network sites across the country in last few months under its network expansion plan.

## Top 3 Cellular Operators by subscribers



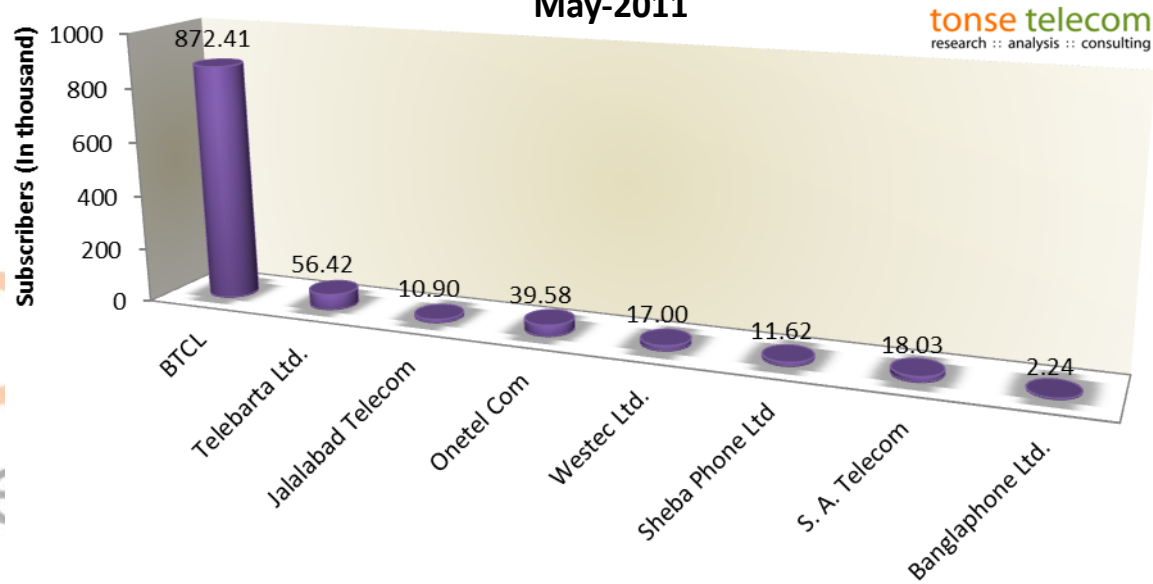


- Based on the current subscriber growth analysis, CDMA is not gaining any market traction. Citycell, only CDMA player in Bangladesh, is losing its customer base and in recent month it experienced a negative subscriber growth of 2.24 %.
- Teletalk also continues to lose its GSM subscriber base and dropped to 1.17 million subscribers as of month of April 2011.

## PSTN Subscribers (In Thousands)

Total PSTN Subscribers - 1028.203 thousand

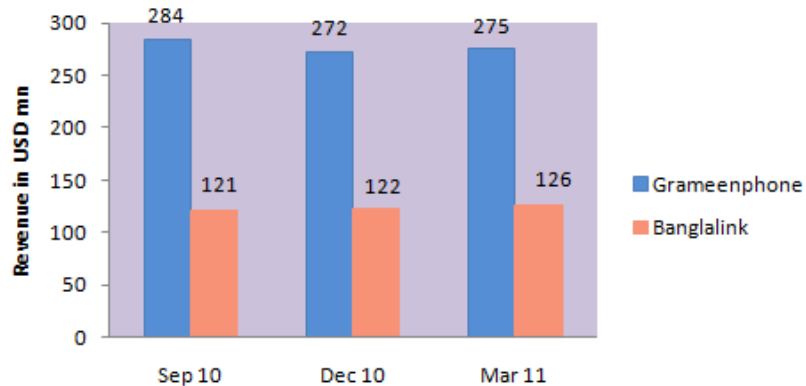
May-2011



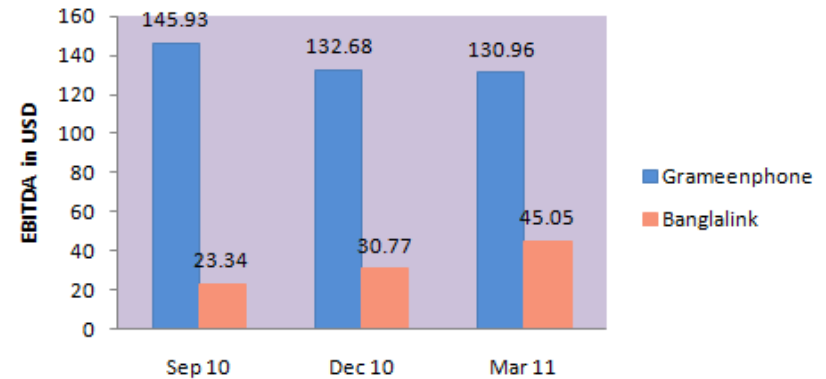
- BTCL captures 85% of the total PSTN market share.

# Bangladesh: Operator stats comparison

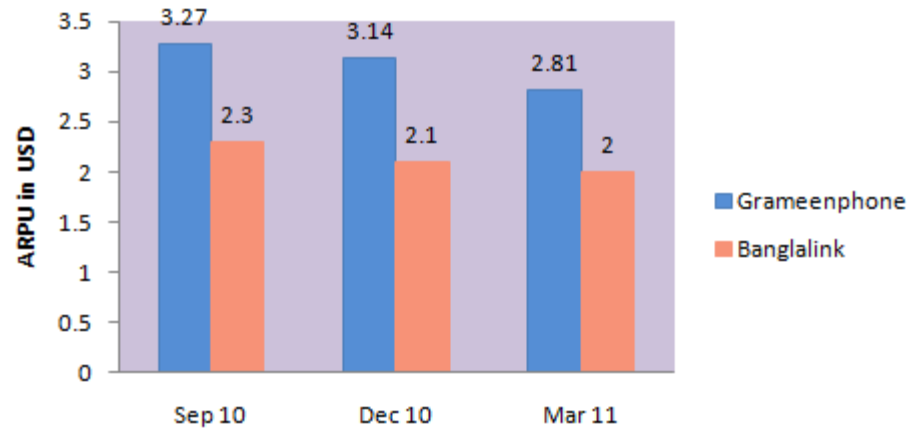
### Grameenphone and Banglalink Total Revenue QoQ Sep 2010- Mar 2011 (In USD mn)



### Grameenphone and Banglalink EBITDA(USD mn) QoQ Sep 2010 - Mar 2011



### Grameenphone and Banglalink ARPU in USD QoQ Sep 2010 - Mar 2011

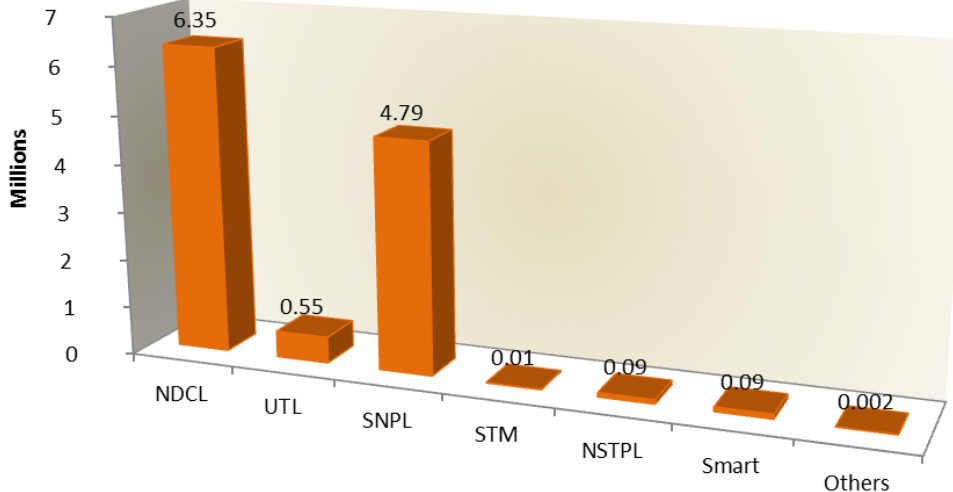


List of Telecom Operators of Nepal		
Serial No.	Operator	Service
1	Nepal Doorsanchar Company Limited (NDCL)	PSTN, WLL, GSM, CDMA
2	Spice Nepal Pvt. Ltd. (SNPL) or Ncell	GSM
3	United Telecom Limited (UTL)	WLL, LMS
4	STM Telecom Sanchar	PSTN
5	Nepal Satellite Telecom Pvt. Ltd (NSTPL)	PSTN, LMS
6	Smart	PSTN

## Operator-wise Subscribers

Total Subscribers - 11.87 Million (Mar '11)

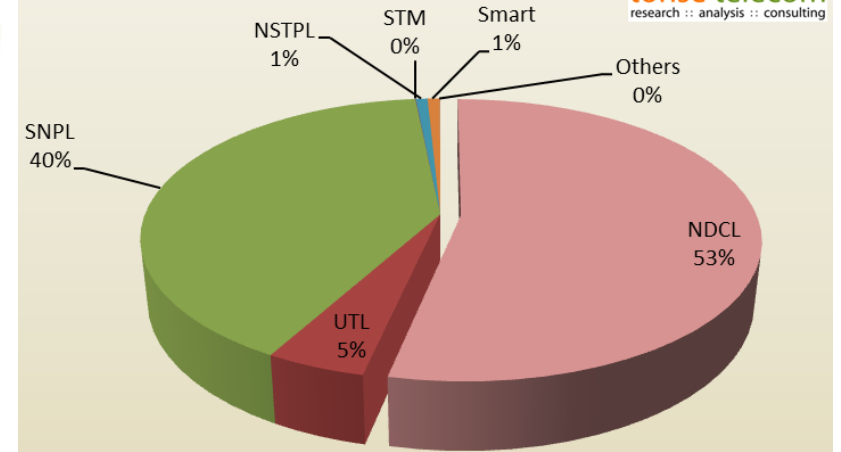
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## Operator Market Share (Mar'11)

Total Subscribers - 11.87 Million

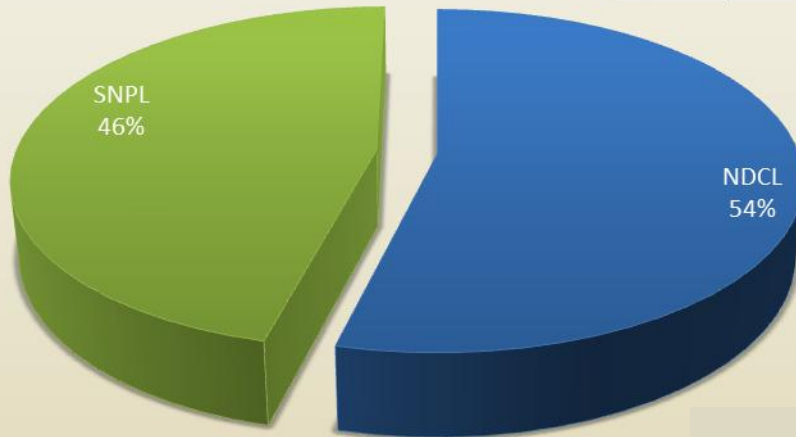
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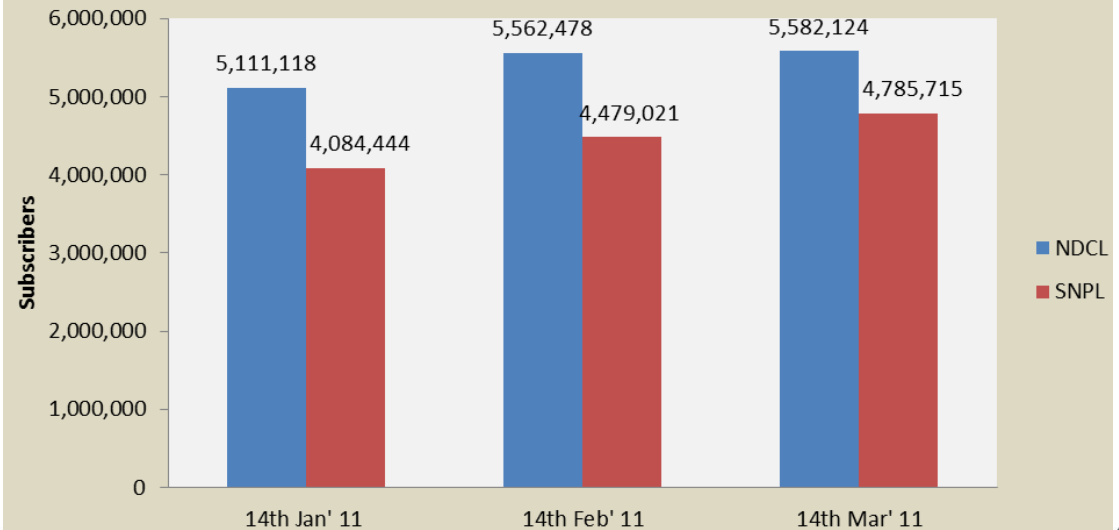
## Cellular Market Share (Mar' 11)

Total Wireless Subscribers - 10.37 Million

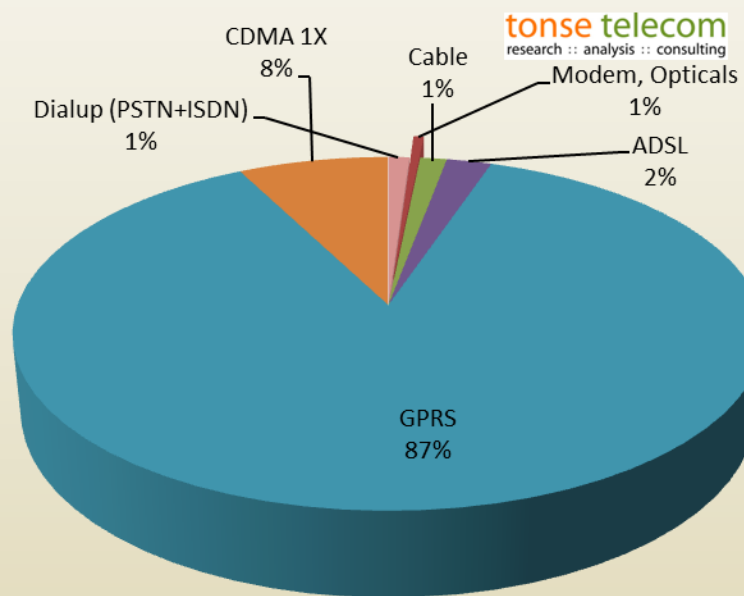
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## Top Cellular Operators by subscribers

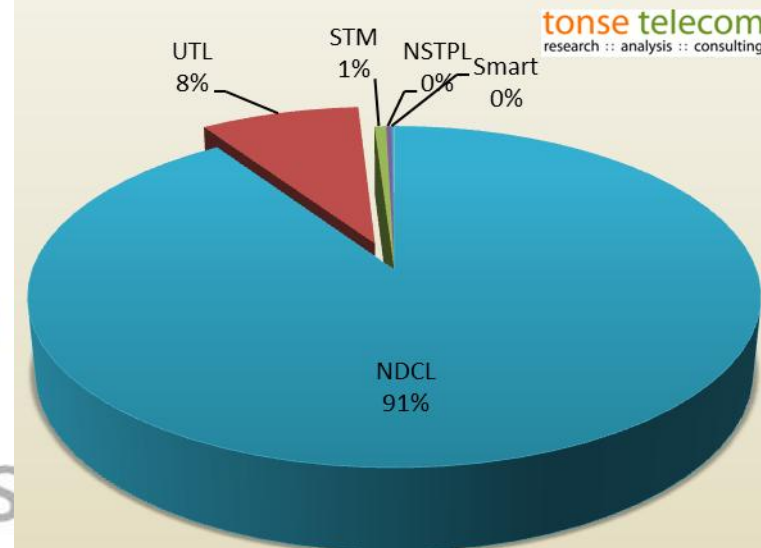


## Internet/ Data Subscribers by Technology



## Fixed line Market Share (Mar'11)

Total Fixed line Subscribers - 0.84 Million



## Data/Internet Services (Mar' 11)

Services	NDCL	UTL	SNPL	ISPs	Total
Dialup (PSTN+ISDN)	6,232			19500	25,732
Modem, Opticals				13000	13,000
Cable				32500	32,500
ADSL	54,813				54,813
GPRS	694,825		1,421,772		2,116,597
CDMA 1X	142,128	41,587			183,715
Total	897,998	41,587	1,421,772	65,000	2,426,357



## **Press Release Source: Light Reading On**

Wednesday June 1, 2011, 10:54 am EDT

NEW DELHI, June 1, 2011 /PRNewswire/ -- Light Reading India ([www.lightreading.in](http://www.lightreading.in)), a new online community targeted at the fast-growing India telecom marketplace, launched today with a mission to help the country's telecom community achieve its aim of developing India's broadband sector.

The new site was launched on the first day of Light Reading's Mobile Broadband Summit (<http://mobilebroadbandsummit.com/>), a two-day event focused on the most pressing issues facing India's telecom sector today.

With its global team of in-house analysts from Heavy Reading and Pyramid Research, a partnership with Indian research house Tonse Telecom, and input from the Light Reading Communications Network's team of international editors, Light Reading India is uniquely positioned to provide an unrivalled perspective," adds Kaur.

## MONTHLY MARKET INTELLIGENCE: MMI

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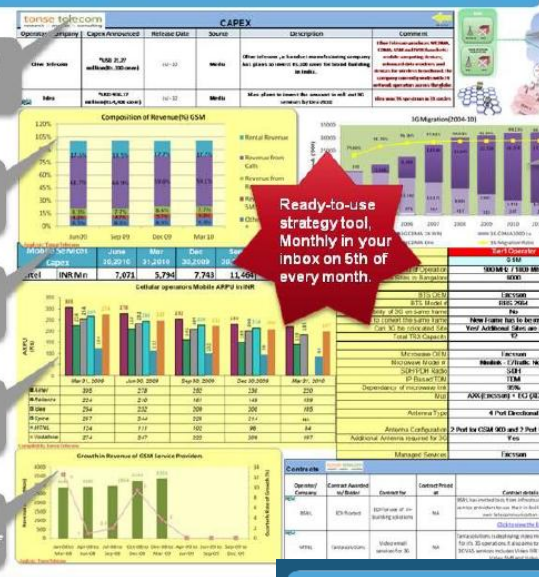
Latest updates on Telecom Capex + Tonse Analysis.

Telecom Industry Stats.

Telecom Operator Financials details

Tonse Analysis Of the Equipment Market.

Capturing Operator Subscriber trends: VAS Offerings, Tariff Plans.



Network Planning and Deployment

Operator Network and Technology Migration Analysis

Operator cell Site Information

Regulatory Updates Latest Industry Updates

Major Contracts: Capturing Open Tenders and EOI

Ready-to-use strategy tool. Monthly in your inbox on 5th of every month.

## 3G TRACKER: GLOBAL+INDIA

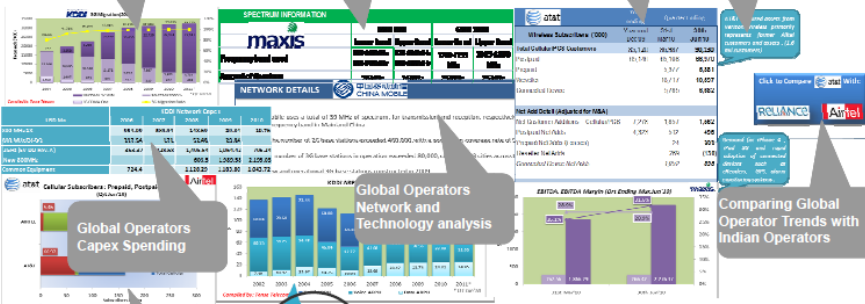
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Global Operators 3G Migration Analysis

Operator Revenue Shares & Spectrum analysis

Extensive Operator Financials and Subscriber trends

Tonse Analysis Of the Operator trends



This reflected higher penetration of discount pricing plans ("Student Discount," "Packet Discount," "Family Discount," and "Pocket Discount") and the introduction in April 2003 of lower land-to-mobile call rates.

## BROADBAND INTELLIGENCE

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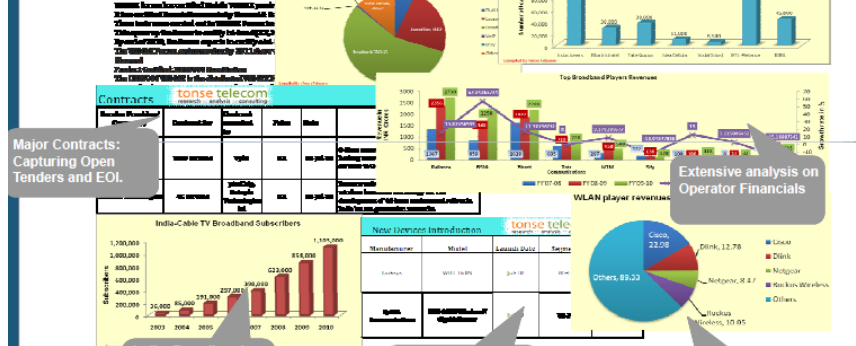
Latest Regulatory and Technology updates

Capturing Subscriber trends: Technology adoption, Tariff Plans.

Infrastructure Deployments: Towers & Fibers

Major Contracts: Capturing Open Tenders and EOI.

Extensive analysis on Operator Financials



India Broadband Market : Cable, ISPs, WiMAX, VSAT, FTTH etc.

Tonse Analysis Of the Broadband Equipment Market.

Network Planning and Deployment

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Email [arunsb@tonsetelecom.com](mailto:arunsb@tonsetelecom.com)

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