

Kazakhstan & Central Asia Telecommunications Report Q2 2011

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Abstracts

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BMI's latest update on the telecoms markets of Kazakhstan and its four Central Asian neighbours incorporates new mobile subscriber data for Q410, ended 31 December. Using this data, we produced revised five-year growth forecasts depicting the development of the region's five mobile markets. We have also revised our five-year forecasts for the development of Central Asia's broadband subscriber markets this quarter. Our new forecasts include fixed and mobile broadband subscribers. These are customers who use devices such as netbooks, smartphones and USB sticks to connect to the internet wirelessly through a high-speed (3G/HSPA) network. In the past few months, operators in countries such as Uzbekistan and Tajikistan have been introducing various promotions, to encourage greater data customer growth and service usage.

In December 2010 Kyrgyzstan became the latest Central Asian republic to introduce third-generation (3G) mobile services. On December 1 2010 VimpelCom-backed Sky Mobile, which operates in the country under the Beeline brand, announced the launch of commercial UMTS-based services. When launching its 3G network, VimpelCom became the country's first mobile operator in Kyrgyzstan to offer 3G. Two other Kyrgyz mobile operators MegaCom and Aktel (Fonex), also received 3G licences and reportedly plan to launch 3G services in 2011.

In December 2010 Kazakh mobile market leader K-Cell, which is owned by the Nordic carrier TeliaSonera, announced it would start operating a commercial UMTS-based 3G network in the capital Astana and in Kazakhstan's largest city Almaty. Prior to that announcement, the Kazakh mobile operators appear to have been concentrating on the

development of fourth-generation (4G) mobile services based on long-term evolution (LTE) technology. This focus on LTE-based services is expected to continue, with operators such as K-Cell expected to use LTE in conjunction with UMTS.

Meanwhile, in November 2010 3G services were launched in Turkmenistan when MTS Turkmenistan launched a 3G network in the capital Ashgabat. However, the following month it was announced that MTS' operating licence had been suspended by the Turkmen government. At the time of writing, MTS remained offline and was proceeding with its lawsuit against two state-owned operators Turkmentelecom and mobile subsidiary Altyn Asyr, regarding the termination of interconnection agreements. In March 2011 it was reported that the government offered to start negotiations with MTS on the buy-out of its assets in Turkmenistan.

In future, BMI forecasts that mobile broadband services based on UMTS/HSPA and LTE technology will make a strong contribution to the growth of internet services in Central Asia. Our new broadband forecasts for Tajikistan, Uzbekistan and Kazakhstan envisage stronger growth as a result of the impact of mobile broadband services. In the long-term, BMI believes the spread of mobile broadband services have the potential to stifle the success of competing wireless technologies such as WiMAX and satellite.

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