

Arab Republic of Egypt

There was very little data received from the in-country user survey, and most of the data has been collected from the in-country expert. This is due to the complex political situation in the country, with the new Egyptian President inaugurated in late June 2012.

TELECOMMUNICATIONS MARKET

There has been no recent change in the number of operators, although 3G is increasingly utilized via pre-paid and post-paid contracts. Apps are increasingly used on mobile phones to access the internet and communicate via data connections, rather than standard SMS/voice connections. Egypt mandated a change in all Egyptian mobile phone numbers to increase the number of digits from 10 to 11 digits by end of March 2012. Some citizens are concerned that the mobile phone number change is also intended to create a more accurate database of user identities.

Indicator ⁵⁰	measurement	Value
Computers in Households	Per 100	44.3
Internet Users	Per 100	35.7
Fixed Lines	Per 100	10.9
Fixed Broadband	Per 100	2.3
Mobile Subscriptions	Per 100	119
Mobile Broadband	Per 100	13.2
International Bandwidth	Per 100	229 kb

In 2012, the Egyptian Mobile market penetration has reached 119% (calculated based on figures from the Central Agency for Public Mobilization and Statistics "CAPMAS," and the operators' official published releases) as a result of the multi-SIM phenomenon. The growth potential lies in the penetration of rural areas and new demographic segments, in the growth of higher-value contract customers, and in the wider availability of mobile broadband services. Mobile broadband/3G connections are becoming increasingly desired, and there is increased usage

49 www.worldbank.org and www.capmas.gov.eg and www.mcit.gov.eg

QUICK FACTS EGYPT

Land Area: 1,009,450 sq km
Population: 81.1 million (2010)
GNI per capita, PPP \$6.060 (WB, 2010)

TLD: .eg
Fixed Telephones: 9.3 million (2010)
GSM Telephones: 83.4 million (2011)
Fixed Broadband: 4.3 million (2011)
Internet Users: 25.9 million (2011)



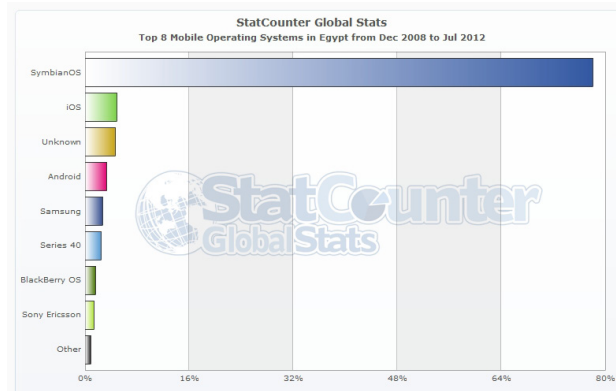
of mobile phones to connect to the internet at WiFi-enabled cafes, with a corresponding increasing number of cafes which offer WiFi access to customers. There is also an increasing desire for wider choice in smartphone handsets, not only iPhone and BlackBerry, but Android OS-based hardware. Mobile phone usage grew approximately 22% in 2011. There is increasing evidence that iPads may outgrow iPhones as a tool for mobile browsing/mobile internet across Middle-East. Egypt was 4th in 2011 in a study of the volume of geo-located tweets on the African continent⁵⁰ in Q4 2011.

50 www.portland-communications.com/Twitter_in_Africa_PPT.pdf

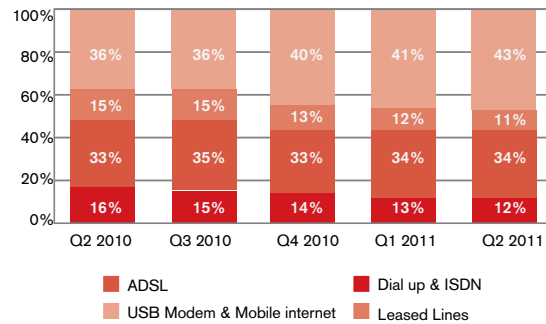
Pricing Analysis (\$US)	Egypt	All Countries Surveyed	
		Rank by Cheapest	Median Price
PRE-PAID Package Pricing			
Monthly Package Cost			
Cost per Minute National Call (first 3 min)	0.06	4	0.09
Price for Data Traffic (Price per MB)	0.03	3	0.05
Price for One Text Message	0.06	9	0.02
POST-PAID Package Pricing			
Monthly Package Cost	35.78	9	7.53
Cost per Minute National Call (First 3 Min)	0.03	3	0.06
Price for Data Traffic (Price per MB)	0.03	4	0.04
Price for One Text Message	0.05	8	0.03

Operator	Etisalat Misr	Mobinil	Vodafone
Brands			Vodafone Egypt Click GSM Sarmady
Survey Respondents	n/a	n/a	n/a
Subscribers	12.4m	30.3m	34.2m
Mobile Internet Users	n/a	n/a	n/a
Ownership	National	France Orange	Vodafone Group

INTERNET ACCESS MOBILE OS USAGE AS SEEN BY STATCOUNTER

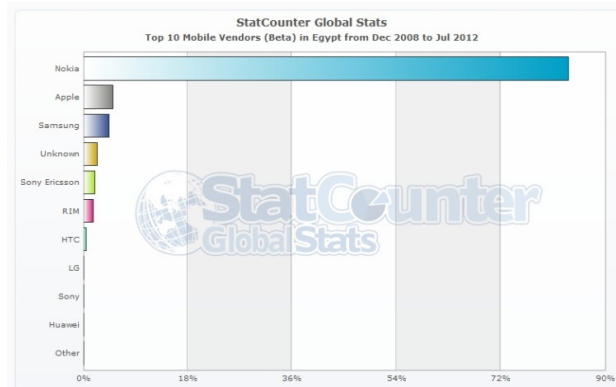


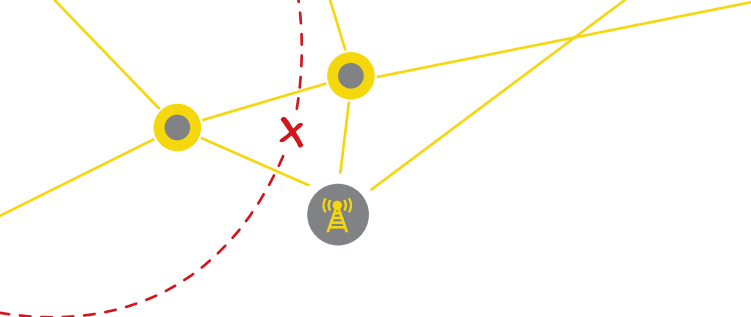
INTERNET CONNECTION TYPES Q2 2010 TO Q2 2011



Sources: Ministry of Communications and information Technology, National Telecom Regulatory Authority

HANDSET MANUFACTURER AS SEEN BY STATSCOUNTER





CENSORSHIP AND CIRCUMVENTION

There is increasing state concern about on-going protests.

Citizens are concerned that the renumbering of Egyptian mobiles is part of a program to establish a more accurate database for monitoring user habits connected to a more accurate identity.

In 2011, the state clearly demonstrated its willingness to completely cut the internet in Egypt off from the outside world. The state blocks primarily on “moral” grounds, i.e., pornography sites, but citizens are increasingly concerned that Egypt may look to broader blocking authority due to ongoing unrest.

PHONE BRANDS⁵¹

Phone	iPhone 4S	BlackBerry Bold 9780	BlackBerry Curve 9360	BlackBerry Torch 9800
Manufacturer	Apple	RIM	RIM	RIM
Released	October 2011	November 2010	August 2011	August 2010
				
Data	GPRS/EDGE C10	GPRS/EDGE	GPRS/EDGE	GPRS/EDGE C10
Bluetooth	V4.0 with A2DP	V2.1 with A2DP	v2.1 with A2DP	v2.0 with A2DP
Sensors	Accelerometer, Gyro, Proximity, Compass			Proximity
Internet	Yes	Yes	Yes	Yes
OS	IOS 5.1	BlackBerry OS 6.0	BlackBerry OS 7.0	BlackBerry OS 6.0
GPS	GPS-A and Glonass	GPS-A	GPS-A	GPS-A
Camera	8MP (gps)	5 MP	5 MP	5 MP
WiFi	b/g/n/hotspot	b/g/UMA	b/g/n/UMA	b/g/n/UMA

51 Data and images from www.gsmarena.com

CONCLUSION

Mobile penetration is over 100%, and there is good competition in the market.

FURTHER INFORMATION

Central Agency for Public Mobilization and Statistics
(CAPMAS) www.capmas.gov.eg
Ministry of Communications and Information Technology
- www.mcit.gov.eg
National Telecommunications Regulatory Authority
(NTRA) - www.tra.gov.eg/english
Eqypt ICT indicators - www.egyptictindicators.gov.eg/en
Internet Eqypt - www.interneteqypt.com

Etisalat – www.etisalat.com.eg
Mobinil – www.mobinil.com
Vodafone Eqypt – www.vodafone.com.eg