

# AREGNET

## WHOLESALE AND REGULATORY MEASURES BENCHMARK DETAILED REPORT

**June 2009**

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## INTRODUCTION

Please note that

- The information included in the following tables has been provided by the relevant authorities of the countries which have responded to the questionnaire: Algeria, Bahrain, Egypt, Jordan, Lebanon, Oman, Qatar, Saudi, and UAE.
- Information included in the following table is valid as of June 30, 2008 unless otherwise specified.
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## A. Regulatory Indicators

### 1. Liberalisation of Fixed Telephony Services

Country	Liberalisation status of public fixed voice telephony networks and services			Legal basis
	Local	Domestic long distance	International	
Algeria	May 9, 2005  A second operator was licensed Compagnie Algérienne des Télécommunications (CAT)	May 9, 2005  A second operator was licensed Compagnie Algérienne des Télécommunications (CAT)	May 9, 2005  A second operator was licensed Compagnie Algérienne des Télécommunications (CAT)	Law n° 2000- 03 of 05 jourmada el oula 1421 (5 August 2000 on post and telecommunications) Executive decree n°05-174 du 09/05/2005 (CAT) Executive decree n°05-460 du 30/11/2005 (Algérie télécom à titre de régularisation) CAT's licence (Cahier des charges)
Bahrain	2004	2004	2004	Section 39 of The Law
Egypt	December 31, 2005  Local loop unbundling is available and VoIP services are allowed. Also domestic value-added services are allowed (e.g. Prepaid Calling Cards). NB. Infrastructure is not liberalised		December 31, 2005  Same as for national calls except that carrier selection is available for international calls.	Article 60 of the telecom law
Jordan	2005	2005	2005	
Lebanon	In Progress	In Progress	In Progress	Telecommunications Law No. 431 was issued on July 22, 2002  The Government of Lebanon has adopted a telecommunications policy that aims to transform the telecommunications sector in Lebanon from a state-owned fixed monopoly to a competitive market, open to private participation. Telecommunications Law No. 431 was issued on July 22, 2002 Public Fixed voice telephony is subject to an exclusivity period to be defined by the TRA – Section 44 of the Telecommunications Law <a href="http://www.mpt.gov.lb/PolicyStatement.pdf">http://www.mpt.gov.lb/PolicyStatement.pdf</a>
Oman	TRA had granted Omantel the first licence for the provision of basic public fixed telecommunication services in 2004.  TRA announced on October 25, 2008 the award of 2nd licence for the provision of full fixed licence.	In February 2004, TRA had granted Class one licence to Omantel. The service in question is liberalized since 2004. Nawras has won the Second Fixed licence recently and the licence award is under process	In February 2004, TRA had granted Class one licence to Omantel.  The service in question is liberalized since 2004. Nawras has won the Second Fixed licence recently and the award is under process. The license includes International gateway.	Royal Decree No. 20/2004 dated February 11, 2004 (Omantel Licence)  Royal Decree No. 17/2005 dated February 19, 2005 (Nawras Licence)
Qatar	The first fixed licence was issued to Qatar Telecom (Qtel) Q.S.C. on October 7, 2007.  The second fixed licence was awarded to Vodafone Qatar Q.S.C. on September 15, 2008.	see column "local"	see column "local"	For regulatory documents see <a href="http://www.ict.gov.qa">www.ict.gov.qa</a> – Regulation – Search Regulatory Documents.

Country	Liberalisation status of public fixed voice telephony networks and services			Legal basis
	Local	Domestic long distance	International	
Saudi Arabia	The second operator, Atheeb, was licensed on April 2009 to provide fixed telecommunications services. Furthermore, two additional operators have been selected and are currently taking the necessary steps to comply with their licensing requirements	see column "local"	see column "local"	
United Arab Emirates	February 12, 2006 (date of the issuance of the licence to second operator) - UAE market is a duopoly			Article (24) of the Federal Law by Decree no. 3 of 2003

## 2. Liberalisation of Mobile Telephony

Country	Liberalisation status of public mobile networks and services	Legal basis
Algeria	Orascom Télécom Algérie (OTA) 31/07/2001 Algérie télécom mobile (ATM) 06/05/2002 (régularisation) Wataniya télécom Algérie (WTA) 11/01/2004	Law n° 2000- 03 of 05 jourmada el oula 1421 (August 5, 2000 on post and telecommunications) Executive decree n°01- 219 of July 31, 2001 (OTA) Executive decree n°0 2-186 of May 6, 2002 (Algérie télécom mobile à titre de régularisation) Executive decree n°04-09 of 11 January 2004 (WTA)
Bahrain	Second mobile network operator licence was granted to MTC-Vodafone (Zain) in 2003 STC won the 3 <sup>rd</sup> MNO auction organised by TRA in January 2009	Section 39 of the Law Section 39 of the Law and the Final statement of Strategic and Retail Market Review
Egypt	First and Second mobile licences granted in 1998 Third mobile licence was granted in 2006.	Mobile licences
Jordan	Second mobile network operator license was granted to Mobilecom ( Orange Mobile) in 1999 Third mobile network operator licence was granted to Umniah in 2004 IDEN ( push to talk) license was granted to Xpress in 2003 2009 Introduction of 3G licence	
Lebanon	The Government of Lebanon owns two mobile networks, and is currently in the process of preparing a tender for contracting the management of the networks to two operators. Liberalisation of the mobile sector is still in progress. The auction of Lebanon's two mobile networks is based on two laws which created the regulatory environment for the liberalization of the telecommunications sector. In 2000, <a href="#">Law 228</a> was issued as a general privatization framework and this called for the enactment of further laws specific to each sector to be privatized. In 2002, <a href="#">Telecommunications Law 431</a> was enacted, creating a comprehensive regulatory regime for the telecommunications sector. The mobile auction will take place in line with international best practices in a process that will be co-managed by the <a href="#">Higher Council for Privatization</a> and the <a href="#">TRA</a> . <a href="http://www.lebanonmobileauction.com">www.lebanonmobileauction.com</a>	
Oman	TRA had granted Omantel the first licence for the provision of basic public mobile telecommunication services in 2004. TRA had granted Omani Qatari Telecommunication company (Nawras) 2nd licence for the provision of basic public mobile telecommunication services in February 2005.	Royal Decree No. 20/2004 Dated 11/2/2004 (Omantel Licence)
Qatar	The first mobile licence was issued to Qatar Telecom (Qtel) Q.S.C. on October 7, 2007. The second mobile licence was issued to Vodafone Qatar Q.S.C. on June 29, 2008. Start of business is planned later in 2009.	For regulatory documents see <a href="http://www.ict.gov.qa">www.ict.gov.qa</a> – Regulation – Search Regulatory Documents.
Saudi Arabia	The second mobile license was issued to Mobily in 2004 and the third to Zain in 2008.	<b>Royal Decrees XXXX and XXXX</b>
United Arab Emirates	February 12, 2006 (date of the issuance of the licence to second operator) - UAE market is a duopoly	Article (24) of the Federal Law by Decree no. 3 of 2003

### 3. Mobile operators

Country	Operators licensed for provision of public mobile communications services				
	Operator	System	Licence (date of issue)	Expiry year	One-off licence fee paid (if applicable in local currency)
Algeria	• MOBILIS (ATM)	GSM 900-1800	Incumbent operator Regularisation (06/05/02)	-	No
	• DJEZZY (OTA)	GSM 900-1800	July 31, 2001	2016 May be renewed for periods of 5 years	
	• NEDJEMA (WTA)	GSM 900-1800	January 11, 2004	2019 May be renewed for periods of 5 years	
Bahrain	Batelco	GSM 900 -1800 -2100	June 21, 2003	2018	
	Zain	GSM 900 -1800 -2100	April 22, 2003	2018	
	STC	GSM 900 -1800 -2100	March 2, 2009	2024	
	3 <sup>rd</sup> MNO, STC, was awarded a license in January. TRA anticipates it will begin its operation before end 2009				
Egypt	<i>Mobinil</i>	<i>GSM 900 -1800 -2100</i>	<i>April 18, 1998</i>	<i>2022</i>	
	<i>Vodafone</i>	<i>GSM 900 -1800 -2100</i>	<i>May 5, 1998</i>	<i>2022</i>	
	<i>Etisalat</i>	<i>GSM 900 -1800 -2100</i>	<i>August 21, 2006</i>	<i>2021</i>	
Jordan	Zain	GSM 900	1995	*2021	
	Orange mobile	GSM 900	1999	2014	
	Umniah	GSM 1800	2004	2019	
	* at Q4 2006 Zain licence has been renewed for another 15 years ( 15 years is the validity of Licence in Jordan)				
Lebanon	MTC Touch	GSM 900 – 1800(recently)	Management Agreement, 2004 and to be reissued following new tender in February 2009	1 year from February 2009 + possibility for 1 year (only) renewal	
	Alfa	GSM 900 – 1800 (recently)	Management Agreement, 2004 and to be reissued following new tender in February 2009	1 year from February 2009 + possibility for 1 year (only) renewal	
	The Government of Lebanon owns two Mobile Networks that are managed by two Operators since 2004.				
	TRA has decided to launch the process for the award of a third mobile licence. It plans to issue a third licence by end 2008 or early 2009. See Strategic Review Document referred to above.				
Oman	Oman Mobile	GSM 900	February 11, 2004 for 15 years	February 11, 2019	OMR 40 million
	Nawras	GSM 900	February 19, 2005 for 15 years	February 11, 2020	OMR 40 million
Qatar	Qatar Telecom (Qtel) QSC	900 -1800-2100 for GSM and UMTS (technology neutral)	October 7, 2007	2018 (20 years)	N/A



Country	Operators licensed for provision of public mobile communications services				
	Operator	System	Licence (date of issue)	Expiry year	One-off licence fee paid (if applicable in local currency)
	Vodafone Qatar QSC	900 -1800-2100 for GSM and UMTS (technology neutral)	June 29, 2008	2019 (20 years)	QAR 7700 mio (approximately USD 2100 mio)
	TRA has decided to launch the process for the award of a third mobile license. It anticipates the issue of the third license in the first part of 2009. See Strategic Review Document referred to above.				
Saudi Arabia	STC	GSM 900-1800-3G	2003	2028	
	Mobily	GSM 900-1800-3G	2004	2029	
	Zain	GSM 900-1800-3G	2008	2033	
United Arab Emirates	Etisalat	GSM 900/1800, UMTS	May 9, 2006	2026	
	du	GSM 900/1800, UMTS	February 12, 2006	2026	

#### 4. Liberalisation of Data Services

Country	Liberalisation status for data networks and services		Legal basis
	National	International	
Algeria	2005	2005	Law n° 2000- 03 of 05 jourmada el oula 1421 (5 August 2000 on post and telecommunications
Bahrain	2003	2004	Section 39 of The Law
Egypt	2000 Four licences granted for the provision of data/ internet services.	2000 Same as National	<a href="http://www.tra.gov.eg/uploads/law/law_en.pdf">http://www.tra.gov.eg/uploads/law/law_en.pdf</a> Article 4
Jordan	2005	2005	
Lebanon	1996	Not liberalised yet	The Government of Lebanon issued licences to Data Service Providers for the provision of data services and the right to use the spectrum in 1996. Existing Data Service Providers and Internet service Providers were issued Interim Licences by the TRA as per the Telecom Law 431/2002 provisions in April 2008
Oman	<ul style="list-style-type: none"> <li>TRA granted Omantel the first licence for the provision of basic public fixed telecommunication services in 2004. TRA announced on 25/10/2008 the award of a 2<sup>nd</sup> licence for the provision of full fixed licence.</li> <li>TRA announced an opening of the telecom market of Class II licence for the provision of internet access services with unlimited entry of service provider. The duration of the licence should not to exceed 10 years</li> <li>TRA announced an opening of the telecom market of Class III licence for the provision of private telecommunication services which includes VSAT networks with unrestricted entry of service provider. The duration of the licence is for a period not exceeding 5 years.</li> </ul>	TRA granted Omantel the first licence for the provision of basic public fixed telecommunication services in 2004. TRA announced on 25/10/2008 the award to Nawras of the 2 <sup>nd</sup> licence for the provision of full fixed licence. The process of granting the licence is underway.	<p>Royal Decree No. 20/2004 Dated 11/2/2004 (Omantel Licence)</p> <p>Royal Decree No. 17/2005 Dated 19/2/2005 (Nawras Licence)</p>
Qatar	Not applicable	Not applicable	No specific "Data Service" Licence is foreseen as such. Data Services are covered by the Mobile and Fixed licences (see the relevant tables there)
Saudi Arabia	2004	2004	
United Arab Emirates	February 12, 2006- UAE market is a duopoly	February 2006- UAE market is a duopoly	Article (24) of the Federal Law by Decree no. 3 of 2003

## 5. Fixed Carrier Services (CS)

Country	CS available? For which type of calls (local, national, international, to mobile, to non-geographical numbers)?	Deadline for introduction (specify if different for different categories of calls)	Which operators are required to provide CS?	Call origination for CS included in RIO?	CS charges in local currency
Algeria	No	No	None	N/A	N/A
Bahrain	CS planned (expected implementation date is Q2 2009) <ul style="list-style-type: none"> <li>National</li> <li>International</li> </ul> <p>In Bahrain, the market of international calls represents a large proportion of total revenues (about 25%). This is not surprising given the population make-up (about 50% expats). International calls are provided in three main ways: (a) directly by operators which have their own infrastructure; (b) through CS; and (c) through prepaid calling cards, PPCCs. The use of PPCCs is extensive (about 50% of international calls), whereas CS is used for less than 5% of calls. Call origination charges for PPCCs are cost based for Batelco mobile and fixed. Given the size of the country CS/CPS make only sense for international calls.</p>	Target date Q2 2009 <sup>1</sup>	CPS regulation imposed operator with SMP (currently only Batelco) to offer CS	To be added once the service is introduced	N/A
Egypt	International calls only	2007	Telecom Egypt	-	Call set up LE 0.08 Per min: LE 0.03
Jordan	International	Provided since Q2 2007	CS regulation imposed on designated operator with SMP ( Jordan Telecom Only)	Yes	Call origination paid by the receiving operator at (.010 JD/ Min).  Charges are based on cost (FAC)
Lebanon	No	N/A	N/A	N/A	N/A
Oman	CS Planned <ul style="list-style-type: none"> <li>International – being planned</li> <li>Others – not decided</li> </ul> <p>A draft carrier selection regulation is available on TRA's website. The document is yet to be approved before coming into effect.</p>	Four (4) months from the formal issuance of Carrier Selection Regulations	All Class I operators including fixed, mobile, fixed-wireless operators will be required to provide Carrier Selection	No	N/A
Qatar	CS not available	N/A	N/A	N/A	N/A
Saudi Arabia	<ul style="list-style-type: none"> <li>International call by call pre-selection to be provided in April 2011</li> </ul>	<ul style="list-style-type: none"> <li>24 months after first fixed facilities based provider license issued in April 2009</li> </ul>	All fixed facility based providers	To be added before the service is introduced	N/A

<sup>1</sup> See SRMR final statement <http://www.tra.org.bh/en/pdf/FINALStatementonStrategicandRetailMarketsReview20080603.pdf>

Country	CS available? For which type of calls (local, national, international, to mobile, to non-geographical numbers)?	Deadline for introduction (specify if different for different categories of calls)	Which operators are required to provide CS?	Call origination for CS included in RIO?	CS charges in local currency
	<ul style="list-style-type: none"> <li>National LD, and Fixed to Mobile call by call pre-selection to be provided in September 2011</li> </ul>	<ul style="list-style-type: none"> <li>30 months after first facilities based fixed license issued in April 2009</li> </ul>			N/A
United Arab Emirates	<ul style="list-style-type: none"> <li>National</li> <li>To mobile</li> <li>International</li> </ul>	July 26, 2007	Both operators	Interconnect Instructions require CS	Normal interconnect call origination charges apply to operators. No charges apply to customers.

## 6. Fixed Carrier Pre-Selection (CPS)

Country	CPS available? For which type of calls (local, national, international, to mobile, to non-geographical numbers)?	Deadline for introduction (specify if different for different categories of calls)	Which operators required to provide CPS?	Call origination for CPS included in RIO?	CPS charges In local currency
Algeria	No	No	No	N/A	N/A
Bahrain	CPS available: <ul style="list-style-type: none"> <li>National (Not used because the national calls are in effect local calls given the size of the country)</li> <li>International</li> </ul>	Implemented in 2007	Dominant Operator (currently Batelco)	Yes	Charge for call origination BD 0.0078 per Minute <sup>2</sup> Charge based on LRIC top-down model The Access Seeker is responsible for billing the Calling Party for the end-to-end CPS Call.
See comments above on CS					
Egypt	No (planning underway for international calls)	No deadline	Not decided	Not decided	Not decided
Jordan	International	Q2 2007	Designated operator (Jordan Telecom)	Yes	Call origination paid by the receiving operator at (0.010 JD/ Min).  Charges are based on cost (FAC)
Lebanon	No	No	N/A	N/A	N/A
Oman	CPS to be under assessment. If obligated upon SMP Class I licensees, then <ul style="list-style-type: none"> <li>International: being planned</li> <li>Others: not decided</li> </ul>	Ten (10) months from the formal issuance of Carrier Selection Regulations	Class I licensees with SMP	No	N/A
A draft carrier selection regulation is available on TRA's website. The document is yet to be approved before coming into effect.					
Qatar	Carrier Pre Selection is not available	N/A	N/A	N/A	N/A

<sup>2</sup> See Batelco RO on CPS <http://www.batelco.com/refPDF/Sch12-130507ROCPS.pdf>

Country	CPS available? For which type of calls (local, national, international, to mobile, to non-geographical numbers)?	Deadline for introduction (specify if different for different categories of calls)	Which operators required to provide CPS?	Call origination for CPS included in RIO?	CPS charges In local currency
Saudi Arabia	Full carrier pre-selection: national, international, and fixed to mobile to be provided in April 2012	36 months after first fixed facility based provider license issued in April 2009	All fixed facility based providers	To be added before the service is introduced	N/A
United Arab Emirates	<ul style="list-style-type: none"> <li>Local (pending)</li> <li>National</li> <li>To mobile</li> <li>International</li> </ul>	CPS is mandated and pending implementation	Both operators	Interconnect Instructions require CPS	Standard interconnect call origination charges apply to operators.

## 7. Fixed number portability (FNP)

Country	Fixed number portability Implemented or not		Implementation deadline and legal basis / decision document	Inter-operator charge per ported number in local currency	Technical solution	Ported numbers statistics
	Geographic numbers	Non-geographic numbers				
Algeria	No	No	No	N/A	N/A	N/A
Bahrain	No	No	Target date to introduce the FNP is Q1 2009. Section 40 of the Law and Final statement of Strategic and Retail Market Review <sup>3</sup>	N/A	N/A	N/A
Egypt	No	No	Not decided	Not decided	Direct rooting ACQ with Centralized DB	No number ported
Jordan	N/A	N/A	N/A	N/A	N/A	N/A
Lebanon	No	No	Scheduled for after the Incorporation of Liban Telecom and the opening of the Fixed Telephony market.			
Oman	No	No	N/A (see comments Below)	N/A (see comments below)	N/A (see comments below)	N/A
Country comments	<ul style="list-style-type: none"> <li>As per the draft document, all operators shall cooperate with the operator ordering number portability and implement the Number Portability and corresponding interconnection arrangements within 90 calendar days of receiving the order</li> <li>As per the draft document, the costs to the donor operator for porting out a subscriber shall be recoverable from the recipient operator.</li> <li>As per the draft document, the technical and administrative solution of number portability must meet the following performance criteria: <ul style="list-style-type: none"> <li>Be efficient and contributes towards the success of its implementation.</li> <li>Support the existing network services, features, and capabilities.</li> <li>As far as possible, avoid relying on other network facilities, or services provided by other operators in order to route calls to the ported numbers.</li> <li>Avoid degradation in service quality or network reliability when implemented.</li> <li>Avoid adverse effect upon the quality of service offered to the ported and non-porting subscribers.</li> <li>Avoid the use of proprietary architectures on inter-operator interfaces, and Applications Programming Interfaces.</li> </ul> </li> </ul> <p>Use the numbering resources efficiently.</p> <p>* A regulation will be issued soon mandating the above conditions where technically feasible.</p>					

<sup>3</sup> <http://www.tra.org.bh/en/pdf/FINALStatementonStrategicandRetailMarketsReview20080603.pdf>

Country	Fixed number portability Implemented or not		Implementation deadline and legal basis / decision document	Inter-operator charge per ported number in local currency	Technical solution	Ported numbers statistics
	Geographic numbers	Non- geographic numbers				
Qatar	Not implemented yet	Not implemented yet	Number portability is mandated in the licences For regulatory documents see <a href="http://www.ict.gov.qa">www.ict.gov.qa</a> – Regulation – Search Regulatory Documents.	N/A	N/A	N/A
Saudi Arabia	No	No	Within 2 years from the date of commercial launch of the first competitive fixed FBP licensee (the latter received its licence in April 2009) Article 87 of the Telecom Bylaw Regulatory Framework on Local Number Portability	N/A	IN. Alternative solutions agreed between service providers subject to CITC approval.	N/A
United Arab Emirates	The UAE has a policy requiring number portability, but it has not yet been implemented	The UAE has a policy requiring number portability, but it has not yet been implemented	Number Portability Policy, Version 1.0, 11 April 2006.	NA	NA	NA



## 8. Fixed Wholesale Services - Termination (FTR) and Origination Rates

Country	Level of Interconnection	Fixed call termination rates in local currency				Fixed call origination rates in local currency			
Algeria		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak
	Local exchange (local currency)			2 DA	2DA				
	Single tandem (local currency)			2,50 DA	2,50 DA				
	Double tandem (local currency)			2.80 DA	2.80 DA				
Bahrain		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak
	Local exchange (local currency)	n/a	n/a	n/a	n/a				
	Single tandem (local currency)	0	0	BD 0.002382	BD 0.002382	0	0	See above for CPS - Charge for C.O. BD 0.0078 per Min. PPCCs: it is BD0.00271 per minute (billing increment per minute)	
	Double tandem (local currency)	0	0	BD 0.002382	BD 0.002382	0	0	See above for CPS - Charge for C.O. BD 0.0078 per Min. PPCCs: it is BD0.00271 per minute (billing increment per minute)	
	One rate for Peak and Off-peak Billing is per minutes, calculated per second based on weighted average of single and double tandem traffic Given the importance of PPCCs (See comment above on CS), call origination charges for PPCCs are more representative and should also be included in the benchmark table								
Egypt		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak
	0.065 L E /minute NB. As of today, only mobile operators use call termination					0,08	0.08	0.03	0.03
Jordan		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak
	Local exchange (local currency)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Country	Level of Interconnection	Fixed call termination rates in local currency				Fixed call origination rates in local currency			
	Single tandem (local currency)	0	0	JD 0.0092	JD 0.0092	0	0	JD .0104	JD .0104
	Double tandem (local currency)	0	0	JD 0.0092	JD 0.0092	0	0	JD .0104	JD .0104
Lebanon		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak		Peak	Off-peak	Peak
	Same rates apply to all levels of interconnection. Per second billing	N/A	N/A	Fixed to Mobile 106 LBP/min Mobile to fixed 10 LBP/min	Fixed to Mobile 106 LBP/min Mobile to fixed 10 LBP/min	N/A	N/A*	N/A	N/A
	Fixed and Mobile networks are state-owned, application of the current interconnection rates has not taken place in practice and <b>payments are now done on a “bill and keep” basis.</b>								
Oman		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak		Peak	Off-peak	Peak
	Single tandem (local currency)	0	0	RO 0.0053	RO 0.0053	N/A	N/A	N/A	N/A
	Double tandem (local currency)	0	0	RO 0.0062	RO 0.0062	N/A	N/A	N/A	N/A
	Long double tandem (local currency)	0	0	RO 0.0069	RO 0.0069	N/A	N/A	N/A	N/A
Qatar		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak
	Local exchange (local currency)	N/A	N/A	QAR 0,074 / minute	QAR 0,074 / minute	N/A	N/A	N/A	N/A
	Single tandem (local currency)	N/A	N/A	QAR 0,074 / minute	QAR 0,074 / minute	N/A	N/A	N/A	N/A
	Double tandem (local currency)	N/A	N/A	QAR 0,074 / minute	QAR 0,074 / minute	N/A	N/A	N/A	N/A
Saudi Arabia		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak
	Local exchange (local currency)	N/A	N/A	SR 0.10	SR 0.10	N/A	N/A	N/A	N/A
	Single tandem (local currency)	0	0	SR 0.10	SR 0.10	N/A	N/A	N/A	N/A

Country	Level of Interconnection	Fixed call termination rates in local currency				Fixed call origination rates in local currency			
	Double tandem (local currency)	0	0	SR 0.10	SR 0.10	N/A	N/A	N/A	N/A
	One rate for Peak and Off-peak Billing calculated per second. One rate for both single and double tandem traffic.								
United Arab Emirates		Call setup		Per minute		Call setup		Per minute	
		Peak	Off-peak	Peak	Off-peak	Peak	Off-peak	Peak	Off-peak
	Local exchange (local currency)	N/A	N/A	-		N/A	N/A	-	-
	Single tandem (local currency)	N/A	N/A	3.7 fils/min	3.7 fils/min	N/A	N/A	3.8 fils/min	3.8 fils/min
	Double tandem (local currency)	N/A	N/A	5.3 fils/min	5.3 fils/min	N/A	N/A	5.6 fils/min	5.6 fils/min

## 9. Fixed Wholesale Services - Price regulation and Cost Accounting System (CAS)

Country	Markets / activities / products available	Pricing rule set by NRA? Cost orientation, retail minus	Where cost orientation, methodology mandated by NRA			Legal basis/Decision document  Link to CAS documents	Brief Description of the product
			Cost base	Cost standard	Type of cost model used bottom-up (BU), top-down (TD) or reconciliation of the two models		
Algeria	Interconnection	Cost based	Current	LRIC	Reconciliation	Executive decree n° 02 -156 of 09/05/2002	
Bahrain	Interconnection	Cost based	CCA	LRIC	TD	Section 57, License conditions and Accounting Separation Regulation <sup>4</sup>	
	Access	Cost based	HCA	FDC	TD	Section 57, License conditions and Accounting Separation Regulation	
Egypt	Interconnection	cost based	HCA	FDC	TD	General Acceptable Telecom Accounting Practice by the Operator	
	Access	cost based	HCA	FDC	TD	General Acceptable Telecom Accounting Practice by the Operator	
Jordan	Interconnection	Cost based	Historical	FAC			
	Bit stream	Cost based	Historical	FAC			
Jordan is in the process of implementing TSLRIC+ interconnection rates.							
Lebanon	TRA issued Price Regulation for public consultation, and the final issuance is planned following the Market assessment and designation of SMP licensed service providers.						
Oman	Interconnection	Cost based	CCA	LRIC	Reconciliation Hybrid Model	Chapter 6 of the act, condition 17 of omantel licence, condition 16 of Oman mobile and Nawras licence	
	Access	Reasonable	Historical	TRA to decide.	TRA to decide.	Chapter 6 of the act, condition 14 of omantel licence, condition 13 of oman mobile and nawras licences	
Qatar	All markets where dominance has been declared	Cost orientation, based on CESP – cost of efficient service provision	CCA (Cost of efficient service provision)	FDC	N/A	Telecommunications Law (Art. 29), Licenses and Dominance Designation of 24 June 2008. For regulatory documents see <a href="http://www.ict.gov.qa">www.ict.gov.qa</a> – Regulation – Search Regulatory Documents	not available
Saudi Arabia	Interconnection	Benchmarking	Current	LRIC under development	BU	CITC statutes including Interconnection Guidelines	

<sup>4</sup> See [http://www.tra.org.bh/en/pdf/Final\\_AS\\_en.pdf](http://www.tra.org.bh/en/pdf/Final_AS_en.pdf)

Country	Markets / activities / products available	Pricing rule set by NRA? Cost orientation, retail minus	Where cost orientation, methodology mandated by NRA			Legal basis/Decision document  Link to CAS documents	Brief Description of the product
			Cost base	Cost standard	Type of cost model used bottom-up (BU), top-down (TD) or reconciliation of the two models		
United Arab Emirates	Interconnection (covers also bitsream access)	Cost orientation	Current	LRIC	TD	Article (41) of the Federal Law by Decree no. 3 of 2003 and Policies/Instructions can be found on the TRA's Website – Rules and Regulations	
	Line sharing	Benchmarking	Current	NA	N/A	Regulatory Framework on Unbundling and Decision 137/1427	
	Wholesale transmission link leasing	Benchmarking	Current	LRIC under development	BU	Interconnection Guidelines	

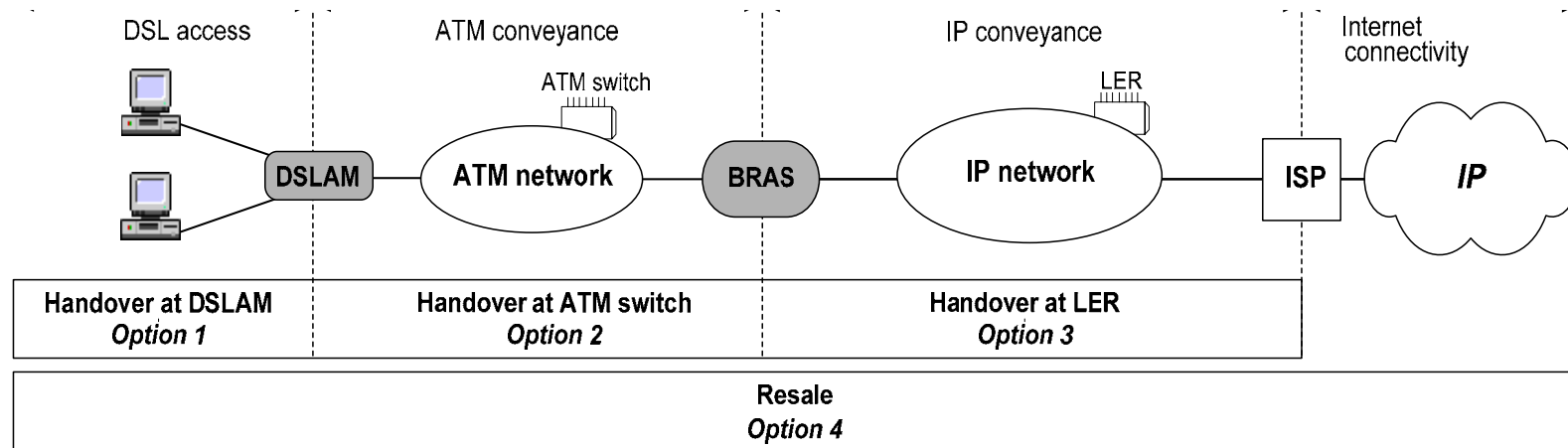
## 10. Wholesale Broadband - Local Loop Unbundling

Country	Status of RUO Legal basis	One-off and monthly prices		Implementation	
		Fully unbundled loop	Shared loop	Number of LLU agreements	Number of unbundled loops
Algeria	No	N/A	N/A	N/A	N/A
Bahrain	TRA in the process of selecting a consultant to assist TRA in the LLU implementation and inclusion in the Incumbent's Reference Offer. Target date to introduce LLU is Q2 2009. Section 40 of the Law and Final statement of Strategic and Retail Market Review <sup>5</sup>	N/A	N/A	N/A	N/A
Egypt	Telecom Egypt (the incumbent) is preparing its RUO according to the obligation in its License.	N/A	5 L.E. (5 Egyptian Pound)	N/A	800,000
Jordan	TRC in the process of selecting a consultant to assist TRC in the LLU implementation.	N/A	N/A	N/A	N/A
Lebanon	Government of Lebanon signed a memorandum of understanding with Data & Internet Service Providers and issued two decrees related to the provisioning of DSL services (Shared Local Loop & Bitsream) during year 2006. Decree1: New fees for some internet services and fees for new broadband services (DSL). <a href="http://www.mpt.gov.lb/e16852mc.pdf">http://www.mpt.gov.lb/e16852mc.pdf</a> Decree 2: Decree for the general structure intended to regulate the launch of the broadband Internet services (DSL) in Lebanon by the public and the private sectors. <a href="http://www.mpt.gov.lb/dec17090m.pdf">http://www.mpt.gov.lb/dec17090m.pdf</a>	N/A	One Time Fee: LBP 55,000 Per Month: LBP 6,000 (Prices are subject to VAT & stamps)	5 Data Service Providers have the right to provide service on shared Local Loop	N/A
Oman	TRA published a draft LLU regulation that is available on TRA website. The document is yet to be approved before coming into effect	N/A	N/A	N/A	N/A
Qatar	No LLU regulation	N/A	N/A	N/A	N/A
Saudi Arabia	Reference Offer for Data Access (RODA) published on <a href="http://www.citc.gov.sa/citcportal/SimpleText/tabid/103/cmsspid/%7B8AAE7D24-2344-4576-8692-C965B58DE721%7D/Default.aspx">http://www.citc.gov.sa/citcportal/SimpleText/tabid/103/cmsspid/%7B8AAE7D24-2344-4576-8692-C965B58DE721%7D/Default.aspx</a> , subsequent to CITC Decision No. (178/1427)	N/A	Connection charge: SR. 320 Monthly charge: SR. 30	0	0
United Arab Emirates	N/A unless or until there is demand	N/A	N/A	N/A	N/A

<sup>5</sup> <http://www.tra.org.bh/en/pdf/FINALStatementonStrategicandRetailMarketsReview20080603.pdf>

## 11. Wholesale Broadband - Bitstream access

Figure 1 below shows the various possible handover points for DSL traffic between an incumbent operator and an alternative operator or ISP.



Source: ERG

DSLAM: DSL Access Multiplexer / ATM: Asynchronous Transfer Mode / BRAS: Broadband-Remote Access Server / LER: Router

Figure 1 - DSL interconnection

### DSL interconnection services – bitstream access (BSA)

Option 1 – handover at the DSLAM.

Option 2 – handover at the ATM network level, either at:

- the 'parent' ATM switch (i.e., the ATM switch closest to the DSLAM); or
- one or more 'distant' switches in the ATM network (involving additional conveyance across the ATM network by the incumbent);

Option 3 – handover at one or more points on the IP network of the incumbent.

### Resale service

Option 4 – resale of end-to-end DSL service between the end-user and the ISP.

Country	Legal basis BSA/resale offered on commercial basis if not mandated?	Option 1 DSLAM level	Option 2 ATM/Ethernet handover	Option 3 IP handover	Option 4 End-to-end resale	Implementation	
						Number of BSA/resale agreements	Number of broadband lines with BSA/resale by alternative operators
Algeria	No resale DSL regulation	N/A	N/A	N/A	N/A	N/A	N/A
Bahrain	The obligation to provide wholesale bitstream access was imposed on Batelco based on the Dominance in Wholesale Markets <sup>6</sup> issued by TRA, 22 January 2006. Bitstream was introduced in 2006 Simple resale of ADSL products is also mandated. The latest wholesale tariffs for bitstream access and wholesale DSL are applicable since July 1, 2008.	N/A	Yes  Batelco Reference Offer Section 1.2.12 <sup>7</sup>	N/A	Yes  Batelco Reference Offer Section 1.2.11 <sup>8</sup>	N/A	N/A
Egypt	BSA/resale not mandated Telecom Egypt has provided a study for commercial offer of BSA, which needs some modifications to the existing licensing scheme NTRA is currently studying the BSA offer	N/A	N/A	N/A	N/A	N/A	N/A
Jordan	<ul style="list-style-type: none"> <li>Bitstream is one of the interconnection services that should be provided by the fixed incumbent operator</li> <li>TRC approved IPstream-3 service schedule for JT</li> <li>JT are requested to provide IP stream 1 service</li> </ul>	In the process	N/A	Service schedule & prices has been approved since 2007	N/A	N/A	Service have been currently provided to end users

<sup>6</sup> See [http://www.tra.org.bh/en/pdf/Dominance\\_Determination\\_Final\\_clean.pdf](http://www.tra.org.bh/en/pdf/Dominance_Determination_Final_clean.pdf)

<sup>7</sup> See <http://www.batelco.com/refPDF/Sch12-120507ROBitstream.pdf>

<sup>8</sup> See <http://www.batelco.com/refPDF/Sch12-110507ROWDSL.pdf>



Country	Legal basis BSA/resale offered on commercial basis if not mandated?	Option 1 DSLAM level	Option 2 ATM/Ethernet handover	Option 3 IP handover	Option 4 End-to-end resale	Implementation	
						Number of BSA/resale agreements	Number of broadband lines with BSA/resale by alternative operators
Lebanon	Government of Lebanon signed a Memorandum of Understanding with Data & Internet Service Providers and issued two decrees related to the provisioning of DSL services (Shared Local Loop & Bitstream) during year 2006. <u>Decree 1</u> : New fees for some internet services and fees for new broadband services (DSL). <a href="http://www.mpt.gov.lb/e16852mc.pdf">http://www.mpt.gov.lb/e16852mc.pdf</a> <u>Decree 2</u> : for the general structure intended to regulate the launch of the broadband Internet services (DSL) in Lebanon by the public and the private sectors. <a href="http://www.mpt.gov.lb/dec17090m.pdf">http://www.mpt.gov.lb/dec17090m.pdf</a>	Not available	Not available	Yes	Not available	6 ISPs have the right to resell bitstream access	bitstream: ≤10,000
Oman	Draft local loop unbundling available on TRA website, which include bitstream service. Also Omantel included the service in their RAO.					N/A	N/A
Qatar	No BSA/DSL resale available	N/A	N/A	N/A	N/A	N/A	N/A
Saudi Arabia	The obligation to provide wholesale bitstream access was mandated by CITC in Decision No. (178/1427)	N/A	NA	N/A	Yes Reference Offer for Data Access (RODA)	0	0
United Arab Emirates	There is no current demand for bitstream access but obligation to provide exists based on Interconnection Instructions.						

## 12. Mobile Number Portability (MNP)

Country	Mobile number portability Implemented or not	Implementation deadline Legal basis/relevant document	Inter-operator charge per ported number in local currency	Technical solution	Implementation	
					Ported numbers statistics	As % of total mobile numbers?
Algeria	No	No	N/A	N/A	N/A	N/A
Bahrain	No	Target date to introduce the MNP is Q1 2009. Section 40 of the Law and Final statement of Strategic and Retail Market Review. <sup>9</sup> Public consultation launched in early October.	N/A	N/A	N/A	N/A
Egypt	May 1, 2008	January 1, 2008	EGP 75	Direct rooting ACQ with centralized DB	25,000	0.5%
Jordan	No	TRC has postponed this issue	N/A	N/A	N/A	N/A
Lebanon	No					
Oman	Yes	August 2006	R.O. 3	onward (indirect) routing	20,915	N/A
Qatar	Not implemented yet	Number portability is mandated in the licences (see tables above). For regulatory documents see <a href="http://www.ict.gov.qa">www.ict.gov.qa</a> – Regulation – Search Regulatory Documents.	N/A	N/A	N/A	N/A
Saudi Arabia	Yes July 8, 2006	Article 27 of the Telecom Act Article 87 of the Telecom Bylaw	Free for customers SR. 55 will be paid by the recipient operator (SR. 15 to the MNP service provider, 40 SR to the donor )	Direct routing, ACQ with centralised database	182,074 numbers as of November 5, 2008	0.6%
United Arab Emirates	The UAE has a policy requiring number portability, but it has not yet been implemented	Number Portability Policy, Version 1.0, April 11, 2006.	N/A	N/A	N/A	N/A

<sup>9</sup> <http://www.tra.org.bh/en/pdf/FINALStatementonStrategicandRetailMarketsReview20080603.pdf>

### 13. Mobile Wholesale Services - Mobile Termination Rates (MTRs)

Country	Mobile Network Operators	Mobile termination rates per minute		Comments
		Peak time in local currency	Off-peak time in local currency	
Algeria	OTA ATM WTA	2.60 DA HT 3.50 DA HT 4.60 DA HT	2.60 DA HT 3.50 DA HT 4.60 DA HT	
Bahrain	Batelco	BD 0.007332	BD 0.007332	No peak/off-peak differentiation
Egypt	Cost based Cost- plus , based on fully distributed cost (FDC)	LE 0.113	LE 0.113	
Jordan	Zain Orange mobile Umniah	JD 0.0320 JD 0.0329 JD 0.0425	JD 0.0320 JD 0.0329 JD 0.0425	Flat interconnection rates are applied
Lebanon	MTC Touch & Alfa	10 LBP	10 LBP	No peak/off-peak differentiation
	Both mobile networks are state-owned, therefore application of the current interconnection rates has not taken place in practice and <b><u>payments are now done on a 'bill and keep' basis.</u></b>			
Oman	Oman Mobile	RO 0.015	RO 0.015	No peak/off-peak differentiation
	Nawras	RO 0.015	RO 0.015	No peak/off-peak differentiation
	SMS	RO 0.0003	RO 0.0003	
Qatar	Qatar Telecom (Qtel) Q.S.C.	QAR 0.1662	QAR 0.1662	Termination rates for Qatar Telecom (Qtel) Q.S.C. were set by ictQATAR on 10 February 2009 by benchmarking. No peak-off peak differentiation. Billing is per minute, the billing increment is per second.
	Vodafone Qatar Q.S.C.	QAR 0.1662	QAR 0.1662	
Saudi Arabia	STC, Mobily, Zain	SR 0.25	SR 0.25	No peak/off-peak differentiation
United Arab Emirates	Du	N/A	N/A	Presently, prices are set by the operators
	Etisalat	N/A	N/A	

#### 14. Mobile Wholesale Services - MTRs: Price Regulation and Cost Accounting System (CAS)

Country	Cost orientation, benchmark or retail minus?	If LRIC, mark-up for common costs?	Mark-up for network externalities?	Fixed-to-mobile, off-net and on-net mobile-to-mobile calls covered?	GSM 900 and 1800 termination covered?	3G voice termination covered?	
						If yes, does same control apply to 2G and 3G termination?	If yes, are 3G network costs and/or licence fees taken into account?
Algeria	Cost based	Yes	No	Yes	No	N/A	N/A
Bahrain	Cost based	Yes Equal proportionate mark-up (EPMU)	No	Yes	Yes	Yes	Yes for network cost
Egypt	Cost based Cost- plus , based on fully distributed cost (FDC)	No	No	Yes	Yes	Yes	Yes both
Jordan	Cost based ( Fully allocated cost)	N/A	No	Yes	Yes	N/A	N/A
Lebanon	-						
Oman	Cost based	Yes Equal proportionate mark-up (EPMU)	No	Yes	Yes	Yes	N/A
Qatar	Cost orientation (Cost of efficient service provision). Qtel is in the process of implementing a Regulatory Accounting System. Details are to be decided.	N/A	N/A	N/A	N/A	N/A	N/A
Saudi Arabia	Benchmarking	LRIC under development. Yes. Equal proportionate mark-up (EPMU)	No	Yes	Yes, cost data for GSM 900 and 1800 is being considered in developing termination costs	Under consideration	Under consideration
United Arab Emirates	Current MTRs are result of negotiations between operators, although operators face a regulatory policy requirement for cost orientation.	Not specified in regulatory policy	Not specified in regulatory policy	Yes	Yes	Yes	Not specified in regulatory policy

#### 15. Mobile Wholesale Services - Price control of Mobile Termination Rates (MTRs)

Country	Symmetry of MTRs between Mobile operators?	Comments
Algeria	No	
Bahrain		Only Batelco's MTR are currently regulated as per the interconnection determination referred to above.
Egypt	Yes	
Jordan	No	All licensees shall provide cost based interconnection rated using the methodology applied by TRC. ( currently FAC) Termination charges for all mobile operators are calculated at cost using FAC and reviewed annually (July 1 each year).
Lebanon	Yes	Bill and keep
Oman	Yes	Both mobile operators are re regulated as per the mobile licence.
Qatar	Yes	The termination rates for Qatar Telecom (Qtel) Q.S.C. were set by ictQATAR on February 10, 2009 by benchmarking. Qatar Telecom (Qtel) Q.S.C. and Vodafone QATAR Q.S.C. agreed on symmetry in their Interconnect Agreement.
Saudi Arabia	Yes	CITC regulates MTR's and mandates that all mobile termination rates shall be symmetrical, unless it decides otherwise based on its statutes.
United Arab Emirates	Not publicly available	

## 16. Rate of return on capital employed

Country	Fixed		Mobile	
	Rate (nominal pre-tax)	Say whether cost of equity is calculated based on Capital Asset Pricing Model (CAPM) and Source	Rate	Breakdown Cost of capital equation used and values of the different parameters if publicly available (e.g. risk free rate, beta, gearing, market risk premium, country risk, tax rates) and Source
Algeria	14,2%		From 11.2% to 12.50%	
Bahrain	Nominal WACC is 12.2%. There are no corporate taxes in Bahrain therefore pre-tax WACC = post-tax WACC	Yes, <sup>10</sup> cost of equity is based on CAPM Cost of debt = 6.9%: <ul style="list-style-type: none"> <li>Risk free rate: 4.5%</li> <li>Country risk premium: 1.5%</li> <li>Debt premium: 0.9%</li> </ul> Cost of equity = 12.5%: <ul style="list-style-type: none"> <li>Risk free rate: 4.5%</li> <li>Equity risk premium: 7.25%</li> <li>Asset beta: 1.05</li> <li>Equity beta: 1.11</li> </ul> Gearing: 5%	Same as fixed. There is no differentiated WACC for Batelco's different business lines.	Same as for fixed
Egypt	Nominal pre-tax 12.9 %	<ul style="list-style-type: none"> <li>Yes – cost of Equity is calculated on CAPM</li> <li>Risk free = 8.5%</li> <li>Market risk premium = 4.5%</li> <li>Beta = 1.05</li> <li>Cost of Debt = 11.5%</li> </ul> Risk free rate and Market Risk premium are likely to be revisited in the coming 3 months due to recent developments in the local financial markets	From 14.8% to 15.8%	<b>Comment:</b> There are three mobile operators with ONLY one operator listed and traded. The risk for this particular operator varies from 14.8% to 15.8%. The only TWO changing variables from the fixed are: <ul style="list-style-type: none"> <li>Market risk premium 6+%</li> <li>Beta at 1.1</li> </ul>
Jordan	Jordan telecom 16.5%	These rates have been determined on a benchmarking base.  TRC has issued instructions on the principles of calculating WACC TRC is in the process of calculating WACC through consultation process. ( planned to be completed by April 2009)	Zain 18% Orange mobile 20% Umniah 22%	These rates have been determined on a benchmarking base.  TRC has issued instructions on the principles of calculating WACC TRC is in the process of calculating WACC through consultation process. ( planned to be completed by April 2009)

<sup>10</sup> [http://www.tra.org.bh/en/pdf/Batelco\\_WACC\\_Determination\\_English%20Version%20final.pdf](http://www.tra.org.bh/en/pdf/Batelco_WACC_Determination_English%20Version%20final.pdf)

Country	Fixed		Mobile	
	Rate (nominal pre-tax)	Say whether cost of equity is calculated based on Capital Asset Pricing Model (CAPM) and Source	Rate	Breakdown Cost of capital equation used and values of the different parameters if publicly available (e.g. risk free rate, beta, gearing, market risk premium, country risk, tax rates) and Source
Lebanon	Not defined yet, the TRA is planning to set the method and value of the WACC for the main Telecom Providers in Lebanon during the course of year 2009			
Oman	8.5% (pre-tax)		9.1 % (pre-tax)	
Qatar	No WACC calculated by now	N/A	N/A	N/A
Saudi Arabia	WACC is under development as part of the LRIC project	N/A	N/A	N/A
United Arab Emirates	N/A			
	WACC calculation in progress			

## 17. Significant Market Power (SMP) / Dominance Designation

Country	NRA powers to collect information Any restrictions?	Definition of relevant markets Set out in the law or defined based on the NRA analysis?	Basis for SMP / Dominance designation 25% threshold or 40% plus analysis of other factors?	Imposition of obligations/remedies Pre-defined by law or discretionary imposed by the NRA	Timeframe for market analysis
Algeria		<ul style="list-style-type: none"> <li>• Turnover</li> <li>• Number of subscribers</li> <li>• Market shares</li> </ul>	Above 50%	N/A	
Bahrain	<p>Under section 53 of Bahrain telecom law<sup>1</sup> Licensed Operators shall provide the Authority, on request, with all such information as is needed to enable the Authority to carry out its duties and to exercise its powers as provided for in this Law.</p> <p>Restrictions:</p> <ul style="list-style-type: none"> <li>• The Authority shall indicate the reasons which justify its request.</li> <li>• The Authority shall have regard to the need to exclude any information which relates to the private affairs of a Person and information whose publication would or might, in the opinion of the Authority, seriously and prejudicially affect the interests of any Person.</li> </ul>	<p>Based on TRA Bahrain analysis applying the Telecom law. TRA has issued a Determination setting its Methodology for Defining Relevant Markets and another one for Determining Market Power.</p>	<p>The Law refers to SMP and Dominance</p> <p>SMP definition included in the Law: 25% or more and also taken into consideration the ability of a Licensed Operator to influence market conditions, its turnover relative to the size of the market, its control of the means of Access to Users, its financial resources and its experience of providing products and services in the market.</p> <p>Dominance definition included in the Law: the Licensee's position of economic power that enables it to prevent the existence and continuation of effective competition in the relevant market through the ability of the Licensee to act independently – to a material extent – of competitors, Subscribers and Users. Note that contrary to the SMP definition there is no threshold predefined in the Law.</p> <p>An SMP designation generally triggers obligations at the retail level whereas a dominance designation triggers obligations</p>	<p>Section 58 stipulates that operators with SMP shall be subject to tariff controls</p> <p>As per Section 57 (which relates to Interconnection and Access) a Licensed Operator in a Dominant Position shall</p> <ul style="list-style-type: none"> <li>• offer to interconnect with any Licensed Operator.</li> <li>• offer Access to its Telecommunications Network and Telecommunications Facilities.</li> <li>• prepare a Reference Offer for TRA's approval. Tariffs and terms shall be fair and reasonable and non-discriminatory and based on forward-looking incremental costs. TRA can also rely on benchmarking.</li> </ul>	Subject to TRA's discretion



Country	NRA powers to collect information Any restrictions?	Definition of relevant markets Set out in the law or defined based on the NRA analysis?	Basis for SMP / Dominance designation 25% threshold or 40% plus analysis of other factors?	Imposition of obligations/remedies Pre-defined by law or discretionary imposed by the NRA	Timeframe for market analysis
			at the wholesale level.  Dominance is the test also applied for anti-competitive practices (Section 65).		
Egypt	(Article 19) of the telecom law	Based on the NRA analysis	The general competition law sets the threshold at 25 %	Discretionary imposed by the NRA	Subject to NRA discretion
Jordan	Article: 3.2.1.2 of the licence: In accordance with Article 29(b) of the Telecommunications Law, the Licensee shall provide TRC with information as it may reasonably require, periodically and from time to time, for the purpose of exercising the functions assigned to TRC under the Telecommunications Law. Such information shall be provided at the time and in the format defined in this Licence Agreement and any Regulations relating to the provision of information by Licensees.	Based on TRC analysis applying the Telecom law. ( Competition safeguard instructions)	25% market shares & other factors	-	TRC is in the process of reviewing markets
Lebanon	Telecommunications Law - Article 32 1) TRA may request all Public Telecommunications Service Providers or any category of Service Provider to submit, as the need may arise, annual or periodic reports containing specific information deemed necessary by TRA to exercise its functions in regulating the telecommunications sector. 2) TRA may request the provision of copies of all contracts and agreements as	TRA issued a 'Significant Market Power Regulation' in April 2008. It is designed to provide potential and current stakeholders in the section with concise explanations of TRA's actions relating to service providers with SMP Telecommunications Law: Definition of "Service Provider with Significant Market Power" included in the Telecommunications Law: A Service Provider that, due to his control of essential facilities or his position in the market, has the ability to affect in practice the	Not yet Defined	TRA will develop regulations including but not limited to interconnection, access licensing, price controls, universal service, and quality of service requirements	Under TRA's discretion. Will be triggered upon the liberalization and privatization of Mobile and Fixed markets.

Country	NRA powers to collect information Any restrictions?	Definition of relevant markets Set out in the law or defined based on the NRA analysis?	Basis for SMP / Dominance designation 25% threshold or 40% plus analysis of other factors?	Imposition of obligations/remedies Pre-defined by law or discretionary imposed by the NRA	Timeframe for market analysis
	<p>well as any kind of arrangements entered into between Public Telecommunications Service Providers or between Public Telecommunications Service Providers and resellers as well as any related information.</p> <p>3) All reports and information provided by Public Telecommunications Service Providers are strictly confidential and shall not be disclosed by the TRA to any other party.</p>	<p>subscription terms related to prices and supply in a specific Telecommunications Services market. Essential telecommunications facilities means a Public Telecommunications Service or infrastructure that is provided exclusively or predominantly by one or a small number of Service Providers and that cannot be feasibly dispensed with, economically or technically, to provide the service.</p>			
Oman		Based on NRA analysis		Chapter 7 of the act, condition 34 of omantel licence, condition 32 of	

Country	NRA powers to collect information Any restrictions?	Definition of relevant markets Set out in the law or defined based on the NRA analysis?	Basis for SMP / Dominance designation 25% threshold or 40% plus analysis of other factors?	Imposition of obligations/remedies Pre-defined by law or discretionary imposed by the NRA	Timeframe for market analysis
				oman mobile and nawras licences	
Qatar	ictQATAR has sufficient powers to collect the necessary information. These powers are specified in the Licence issued and in Decree Law No. 34 of 2006 on the Promulgation of the Telecommunications Law e.g.: article (4) 10 of the Telecommunications Law states “ requiring the provision of information which enables it to exercise and perform its authorities and powers, including network or service development plans and financial, technical, statistical information and accounting records and other information;”	The competition rules are set out in Chapter 9 of the Telecommunications Law (Articles 40ff).  The relevant markets are defined according to ictQATAR's analysis. <sup>11 12</sup>	Based on various factors, according to international best-practise competition law. Market share is one, important, input factor.  Annexure I, 3.1. of the licences gives the guideline: “... substantially lessening competition in any public telecommunications service market in the State of Qatar.”	A set of remedies is pre-defined by the Telecommunications Law. IctQATAR also has the powers to define obligation/remedies.  Article (41) prohibits the conduct of anti-competitive practices. Article (43) lists what is considered an abuse of a Dominant position. Annexure I of the Licences also prohibits the abuse of a Dominant Position.	No timeframe foreseen in legislation – subject to ictQATAR's discretion
Saudi Arabia	Any information that the CITC considers necessary for the administration of a CITC statute. Subject to respecting confidentiality provisions in the statutes.	STC was designated dominant in all markets under Decision No. (1/1423). Market analysis including designation of relevant markets and designation of dominance now under review.	40% plus analysis of other factors	Certain remedies are pre-defined in the statutes and others are discretionary.	No timeframe specified at this time
United Arab Emirates	The TRA has sufficient powers to collect the necessary information.	The TRA has the power to determine relevant markets..	Regime is being prepared.	Regime is being prepared.	N/A

<sup>11</sup> <http://www.ict.gov.qa/files/ICTRA0308NC20080624DominanceDesignat.pdf>

<sup>12</sup> <http://www.ict.gov.qa/files/ICTRA0308A20080624DominanceDesignationNoticeandOrders.pdf>

# 18. Market Analysis (Definition of Relevant Markets) and designation of Significant Market Power (SMP) / Dominance

Country	Relevant product market Specify retail or wholesale	Specify the product and geographic scope	Operator(s) with SMP / Dominance	Obligations/Remedies imposed on SMP / dominant operator(s)	Legal basis Reference to relevant legislation or NRA decision
Algeria	Relevant markets for fixed and mobile		Algérie télécom (AT) dominant on market for leased lines  OTA (djezzy) Dominant on mobile market		ARPT Decision n°05 of 06/02/2007 re. Definition of relevant markets in telecom ARPT Decision n° 06 of 06/02/2007 designating OTA as dominant on the relevant market for mobile telephony (GSM) ARPT Decision n° 09 of 06/02/2007 designating Algérie télécom (AT) as having SMP on the market for leased lines
Bahrain (Retail)	Fixed access narrowband services markets : • 1a: For residential customers • 1b: For non-residential customers	National	Batelco	All retail tariffs are currently subject to advanced tariff approval as per Batelco's licenses. This includes mobile services.	Determination of Significant Market Power, 3 June 2008
	Domestic calls originating on fixed lines markets: • 2a: For residential customers • 2b: For non-residential customers	National	Batelco	Following its market analysis of Q2 2008, TRA is in the process of revising the retail regulation framework in place.  Section 58 of the Law provides for the	Batelco's licences

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	Fixed originated international calls markets: <sup>13</sup> <ul style="list-style-type: none"> <li>3a: to Zone 1 GCC countries;</li> <li>3b: to Zone 2 countries</li> <li>3c: to Zone 3 countries;</li> <li>3d: to Zone 4 countries.</li> </ul> Mobile originated international calls markets: <ul style="list-style-type: none"> <li>3e: to Zone 1</li> <li>3f: to Zone 2</li> <li>3g: to Zone 3</li> <li>3h: to Zone 4</li> </ul>	National	Batelco holds SMP in market 3a and 3c	following: Operator with SMP shall be subject to tariff controls. Tariffs charged by Licensed Operators for their Telecommunications services shall be fair and equitable, non-discriminatory and based on forward-looking costs.	
	Broadband internet access from a fixed location	National	Batelco		
	Dial-up internet access from a fixed location	National	Batelco		
	Domestic leased lines (6a) International leased lines (6b)	National	Batelco		
Bahrain (Wholesale)	The relevant wholesale, or operator-to-operator, 'product markets' for Interconnection services are as follows: <ol style="list-style-type: none"> <li>call termination on public fixed networks</li> <li>the market for mobile call termination and retail service</li> <li>the market for international correspondent services, including international switching and conveyance.</li> </ol>	National	Batelco	Batelco submits for TRTA approval a Reference Offer on an annual cycle (as per Section 57 of the Law).  The full list of regulated wholesale products can be found in Batelco's published reference offer (see link above).	Determination of Dominance in interconnection <sup>14</sup> , 9 August 2003

<sup>13</sup> Zone 1: GCC countries;

Zone 2: South Asian countries: Bangladesh, India, Pakistan, the Philippines and Sri Lanka

Zone 3: Australia, Canada, France, Germany, Greece, Italy, Iran, New Zealand, Thailand, UK, USA, and Yemen

Zone 4: rest of the world.

<sup>14</sup> See [http://www.tra.org.bh/en/pdf/Dominance\\_in\\_Interconnection\\_Markets\\_ERU\\_DE\\_005\\_v1.0\\_PDF.pdf](http://www.tra.org.bh/en/pdf/Dominance_in_Interconnection_Markets_ERU_DE_005_v1.0_PDF.pdf)

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	<p>The relevant wholesale, or operator-to-operator, 'product markets' for access services are as follows:</p> <ul style="list-style-type: none"> <li>the wholesale market for fixed access to customer premises (including high-bandwidth, broadband and narrowband access)</li> <li>the wholesale market for access to transmission capacity</li> <li>the wholesale market for access to international facilities.</li> </ul>	National	Batelco	<p>Batelco submits for TRA approval a Reference Offer on an annual cycle (as per Section 57 of the Law).</p> <p>The full list of regulated wholesale products can be found in Batelco's published reference offer (see link above).</p> <p>Wholesale DSL and bitstream are currently available. TRA plans to introduce LLU in Q2 2009.</p>	Dominance in Wholesale Markets by Batelco <sup>15</sup> , January 22, 2006
Egypt	Under preparation	Under preparation	Under preparation	Under preparation	Article 5.4 & 24 of the telecom law
Jordan	(1) Fixed public telecommunications network and services	National	Orange Fixed ( JT)	<ul style="list-style-type: none"> <li>RIO</li> <li>call origination</li> </ul>	TRC decision of March 2, 2003
	(2) Mobile public telecommunications network and services	National	Zain	<ul style="list-style-type: none"> <li>RIO</li> <li>call origination</li> </ul>	TRC decision of March 2, 2003
	(3) Leased lines	National	Orange Fixed ( JT)		
	(4) Interconnection ( call termination)	National	All operators are designated in termination market		TRC decision of March 2, 2003
Oman	Under process	N/A	N/A	N/A	N/A

<sup>15</sup> See [http://www.tra.org.bh/en/pdf/Dominance\\_Determination\\_Final\\_clean.pdf](http://www.tra.org.bh/en/pdf/Dominance_Determination_Final_clean.pdf)

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Qatar	<p>Retail Markets</p> <ul style="list-style-type: none"> <li>Access to the public telecommunications network at a fixed location</li> <li>Access to the public mobile telecommunications network via a mobile device</li> <li>Publicly available national telecommunications services provided at a fixed location</li> <li>Publicly available national telecommunications services provided via a mobile device</li> <li>Publicly available international telecommunications services</li> <li>Retail leased lines and</li> <li>Broadband services.</li> </ul> <p>Wholesale Markets</p> <ul style="list-style-type: none"> <li>Call origination on public telecommunications networks at a fixed location</li> <li>Call termination on individual public telecommunications networks at a fixed location</li> <li>Transit Services on public telecommunications networks</li> <li>Access and call origination on public mobile networks</li> <li>Call termination on individual public mobile networks</li> <li>Wholesale leased lines and associated services irrespective of the technology used to provide leased or dedicated capacity</li> <li>Access to and use of International</li> </ul>	Geographic scope: Qatar	Qtel	Remedies are set in the Telecommunications Law (e.g article 46) and the Licences (e.g. Annexure F).	<p>Telecommunications Law and Licences.</p> <p>The Dominance designation was issued on 24 June 2008.<sup>16</sup></p> <p>For regulatory documents see <a href="http://www.ict.gov.qa">www.ict.gov.qa</a> – Regulation – Search Regulatory Documents.</p>

<sup>16</sup><http://www.ict.gov.qa/output/page36.asp?docid={D8F5F720-25BD-4D5E-B281-3718C7F5530E}>  
<http://www.ict.gov.qa/output/page36.asp?docid={1F1EFEAF-0F33-4704-A0EF-BD32EE683397}>

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	Gateway Facilities and <ul style="list-style-type: none"> <li>Access to and use of Network and Facilities</li> <li>For the supply of domestic and international services, as, but not limited to, access to and use of sites, towers, underground facilities, etc.</li> </ul>				
Saudi Arabia	STC was designated dominant in all telecommunications markets under Decision No. (1/1423). Definition of relevant markets and designation of dominance now under review.	National	STC	<p>All retail tariffs are currently subject to advanced tariff approval. This includes mobile services.</p> <p>Following completion of the market analysis, CITC will review its retail tariff regulation procedures.</p> <p>Other remedies include:</p> <ul style="list-style-type: none"> <li>Issuance of RIO which includes wholesale products such as: <ul style="list-style-type: none"> <li>Transmission Links</li> <li>Data Local</li> <li>Access Circuits</li> <li>International Leased Circuits</li> <li>International Voice Call</li> <li>Conveyance</li> <li>Tower Sharing.</li> </ul> </li> </ul> <p>The STC RIO is available on <a href="http://citc.gov.sa">citc.gov.sa</a>.</p> <ul style="list-style-type: none"> <li>Issuance of RODA which is available at <a href="http://stc.com.sa">stc.com.sa</a></li> <li>Accounting separation</li> <li>QoS obligations</li> </ul>	Telecommunications Bylaw chapter 7
United Arab Emirates	Regime in preparation				



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<sup>i</sup>See [http://www.tra.org.bh/en/pdf/Telecom\\_Law\\_final.pdf](http://www.tra.org.bh/en/pdf/Telecom_Law_final.pdf)