

## Tunisian Republic

Mobile penetration in the Tunisian Republic is reaching 117% of the population. In November 2011, the Tunisian government set up a national holding company called CDC (Caisse des Dépôts et Consignation) to manage its shareholdings in the country's two mobile operators, Tunisiana and Orange. An independent subcommittee has also been assigned to monitor corruption, approve the general policies of the funds and evaluate the investments. The CDC manages 25% of Tunisiana, 51% of Orange and the Zitouna bank, which was seized from the former ruling family.

### TELECOMMUNICATIONS MARKET

The total penetration of mobile phone users in Tunisia is almost 117% (there are more mobile phone subscriptions than the total population). The total number of mobile services subscribers in Tunisia is 12,533,369. The market is dominated by two main operators (Tunisiana and Tunisie Télécom) who own 90% of the market with 54% and 36% share of the market, respectively.

Indicator <sup>77</sup>	Measurement	Value
Computers	Per 100	15.0
Internet Users	Per 100	33.4
Fixed Lines	Per 100	10.7
Internet Broadband	Per 100	5.2
Mobile Subscriptions	Per 100	116.6
Mobile Broadband	Per 100	3.4
International Bandwidth	Per 100	568 kb

Until mid-2012, only two operators could afford 3G, Tunisie Télécom and Orange Tunisie. In early 2010, France Telecom's Orange launched a 3G network in the country, in cooperation with Investec, a Tunisian subsidiary of the Mabrouk group. In September

80 <http://www.intt.tn/upload/files/Tableau%20de%20Bord%20Mobile%20-%20Mars2012.pdf> and <http://www.mincom.tn/index.php?id=315&L=2>

### QUICK FACTS TUNISIAN REPUBLIC

**Land Area:** 163,610 sq km  
**Population:** 10.55 million  
**GNI per capita, PPP** \$9,060 (WB, 2010)

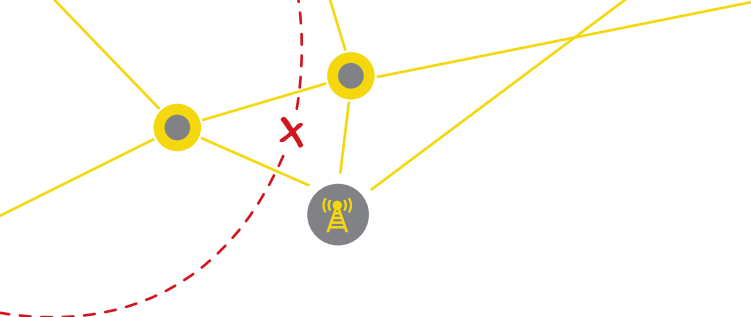
**TLD:** .tn  
**Fixed Telephones:** 1.15 million (2012)  
**GSM Telephones:** 12.5 million (2012)  
**Fixed Broadband:** 0.6 million (2012)  
**Internet Hosts:** 12,684 (2012)  
**Internet Users:** 3.5 million (2009)



2010, Tunisie Telecom was awarded a 3G license at a cost of US\$ 80.2 million. In May 2012, Qatar Telecom (Qtel) announced that its subsidiary Tunisiana was awarded licenses to launch and operate a 3G network and a fixed-line network by the Tunisian Ministry of Information Technologies and Communication. The licences were purchased for approximately US \$135 million. In line with regulatory guidelines, the 3G network will be launched in July 2012, with fixed-line services launching at the beginning of 2013. Tunisiana has also signed an agreement with Huawei to deploy a 3G network in the internal regions within the country.

In June 2012, ZTE from China, which is the world's fourth-largest mobile phone producer<sup>81</sup>, announced that

81 <http://allafrica.com/stories/201206200071.html> - ZTE's Marketing Director, Jasmine Xu, told Xinhua that ZTE employs 85,000 people and ZTE's turnover estimated at US\$ 13.6 bn in 2011



it had entered the Tunisian market. Following a test launch in 2011, ZTE opted for Tunisia in its bid to enter the African market. The Chinese company's Tunisian partner, Rayencom, will benefit from the exclusive distribution of a wide range of ZTE products. ZTE will commercialize five products, including two smartphones and a tablet running on Android 2.3.

In February 2012, the Tunisian Internet Agency, in partnership with the company Landolsi L2T Telecom Technology, launched the first multi-store operators to host and download Android applications in Tunisian and international Yasmine Market.

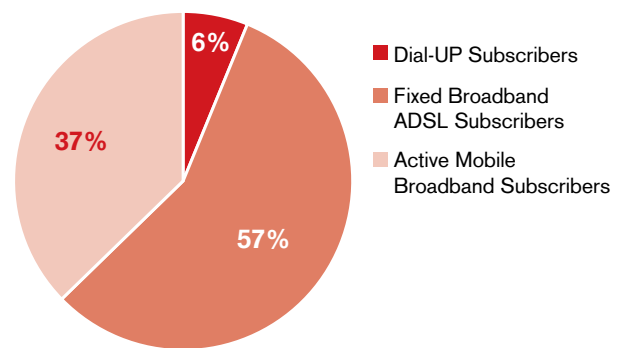
Pricing Analysis (\$US)	Tunisia	All Countries Surveyed	
		Rank by Cheapest	Median Price
PRE-PAID Package Pricing			
Monthly Package Cost			
Cost per Minute National Call (First 3 Min)	0.14	8	0.09
Price for Data Traffic (Price per MB)	0.01	1	0.05
Price for One Text Message	0.03	7	0.02
POST-PAID Package Pricing			
Monthly Package Cost		1	7.53
Cost per Minute National Call (first 3 min)	0.52	10	0.06
Price for Data Traffic (Price per MB)	0.01	3	0.04
Price for One Text Message	0.03	6	0.03

Operator	Tunisia	Tunisie Télécom	Orange
Brands			
Survey Respondents	78%	11%	7%
Subscribers	6.8m	4.5m	1.2m
Mobile Internet Users	0.0m	0.0m	0.0m
Ownership	Qatar (Otel)	UAE	Mixed

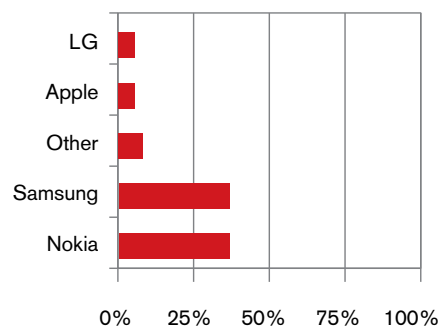
## INTERNET ACCESS

45% of respondents said they used mobile internet, with 48% saying they did not. 38% of mobile internet users used WiFi to access the internet, with 15% paying for a limited volume of data with their subscription, and a further 11% paying for usage. Over 33% indicated they had no access to the internet using their mobile handsets.

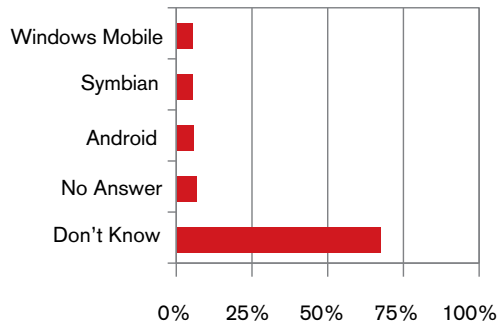
## INTERNET CONNECTION TYPES 2010



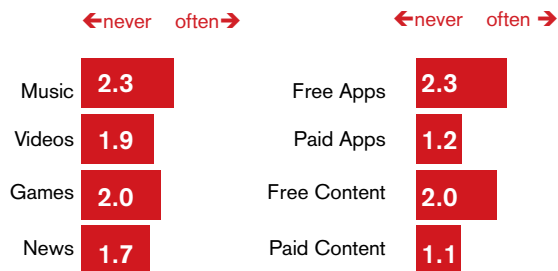
## TOP 5 MOBILE HANDSET MANUFACTURERS



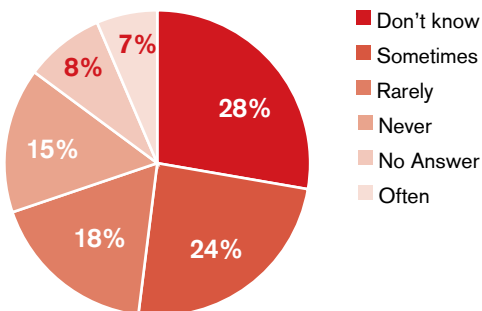
**TOP 5 MOBILE OS IN USE**



**TYPES OF MOBILE DOWNLOADS INCLUDING CONTENT (LEFT) AND TYPES OF APPS (RIGHT)**



**HOW OFTEN DO YOU ENCOUNTER BLOCKED WEBSITES? (IN COUNTRY SURVEY)**



**CENSORSHIP AND CIRCUMVENTION**

Before the revolution the government was filtering every call especially for politicians, journalists and artists. It is believed that there is no calls interception after the

revolution. In January 2011, the Secretary of State for Information and Communication Technologies stated<sup>82</sup> that access to all websites in Tunisia is free, except for sites with indecent content, comprising violent elements, or inciting hatred. An email address (contact@web-liberte.tn) is made available for citizens and civil society components for any claim in relation to freedom of expression on the internet.

On February 22nd, 2012, the Supreme Court (Cour de Cassation) accepted the appeal of the ATI, the Tunisian Internet Agency, and sent it back to the Court of Appeal. ATI was appealing a decision by a judge issuing an order to requiring ATI to censor pornographic websites. In June 2011, ATI had implemented the filtering of pornographic site addresses listed by Smartfilter®.

**CONCLUSION**

The market in Tunisia has become more transparent since the Arab Spring movement changed the political landscape. There are three major players and market penetration exceeds 100%.

**FURTHER INFORMATION**

Instance Nationale des Télécommunications - [www.intt.tn](http://www.intt.tn)

Ministry of Information and Communications Technologies - [www.minicom.tn](http://www.minicom.tn)

Tunisian Internet Agency - [www.ati.tn](http://www.ati.tn)

Tunisiana - [www.tunisiana.com](http://www.tunisiana.com)

Tunisie Télécom - [www.tunisietelecom.tn](http://www.tunisietelecom.tn)

Orange - [www.orange.tn](http://www.orange.tn)

[www.yasminemarket.com](http://www.yasminemarket.com)

Arab Information and Communications Technologies Organization - [www.aicto.org](http://www.aicto.org)

The ITU's Arab Regional Office - [www.ituarabic.org](http://www.ituarabic.org)

The ITU's Arab Centre of Excellence - [www.ituarabic.org/ceo](http://www.ituarabic.org/ceo)

82 [http://www.minicom.tn/index.php?id=291&L=2&tx\\_ttnews\[tt\\_news\]=784&tx\\_ttnews\[backPid\]=11&cHash=c49c057e6f](http://www.minicom.tn/index.php?id=291&L=2&tx_ttnews[tt_news]=784&tx_ttnews[backPid]=11&cHash=c49c057e6f)