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STRATEGYANALYTICS
TELIGEN TARIFF & BENCHMARKING

Telecommunications Retail Price Benchmarking for Arab Countries 2015

Report from the AREGNET Price Benchmarking Study

December 2015

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- The operators who have contributed with additional tariff information

Disclaimer:

While great care has been taken to ensure the greatest possible completeness and correctness of the data presented in this report, Strategy Analytics assumes no responsibility for any actions or decisions taken on the basis of this report, and does not guarantee the correctness or suitability of the data presented.

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Contents of this report

• Background to the study and basket concept	5
• Comparative Price Level (CPL) and Purchasing Power Parity (PPP)	6
• Price benchmarking with “Baskets”	7
• Results from the PSTN basket for 2015, time series and ranking	8
• Results from the mobile basket for 2015, time series and ranking	33
• Results from the leased line basket for 2015, time series and ranking	73
• Results from the broadband basket for 2015, time series and ranking	95
• Results from the mobile broadband basket for 2015, time series and ranking	158
• Results from the call price comparison for 2015 and time series	188
• Summary of main findings from the benchmarking study	201
• Appendix	
– Exchange rates and VAT	210
– Purchasing power parities (PPPs)	211
– List of acronyms used	212

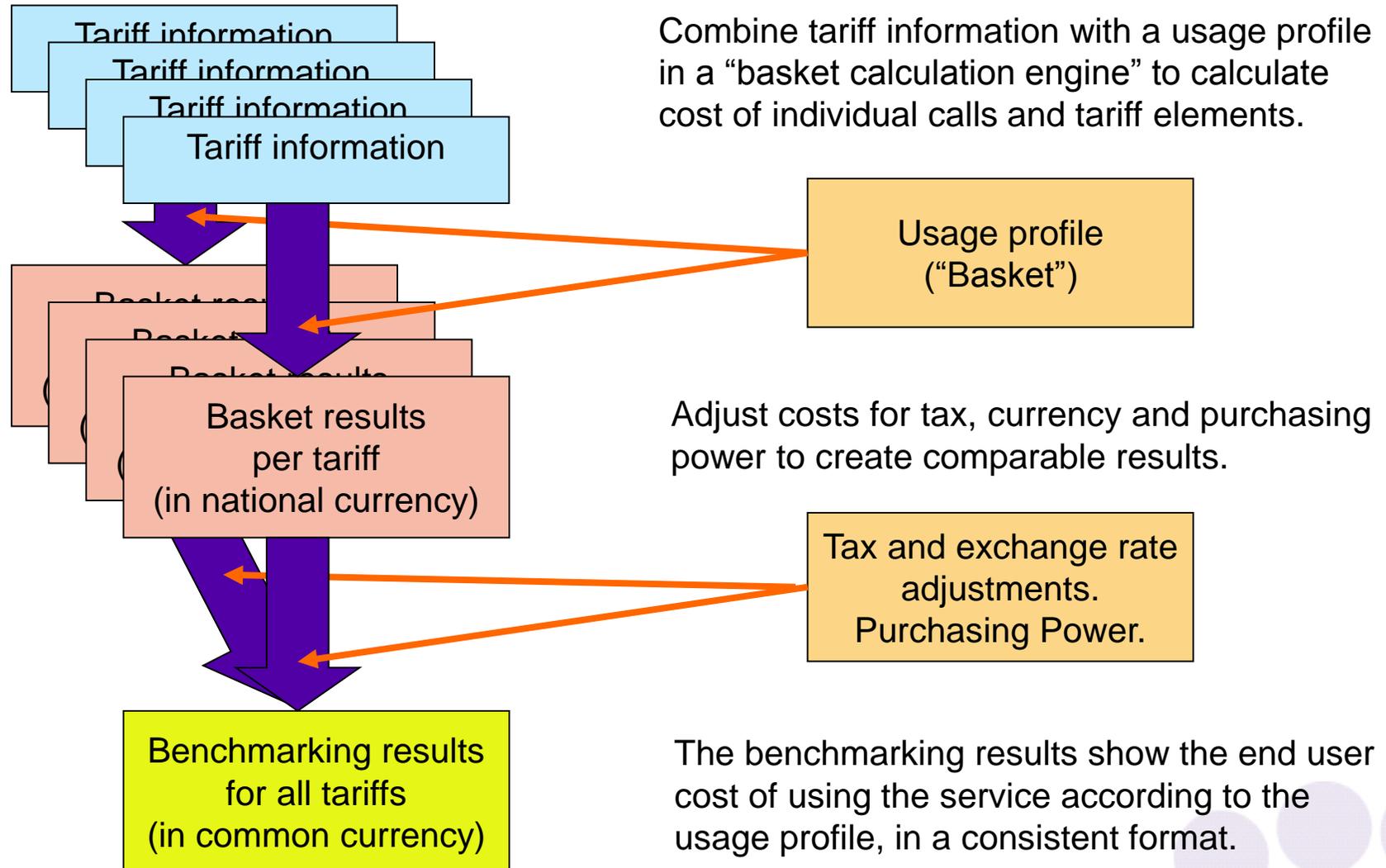
Background to the study and basket context

- The benchmarking study was originally initiated by TRA Bahrain in 2008 and updated in 2009, 2010, 2011, 2012 and 2013. This update for 2015 was commissioned by TRA Bahrain on behalf of AREGNET.
- In increasingly competitive markets it is important for regulators to be able to track the evolution of prices and analyze the impact of price changes and competition on the effective prices paid by consumers.
- This study allows Arab countries to compare the price levels within and between countries, and also to compare with the OECD countries. To enable such comparisons, this study shows the cost of purchasing 'baskets' of telecommunications services. Additionally, time series data is presented, showing how the cost of such baskets has changed in each country over the period from 2010 to 2015.
- The benchmarking covers the following services:
 - Fixed voice (PSTN) (OECD basket equivalent)
 - Mobile telephony (OECD basket equivalent)
 - Leased Lines (OECD basket equivalent)
 - Broadband ADSL (OECD basket equivalent)
 - Mobile broadband (OECD basket equivalent)
 - Call cost for specific types of calls
- The methodologies for fixed and mobile telephony and leased lines and fixed broadband are identical to the OECD Price Benchmarking baskets from 2010, with minor changes. A separate document explaining the methodology used in this study is available.
 - The OECD adopted a new set of Mobile Broadband baskets in 2012, and these are used for the analysis of the mobile broadband services.
 - The mobile voice baskets were also extended to incorporate handset data, and results for these new baskets are covered in this report.
 - The OECD adopted a new set of Fixed Broadband baskets in 2014, and a subset of these are used for the analysis of the fixed broadband services.
- The data was collected in June 2015 by Teligen from public sources on the Internet, and was subsequently passed to national regulators for comments and checking.

Comparative Price Level (CPL) and Purchasing Power Parity (PPP)

- The data presented in the report is presented using purchasing power parities (PPPs), which are used to incorporate both the financial differences between exchange rates, and the differences in the state of the economies as seen through the purchasing power of the citizens in each country.
- In order to create an up to date PPP conversion factor, published Comparative Price Level (CPL) data is used
 - This is described in more depth on page 180 of this report
- The CPL data used for this study has been obtained from the World Bank, and is based on 2012 data. This was also used for the 2013 study
- In updates prior to the 2013 study, World Bank CPL data from 2005 was used, as this was the most recent available at the time the updates were prepared.
- The World Bank CPL data also contained some gaps i.e. data for some countries was not available, so assumptions were made as to the likely CPL values for these countries
- For this report (and the 2013 report), World Bank CPL data for 2012 has been used
 - The 2012 CPL data addresses some of the gaps and assumptions made previously, and allows for more up-to-date PPP values.
- The PPP values have been applied retrospectively to any historic data presented in this report
 - This is to ensure that any changes observed in the time series are as a result of changes to tariffs
- The output from this report will not necessarily be comparable with reports prior to the 2013 report, due to the changes in CPL that have occurred.

Price benchmarking with “Baskets”



PSTN 2015 basket results (using OECD 2010 baskets)

Fixed voice (PSTN) data issues

- Due to lack of published data, and lack of feedback, no data is available (and no results are included) for:
 - Comoros
 - Djibouti
 - Iraq
 - Libya
 - Kuwait
 - Somalia
 - Yemen
- Part of data is missing for:
 - Yemen (no prices for national calls and fixed line)
 - No business tariffs are available for PSTN in Qatar, Saudi Arabia and Sudan
- The analysis covers up to 88 tariffs from the incumbent operators in 15 countries



Fixed voice (PSTN) baskets, 2010 version

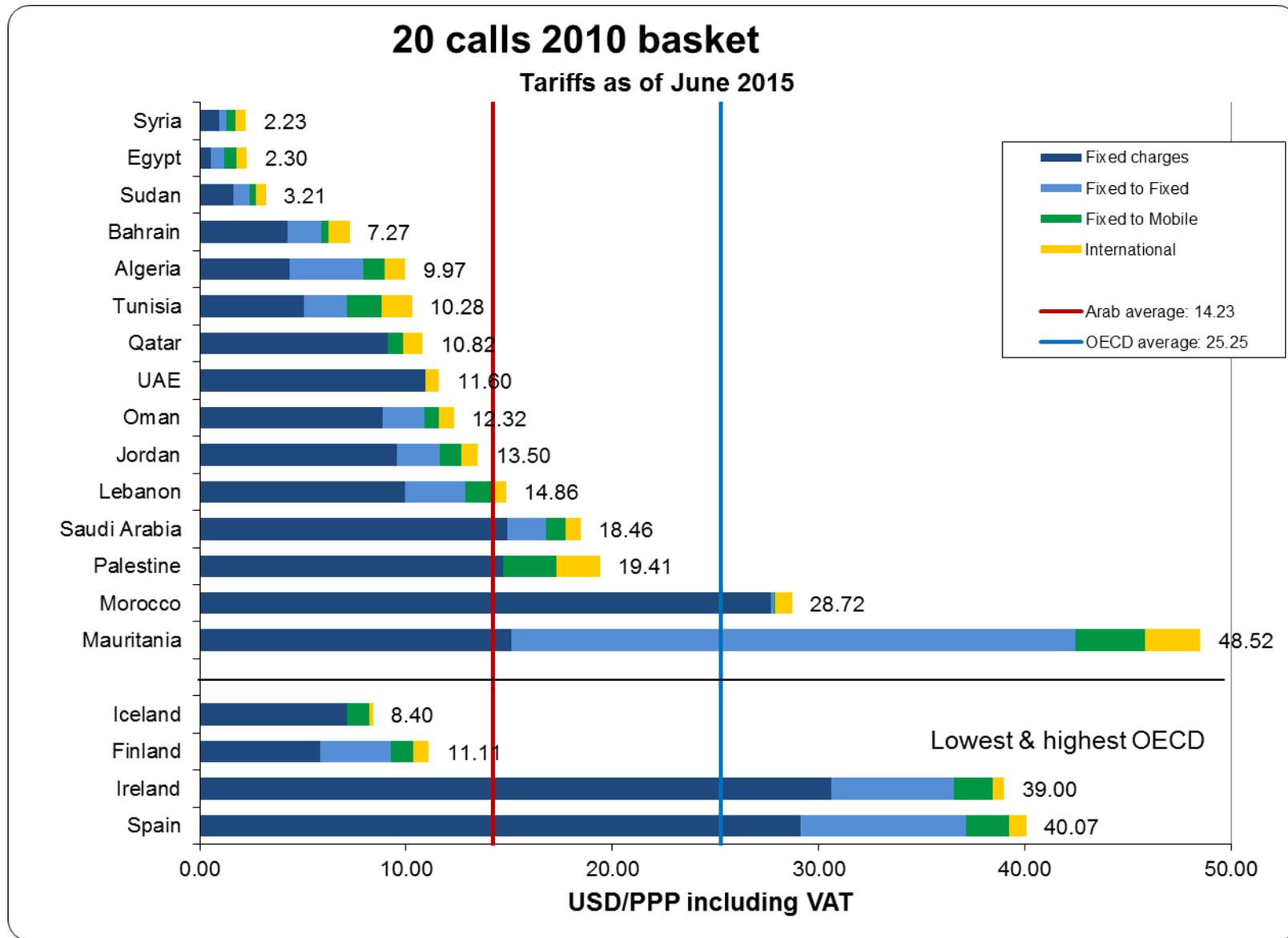
- Six different basket definitions:
 - Defined by number of calls per month
 - Residential: 20, 60, 140 and 420 calls per month
 - Business: 100 and 260 calls per month

		Call distribution			
Calls per month	Total calls	Fixed to fixed Local	Fixed to fixed National	Fixed to mobile	International
20 calls basket	20	61%	20%	17%	2%
60 calls basket	60	60%	15%	21%	4%
140 calls basket	140	58%	15%	23%	4%
420 calls basket	420	73%	17%	8%	2%
100 calls business basket	100	48%	19%	30%	3%
260 calls business basket	260	43%	23%	25%	9%

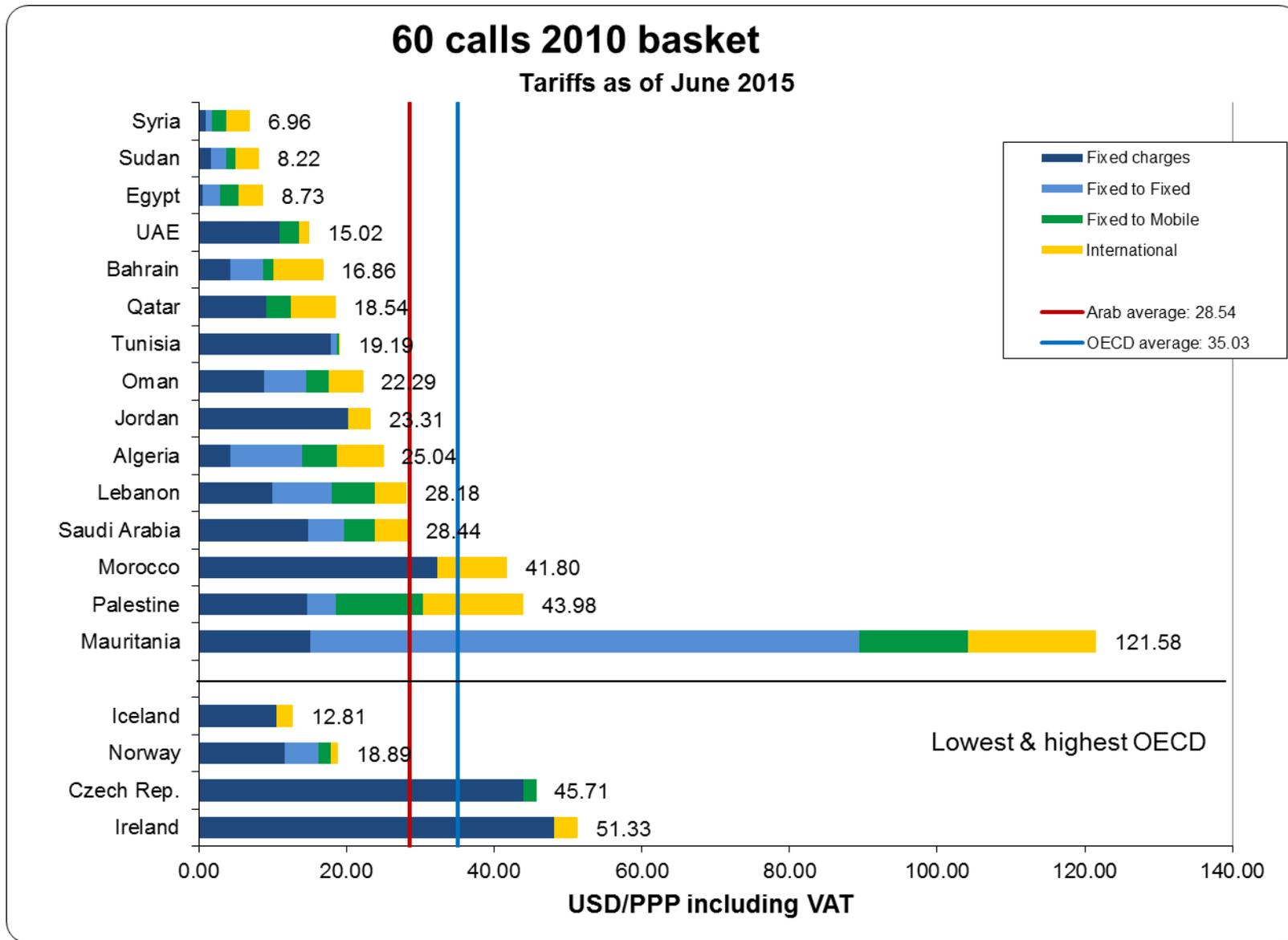
- Tariffs from the incumbent operator in each country
 - Several tariff packages can be covered for each operator
 - The results show the lowest cost option for each operator
- Tariff information included in basket calculation:
 - Fixed charges for installation and rental
 - Usage charges covering local through to national calls, calls to mobiles, and international calls to other AREGNET countries plus a few other destinations



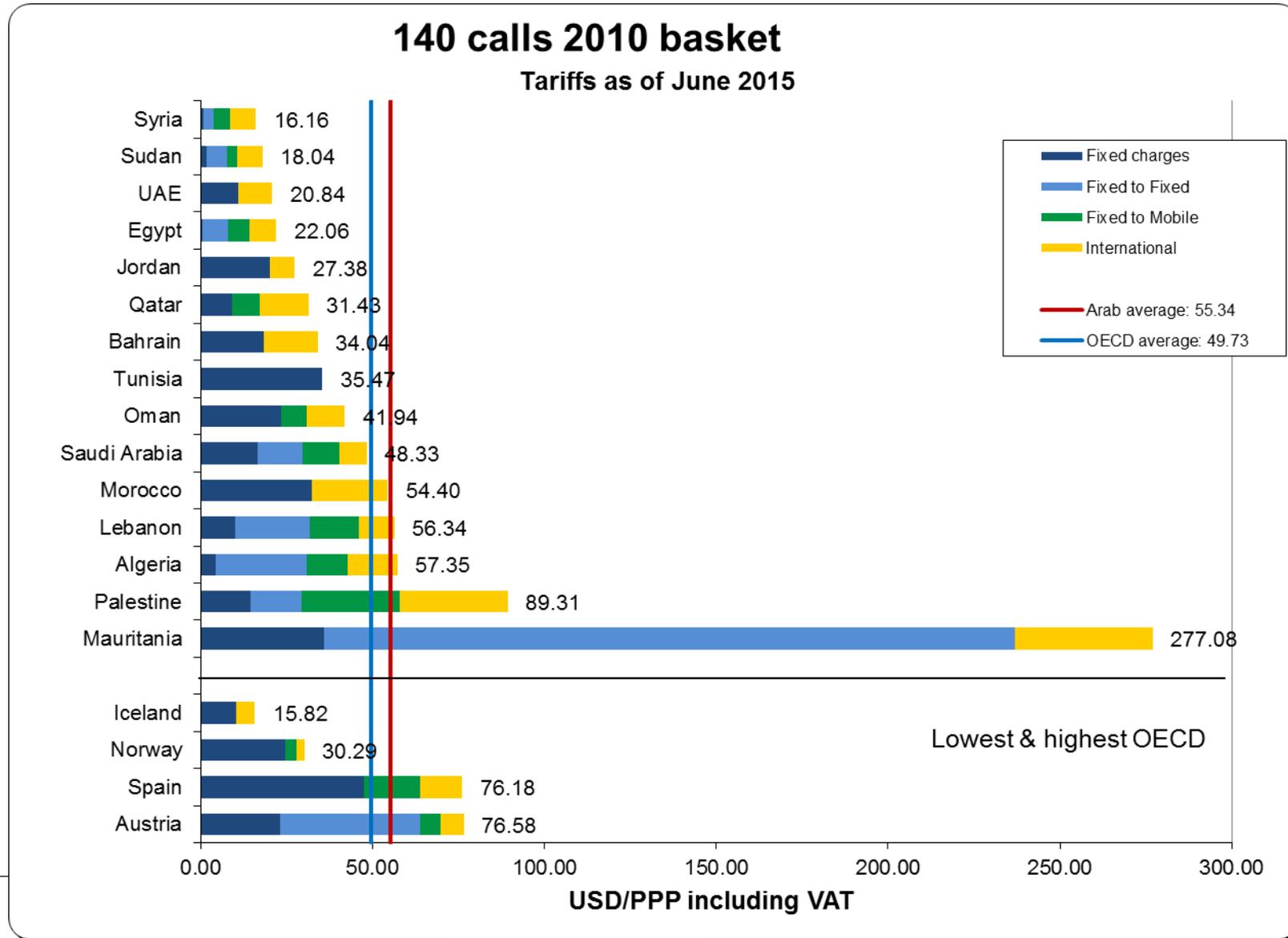
20 calls/month, Residential based on 2010 OECD PSTN basket



60 calls/month, Residential based on 2010 OECD PSTN basket



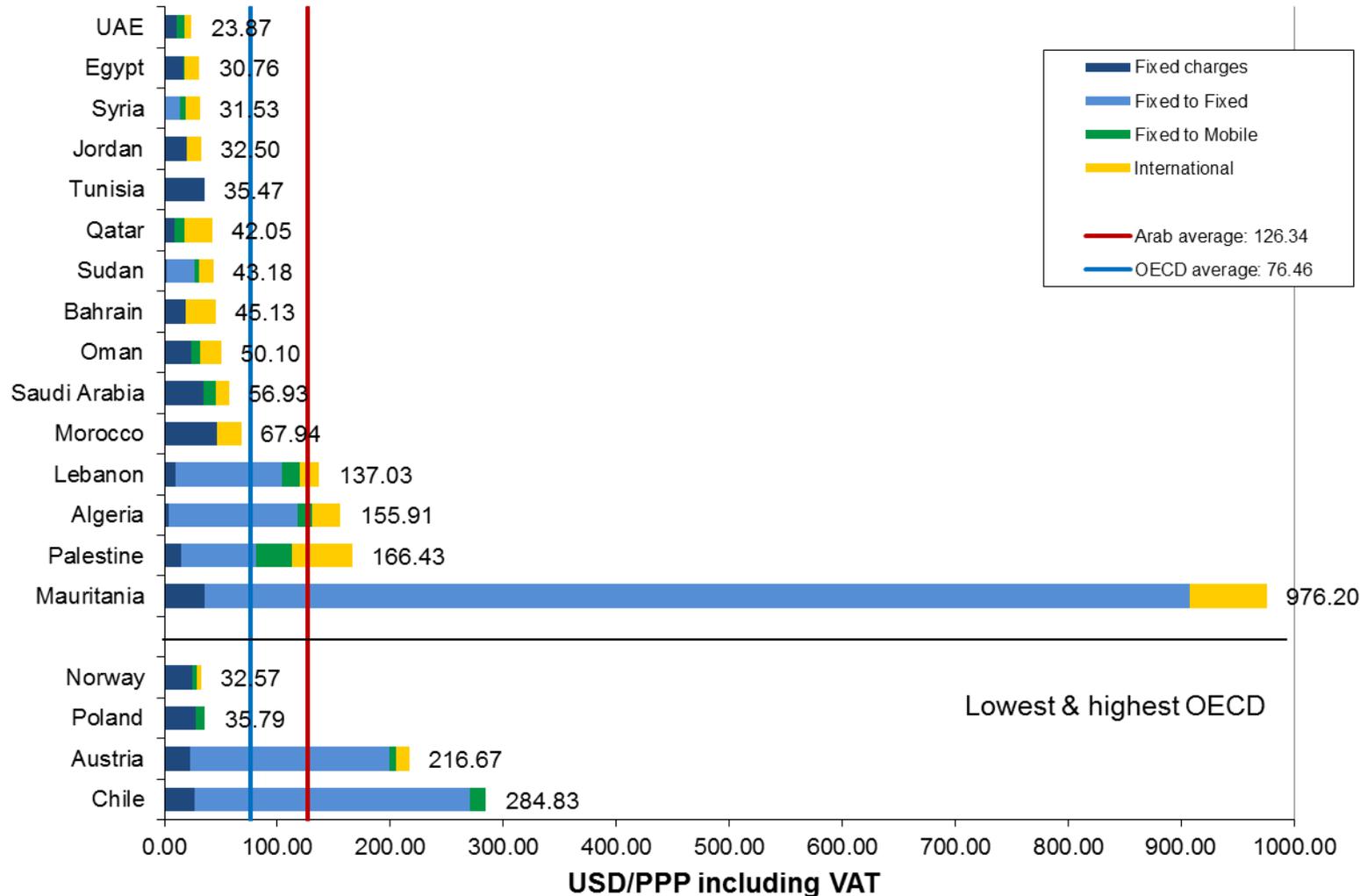
140 calls/month, Residential based on 2010 OECD PSTN basket



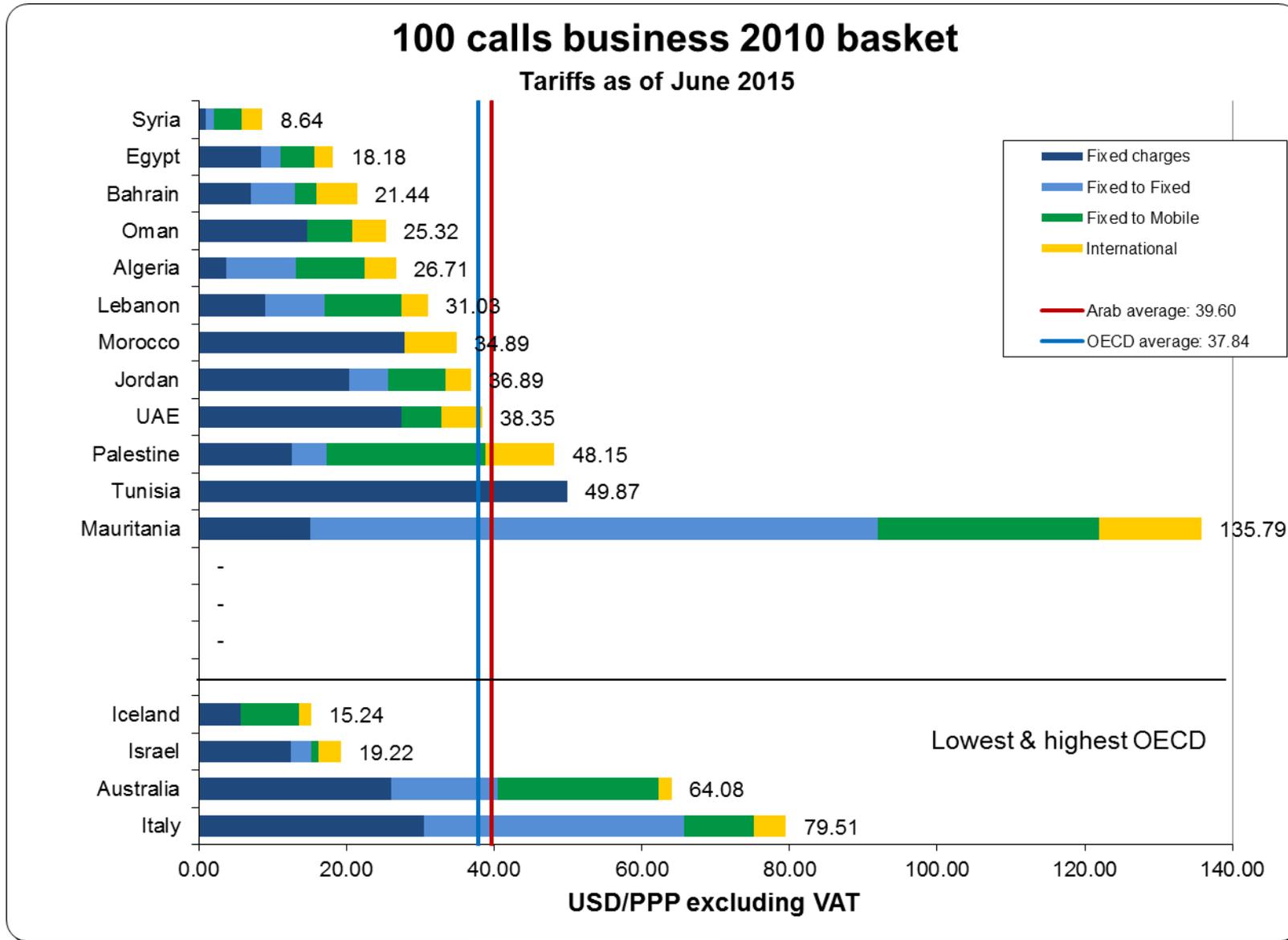
420 calls/month, Residential based on 2010 OECD PSTN basket

420 calls 2010 basket

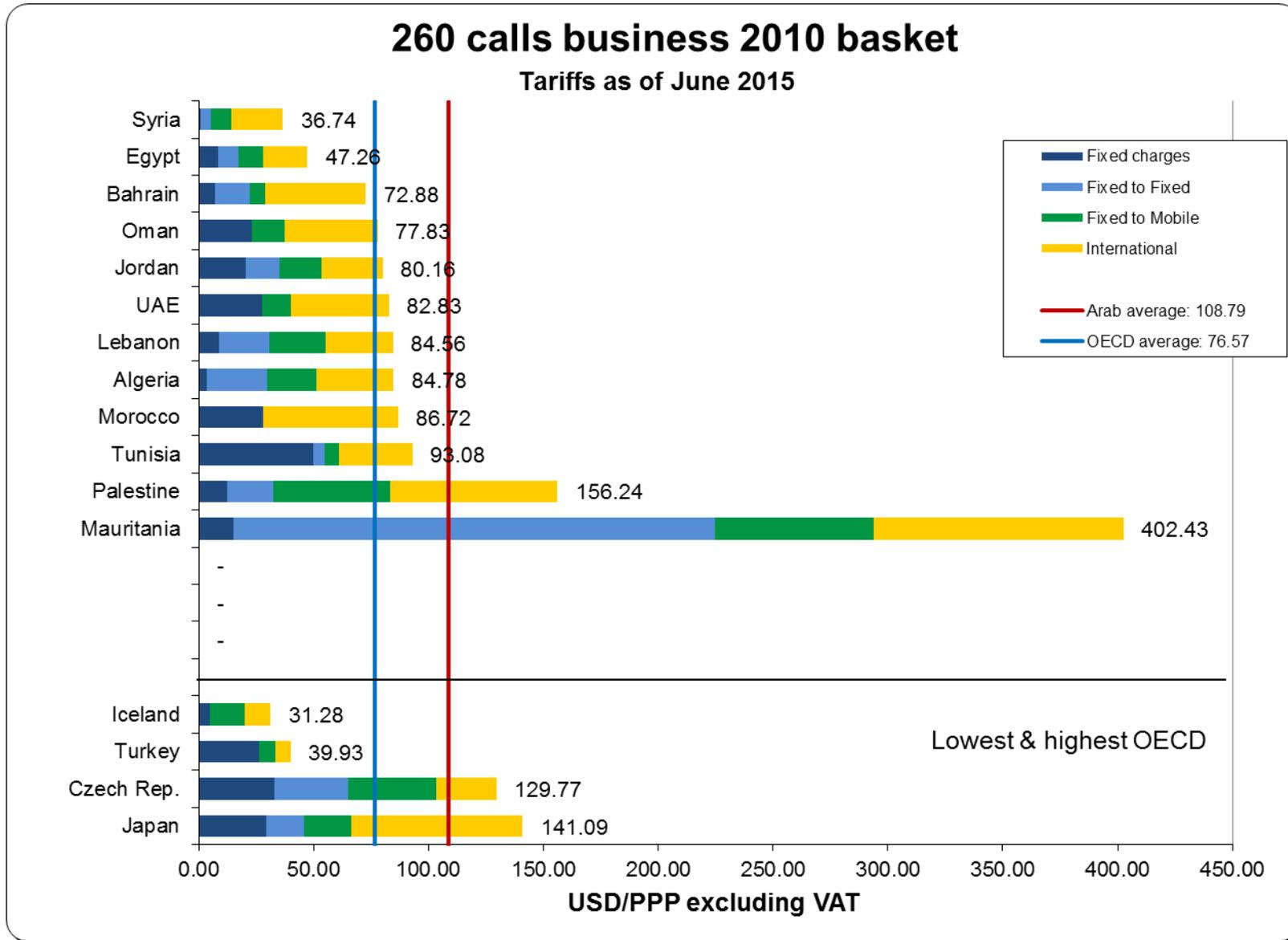
Tariffs as of June 2015



100 calls/month, Business based on 2010 OECD PSTN basket



260 calls/month, Business based on 2010 OECD PSTN basket



Observations from PSTN basket results

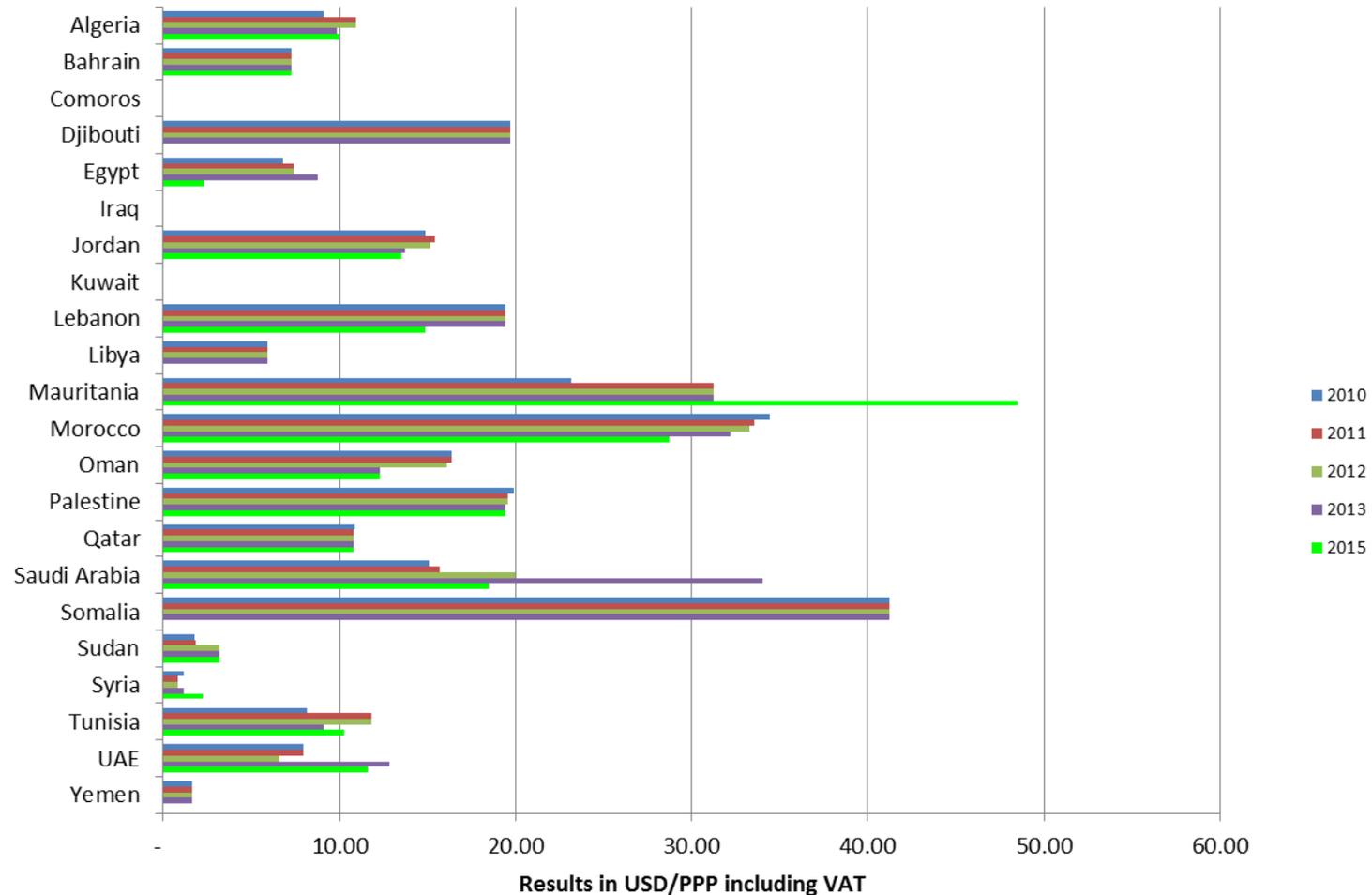
- The cheapest countries throughout are : (*)
 - Syria, Sudan, Egypt, UAE and Bahrain
 - The exact order of these may vary with usage level,
 - Syria is consistently the cheapest across all baskets apart from the 420 calls residential basket, where UAE is the cheapest (and Syria ranks third cheapest). Egypt also ranks as one of the cheapest countries, and is second to fourth cheapest across all the baskets, both residential and business. Mauritania is consistently the most expensive, across all baskets. Morocco, Palestine, Saudi Arabia and Tunisia are also generally among the more expensive countries.
- Of these cheapest countries, most fall below the OECD average across all the residential baskets, and often significantly so.
- Costs for the business baskets in the Arab countries tend to be above the OECD average, particularly for the highest usage business basket, with the exception of Syria, Egypt, Bahrain and Oman. For the lower usage residential baskets, the Arab average is below the OECD average
- Generally the Arab countries in North Africa are more expensive than the Arab countries in the Middle East.
- As in previous years, the price range for the Arab countries (cheapest to most expensive) is wider than for the OECD countries
 - An increased number of Arab countries are cheaper than or on par with the cheapest OECD country, particularly for the lower usage baskets. On all baskets, there is at least one Arab country (and sometimes two or three) that are cheaper than the cheapest OECD country. Syria, Sudan, Egypt and UAE are particularly notable in this regard.
 - The most expensive Arab country is more expensive than the most expensive OECD country, and significantly so for higher usage baskets
- A number of Arab countries continue to have fixed costs well below the OECD countries, causing the usage element to dominate. This makes the overall cost grow quicker with increasing usage, something that will discourage growth in usage. In some Arab countries, however, both fixed and usage costs are much higher than OECD countries.
- Even where fixed costs are significantly lower, the overall cost of using the service is higher in the Arab countries than in the OECD countries.
- There remains a clear lack of rebalancing in several Arab countries, where the usage revenue covers a significant portion of the fixed line cost for the operators. Notably, some countries appear to have restructured their fixed line plans, with more focus on upfront charges with increased allowances or reduced/free local and national calls. Egypt, Bahrain, Qatar, and UAE are examples where this has happened, and as a result are much more in line, and at times cheaper than many OECD countries.
- International calls remain significantly more expensive than in OECD countries



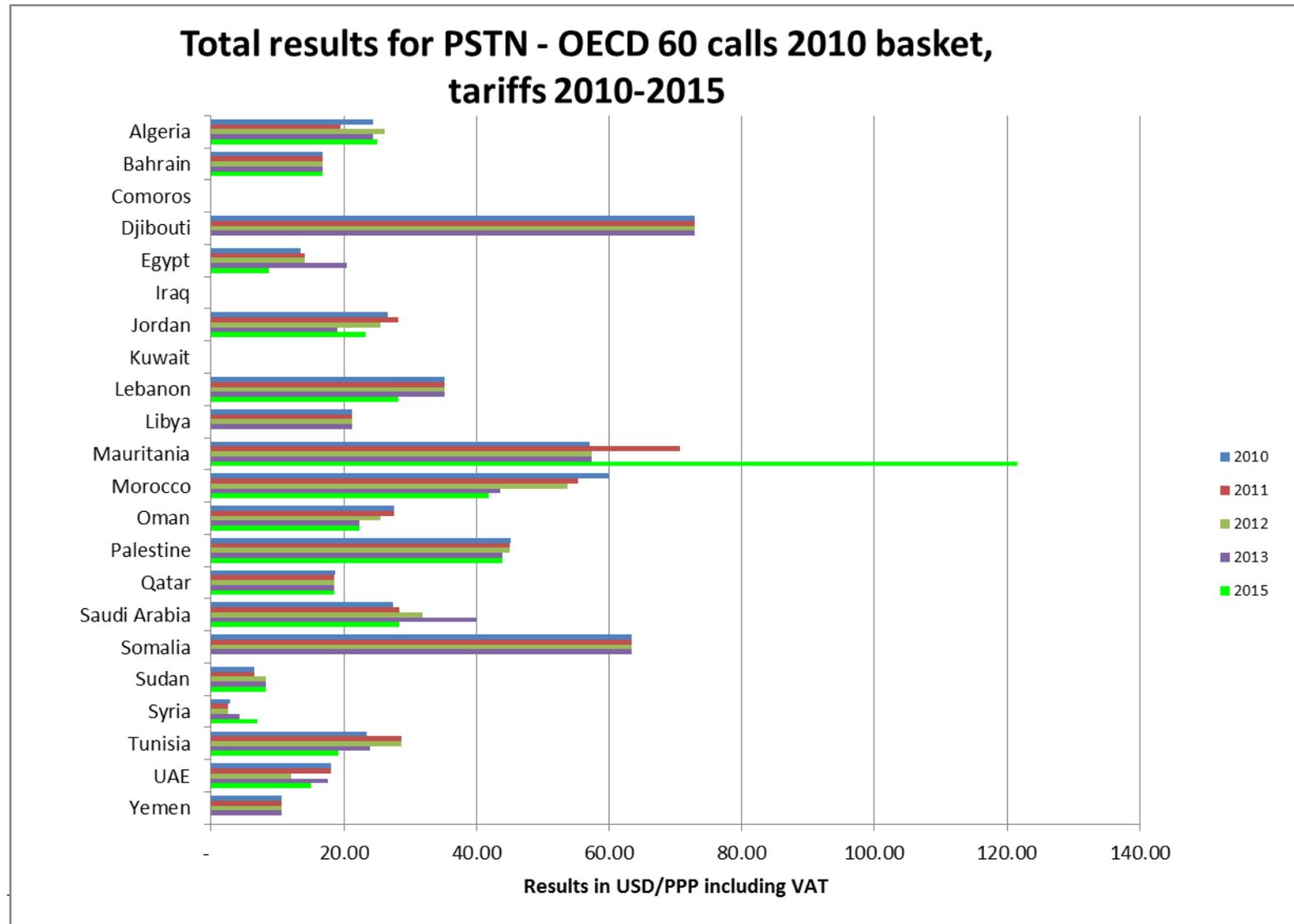
PSTN time series analysis (using OECD 2010 baskets)

2010 OECD PSTN baskets time series, 20 calls/month, residential

Total results for PSTN - OECD 20 calls 2010 basket, tariffs 2010-2015

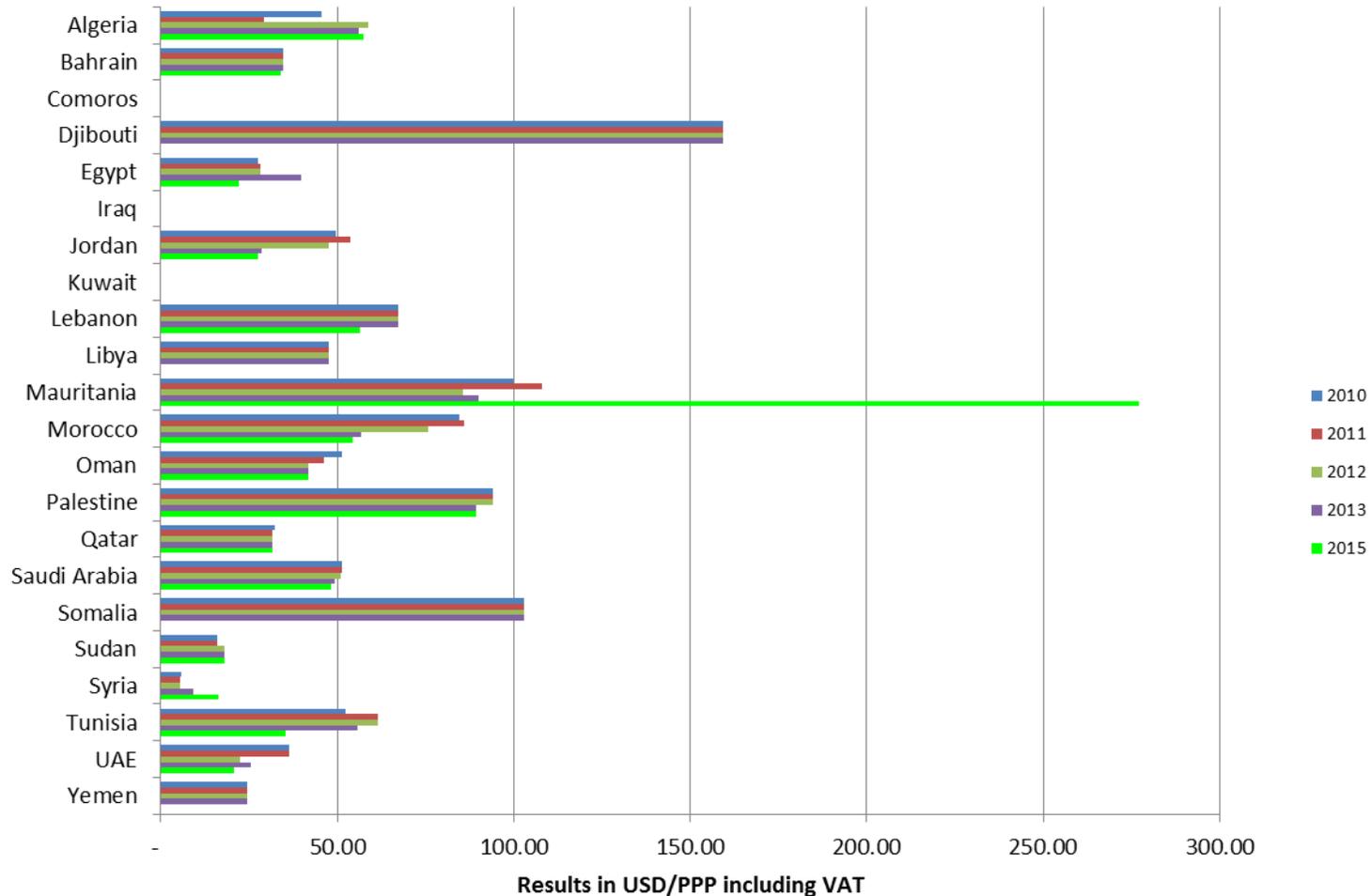


2010 OECD PSTN baskets time series, 60 calls/month, residential

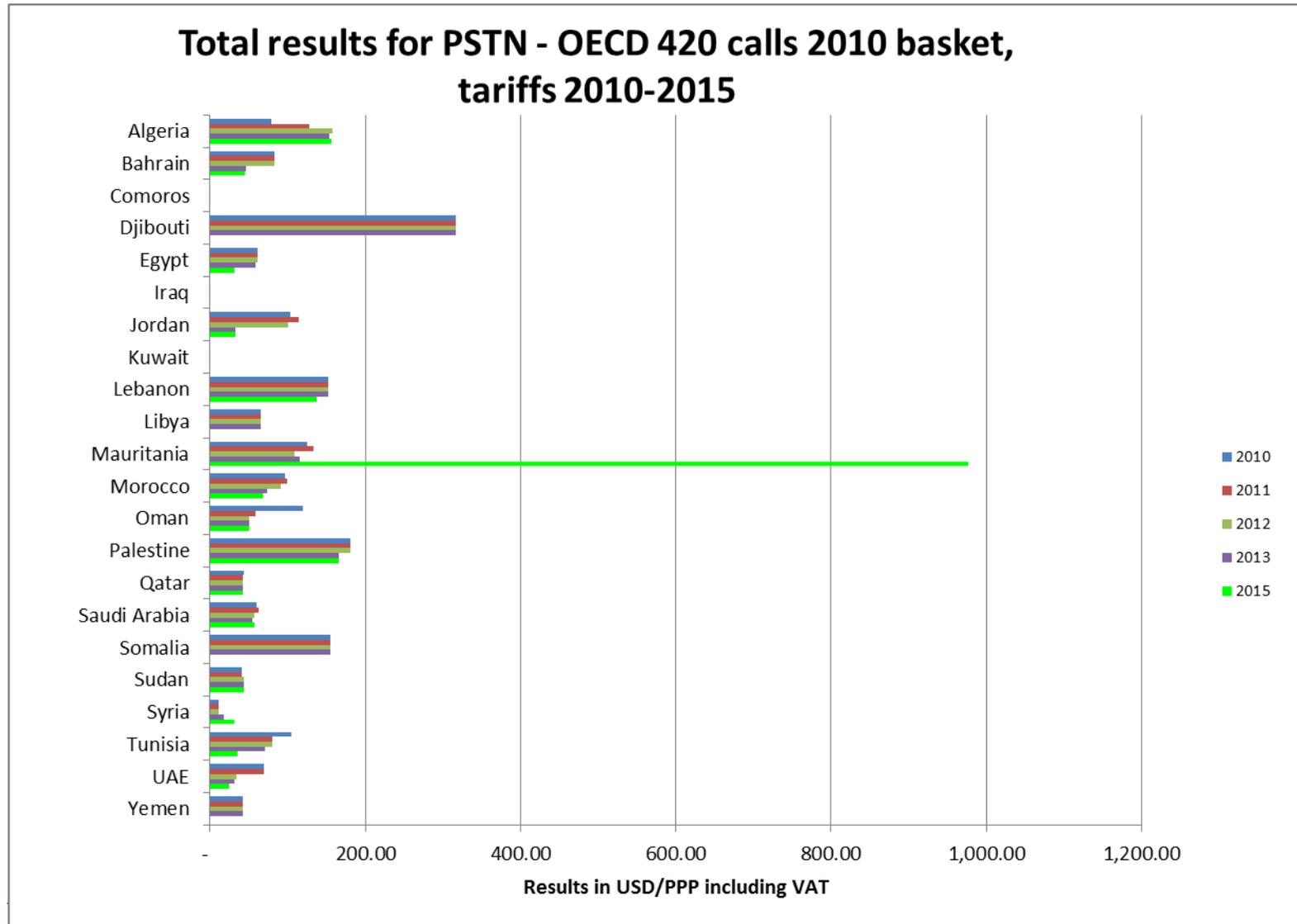


2010 OECD PSTN baskets time series, 140 calls/month, residential

Total results for PSTN - OECD 140 calls 2010 basket, tariffs 2010-2015

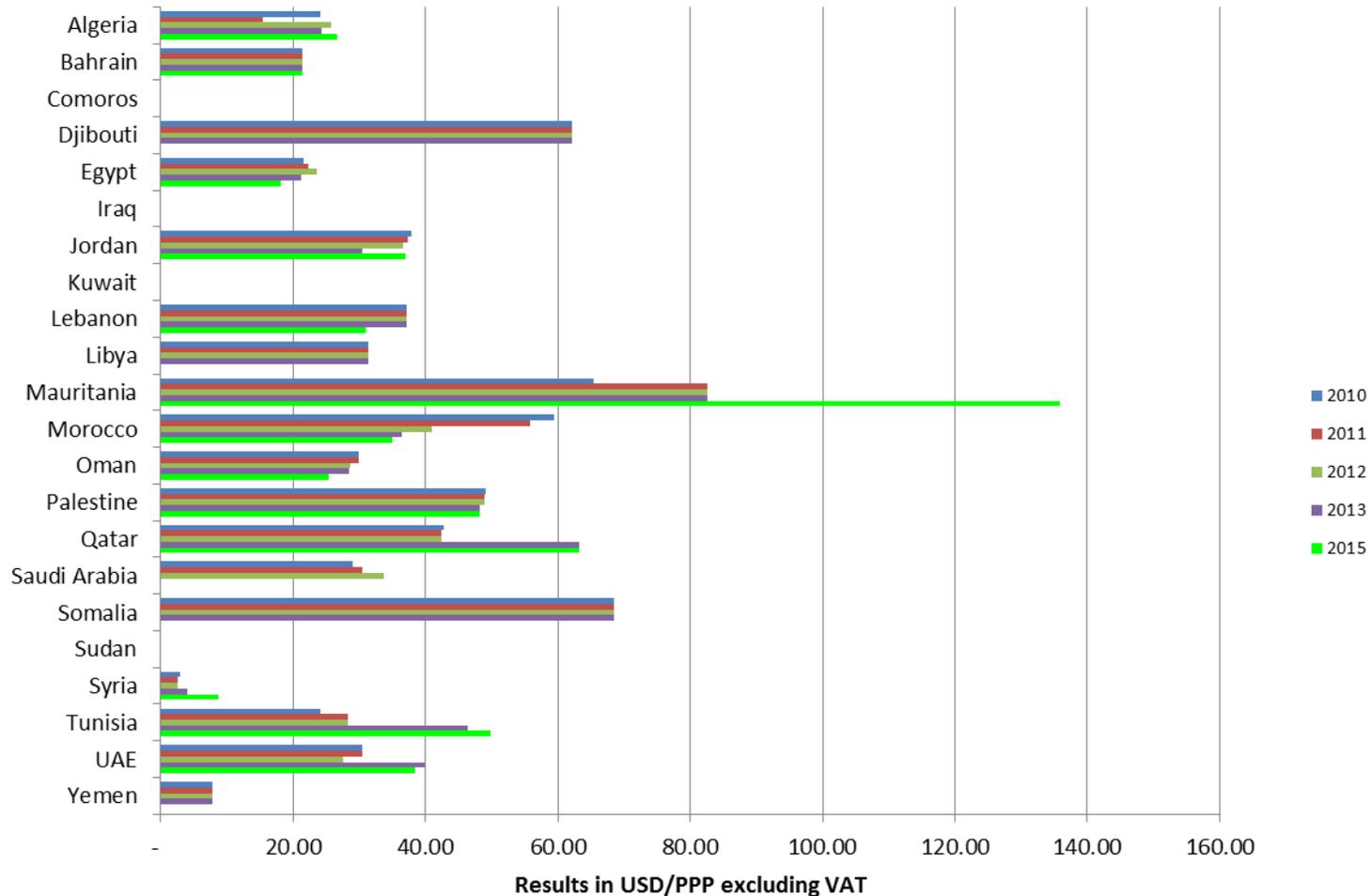


2010 OECD PSTN baskets time series, 420 calls/month, residential



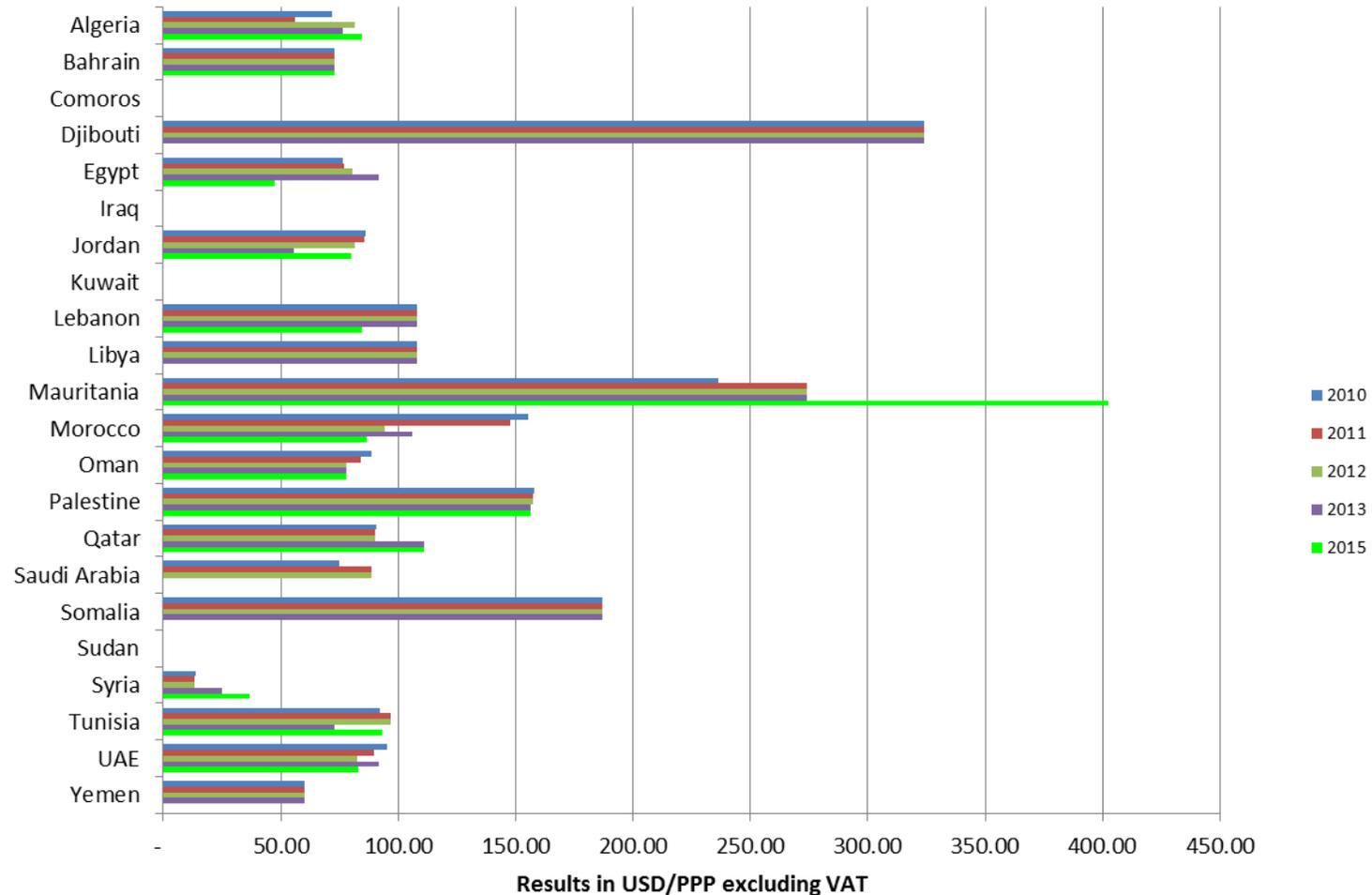
2010 OECD PSTN baskets time series, 100 calls/month, business

Total results for PSTN - OECD 100 calls business 2010 basket, tariffs 2010-2015



2010 OECD PSTN baskets time series, 260 calls/month, business

Total results for PSTN - OECD 260 calls business 2010 basket, tariffs 2010-2015



Observations from PSTN time series results

- There were price changes in just over a half of the Arab countries since 2013, and while many were fairly modest, some had a substantial impact on some baskets.
 - Most notable changes were seen in Algeria, Jordan, Morocco and UAE
- Notable price changes 2013 - 2015:
 - Algeria: change in international call charges, resulting in a modest increase in costs across all baskets.
 - Egypt: removal of the monthly charge for the basic services, resulting in a significant reduction in costs across all usage baskets.
 - Mauritania: call charges have increased significantly, by a factor of two or more. In addition, off-peak charges have been removed. International call charges have also changed, with a restructuring of the zones. International call costs have generally decreased, depending on destination, however, this decrease is not enough to offset the increased in national call charges.
 - Morocco: introduction of a number of new options, incorporating allowances for fixed and mobile calls, resulting in a reduction in costs across all residential baskets
 - Oman: Increased in the number of minutes included per month in the business service, resulting in a reduction in costs for the business baskets.
 - Qatar: Removal of published prices for business services
 - Saudi Arabia: Re-introduction of Hatif 45 package which was removed in 2013, resulting in a decrease in residential pricing for the lower usage baskets in particular.,
 - Syria: A significant increase in basic rental by a factor of 2.5, resulting in an increase in costs across all usage baskets.
 - Tunisia: Amendments to residential package pricing with more favourable usage options, resulting in a decrease in costs all residential baskets, apart from the 20 calls basket, which increased slightly.
 - UAE: Reduction in the cost of calls to mobile, resulting in lower costs across all usage levels.
- Average costs across the baskets have climbed slightly for lower use baskets in the Arab countries, and fallen in the higher use baskets. By contrast, OECD averages have remained broadly static across all usage levels.

** Countries with gaps in the tariff information are not considered.*



PSTN ranking tables, 2010-2015

PSTN 20 calls residential basket ranking

Total results for PSTN OECD 20 calls 2010 basket, tariffs 2010-2015
Results in USD/PPP including VAT, residential results

	2010	2011	2012	2013	2015
Algeria	9.07	10.94	10.94	9.87	9.97
Bahrain	7.27	7.27	7.27	7.27	7.27
Comoros					
Djibouti	19.70	19.70	19.70	19.70	
Egypt	6.79	7.41	7.41	8.79	2.30
Iraq					
Jordan	14.86	15.41	15.17	13.75	13.50
Kuwait					
Lebanon	19.41	19.41	19.41	19.41	14.86
Libya	5.94	5.94	5.94	5.94	
Mauritania	23.16	31.25	31.25	31.25	48.52
Morocco	34.46	33.53	33.27	32.23	28.72
Oman	16.38	16.38	16.09	12.32	12.32
Palestine	19.90	19.59	19.59	19.41	19.41
Qatar	10.88	10.82	10.82	10.82	10.82
Saudi Arabia	15.07	15.67	19.99	34.05	18.46
Somalia	41.24	41.24	41.24	41.24	
Sudan	1.77	1.82	3.21	3.21	3.21
Syria	1.16	0.85	0.85	1.15	2.23
Tunisia	8.13	11.79	11.79	9.07	10.28
UAE	7.98	7.98	6.58	12.85	11.60
Yemen	1.66	1.66	1.66	1.66	

Arab average	13.94	14.67	14.85	15.47	14.23
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■ Below Arab average
■ Above Arab average

Ranking for PSTN OECD 20 calls 2010 basket
Residential results

	2010	2011	2012	2013	2015
Algeria	9	9	9	8	5
Bahrain	6	5	6	5	4
Comoros	-	-	-	-	-
Djibouti	15	16	15	15	-
Egypt	5	6	7	6	2
Iraq	-	-	-	-	-
Jordan	11	11	11	12	10
Kuwait	-	-	-	-	-
Lebanon	14	14	13	14	11
Libya	4	4	4	4	-
Mauritania	17	17	17	16	15
Morocco	18	18	18	17	14
Oman	13	13	12	10	9
Palestine	16	15	14	13	13
Qatar	10	8	8	9	7
Saudi Arabia	12	12	16	18	12
Somalia	19	19	19	19	-
Sudan	3	3	3	3	3
Syria	1	1	1	1	1
Tunisia	8	10	10	7	6
UAE	7	7	5	11	8
Yemen	2	2	2	2	-

■ Least expensive
■ Most expensive



PSTN 60 calls residential basket ranking

Total results for PSTN OECD 60 calls 2010 basket, tariffs 2010-2015
Results in USD/PPP including VAT, residential results

	2010	2011	2012	2013	2015
Algeria	24.36	19.43	26.23	24.41	25.04
Bahrain	16.86	16.86	16.86	16.86	16.86
Comoros					
Djibouti	72.89	72.89	72.89	72.89	
Egypt	13.55	14.16	14.16	20.50	8.73
Iraq					
Jordan	26.63	28.16	25.53	19.04	23.31
Kuwait					
Lebanon	35.17	35.17	35.17	35.17	28.18
Libya	21.19	21.19	21.19	21.19	
Mauritania	57.14	70.70	57.31	57.31	121.58
Morocco	59.92	55.28	53.69	43.66	41.80
Oman	27.52	27.52	25.58	22.29	22.29
Palestine	45.25	44.94	44.94	43.98	43.98
Qatar	18.78	18.54	18.54	18.54	18.54
Saudi Arabia	27.38	28.35	31.83	39.93	28.44
Somalia	63.46	63.46	63.46	63.46	
Sudan	6.51	6.56	8.22	8.22	8.22
Syria	2.85	2.54	2.54	4.23	6.96
Tunisia	23.53	28.66	28.66	23.90	19.19
UAE	18.11	18.11	12.10	17.56	15.02
Yemen	10.65	10.65	10.65	10.65	

Arab average	30.09	30.69	29.98	29.67	28.54
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■ Below Arab average
■ Above Arab average

Ranking for PSTN OECD 60 calls 2010 basket
Residential results

	2010	2011	2012	2013	2015
Algeria	10	8	11	12	10
Bahrain	5	5	6	4	5
Comoros	-	-	-	-	-
Djibouti	19	19	19	19	-
Egypt	4	4	5	8	3
Iraq	-	-	-	-	-
Jordan	11	11	9	7	9
Kuwait	-	-	-	-	-
Lebanon	14	14	14	13	11
Libya	8	9	8	9	-
Mauritania	16	18	17	17	15
Morocco	17	16	16	15	13
Oman	13	10	10	10	8
Palestine	15	15	15	16	14
Qatar	7	7	7	6	6
Saudi Arabia	12	12	13	14	12
Somalia	18	17	18	18	-
Sudan	2	2	2	2	2
Syria	1	1	1	1	1
Tunisia	9	13	12	11	7
UAE	6	6	4	5	4
Yemen	3	3	3	3	-

■ Least expensive
■ Most expensive



PSTN 140 calls residential basket ranking

Total results for PSTN OECD 140 calls 2010 basket, tariffs 2010-2015
Results in USD/PPP including VAT, residential results

	2010	2011	2012	2013	2015
Algeria	45.62	29.08	58.86	55.90	57.35
Bahrain	34.76	34.76	34.76	34.67	34.04
Comoros					
Djibouti	159.42	159.42	159.42	159.42	
Egypt	27.59	28.20	28.20	39.67	22.06
Iraq					
Jordan	49.62	53.80	47.49	28.61	27.38
Kuwait					
Lebanon	67.20	67.20	67.20	67.20	56.34
Libya	47.41	47.41	47.41	47.41	
Mauritania	99.87	107.95	85.68	89.98	277.08
Morocco	84.55	85.85	75.77	56.66	54.40
Oman	51.34	46.31	41.94	41.94	41.94
Palestine	94.23	93.92	93.92	89.31	89.31
Qatar	32.28	31.43	31.43	31.43	31.43
Saudi Arabia	51.42	51.16	50.85	49.32	48.33
Somalia	103.05	103.05	103.05	103.05	
Sudan	15.91	15.97	18.04	18.04	18.04
Syria	5.73	5.42	5.42	9.28	16.16
Tunisia	52.38	61.44	61.44	55.83	35.47
UAE	36.47	36.47	22.38	25.54	20.84
Yemen	24.58	24.58	24.58	24.58	

Arab average	57.02	57.02	55.68	54.10	55.34
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■ Below Arab average
■ Above Arab average

Ranking for PSTN OECD 140 calls 2010 basket
Residential results

	2010	2011	2012	2013	2015
Algeria	8	5	12	13	13
Bahrain	6	7	7	7	7
Comoros	-	-	-	-	-
Djibouti	19	19	19	19	-
Egypt	4	4	5	8	4
Iraq	-	-	-	-	-
Jordan	10	12	10	5	5
Kuwait	-	-	-	-	-
Lebanon	14	14	14	15	12
Libya	9	10	9	10	-
Mauritania	17	18	16	17	15
Morocco	15	15	15	14	11
Oman	11	9	8	9	9
Palestine	16	16	17	16	14
Qatar	5	6	6	6	6
Saudi Arabia	12	11	11	11	10
Somalia	18	17	18	18	-
Sudan	2	2	2	2	2
Syria	1	1	1	1	1
Tunisia	13	13	13	12	8
UAE	7	8	3	4	3
Yemen	3	3	4	3	-

■ Least expensive
■ Most expensive



PSTN 420 calls residential basket ranking

Total results for PSTN OECD 420 calls 2010 basket, tariffs 2010-2015
Results in USD/PPP including VAT, residential results

	2010	2011	2012	2013	2015
Algeria	78.39	128.05	157.84	153.43	155.91
Bahrain	82.48	82.48	82.48	46.04	45.13
Comoros					
Djibouti	315.95	315.95	315.95	315.95	
Egypt	60.92	61.54	61.54	58.87	30.76
Iraq					
Jordan	103.89	114.79	100.80	32.65	32.50
Kuwait					
Lebanon	152.60	152.60	152.60	152.60	137.03
Libya	65.60	65.60	65.60	65.60	
Mauritania	124.94	133.24	109.04	115.27	976.20
Morocco	96.98	99.70	91.53	72.71	67.94
Oman	119.81	57.79	50.10	50.10	50.10
Palestine	180.79	180.48	180.48	166.43	166.43
Qatar	43.00	42.05	42.05	42.05	42.05
Saudi Arabia	59.65	61.95	57.38	54.75	56.93
Somalia	155.47	155.47	155.47	155.47	
Sudan	40.52	40.57	43.18	43.18	43.18
Syria	11.15	10.84	10.84	17.38	31.53
Tunisia	105.15	80.35	80.35	70.75	35.47
UAE	69.88	69.29	33.80	31.20	23.87
Yemen	42.14	42.14	42.14	42.14	

Arab average	100.49	99.73	96.48	88.77	126.34 *
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 Below Arab average
 Above Arab average

Ranking for PSTN OECD 420 calls 2010 basket
Residential results

	2010	2011	2012	2013	2015
Algeria	9	14	17	16	13
Bahrain	10	11	11	7	8
Comoros	-	-	-	-	-
Djibouti	19	19	19	19	-
Egypt	6	6	8	10	2
Iraq	-	-	-	-	-
Jordan	12	13	13	3	4
Kuwait	-	-	-	-	-
Lebanon	16	16	15	15	12
Libya	7	8	9	11	-
Mauritania	15	15	14	14	15
Morocco	11	12	12	13	11
Oman	14	5	6	8	9
Palestine	18	18	18	18	14
Qatar	4	3	3	4	6
Saudi Arabia	5	7	7	9	10
Somalia	17	17	16	17	-
Sudan	2	2	5	6	7
Syria	1	1	1	1	3
Tunisia	13	10	10	12	5
UAE	8	9	2	2	1
Yemen	3	4	4	5	-

 Least expensive
 Most expensive

*Please note: the increase in the Arab average for 2015 is due to the big increase in prices in Mauritania
If Mauritania is discounted, the 2015 average would be USD/PPP 65.63



PSTN 100 calls business basket ranking

Total results for PSTN OECD 100 calls business 2010 basket, tariffs 2010-2015
Results in USD/PPP excluding VAT, business results

Ranking for PSTN OECD 100 calls business 2010 basket
Business results

	2010	2011	2012	2013	2015
Algeria	24.12	15.48	25.71	24.32	26.71
Bahrain	21.44	21.44	21.44	21.44	21.44
Comoros					
Djibouti	62.05	62.05	62.05	62.05	
Egypt	21.52	22.35	23.47	21.16	18.18
Iraq					
Jordan	37.84	37.40	36.63	30.37	36.89
Kuwait					
Lebanon	37.10	37.10	37.10	37.10	31.03
Libya	31.42	31.42	31.42	31.42	
Mauritania	65.35	82.53	82.53	82.53	135.79
Morocco	59.48	55.84	40.93	36.44	34.89
Oman	29.82	29.82	28.70	28.41	25.32
Palestine	49.16	48.90	48.90	48.15	48.15
Qatar	42.70	42.41	42.41	63.23	
Saudi Arabia	29.06	30.39	33.71		
Somalia	68.40	68.40	68.40	68.40	
Sudan					
Syria	2.85	2.54	2.54	4.00	8.64
Tunisia	24.08	28.34	28.34	46.40	49.87
UAE	30.40	30.40	27.62	39.87	38.35
Yemen	7.72	7.72	7.72	7.72	

	2010	2011	2012	2013	2015
Algeria	6	3	5	5	5
Bahrain	3	4	3	4	3
Comoros	-	-	-	-	-
Djibouti	16	16	16	14	-
Egypt	4	5	4	3	2
Iraq	-	-	-	-	-
Jordan	12	12	11	7	8
Kuwait	-	-	-	-	-
Lebanon	11	11	12	10	6
Libya	10	10	9	8	-
Mauritania	17	18	18	17	12
Morocco	15	15	13	9	7
Oman	8	7	8	6	4
Palestine	14	14	15	13	10
Qatar	13	13	14	15	-
Saudi Arabia	7	8	10	-	-
Somalia	18	17	17	16	-
Sudan	-	-	-	-	-
Syria	1	1	1	1	1
Tunisia	5	6	7	12	11
UAE	9	9	6	11	9
Yemen	2	2	2	2	-

Arab average	2010	2011	2012	2013	2015
	35.81	36.36	36.09	38.41	39.60

■ Below Arab average
■ Above Arab average

■ Least expensive
■ Most expensive



PSTN 260 calls business basket ranking

Total results for PSTN OECD 260 calls business 2010 basket, tariffs 2010-2015
Results in USD/PPP excluding VAT, business results

Ranking for PSTN OECD 260 calls business 2010 basket
Business results

	2010	2011	2012	2013	2015
Algeria	71.94	56.18	81.64	76.17	84.78
Bahrain	72.88	72.88	72.88	72.88	72.88
Comoros					
Djibouti	324.12	324.12	324.12	324.12	
Egypt	76.29	77.12	80.61	91.80	47.26
Iraq					
Jordan	86.17	85.73	81.60	55.31	80.16
Kuwait					
Lebanon	108.11	108.11	108.11	108.11	84.56
Libya	107.93	107.93	107.93	107.93	
Mauritania	236.34	274.31	274.31	274.31	402.43
Morocco	155.43	147.78	94.17	105.93	86.72
Oman	88.87	84.00	77.83	77.83	77.83
Palestine	157.83	157.56	157.56	156.24	156.24
Qatar	90.66	90.14	90.14	110.96	
Saudi Arabia	74.78	88.53	88.53		
Somalia	186.87	186.87	186.87	186.87	
Sudan					
Syria	13.62	13.30	13.30	24.92	36.74
Tunisia	92.33	97.00	97.00	72.87	93.08
UAE	95.52	89.69	82.56	91.81	82.83
Yemen	60.28	60.28	60.28	60.28	

	2010	2011	2012	2013	2015
Algeria	3	2	7	6	8
Bahrain	4	4	3	5	3
Comoros	-	-	-	-	-
Djibouti	18	18	18	17	-
Egypt	6	5	5	8	2
Iraq	-	-	-	-	-
Jordan	7	7	6	2	5
Kuwait	-	-	-	-	-
Lebanon	13	13	14	12	7
Libya	12	12	13	11	-
Mauritania	17	17	17	16	12
Morocco	14	14	11	10	9
Oman	8	6	4	7	4
Palestine	15	15	15	14	11
Qatar	9	10	10	13	-
Saudi Arabia	5	8	9	-	-
Somalia	16	16	16	15	-
Sudan	-	-	-	-	-
Syria	1	1	1	1	1
Tunisia	10	11	12	4	10
UAE	11	9	8	9	6
Yemen	2	3	2	3	-

Arab average	2010	2011	2012	2013	2015
	116.66	117.86	115.52	117.55	108.79

■ Below Arab average
■ Above Arab average

■ Least expensive
■ Most expensive



Mobile basket 2015 results (using OECD 2010 baskets)

Mobile tariff data issues

- No tariff information available for:
 - Djibouti, Somalia
 - Only pre-paid for Libya
 - One operator only for Comoros
- Otherwise two operators are covered for each country
- A total of 908 tariff packages covered for 39 operators in 19 countries



OECD mobile baskets 2010

- The OECD adopted new baskets for mobile in March 2010. The key information about the basket definitions is shown below.
 - The following 6 pages show the results using the new basket definitions
 - Tariff elements used are the same as for previous results
 - New baskets include a new way of calculating call costs, and also include the capability to cover “Selective discounts”
 - Pre- and Post-paid tariffs are included for all baskets
 - Handset data baskets included (introduced 2013)

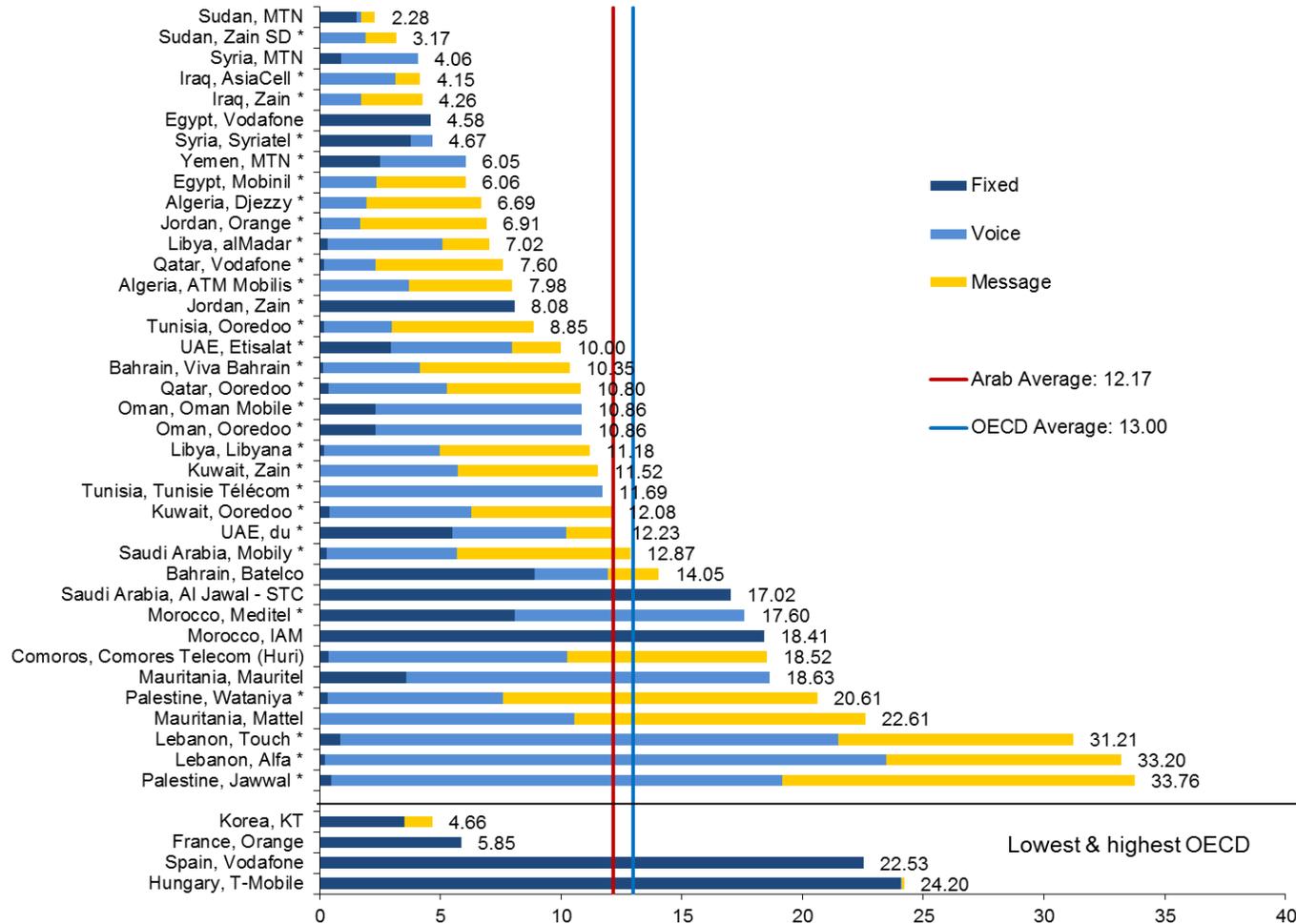
Basket	Calls/month	Call distribution				SMS	Data MB
		To fixed	Mobile On	Mobile Off	Voicemail		
30 calls basket	30	16%	55%	25%	4%	100	0
100 calls basket	100	17%	52%	28%	3%	140	0
300 calls basket	300	14%	46%	37%	3%	225	0
900 calls basket	900	14%	55%	28%	3%	350	0
40 calls prepaid basket	40	14%	64%	18%	4%	60	0
400 messages basket	8	8%	55%	25%	12%	400	0
30 calls + 100 MB	30	16%	55%	25%	4%	100	100
100 calls + 500 MB	100	17%	52%	28%	3%	140	500
300 calls + 1 GB	300	14%	46%	37%	3%	225	1000
900 calls + 2 GB	900	14%	55%	28%	3%	350	2000
100 calls + 2 GB	100	14%	52%	28%	3%	140	2000



30 calls/month basket result based on 2010 OECD mobile basket

30 calls basket

Tariffs as of June 2015

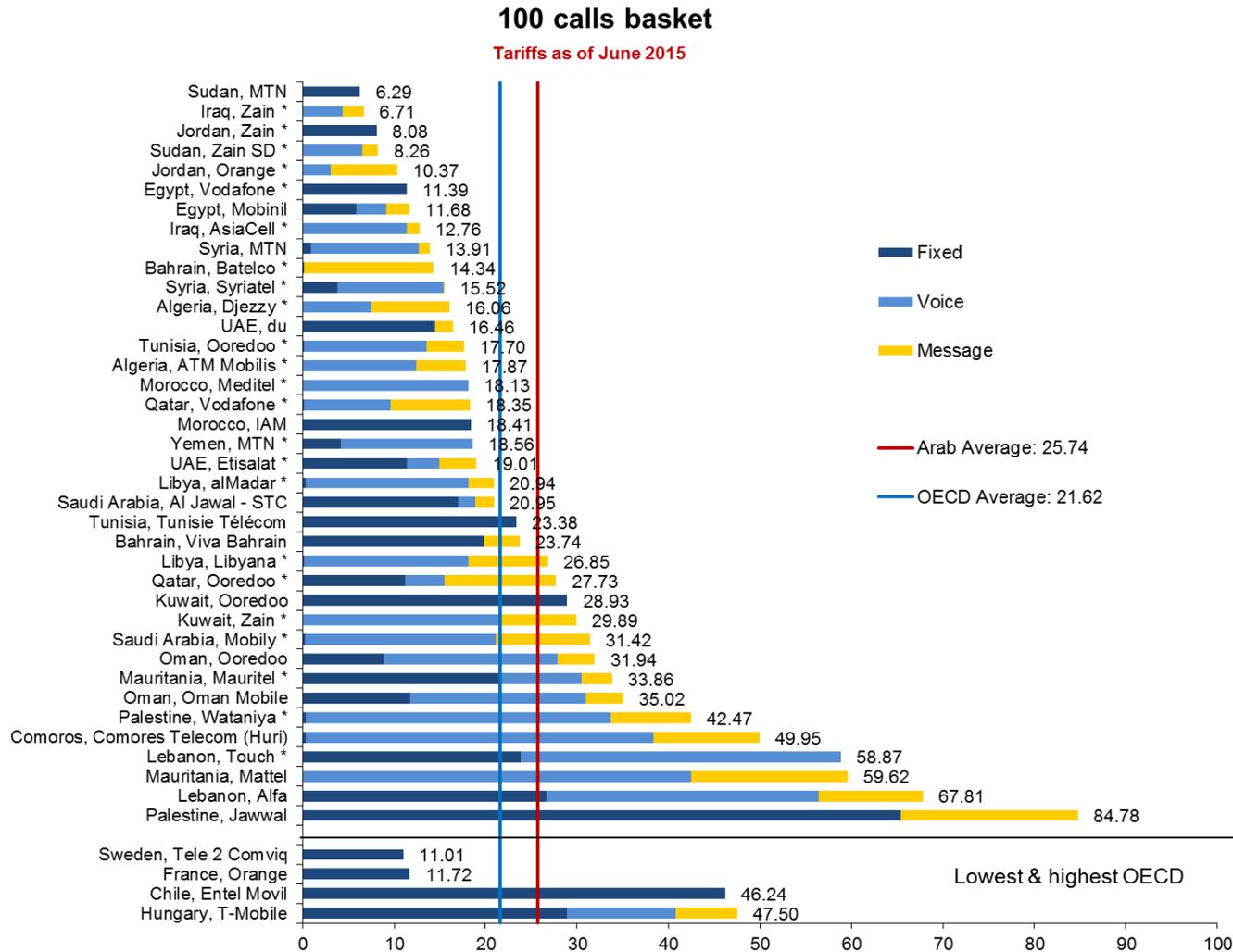


Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.



100 calls/month basket result based on 2010 OECD mobile basket

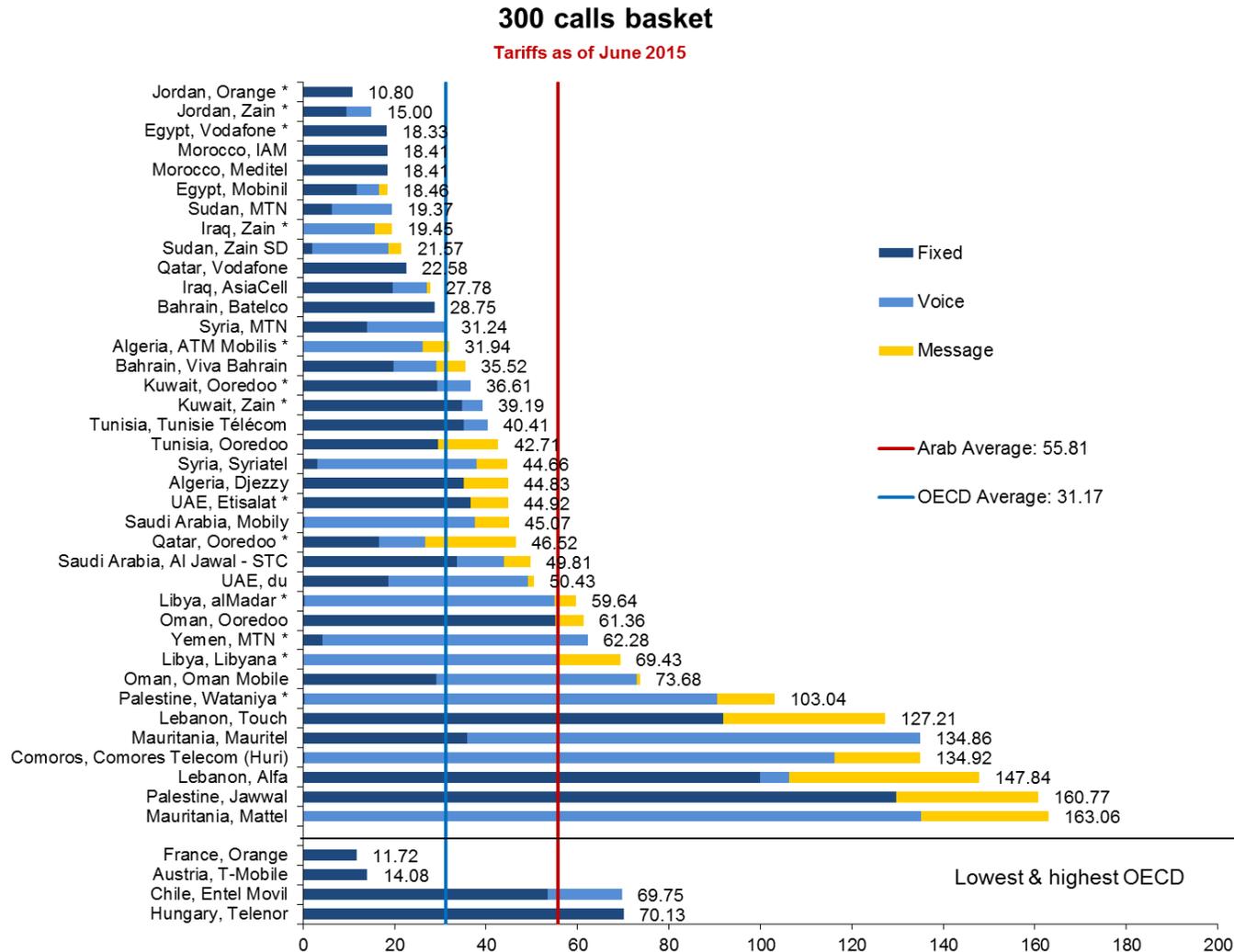


Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.



300 calls/month basket result based on 2010 OECD mobile basket

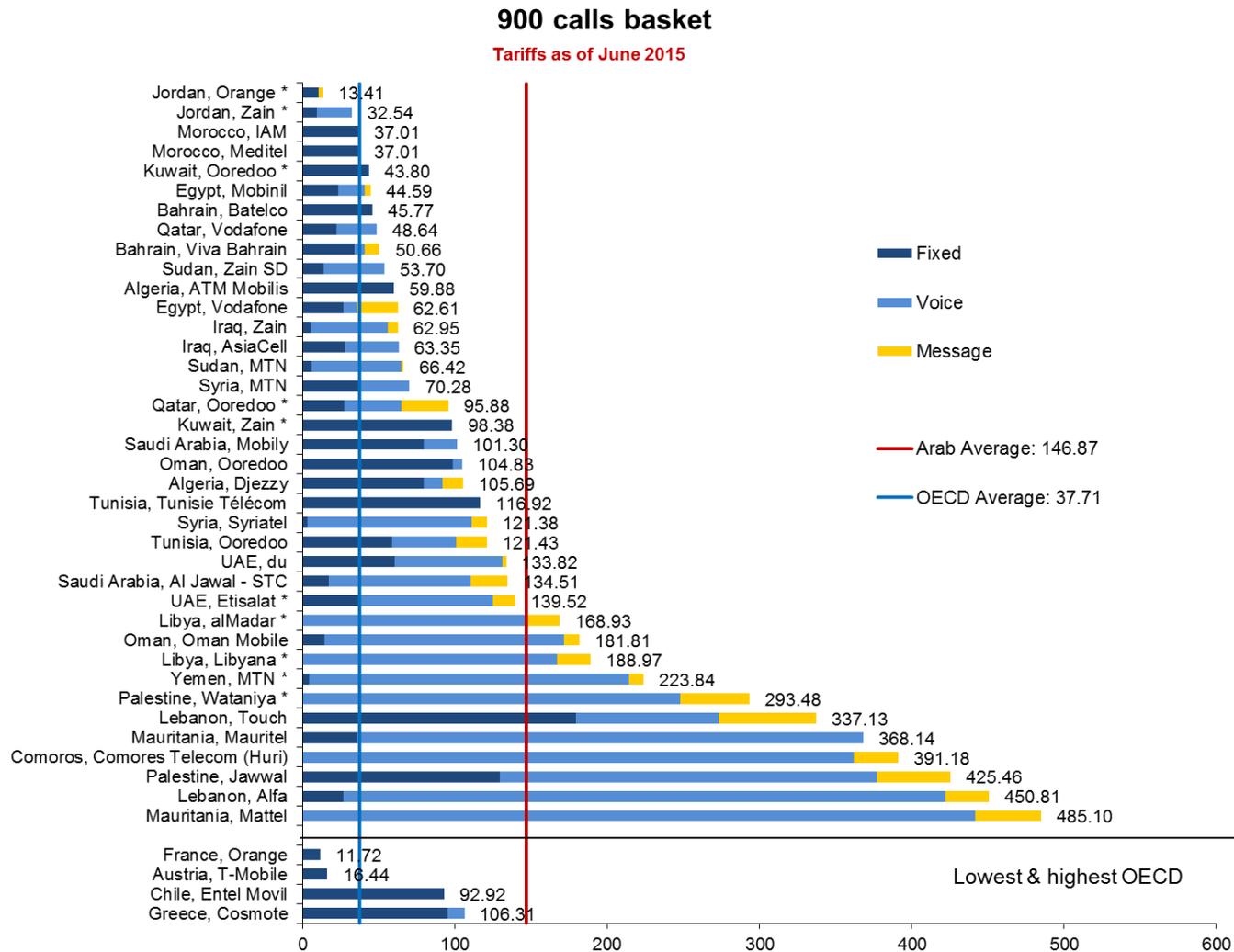


Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.



900 calls/month basket result based on 2010 OECD mobile basket



Please note:
No data for Djibouti and Somalia.
Selective discounts included.

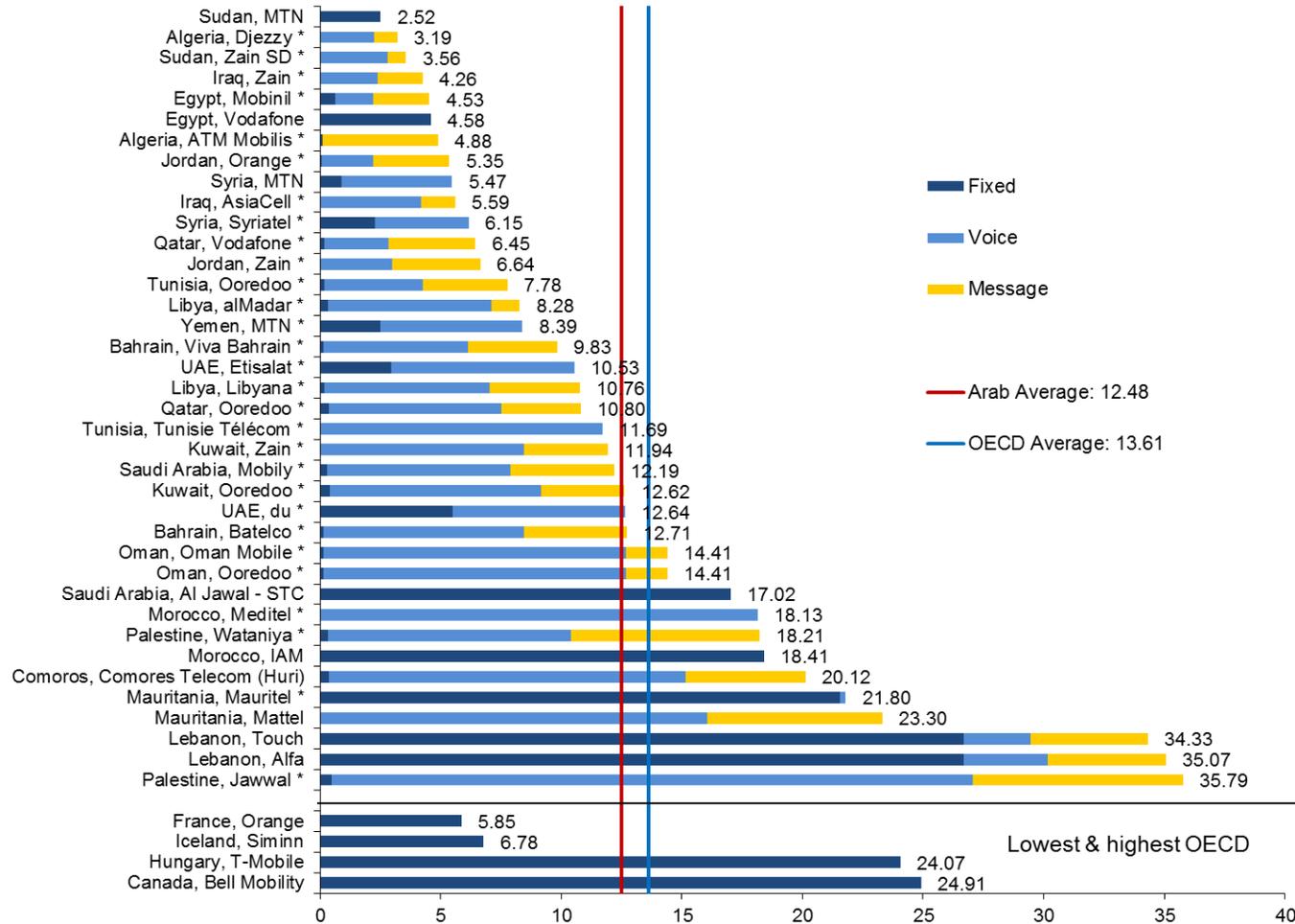
* marks pre-paid tariffs.



40 calls/month prepaid basket result based on 2010 OECD mobile basket

40 calls prepaid basket

Tariffs as of June 2015

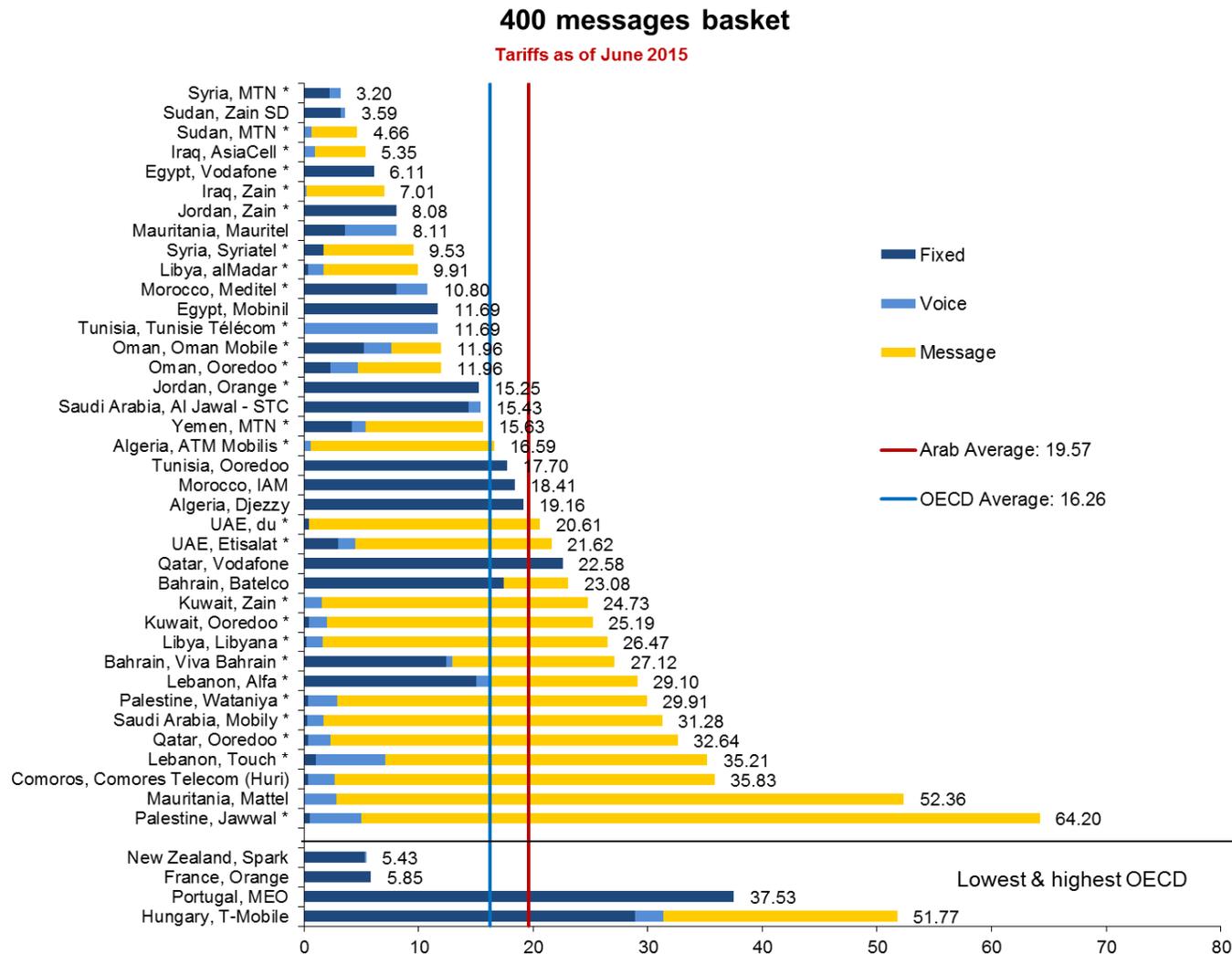


Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.



400 messages/month basket result based on 2010 OECD mobile basket



Please note:
No data for Djibouti and Somalia.
Selective discounts included.

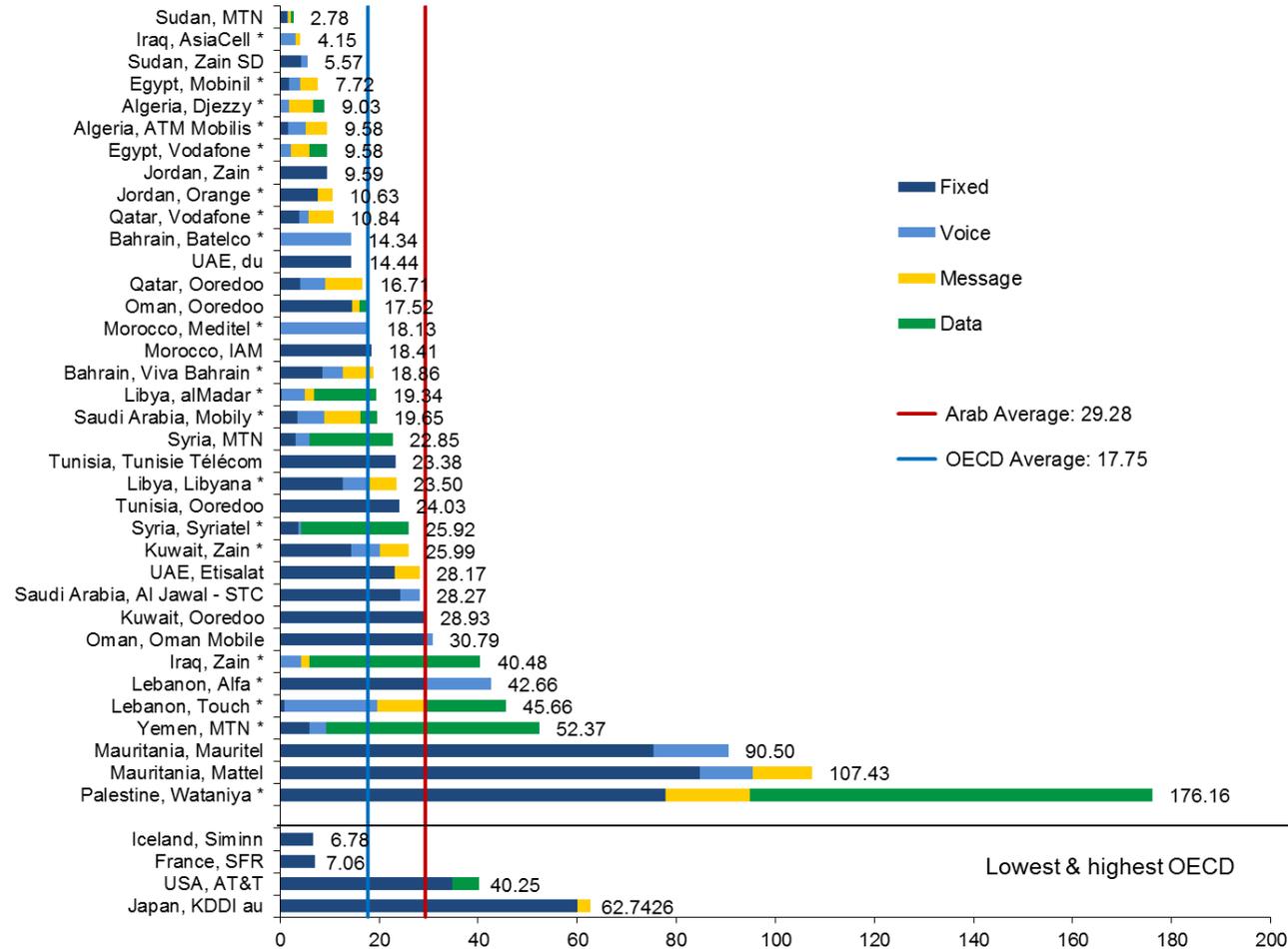
* marks pre-paid tariffs.



30 calls and 100 MB/month basket result based on 2010 OECD mobile basket

30 calls + 100 MB

Tariffs as of June 2015



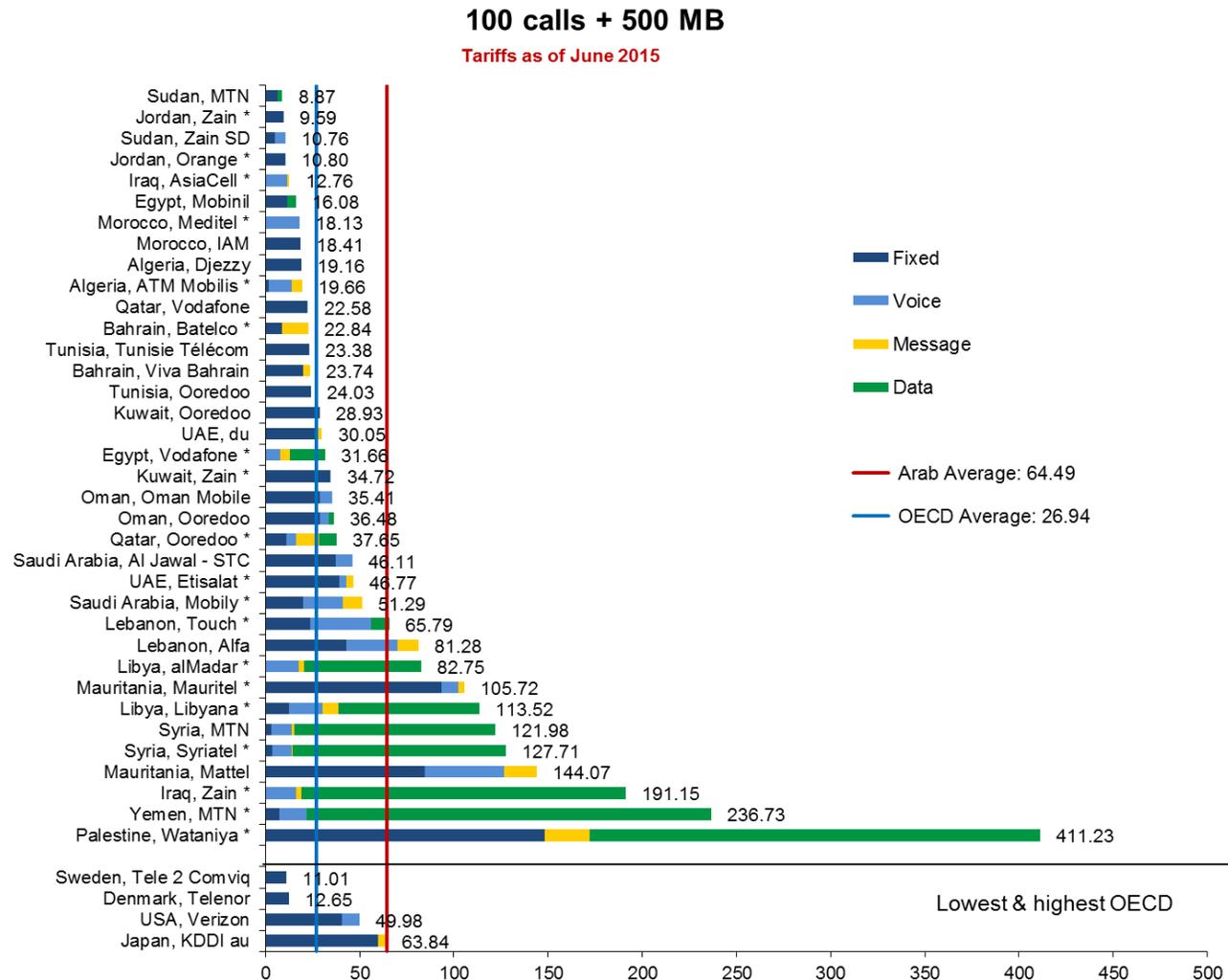
Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.

The data charges shown on the graph refer to overage charges only. Fixed data charges may be embedded in the monthly fixed charges.



100 calls and 500 MB/month basket result based on 2010 OECD mobile basket



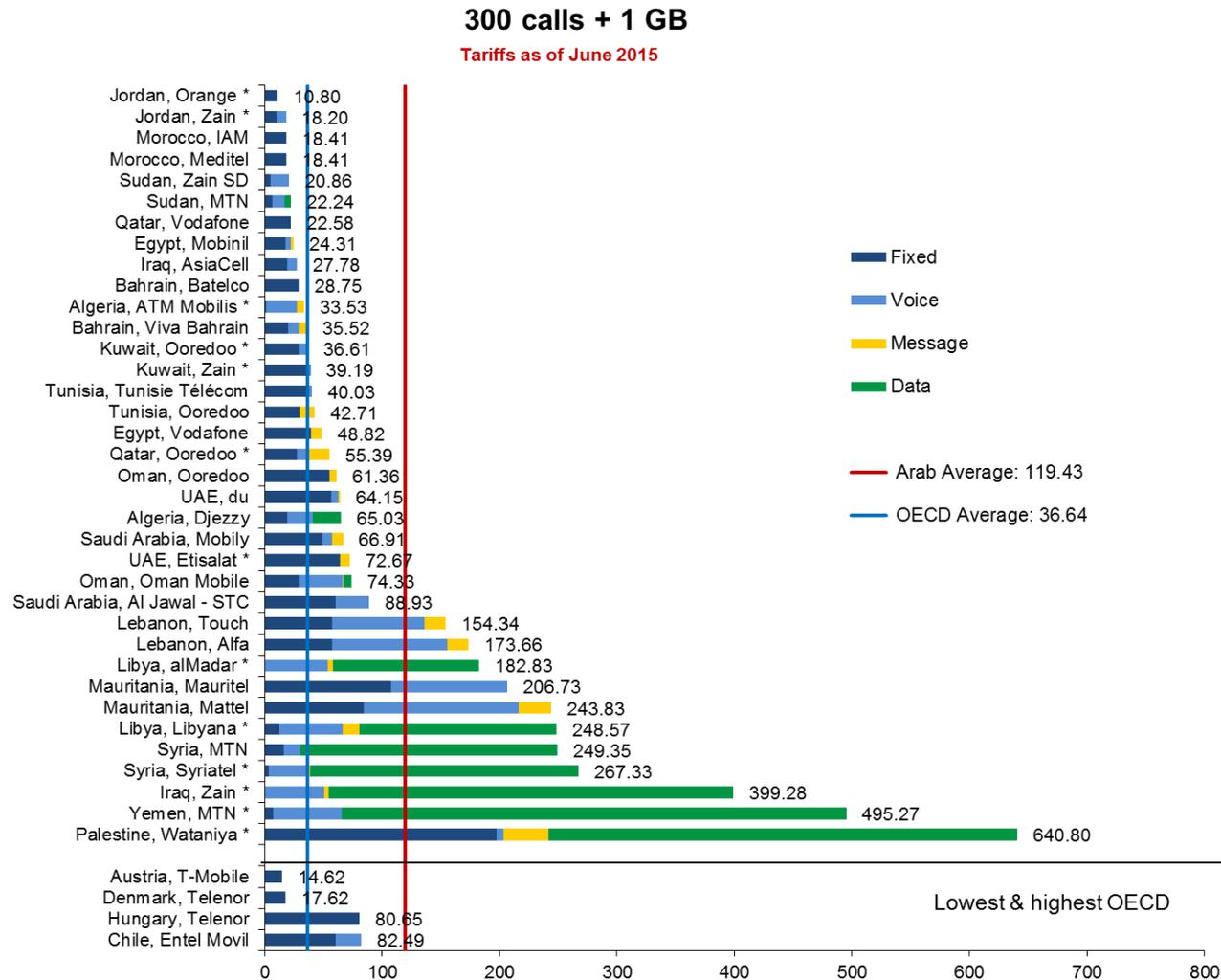
Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.

The data charges shown on the graph refer to overage charges only. Fixed data charges may be embedded in the monthly fixed charges.



300 calls and 1 GB/month basket result based on 2010 OECD mobile basket



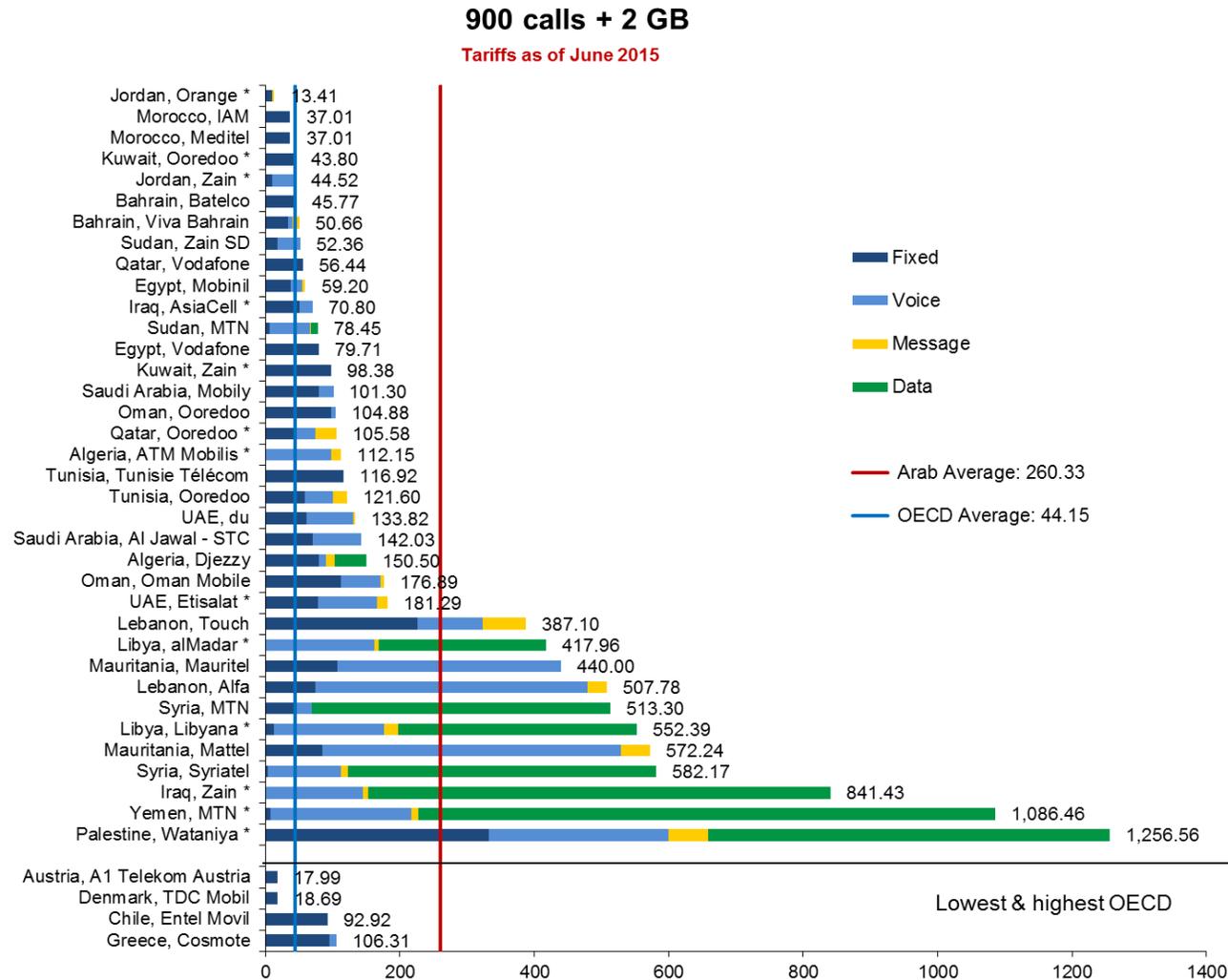
Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.

The data charges shown on the graph refer to overage charges only. Fixed data charges may be embedded in the monthly fixed charges.



900 calls and 2 GB/month basket result based on 2010 OECD mobile basket



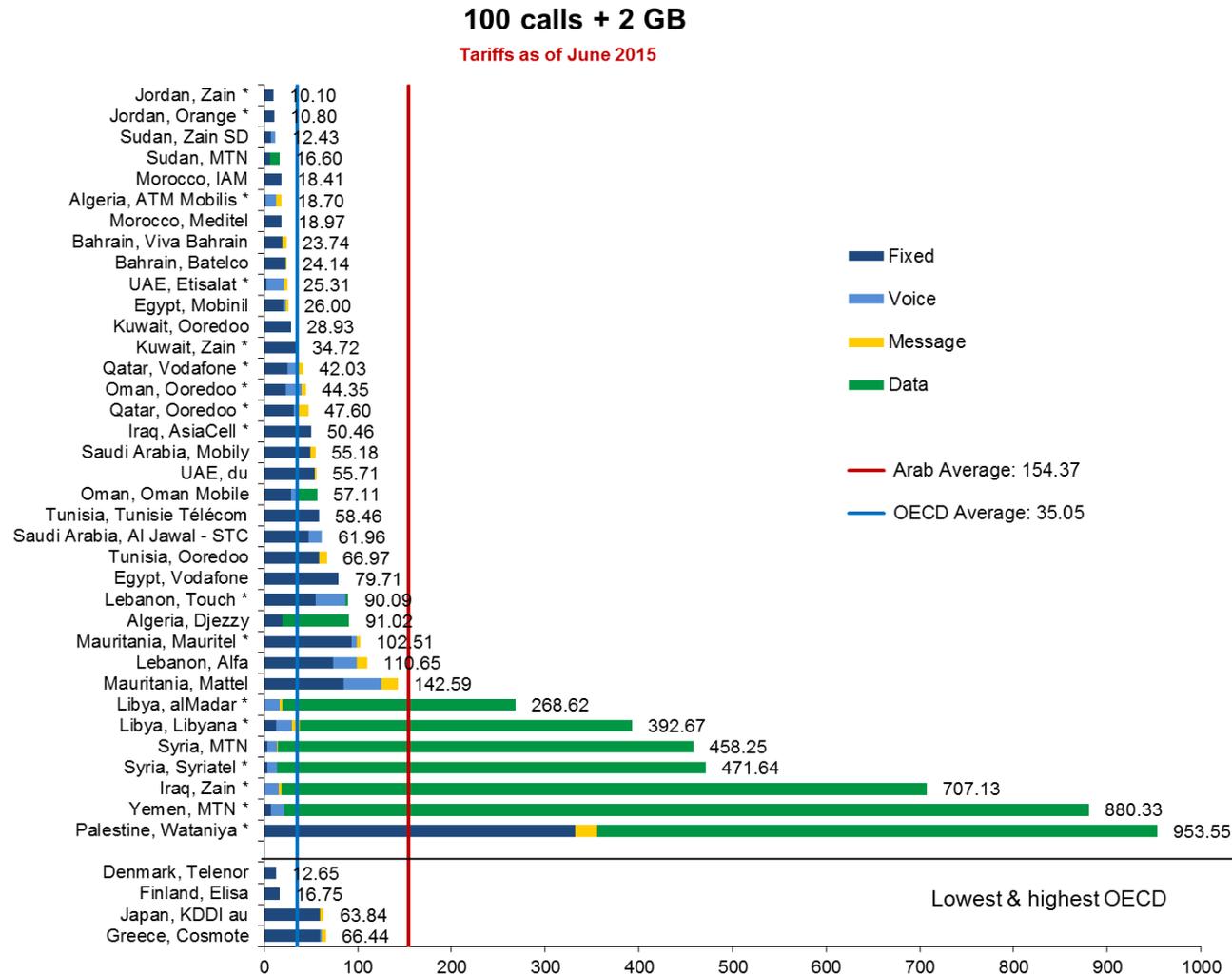
Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.

The data charges shown on the graph refer to overage charges only. Fixed data charges may be embedded in the monthly fixed charges.



100 calls and 2 GB/month basket result based on 2010 OECD mobile basket



Please note:
No data for Djibouti and Somalia.
Selective discounts included.

* marks pre-paid tariffs.

The data charges shown on the graph refer to overage charges only. Fixed data charges may be embedded in the monthly fixed charges.



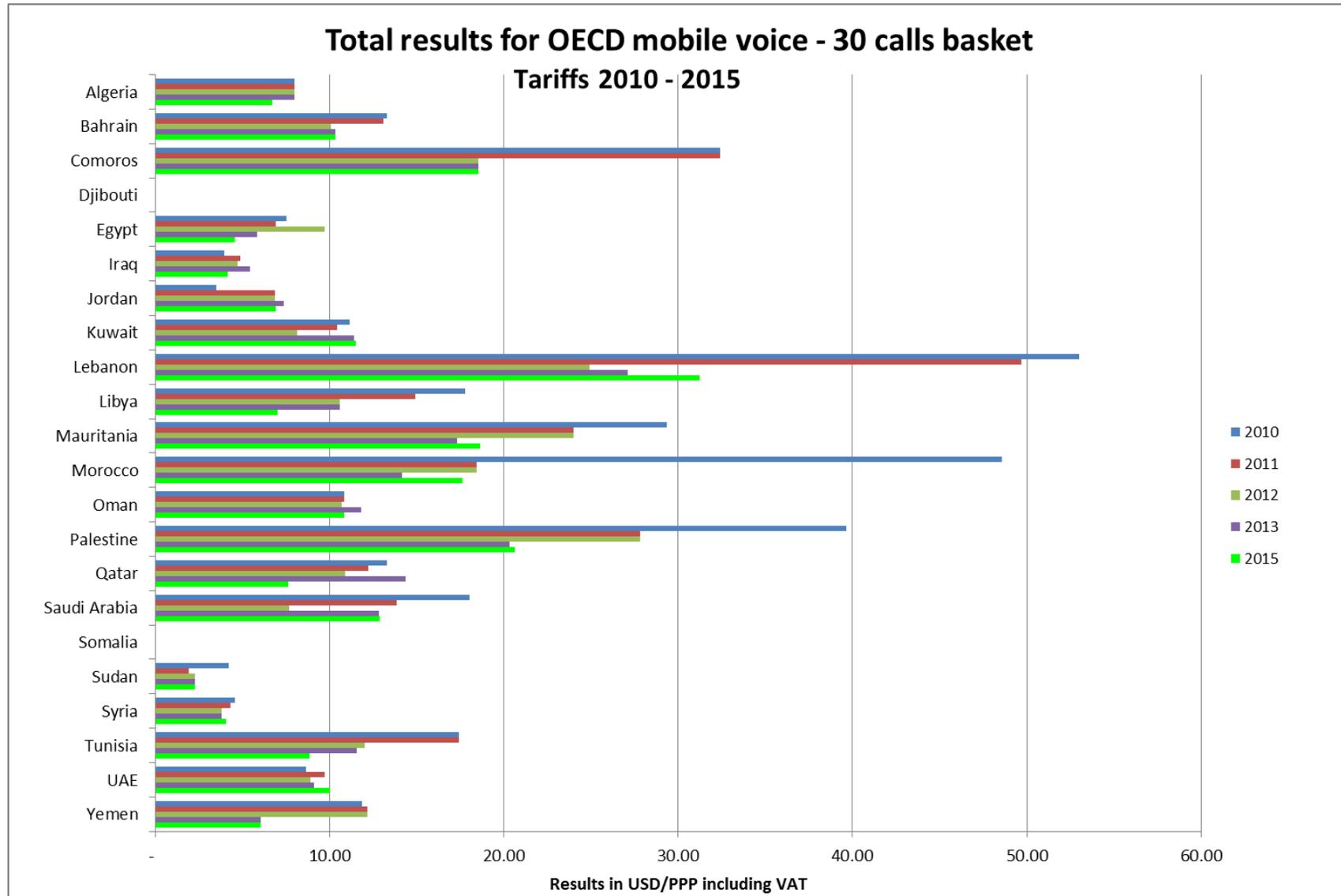
Observations from mobile basket results

- The cheapest countries throughout are :
 - Sudan, Jordan, Egypt, Iraq and Syria
 - The exact order of these may vary with usage level
 - Sudan is often the cheapest or second cheapest, with the exception of the 900 calls basket, where it is fifth cheapest
 - The cheapest countries for mobile are more likely to have the best PSTN results
- For the 30 calls basket, and 40 calls prepaid basket, around half of the Arab countries have price levels below the OECD average.
- For medium to high usage (the 300 and 900 call baskets, and to a lesser extent, the 100 call basket), as well as the 400 messages basket, most Arab countries are above the OECD average
- The average result for the Arab countries is consistently higher than the OECD average across all mobile baskets , with the exception of the 30 calls baskets and 40 calls prepaid basket, where the Arab average is slightly lower than the OECD one.
- For higher usage baskets, the Arab average is significantly higher than that of the OECD; for the 300 calls basket it is almost double, and for the 900 calls basket it is almost four times that of the OECD. For low and mid usage, and for the messages basket, the averages are much more on par
- Baskets which incorporate handset data show a broad variation in price across the Arab providers – the difference becoming more marked for baskets with higher data requirements.
- Similar to the voice baskets, the Arab average for the data baskets is typically much higher than the OECD one, although this is skewed by particularly expensive countries at the upper end.
- Where data costs are shown on the graph, these refer to overage charges or data add-on packages, rather than data included in the basic voice tariff. Where overage charges are higher, the indication is that there is a limited range of data options, and mobile handset data services are much less well established, and are geared only towards very modest use. Over time, these costs should fall significantly, as mobile data use becomes more commonplace, and operators offer more competitively priced tariffs with more data included.
- For both low and high data usage, several countries are much more on par with the OECD average, with countries of note being; Sudan, Bahrain, Jordan, Oman, Morocco, Iraq and Kuwait.
- The number of tariff packages offered by the Arab operators has increased steadily, with the average number of packages per operator increasing from 10.9 in 2011, to 15.6 in 2012, 19.1 in 2013, and 23.2 in 2015.

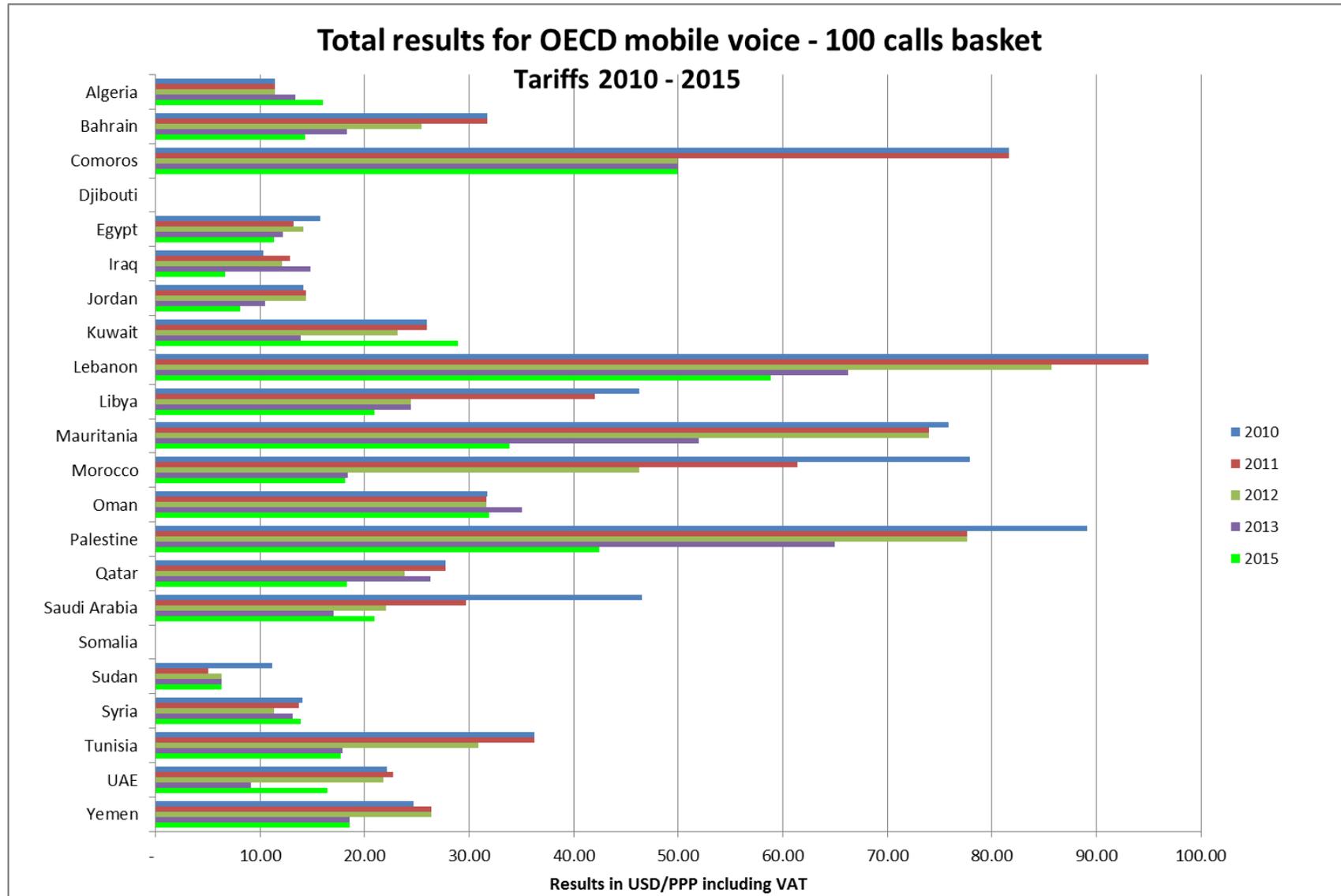


Mobile time series analysis (using OECD 2010 baskets)

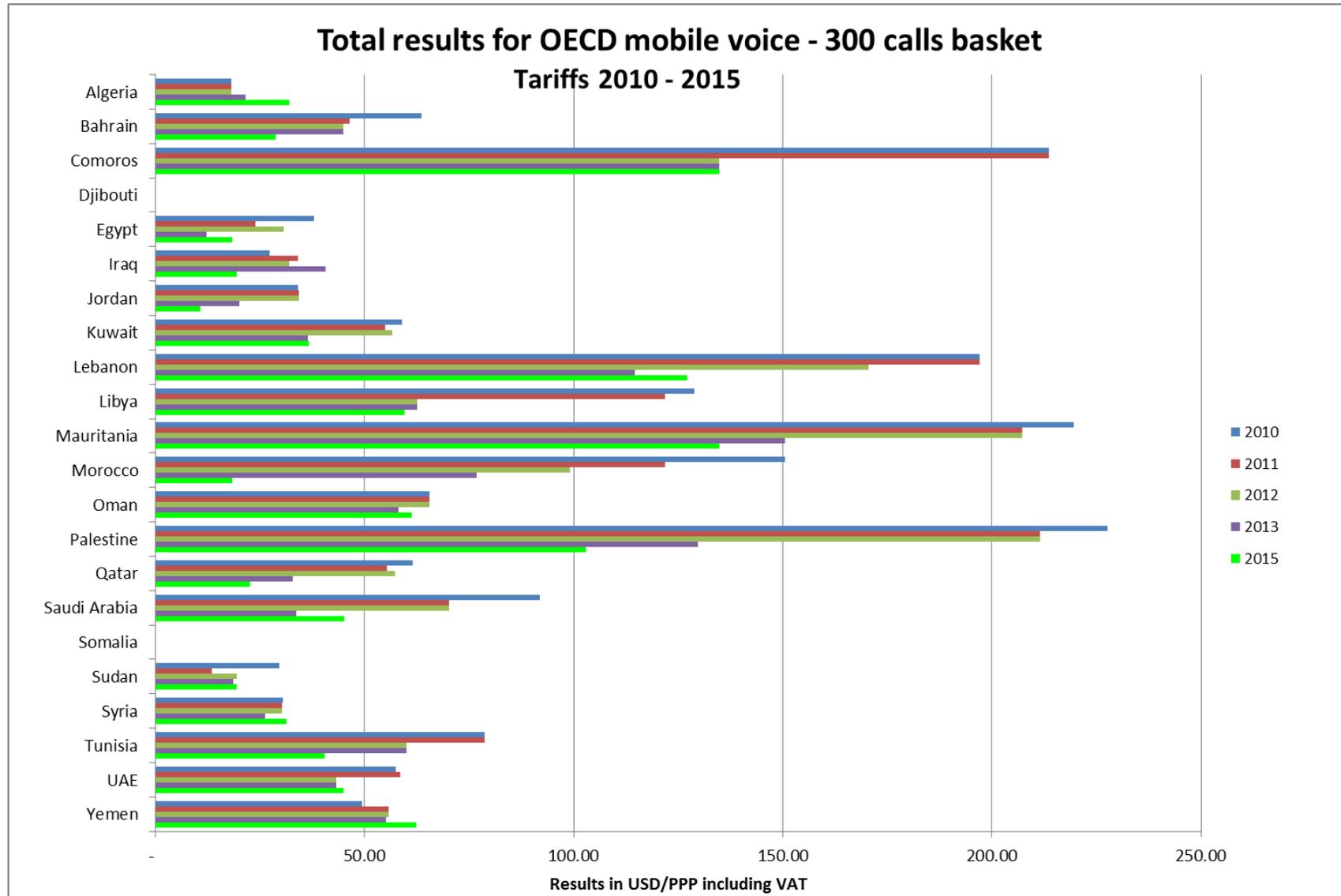
2010 OECD mobile baskets time series, 30 calls/month



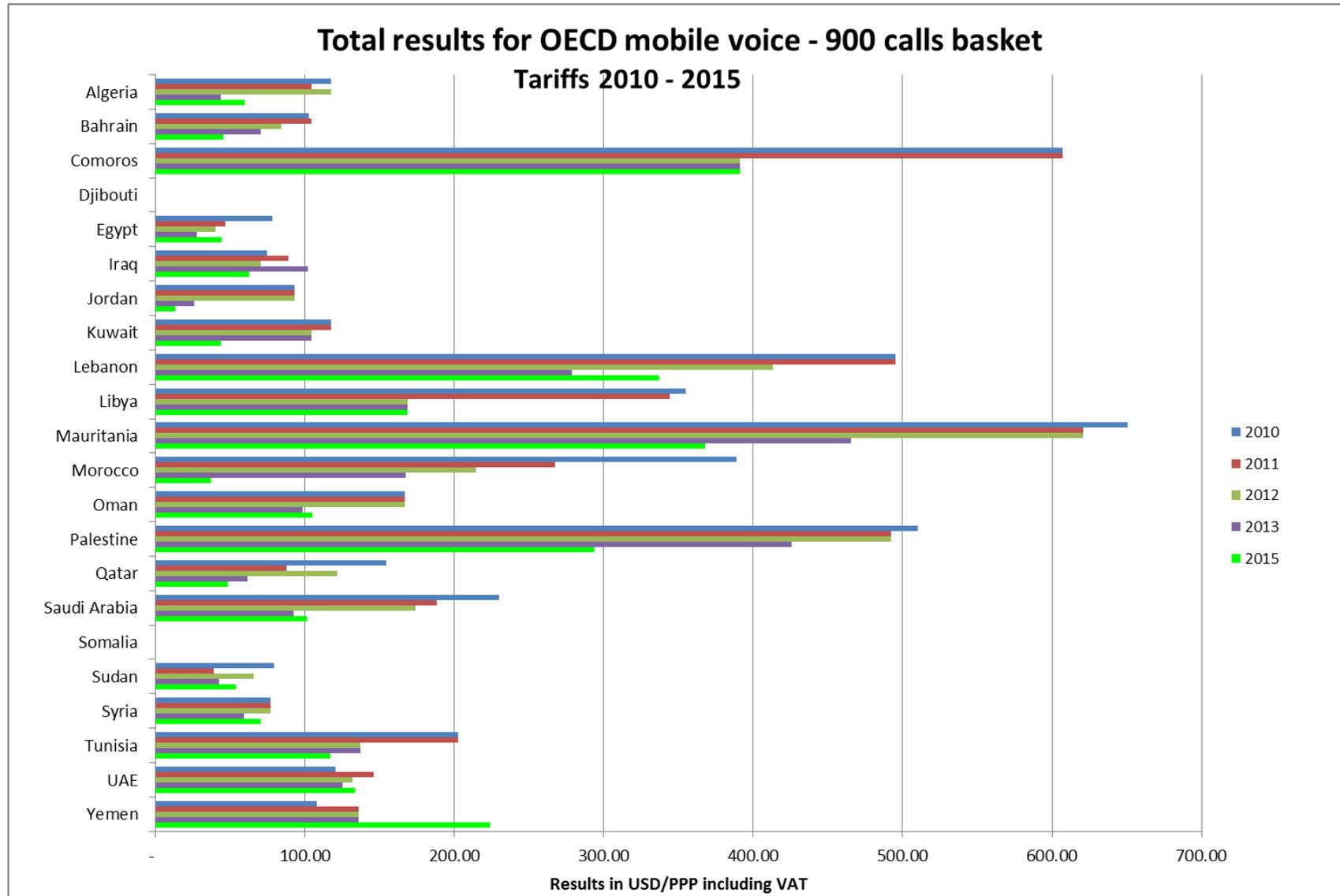
2010 OECD mobile baskets time series, 100 calls/month



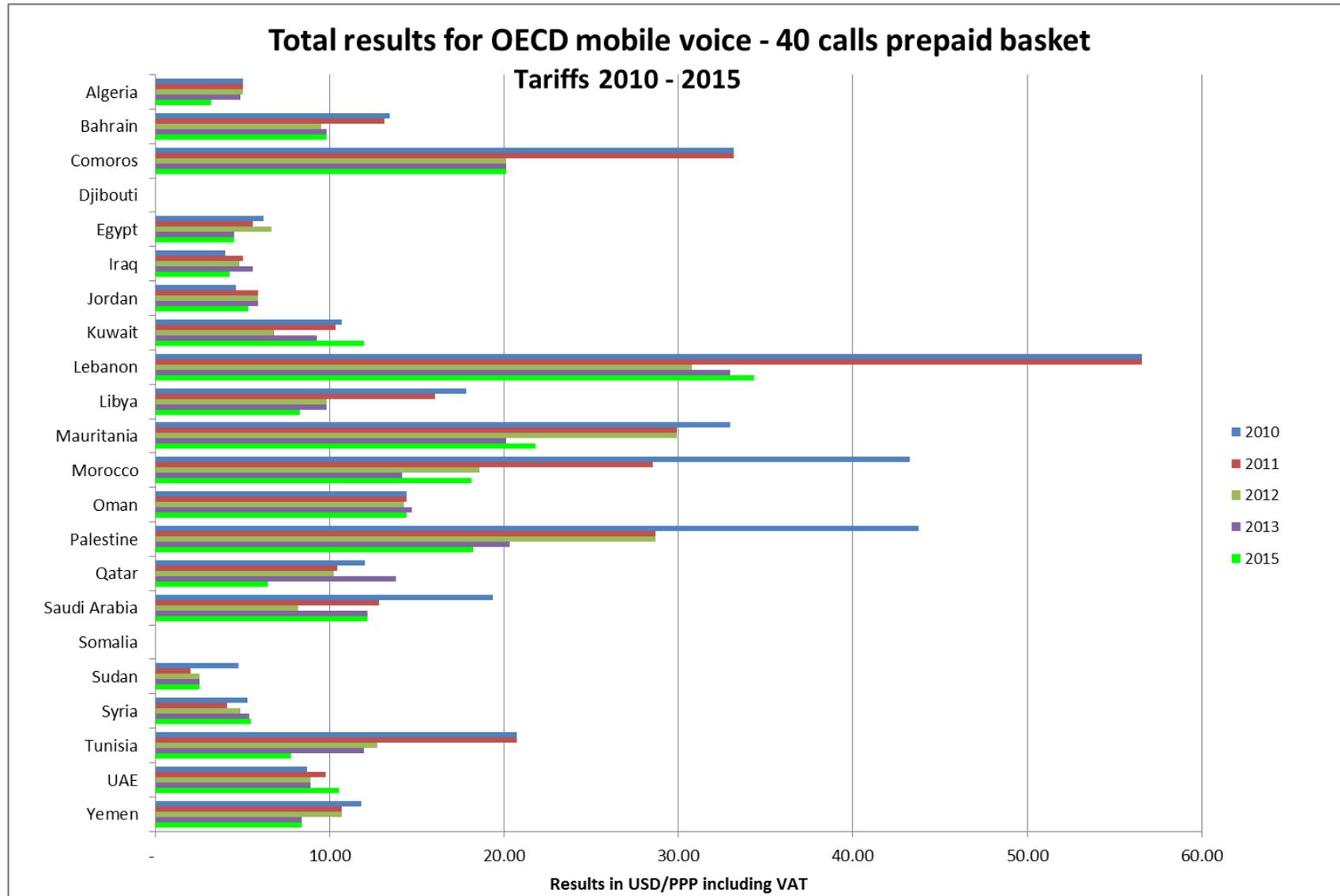
2010 OECD mobile baskets time series, 300 calls/month



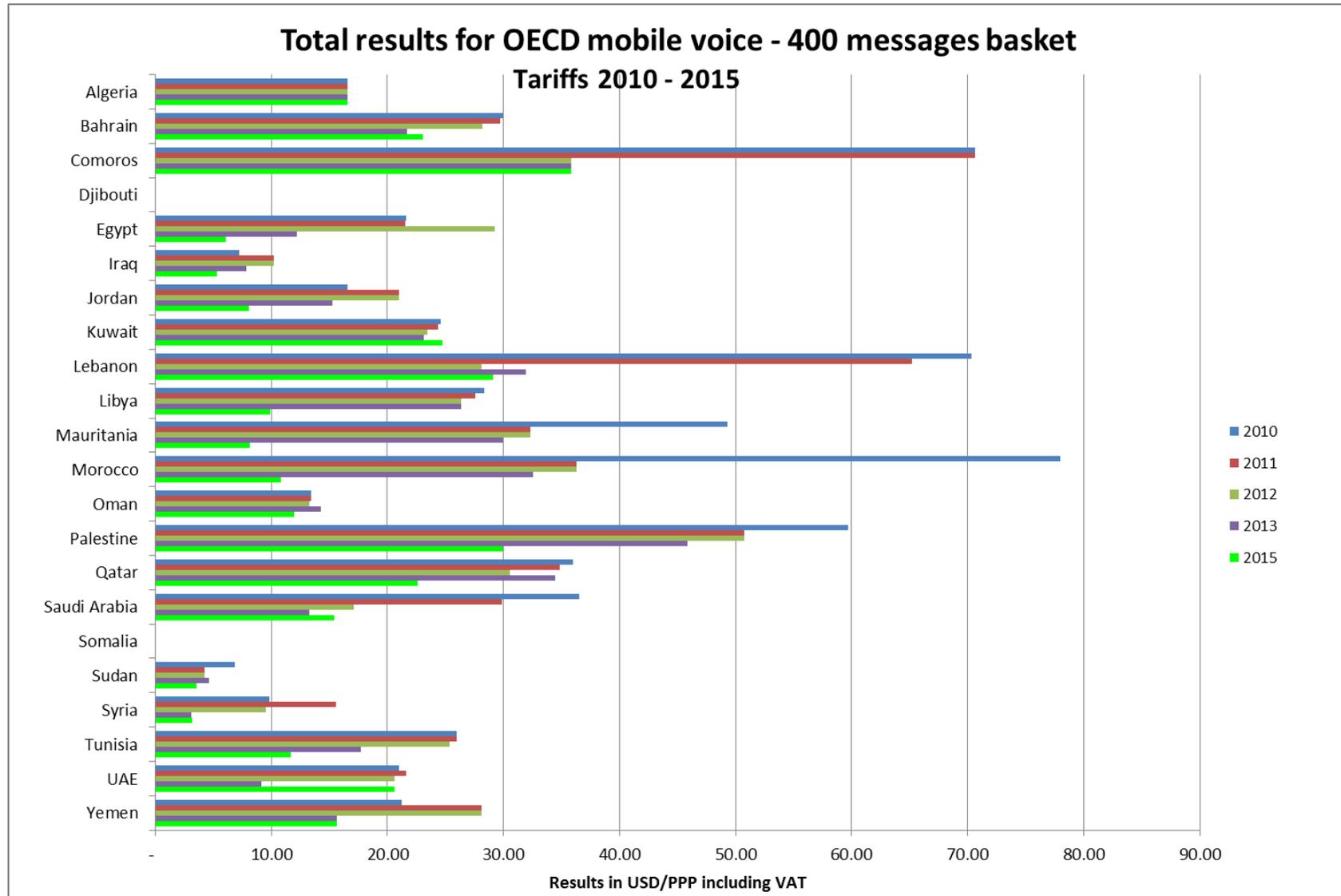
2010 OECD mobile baskets time series, 900 calls/month



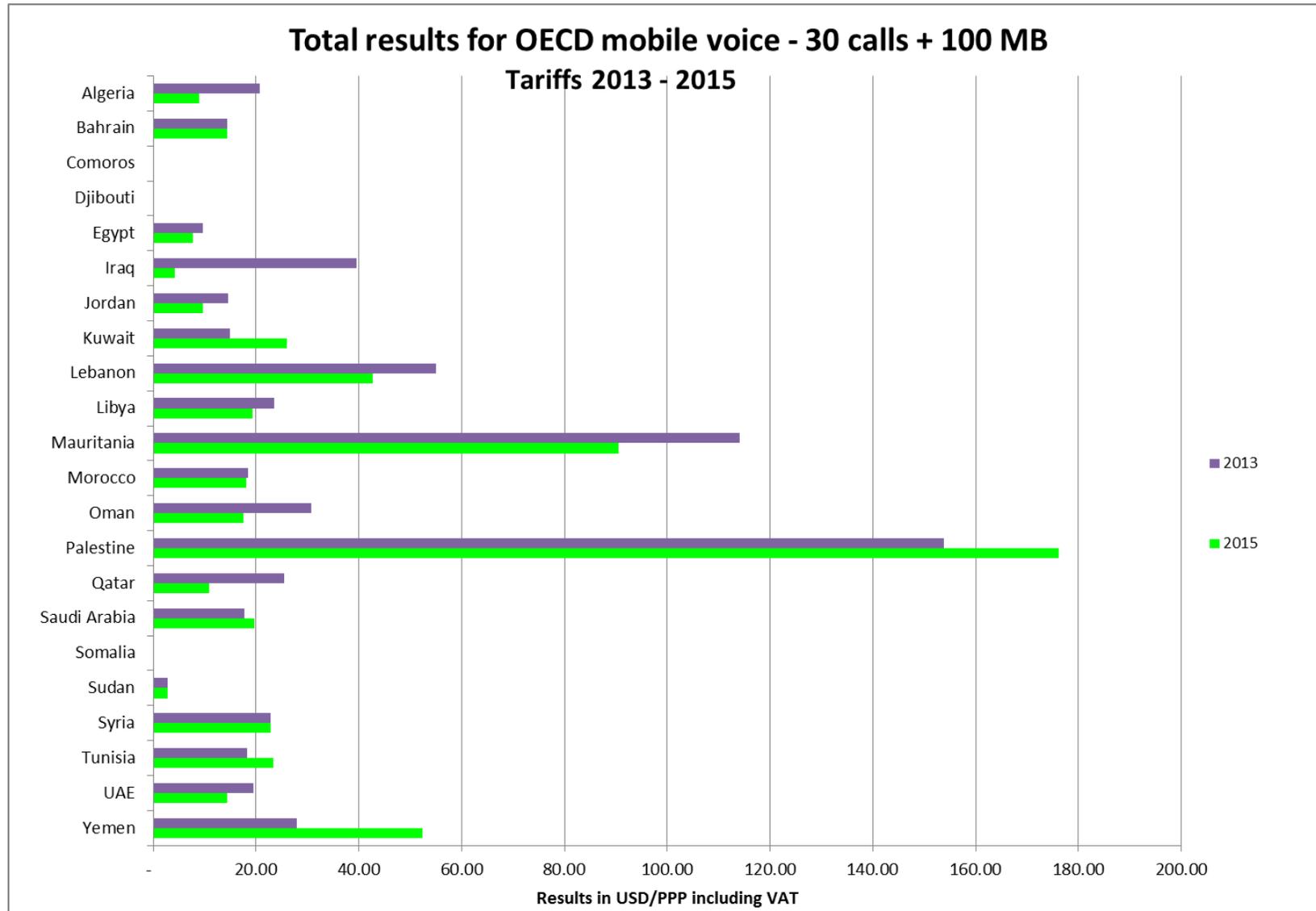
2010 OECD mobile baskets time series, 40 calls/month prepaid



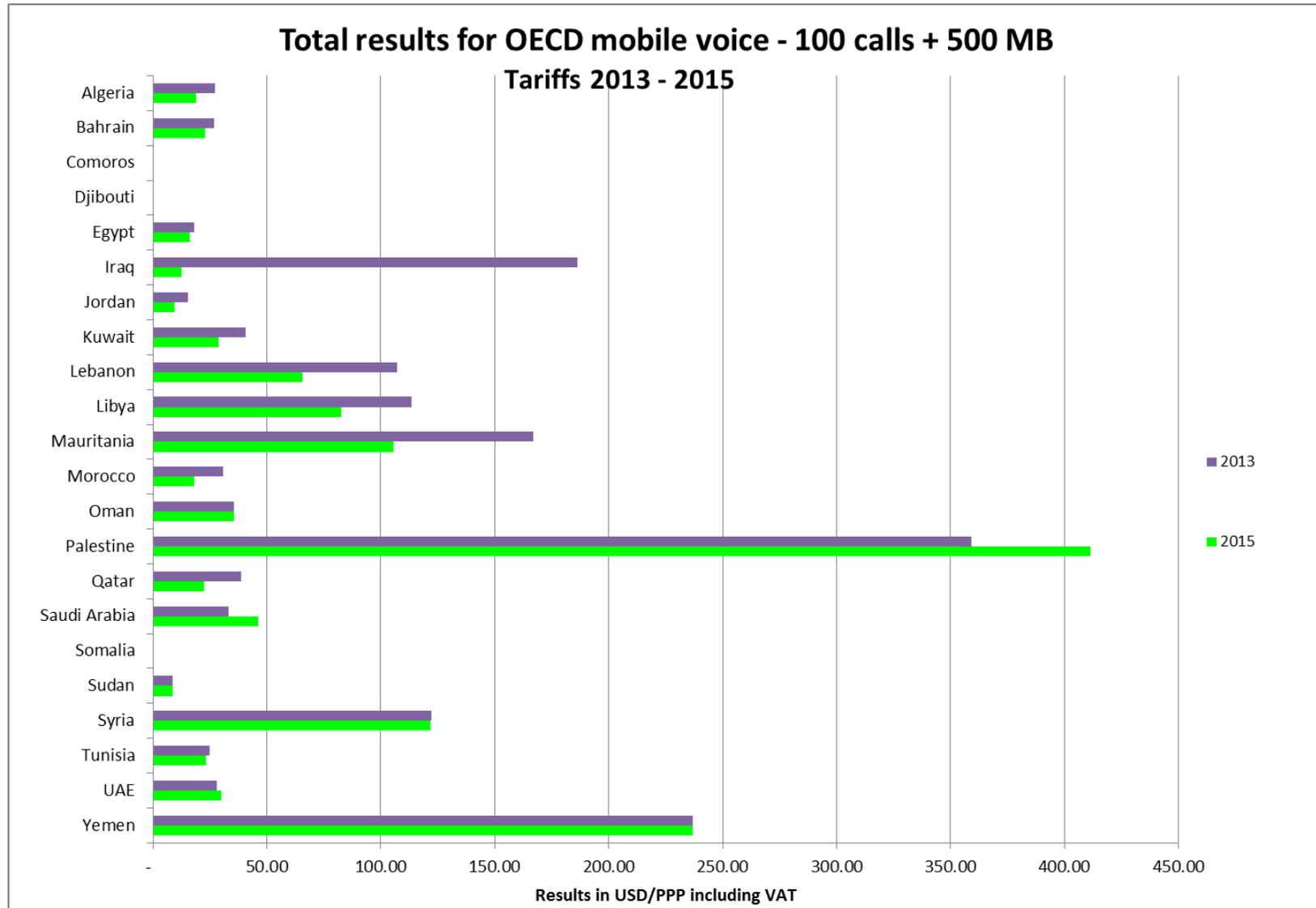
2010 OECD mobile baskets time series, 400 messages/month



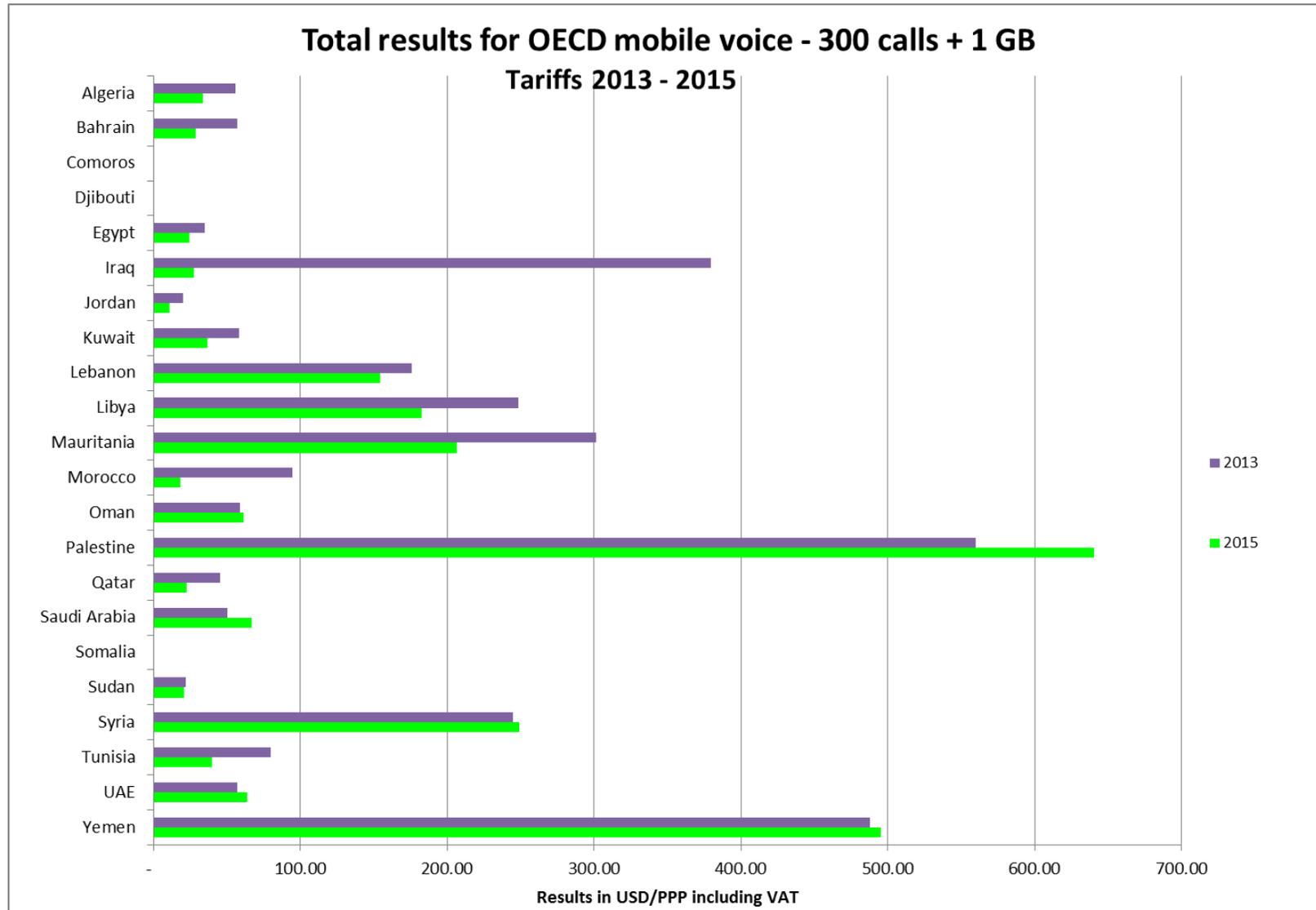
2010 OECD mobile baskets time series, 30 calls + 100 MB/month



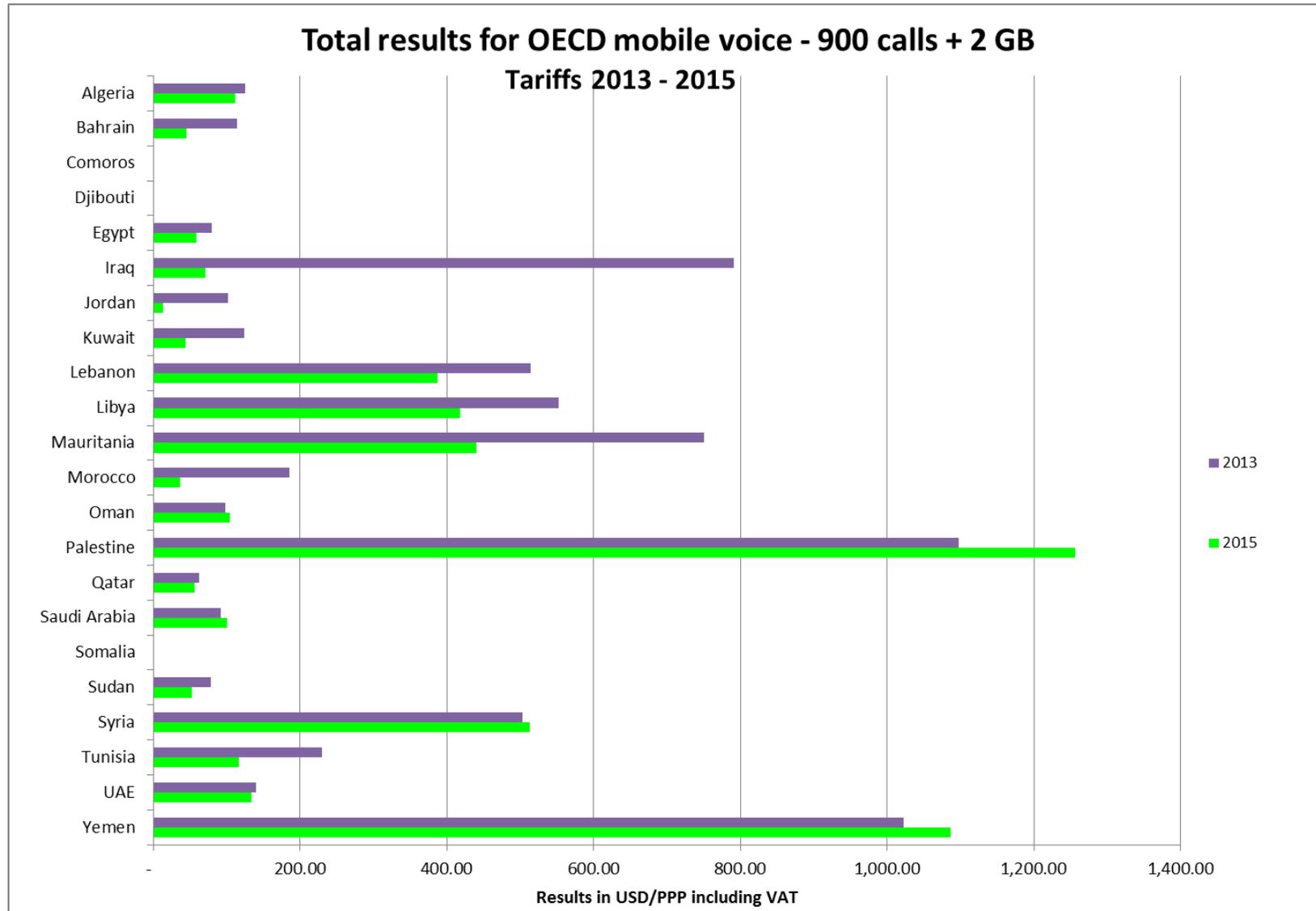
2010 OECD mobile baskets time series, 100 calls + 500 MB/month



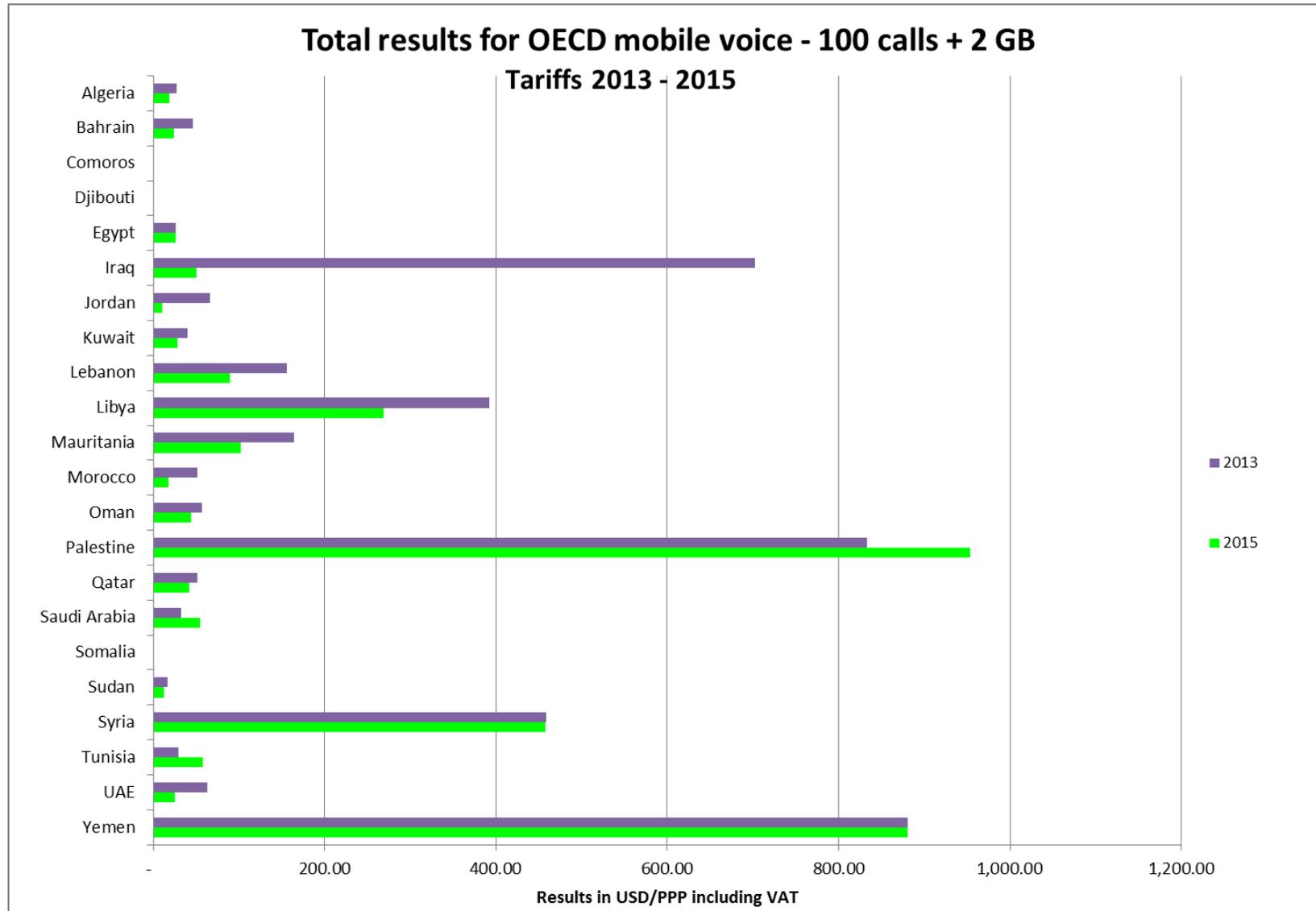
2010 OECD mobile baskets time series, 300 calls + 1GB/month



2010 OECD mobile baskets time series, 900 calls + 2 GB/month



2010 OECD mobile baskets time series, 100 calls + 2 GB/month



Observations from mobile time series results

- The majority of operators across the Arab countries changed and extended their mobile tariff offerings; the average number of packages offered in the Arab countries now stands at just over 23 per operator - an increase of 22% since 2013.
- Most operators introduced new pre- and/or post-paid packages, alongside existing offers. In some cases, the number of new plans was very substantial
 - 3G+ and 4G services are increasingly being rolled out across a number of Arab countries, which has contributed to this. For example, services of 42 Mb/s and above are available in Algeria, Bahrain, Egypt, Jordan, and Kuwait. Not all providers advertise services according to whether they are 3G or 4G, and not all providers publish advertised download speeds.
- Many countries experienced decreases across some or all of the baskets, some of which were very substantial. A handful of countries remained static over the previous year, while some countries experienced increases across a number of baskets.
- The changes are as a result of a number of factors, such as packages no longer being available, and being replaced by alternate packages, either from the same or other operators, or as a result of a rebalancing of tariff elements in the packages – with the overall impact being a fall in prices.
- The average cost of all usage baskets fell, with the higher usage baskets seeing the largest decreases; the 30 calls and 40 calls prepaid baskets both fell by 3% while the other calls baskets fell by between 8-10%. The 400 messages basket saw a very substantial decrease – 22% since 2013.
- The baskets which include handset data also saw significant decreases. With the exception of the 30 calls + 100 MB basket, which fell by 10%, all the baskets saw decreases of between 19 – 24%. This is in line with trends seen in other countries. Data usage is increasingly dramatically, and consequently data is promoted much more actively by operators, with price as a key tool in attracting users.



Mobile ranking tables, 2010-2015

Mobile OECD 30 calls/month basket ranking

Total results for OECD mobile voice - 30 calls basket
Results in USD/PPP including VAT

	2010	2011	2012	2013	2015
Algeria	7.98	7.98	7.98	7.98	6.69
Bahrain	13.30	13.06	10.08	10.35	10.35
Comoros	32.41	32.41	18.52	18.52	18.52
Djibouti					
Egypt	7.50	6.92	9.72	5.85	4.58
Iraq	3.96	4.85	4.71	5.42	4.15
Jordan	3.47	6.88	6.88	7.38	6.91
Kuwait	11.16	10.41	8.11	11.40	11.52
Lebanon	53.02	49.70	24.93	27.11	31.21
Libya	17.75	14.91	10.58	10.58	7.02
Mauritania	29.37	24.01	24.01	17.34	18.63
Morocco	48.56	18.41	18.41	14.14	17.60
Oman	10.85	10.85	10.69	11.83	10.86
Palestine	39.66	27.84	27.84	20.33	20.61
Qatar	13.27	12.23	10.89	14.38	7.60
Saudi Arabia	18.05	13.85	7.70	12.82	12.87
Somalia					
Sudan	4.23	1.92	2.28	2.28	2.28
Syria	4.56	4.29	3.80	3.80	4.06
Tunisia	17.42	17.42	12.03	11.54	8.85
UAE	8.64	9.69	8.92	9.10	10.00
Yemen	11.88	12.16	12.16	6.05	6.05

Arab average	17.85	14.99	12.01	11.41	11.02
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Below Arab average
 Above Arab average

Ranking for OECD mobile 30 calls basket

	2010	2011	2012	2013	2015
Algeria	6	6	6	7	6
Bahrain	12	12	10	9	12
Comoros	17	19	17	18	17
Djibouti	-	-	-	-	-
Egypt	5	5	9	4	4
Iraq	2	3	3	3	3
Jordan	1	4	4	6	7
Kuwait	9	8	7	11	14
Lebanon	20	20	19	20	20
Libya	14	14	11	10	8
Mauritania	16	17	18	17	18
Morocco	19	16	16	15	16
Oman	8	9	12	13	13
Palestine	18	18	20	19	19
Qatar	11	11	13	16	9
Saudi Arabia	15	13	5	14	15
Somalia	-	-	-	-	-
Sudan	3	1	1	1	1
Syria	4	2	2	2	2
Tunisia	13	15	14	12	10
UAE	7	7	8	8	11
Yemen	10	10	15	5	5

Least expensive
 Most expensive

Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries



Mobile OECD 100 calls/month basket ranking

Total results for OECD mobile voice - 100 calls basket
Results in USD/PPP including VAT

	2010	2011	2012	2013	2015
Algeria	11.40	11.40	11.40	13.37	16.06
Bahrain	31.75	31.75	25.43	18.31	14.34
Comoros	81.67	81.67	49.95	49.95	49.95
Djibouti					
Egypt	15.79	13.18	14.19	12.22	11.39
Iraq	10.34	12.91	12.07	14.80	6.71
Jordan	14.19	14.38	14.38	10.46	8.08
Kuwait	25.97	25.97	23.17	13.89	28.93
Lebanon	95.00	95.00	85.72	66.28	58.87
Libya	46.29	42.02	24.46	24.46	20.94
Mauritania	75.83	74.01	74.01	51.93	33.86
Morocco	77.88	61.38	46.29	18.41	18.13
Oman	31.78	31.70	31.70	35.02	31.94
Palestine	89.14	77.66	77.66	64.94	42.47
Qatar	27.77	27.77	23.81	26.34	18.35
Saudi Arabia	46.51	29.72	22.08	17.02	20.95
Somalia					
Sudan	11.21	5.05	6.29	6.29	6.29
Syria	14.07	13.70	11.35	13.11	13.91
Tunisia	36.21	36.21	30.93	17.86	17.70
UAE	22.11	22.76	21.79	9.10	16.46
Yemen	24.70	26.43	26.43	18.56	18.56

Arab average	39.48	36.73	31.66	25.12	22.69
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■ Below Arab average
■ Above Arab average

Ranking for OECD mobile 100 calls basket

	2010	2011	2012	2013	2015
Algeria	3	2	3	6	7
Bahrain	11	13	12	11	6
Comoros	18	19	17	17	19
Djibouti	-	-	-	-	-
Egypt	6	4	5	4	4
Iraq	1	3	4	8	2
Jordan	5	6	6	3	3
Kuwait	9	8	9	7	15
Lebanon	20	20	20	20	20
Libya	14	15	11	14	13
Mauritania	16	17	18	18	17
Morocco	17	16	16	12	10
Oman	12	12	15	16	16
Palestine	19	18	19	19	18
Qatar	10	10	10	15	11
Saudi Arabia	15	11	8	9	14
Somalia	-	-	-	-	-
Sudan	2	1	1	1	1
Syria	4	5	2	5	5
Tunisia	13	14	14	10	9
UAE	7	7	7	2	8
Yemen	8	9	13	13	12

■ Least expensive
■ Most expensive

Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries



Mobile OECD 300 calls/month basket ranking

Total results for OECD mobile voice - 300 calls basket
Results in USD/PPP including VAT

	2010	2011	2012	2013	2015
Algeria	18.19	18.19	18.19	21.56	31.94
Bahrain	63.56	46.48	45.02	44.94	28.75
Comoros	213.73	213.73	134.92	134.92	134.92
Djibouti					
Egypt	37.91	23.92	30.62	12.22	18.33
Iraq	27.27	34.14	32.05	40.76	19.45
Jordan	34.11	34.30	34.30	20.04	10.80
Kuwait	59.06	54.97	56.73	36.47	36.61
Lebanon	196.99	196.99	170.56	114.58	127.21
Libya	128.86	121.86	62.59	62.59	59.64
Mauritania	219.61	207.19	207.19	150.45	134.86
Morocco	150.63	121.77	99.05	76.80	18.41
Oman	65.65	65.57	65.57	58.08	61.36
Palestine	227.63	211.60	211.60	129.62	103.04
Qatar	61.53	55.36	57.24	32.74	22.58
Saudi Arabia	91.83	70.17	70.17	33.58	45.07
Somalia					
Sudan	29.63	13.47	19.37	18.67	19.37
Syria	30.41	30.31	30.31	26.33	31.24
Tunisia	78.66	78.66	59.92	59.92	40.41
UAE	57.38	58.58	43.27	43.26	44.92
Yemen	49.43	55.82	55.82	55.19	62.28

Arab average	92.10	85.65	75.22	58.64	52.56
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Below Arab average
 Above Arab average

Ranking for OECD mobile 300 calls basket

	2010	2011	2012	2013	2015
Algeria	1	2	1	4	9
Bahrain	11	7	8	11	7
Comoros	18	20	17	19	20
Djibouti	-	-	-	-	-
Egypt	6	3	4	1	2
Iraq	2	5	5	9	5
Jordan	5	6	6	3	1
Kuwait	9	8	10	8	10
Lebanon	17	17	18	17	18
Libya	15	16	13	15	14
Mauritania	19	18	19	20	19
Morocco	16	15	16	16	3
Oman	12	12	14	13	15
Palestine	20	19	20	18	17
Qatar	10	9	11	6	6
Saudi Arabia	14	13	15	7	13
Somalia	-	-	-	-	-
Sudan	3	1	2	2	4
Syria	4	4	3	5	8
Tunisia	13	14	12	14	11
UAE	8	11	7	10	12
Yemen	7	10	9	12	16

Least expensive
 Most expensive

Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries



Mobile OECD 900 calls/month basket ranking

Total results for OECD mobile voice - 900 calls basket
Results in USD/PPP including VAT

	2010	2011	2012	2013	2015
Algeria	117.39	104.26	117.39	43.91	59.88
Bahrain	102.80	104.49	84.12	70.54	45.77
Comoros	607.14	607.14	391.18	391.18	391.18
Djibouti					
Egypt	77.97	46.58	40.25	27.50	44.59
Iraq	74.51	88.91	70.35	101.85	62.95
Jordan	93.02	93.21	93.21	26.12	13.41
Kuwait	117.56	117.56	104.16	104.16	43.80
Lebanon	495.17	495.17	412.90	278.46	337.13
Libya	354.94	344.06	168.93	168.93	168.93
Mauritania	650.80	620.81	620.81	465.47	368.14
Morocco	388.86	267.62	214.58	167.74	37.01
Oman	167.15	167.07	167.07	98.54	104.83
Palestine	510.41	492.40	492.40	425.73	293.48
Qatar	154.19	87.74	121.70	61.46	48.64
Saudi Arabia	229.84	188.55	173.86	92.51	101.30
Somalia					
Sudan	79.21	38.75	66.03	42.57	53.70
Syria	77.27	77.16	77.16	59.04	70.28
Tunisia	202.51	202.51	137.38	137.38	116.92
UAE	120.76	145.89	131.52	125.53	133.82
Yemen	107.87	135.96	135.96	135.96	223.84

Ranking for OECD mobile 900 calls basket

	2010	2011	2012	2013	2015
Algeria	8	7	8	4	8
Bahrain	6	8	5	7	5
Comoros	19	19	17	18	20
Djibouti	-	-	-	-	-
Egypt	3	2	1	2	4
Iraq	1	5	3	10	9
Jordan	5	6	6	1	1
Kuwait	9	9	7	11	3
Lebanon	17	18	18	17	18
Libya	15	16	14	16	15
Mauritania	20	20	20	20	19
Morocco	16	15	16	15	2
Oman	12	12	13	9	12
Palestine	18	17	19	19	17
Qatar	11	4	9	6	6
Saudi Arabia	14	13	15	8	11
Somalia	-	-	-	-	-
Sudan	4	1	2	3	7
Syria	2	3	4	5	10
Tunisia	13	14	12	14	13
UAE	10	11	10	12	14
Yemen	7	10	11	13	16

Arab average	236.47	221.29	191.05	151.23	135.98
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Below Arab average
 Above Arab average

Least expensive
 Most expensive

Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries



Mobile OECD 40 calls/month prepaid basket ranking

Total results for OECD mobile voice - 40 calls prepaid basket
Results in USD/PPP including VAT

Ranking for OECD mobile 40 calls prepaid basket

	2010	2011	2012	2013	2015
Algeria	5.01	5.01	5.01	4.88	3.19
Bahrain	13.45	13.11	9.53	9.83	9.83
Comoros	33.20	33.20	20.12	20.12	20.12
Djibouti					
Egypt	6.21	5.57	6.64	4.53	4.53
Iraq	4.00	5.01	4.80	5.59	4.26
Jordan	4.61	5.90	5.90	5.87	5.35
Kuwait	10.71	10.32	6.83	9.26	11.94
Lebanon	56.60	56.60	30.76	32.97	34.33
Libya	17.81	16.05	9.80	9.80	8.28
Mauritania	32.96	29.91	29.91	20.14	21.80
Morocco	43.29	28.55	18.60	14.14	18.13
Oman	14.39	14.39	14.23	14.70	14.41
Palestine	43.78	28.66	28.66	20.33	18.21
Qatar	12.02	10.41	10.22	13.81	6.45
Saudi Arabia	19.34	12.80	8.16	12.14	12.19
Somalia					
Sudan	4.77	2.00	2.52	2.52	2.52
Syria	5.29	4.10	4.88	5.38	5.47
Tunisia	20.74	20.74	12.70	11.96	7.78
UAE	8.72	9.77	8.92	8.92	10.53
Yemen	11.82	10.68	10.68	8.39	8.39

	2010	2011	2012	2013	2015
Algeria	4	3	4	3	2
Bahrain	11	12	10	11	11
Comoros	17	19	17	17	18
Djibouti	-	-	-	-	-
Egypt	6	5	6	2	4
Iraq	1	4	2	5	3
Jordan	2	6	5	6	5
Kuwait	8	8	7	9	13
Lebanon	20	20	20	20	20
Libya	13	14	11	10	9
Mauritania	16	18	19	18	19
Morocco	18	16	16	15	16
Oman	12	13	15	16	15
Palestine	19	17	18	19	17
Qatar	10	9	12	14	7
Saudi Arabia	14	11	8	13	14
Somalia	-	-	-	-	-
Sudan	3	1	1	1	1
Syria	5	2	3	4	6
Tunisia	15	15	14	12	8
UAE	7	7	9	8	12
Yemen	9	10	13	7	10

Arab average	18.44	16.14	12.44	11.76	11.39
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■ Below Arab average
■ Above Arab average

Least expensive
 Most expensive

Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries



Mobile OECD 400 messages/month basket ranking

Total results for OECD mobile voice - 400 messages basket
Results in USD/PPP including VAT

	2010	2011	2012	2013	2015
Algeria	16.59	16.59	16.59	16.59	16.59
Bahrain	29.98	29.74	28.20	21.66	23.08
Comoros	70.63	70.63	35.83	35.83	35.83
Djibouti					
Egypt	21.62	21.50	29.23	12.22	6.11
Iraq	7.24	10.22	10.19	7.86	5.35
Jordan	16.57	20.98	20.98	15.23	8.08
Kuwait	24.61	24.39	23.43	23.15	24.73
Lebanon	70.37	65.22	28.09	31.91	29.10
Libya	28.31	27.55	26.33	26.33	9.91
Mauritania	49.26	32.28	32.28	29.93	8.11
Morocco	78.02	36.26	36.26	32.51	10.80
Oman	13.42	13.42	13.26	14.24	11.96
Palestine	59.69	50.78	50.78	45.88	29.91
Qatar	35.99	34.83	30.57	34.49	22.58
Saudi Arabia	36.53	29.89	17.08	13.25	15.43
Somalia					
Sudan	6.84	4.23	4.25	4.61	3.59
Syria	9.84	15.58	9.54	3.11	3.20
Tunisia	25.96	25.96	25.34	17.70	11.69
UAE	20.96	21.61	20.65	9.10	20.61
Yemen	21.23	28.11	28.11	15.63	15.63

Arab average	32.18	28.99	24.35	20.56	15.62
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■ Below Arab average
■ Above Arab average

Ranking for OECD mobile 400 messages basket

	2010	2011	2012	2013	2015
Algeria	6	5	5	10	13
Bahrain	13	13	14	12	16
Comoros	19	20	18	19	20
Djibouti	-	-	-	-	-
Egypt	9	7	15	5	4
Iraq	2	2	3	3	3
Jordan	5	6	8	8	5
Kuwait	10	9	9	13	17
Lebanon	18	19	12	16	18
Libya	12	11	11	14	7
Mauritania	16	15	17	15	6
Morocco	20	17	19	17	8
Oman	4	3	4	7	10
Palestine	17	18	20	20	19
Qatar	14	16	16	18	15
Saudi Arabia	15	14	6	6	11
Somalia	-	-	-	-	-
Sudan	1	1	1	2	2
Syria	3	4	2	1	1
Tunisia	11	10	10	11	9
UAE	7	8	7	4	14
Yemen	8	12	13	9	12

■ Least expensive
■ Most expensive

Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries



Mobile OECD 30 calls + 100MB/month basket ranking

Total results for OECD mobile voice - 30 calls + 100 MB basket
Results in USD/PPP including VAT

	2013	2015
Algeria	20.76	9.03
Bahrain	14.34	14.34
Comoros		
Djibouti		
Egypt	9.58	7.72
Iraq	39.56	4.15
Jordan	14.54	9.59
Kuwait	14.87	25.99
Lebanon	55.06	42.66
Libya	23.50	19.34
Mauritania	114.03	90.50
Morocco	18.41	18.13
Oman	30.79	17.52
Palestine	153.85	176.16
Qatar	25.54	10.84
Saudi Arabia	17.79	19.65
Somalia		
Sudan	2.78	2.78
Syria	22.88	22.85
Tunisia	18.36	23.38
UAE	19.49	14.44
Yemen	28.02	52.37

Arab average	33.90	30.60
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Below Arab average
 Above Arab average

Ranking for OECD mobile 30 calls + 100 MB basket

	2013	2015
Algeria	10	4
Bahrain	3	7
Comoros	-	-
Djibouti	-	-
Egypt	2	3
Iraq	16	2
Jordan	4	5
Kuwait	5	15
Lebanon	17	16
Libya	12	11
Mauritania	18	18
Morocco	8	10
Oman	15	9
Palestine	19	19
Qatar	13	6
Saudi Arabia	6	12
Somalia	-	-
Sudan	1	1
Syria	11	13
Tunisia	7	14
UAE	9	8
Yemen	14	17

Least expensive
 Most expensive



Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries

Mobile OECD 100 calls + 500MB/month basket ranking

Total results for OECD mobile voice - 100 calls + 500 MB basket
Results in USD/PPP including VAT

	2013	2015
Algeria	27.15	19.16
Bahrain	26.82	22.84
Comoros		
Djibouti		
Egypt	18.37	16.08
Iraq	186.27	12.76
Jordan	15.23	9.59
Kuwait	40.81	28.93
Lebanon	107.09	65.79
Libya	113.52	82.75
Mauritania	166.91	105.72
Morocco	30.66	18.13
Oman	35.41	35.41
Palestine	359.15	411.23
Qatar	38.88	22.58
Saudi Arabia	33.07	46.11
Somalia		
Sudan	8.87	8.87
Syria	122.38	121.98
Tunisia	24.88	23.38
UAE	28.03	30.05
Yemen	236.73	236.73

Arab average	85.28	69.37
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Below Arab average
 Above Arab average

Ranking for OECD mobile 100 calls + 500 MB basket

	2013	2015
Algeria	6	6
Bahrain	5	8
Comoros	-	-
Djibouti	-	-
Egypt	3	4
Iraq	17	3
Jordan	2	2
Kuwait	12	10
Lebanon	13	14
Libya	14	15
Mauritania	16	16
Morocco	8	5
Oman	10	12
Palestine	19	19
Qatar	11	7
Saudi Arabia	9	13
Somalia	-	-
Sudan	1	1
Syria	15	17
Tunisia	4	9
UAE	7	11
Yemen	18	18

Least expensive
 Most expensive



Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries

Mobile OECD 300 calls + 1GB/month basket ranking

Total results for OECD mobile voice - 300 calls + 1 GB basket
Results in USD/PPP including VAT

	2013	2015
Algeria	55.89	33.53
Bahrain	57.22	28.75
Comoros		
Djibouti		
Egypt	35.33	24.31
Iraq	379.74	27.78
Jordan	20.04	10.80
Kuwait	58.35	36.61
Lebanon	175.78	154.34
Libya	248.57	182.83
Mauritania	301.53	206.73
Morocco	94.84	18.41
Oman	58.75	61.36
Palestine	559.65	640.80
Qatar	45.28	22.58
Saudi Arabia	50.44	66.91
Somalia		
Sudan	22.24	20.86
Syria	244.87	249.35
Tunisia	80.19	40.03
UAE	57.27	64.15
Yemen	488.18	495.27

Arab average	159.69	125.55
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■ Below Arab average
■ Above Arab average

Ranking for OECD mobile 300 calls + 1 GB basket

	2013	2015
Algeria	6	8
Bahrain	7	7
Comoros	-	-
Djibouti	-	-
Egypt	3	5
Iraq	17	6
Jordan	1	1
Kuwait	9	9
Lebanon	13	14
Libya	15	15
Mauritania	16	16
Morocco	12	2
Oman	10	11
Palestine	19	19
Qatar	4	4
Saudi Arabia	5	13
Somalia	-	-
Sudan	2	3
Syria	14	17
Tunisia	11	10
UAE	8	12
Yemen	18	18

■ Least expensive
■ Most expensive



Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries

Mobile OECD 900 calls + 2GB/month basket ranking

Total results for OECD mobile voice - 900 calls + 2 GB basket
Results in USD/PPP including VAT

	2013	2015
Algeria	125.59	112.15
Bahrain	113.84	45.77
Comoros		
Djibouti		
Egypt	79.71	59.20
Iraq	790.80	70.80
Jordan	102.15	13.41
Kuwait	124.82	43.80
Lebanon	513.74	387.10
Libya	552.39	417.96
Mauritania	750.21	440.00
Morocco	186.34	37.01
Oman	98.54	104.88
Palestine	1097.43	1256.56
Qatar	62.71	56.44
Saudi Arabia	92.51	101.30
Somalia		
Sudan	78.45	52.36
Syria	503.16	513.30
Tunisia	229.87	116.92
UAE	140.16	133.82
Yemen	1023.00	1086.46

Arab average	350.81	265.75
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Below Arab average
 Above Arab average

Ranking for OECD mobile 900 calls + 2 GB basket

	2013	2015
Algeria	9	11
Bahrain	7	4
Comoros	-	-
Djibouti	-	-
Egypt	3	7
Iraq	17	8
Jordan	6	1
Kuwait	8	3
Lebanon	14	14
Libya	15	15
Mauritania	16	16
Morocco	11	2
Oman	5	10
Palestine	19	19
Qatar	1	6
Saudi Arabia	4	9
Somalia	-	-
Sudan	2	5
Syria	13	17
Tunisia	12	12
UAE	10	13
Yemen	18	18

Least expensive
 Most expensive



Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries

Mobile OECD 100 calls + 2GB/month basket ranking

Total results for OECD mobile voice - 100 calls + 2 GB basket
Results in USD/PPP including VAT

	2013	2015
Algeria	27.15	18.70
Bahrain	46.67	23.74
Comoros		
Djibouti		
Egypt	26.01	26.00
Iraq	702.38	50.46
Jordan	66.04	10.10
Kuwait	40.02	28.93
Lebanon	155.96	90.09
Libya	392.67	268.62
Mauritania	164.73	102.51
Morocco	51.77	18.41
Oman	57.11	44.35
Palestine	832.80	953.55
Qatar	51.43	42.03
Saudi Arabia	32.49	55.18
Somalia		
Sudan	16.60	12.43
Syria	458.79	458.25
Tunisia	29.56	58.46
UAE	63.56	25.31
Yemen	880.33	880.33

Arab average	215.58	166.71
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Below Arab average
 Above Arab average

Ranking for OECD mobile 100 calls + 2 GB basket

	2013	2015
Algeria	3	4
Bahrain	7	5
Comoros	-	-
Djibouti	-	-
Egypt	2	7
Iraq	17	11
Jordan	12	1
Kuwait	6	8
Lebanon	13	14
Libya	15	16
Mauritania	14	15
Morocco	9	3
Oman	10	10
Palestine	18	19
Qatar	8	9
Saudi Arabia	5	12
Somalia	-	-
Sudan	1	2
Syria	16	17
Tunisia	4	13
UAE	11	6
Yemen	19	18

Least expensive
 Most expensive



Note: The year on year results and averages are based on lowest cost per country, and will not be the same as the average across all carriers and countries

Leased line basket 2015 results (using OECD 2010 baskets)

Leased line basket, as defined by the OECD (2010 version of OECD baskets)

- Prices for 2 Mb/s and 34 Mb/s national circuits
- 6 specific distances are used:
 - 2 km, 20 km, 50 km, 100 km, 200 km and 500 km
- Each distance is weighted in order to calculate a **weighted average price for one circuit** as follows:

National Distance	2km	20km	50km	100km	200km	500km	Total
64 kb/s	50%	18%	6%	8%	10%	8%	100%
2 Mb/s	50%	18%	6%	8%	10%	8%	100%
34 Mb/s	42%	18%	15%	9%	8%	8%	100%

- The 2 bitrates are calculated and reported separately.
- Where the distances in the basket go beyond the country borders, the weights of those distances are attributed to the longest available tariff zone.
 - For example: In Bahrain a 2 Mb/s circuit costs BD 890 regardless of distance. The longest possible circuit distance in Bahrain is approximately 50 km. But the weights for 100 km (8%), 200 km (10%) and 500 km (8%) are still applied to this price as the price for the longest possible circuit in order to cover 100%.
 - This may bias the results for small countries with distance-sensitive prices in the sense that a relatively higher proportion of the circuits will be at maximum cost
 - Small countries with no distance pricing will be favoured by this scheme.
- For the Arab country price benchmarking three more bitrates are added, to the extent they are offered in the countries concerned:
 - 64 kb/s (formerly used in the OECD 2006 baskets) and 256 kb/s in order to cover a wider range of services relevant for the region, and 155 Mb/s to show the potential for future development.
 - The calculations for these speeds use the same weighted average price as for 2 Mb/s and 34 Mb/s respectively

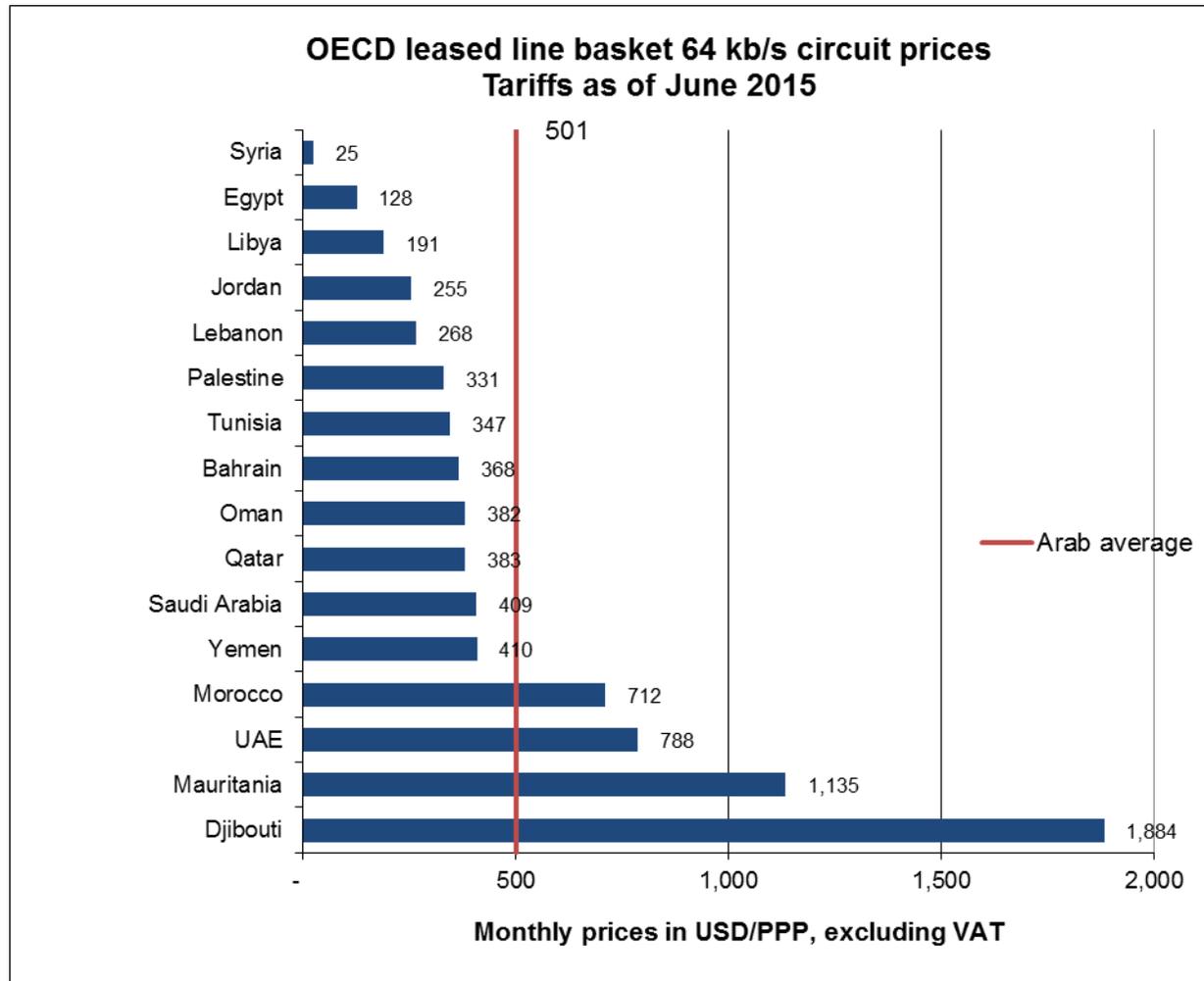


Leased line data issues

- No price data available for:
 - Comoros
 - Iraq
 - Kuwait
 - Somalia
- Other countries may have data missing for specific bitrates



64 kb/s OECD leased line basket results

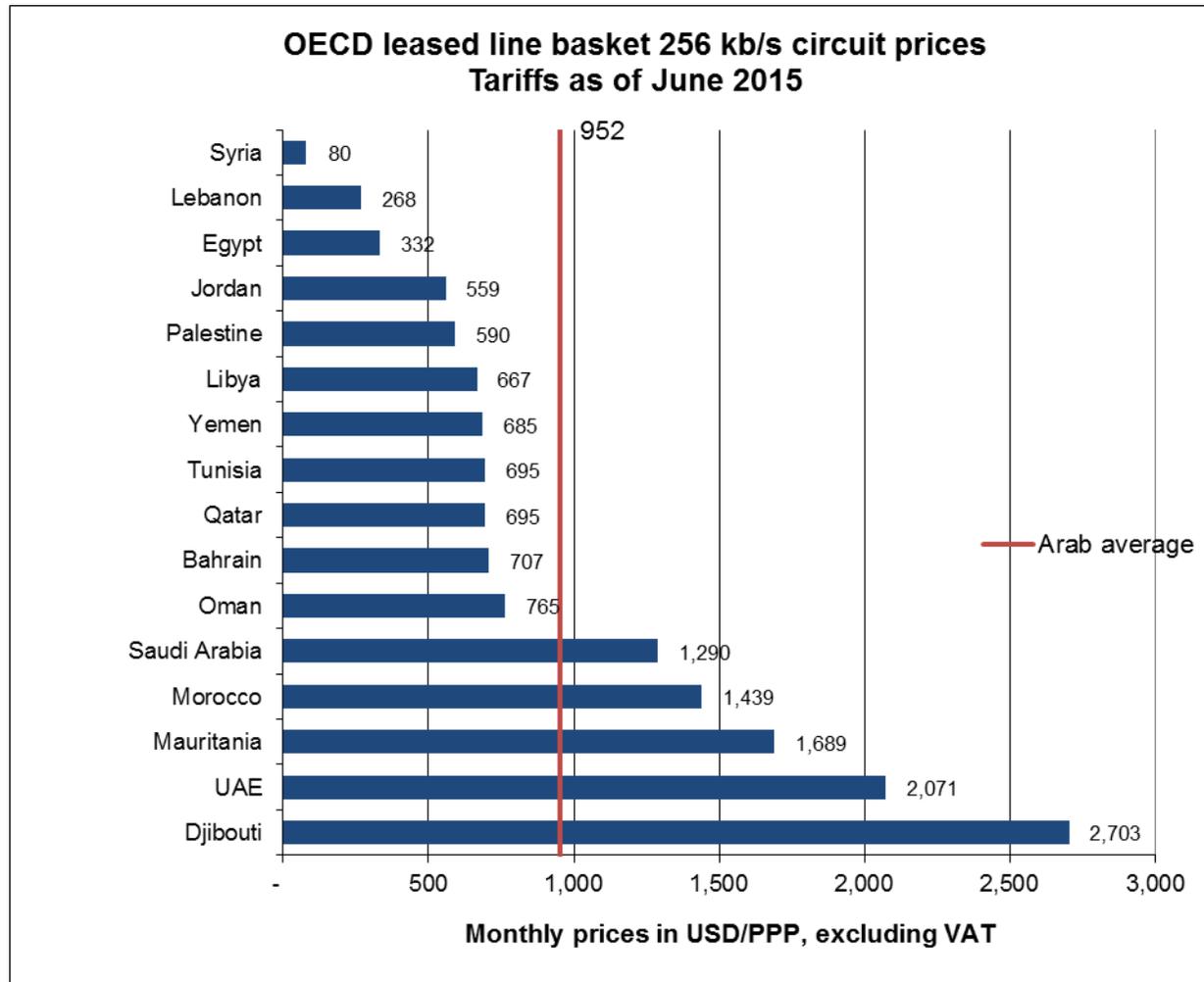


The 64 kb/s basket is no longer covered within the OECD baskets, however the standard 2010 methodology has been applied to 64 kb/s circuits for the Arab countries

Note: No equivalent OECD data exists.



256kb/s OECD leased line basket results

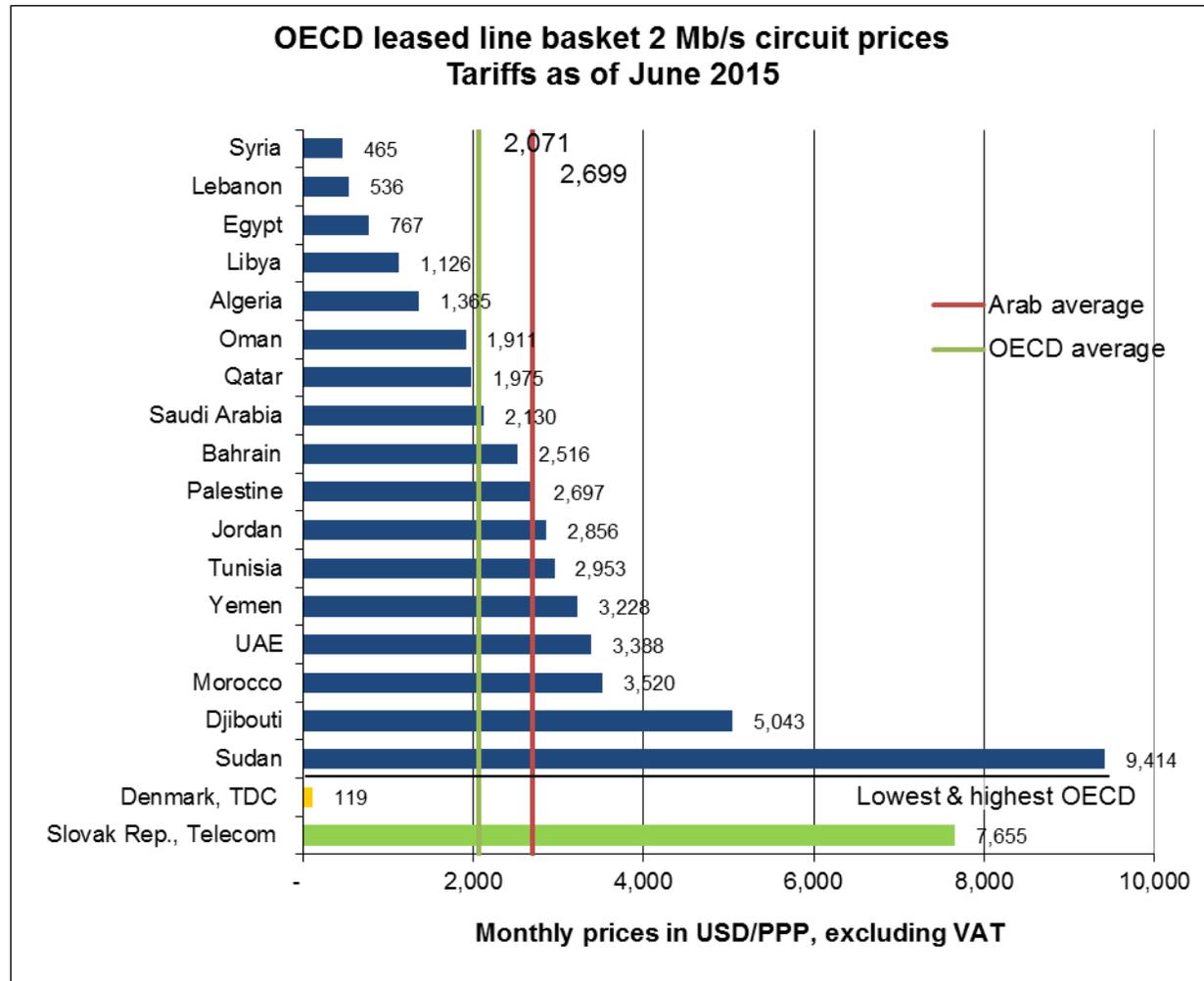


The OECD basket does not cover 256 kb/s, however the standard 2010 methodology has been applied to 256 kb/s circuits for the Arab countries

Note: No equivalent OECD data exists.



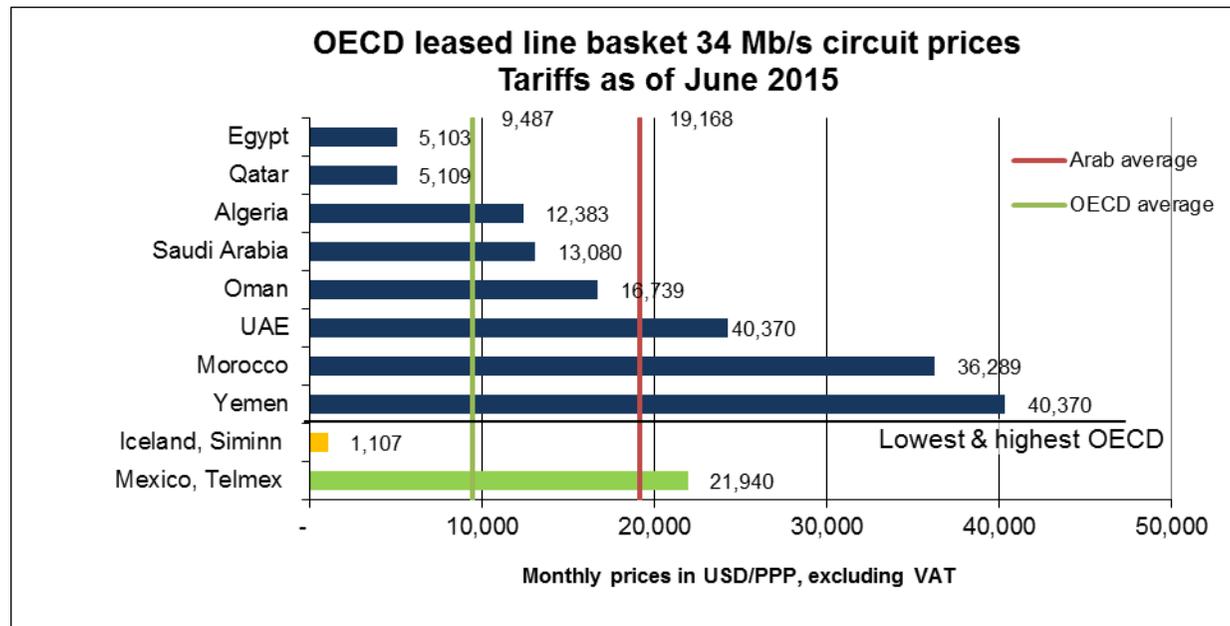
2 Mb/s OECD leased line basket results



The OECD data shown represents the lowest and highest prices found in OECD countries, and the average across all 34 OECD countries.



34 Mb/s OECD leased line basket results

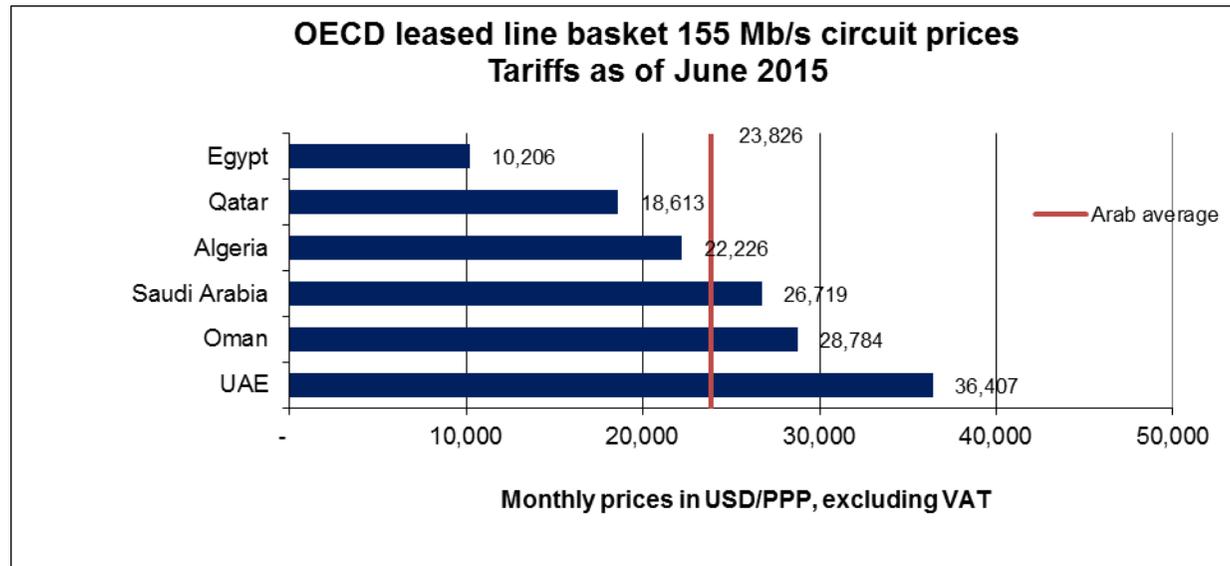


The OECD data shown represents the lowest and highest prices found in OECD countries, and the average across all 34 OECD countries.

Only a few of the Arab countries publish these prices. The service may still be offered, though.



155 Mb/s OECD leased line basket results



Only a few of the Arab countries publish these prices. The service may still be offered, though.

The OECD basket does not cover 155 Mb/s, however the standard 2010 methodology has been applied to 155 Mb/s circuits for the Arab countries

Note: No equivalent OECD data exists.



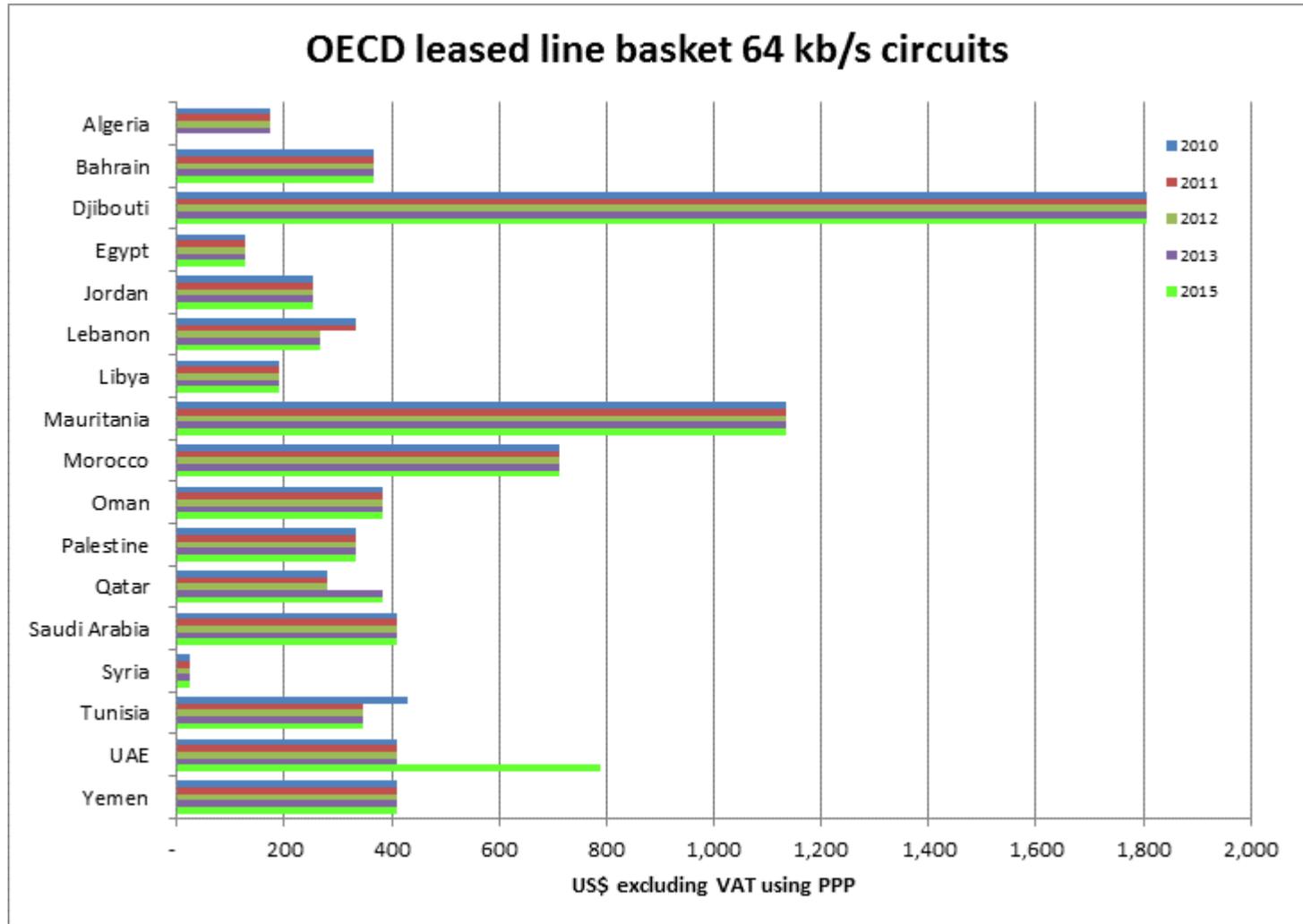
Observations from leased line results

- Egypt, Libya, Lebanon, Jordan and Syria have the lowest prices for National Leased Lines.
 - The price ranking may vary with product
- For 34 Mb/s and 155 Mb/s a lot of the prices are not available in the public domain, and have not been included.
 - For 34 Mb/s, prices are only available from 8 countries, and for 155 Mb/s, from 6 countries.
- As in previous year, the prices in Djibouti and Mauritania for 64 kb/s and 256 kb/s, remain very high. UAE circuit prices are also high, as prices have increased since 2013.
- For 2 Mb/s, most of the Arab countries have prices below the most expensive OECD country
 - However, all Arab countries are significantly more expensive than the OECD “best-in-class” (Denmark) at this speed
 - 7 of the 17 Arab countries (around 60%) are below the OECD average, as was the case in 2013.
- Although the 34 Mb/s average for the Arab countries is considerably higher than the OECD average at this speed, - more than double – this is as a result of particularly high circuit costs in Yemen and Morocco and, to a lesser extent in UAE
 - 2 of the 6 Arab countries analysed are well below the OECD average cost
 - All are considerably more expensive than the OECD “best-in-class” at this speed, however
- Many of the Arab countries are quite small in size and this price comparison may give advantage to the tariff structure used in these small countries.
 - i.e. the reality may be not be as favourable as shown here.

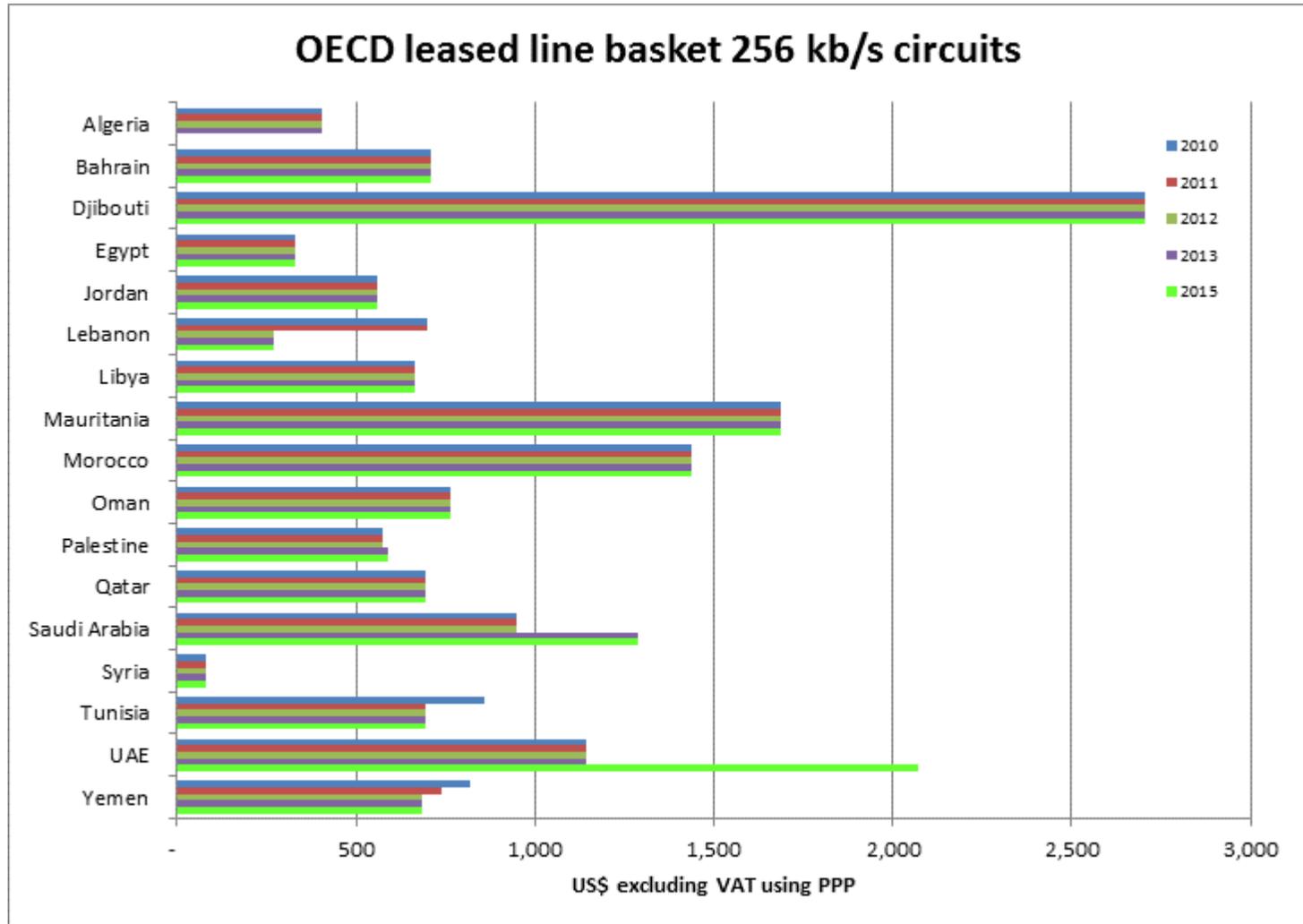


Leased line time series analysis (using OECD 2010 baskets)

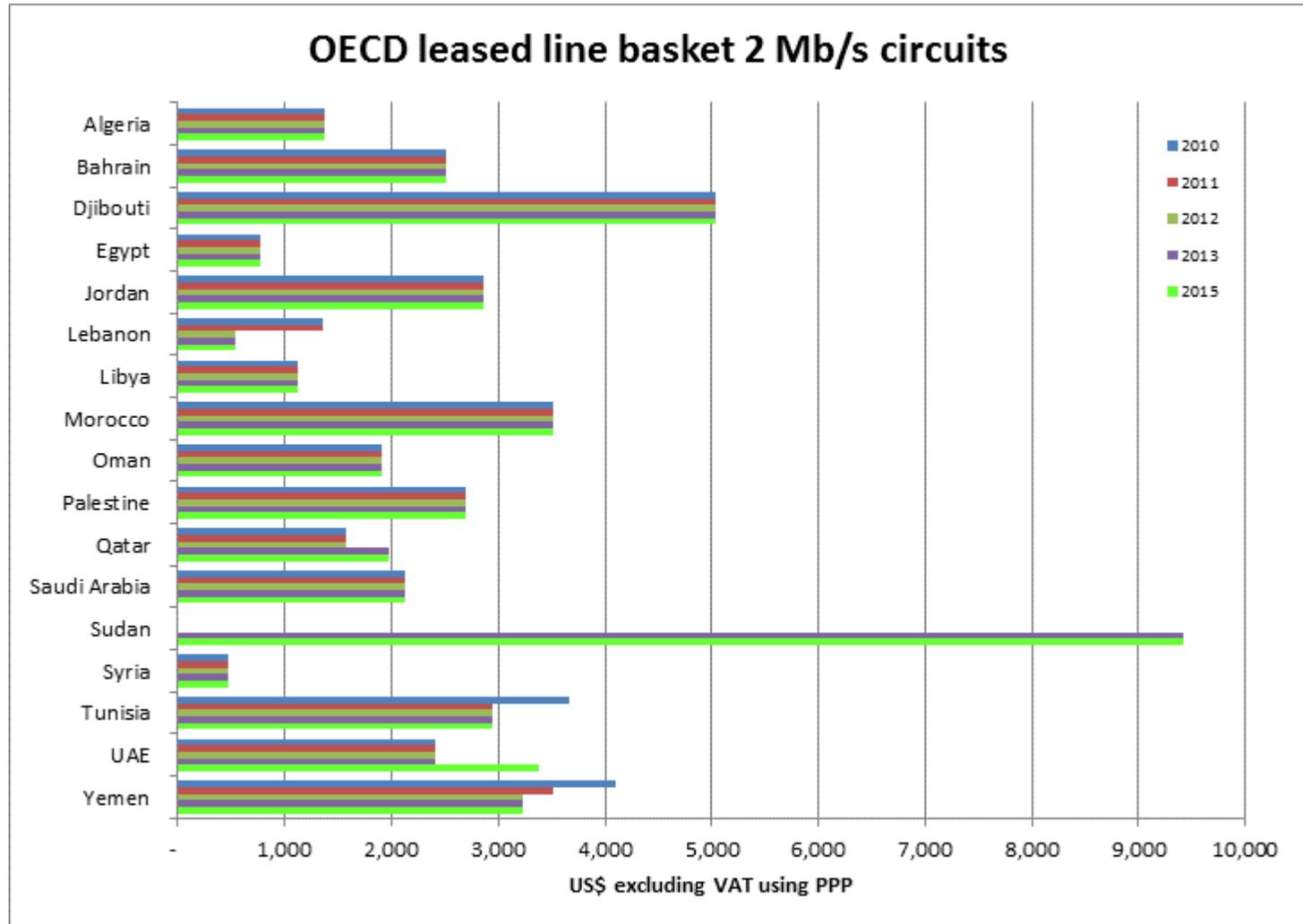
2010 OECD leased line baskets time series, 64 kb/s



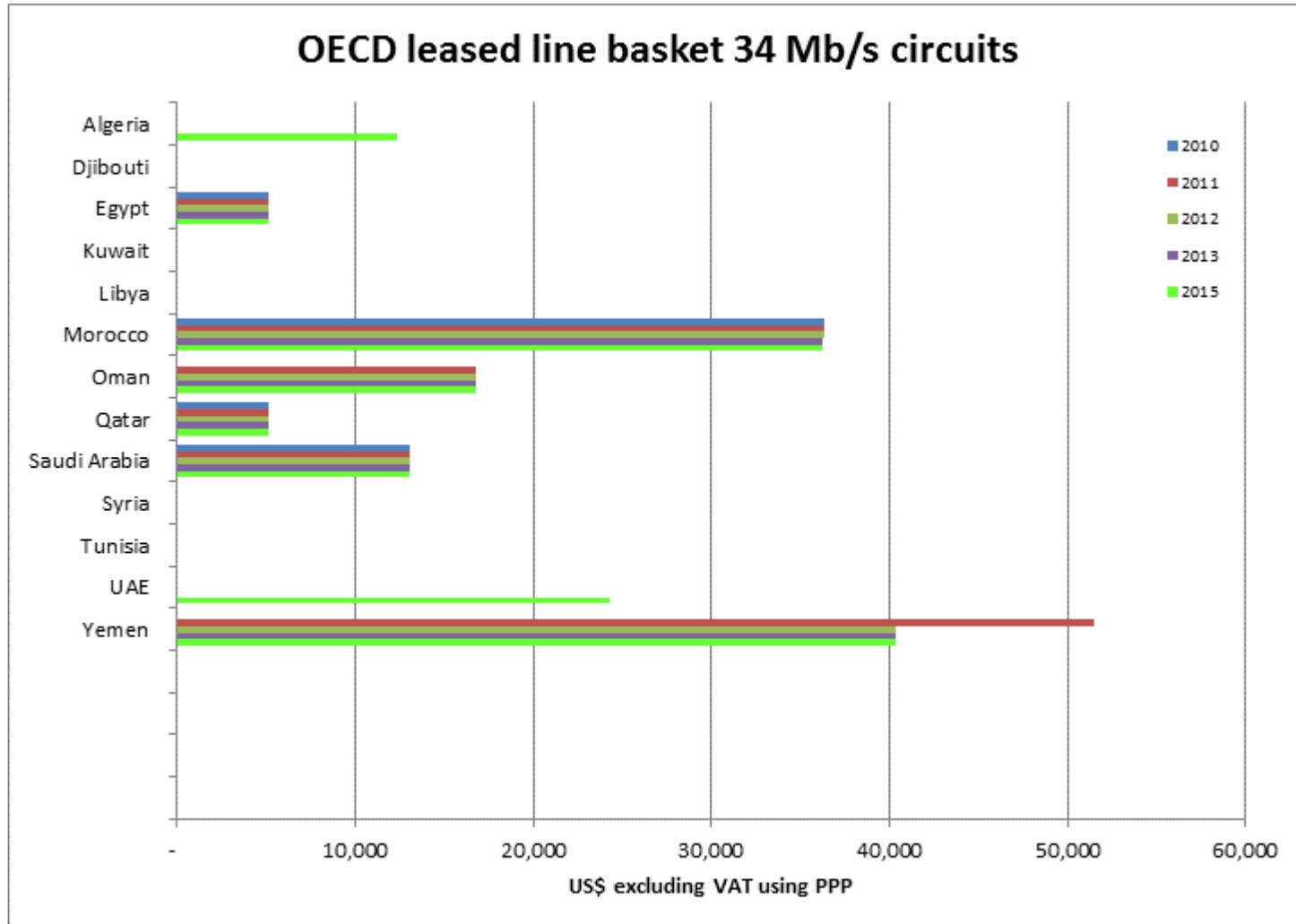
2010 OECD leased line baskets time series, 256 kb/s



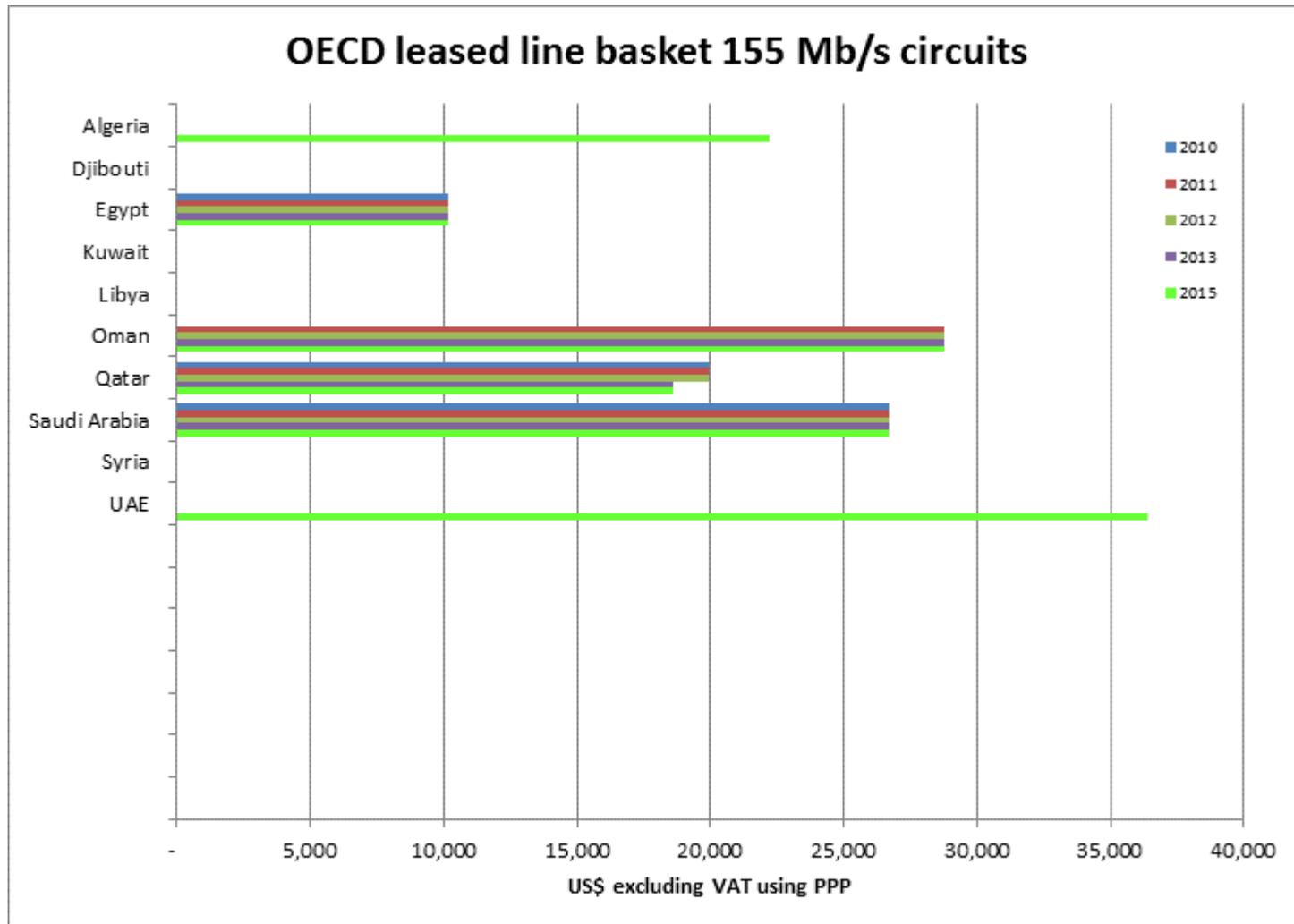
2010 OECD leased line baskets time series, 2 Mb/s



2010 OECD leased line baskets time series, 34 Mb/s



2010 OECD leased line baskets time series, 155 Mb/s



Observations from leased line time series results

- Leased line prices have been generally stable, with no change to most of the operator prices.
- Price changes occurred in only the UAE between 2013 and 2015:
 - Circuit costs were increased, and by a substantial amount.
 - Pricing was also introduced for 34 Mb/s and 155 Mb/s
- In addition, Algeria stopped publishing prices for 64 kb/s and 256 kb/s circuits, but introduced prices for 34 Mb/s and 155 Mb/s, in addition to 2 Mb/s
- The Arab average has risen for all circuit types, apart from the 34 Mb/s basket, as a result of the new and revised pricing for UAE, and the introduction of new prices for Algeria
- The average price changes for each basket between 2013 and 2014 are shown in the table below

Percentage change 2012/13 and 2013/15

	2012-2013	2013-2015
64 kb/s	1%	9%
256 kb/s	2%	10%
2 Mb/s	20%	2%
34 Mb/s	0%	-1%
155 Mb/s	-2%	13%



Leased line ranking tables, 2010-2015

OECD leased line basket 64 kb/s ranking

	2010	2011	2012	2013	2015
Algeria	174	174	174	174	
Bahrain	368	368	368	368	368
Comoros					
Djibouti	1,884	1,884	1,884	1,884	1,884
Egypt	128	128	128	128	128
Iraq					
Jordan	255	255	255	255	255
Kuwait					
Lebanon	332	332	268	268	268
Libya	191	191	191	191	191
Mauritania	1,135	1,135	1,135	1,135	1,135
Morocco	712	712	712	712	712
Oman	382	382	382	382	382
Palestine	331	331	331	331	331
Qatar	281	281	281	383	383
Saudi Arabia	409	409	409	409	409
Somalia					
Sudan					
Syria	25	25	25	25	25
Tunisia	431	347	347	347	347
UAE	408	408	408	408	788
Yemen	410	410	410	410	410

Arab average	462	457	453	459	501
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■ Below Arab average
■ Above Arab average

	2010	2011	2012	2013	2015
Algeria	3	3	3	3	-
Bahrain	9	10	10	9	8
Comoros	-	-	-	-	-
Djibouti	17	17	17	17	16
Egypt	2	2	2	2	2
Iraq	-	-	-	-	-
Jordan	5	5	5	5	4
Kuwait	-	-	-	-	-
Lebanon	8	8	6	6	5
Libya	4	4	4	4	3
Mauritania	16	16	16	16	15
Morocco	15	15	15	15	13
Oman	10	11	11	10	9
Palestine	7	7	8	7	6
Qatar	6	6	7	11	10
Saudi Arabia	12	13	13	13	11
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	1	1	1	1	1
Tunisia	14	9	9	8	7
UAE	11	12	12	12	14
Yemen	13	14	14	14	12

■ Least expensive
■ Most expensive



OECD leased line basket 256 kb/s ranking

Total results for 256 kb/s leased line basket
Results in US\$PPP excluding VAT

	2010	2011	2012	2013	2015
Algeria	406	406	406	406	
Bahrain	707	707	707	707	707
Comoros					
Djibouti	2,703	2,703	2,703	2,703	2,703
Egypt	332	332	332	332	332
Iraq					
Jordan	559	559	559	559	559
Kuwait					
Lebanon	697	697	268	268	268
Libya	667	667	667	667	667
Mauritania	1,689	1,689	1,689	1,689	1,689
Morocco	1,439	1,439	1,439	1,439	1,439
Oman	765	765	765	765	765
Palestine	573	573	573	590	590
Qatar	695	695	695	695	695
Saudi Arabia	948	948	948	1,290	1,290
Somalia					
Sudan					
Syria	80	80	80	80	80
Tunisia	861	695	695	695	695
UAE	1,144	1,144	1,144	1,144	2,071
Yemen	819	737	685	685	685

Arab average	887	873	844	865	952
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■ Below Arab average
■ Above Arab average

Ranking for 256 kb/s leased line basket

	2010	2011	2012	2013	2015
Algeria	3	3	4	4	-
Bahrain	9	10	11	11	10
Comoros	-	-	-	-	-
Djibouti	17	17	17	17	16
Egypt	2	2	3	3	3
Iraq	-	-	-	-	-
Jordan	4	4	5	5	4
Kuwait	-	-	-	-	-
Lebanon	8	9	2	2	2
Libya	6	6	7	7	6
Mauritania	16	16	16	16	14
Morocco	15	15	15	15	13
Oman	10	12	12	12	11
Palestine	5	5	6	6	5
Qatar	7	8	10	10	9
Saudi Arabia	13	13	13	14	12
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	1	1	1	1	1
Tunisia	12	7	9	9	8
UAE	14	14	14	13	15
Yemen	11	11	8	8	7

■ Least expensive
■ Most expensive



OECD leased line basket 2 Mb/s ranking

Total results for 2 Mb/s leased line basket
Results in US\$PPP excluding VAT

	2010	2011	2012	2013	2015
Algeria	1,365	1,365	1,365	1,365	1,365
Bahrain	2,516	2,516	2,516	2,516	2,516
Comoros					
Djibouti	5,043	5,043	5,043	5,043	5,043
Egypt	767	767	767	767	767
Iraq					
Jordan	2,856	2,856	2,856	2,856	2,856
Kuwait					
Lebanon	1,361	1,361	536	536	536
Libya	1,126	1,126	1,126	1,126	1,126
Mauritania					
Morocco	3,520	3,520	3,520	3,520	3,520
Oman	1,911	1,911	1,911	1,911	1,911
Palestine	2,697	2,697	2,697	2,697	2,697
Qatar	1,571	1,571	1,571	1,975	1,975
Saudi Arabia	2,130	2,130	2,130	2,130	2,130
Somalia					
Sudan				9,414	9,414
Syria	465	465	465	465	465
Tunisia	3,659	2,953	2,953	2,953	2,953
UAE	2,403	2,403	2,403	2,403	3,388
Yemen	4,096	3,523	3,228	3,228	3,228

Arab average	2,343	2,263	2,193	2,642	2,699
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■ Below Arab average
■ Above Arab average

Ranking for 2 Mb/s leased line basket

	2010	2011	2012	2013	2015
Algeria	5	5	5	5	5
Bahrain	10	10	10	10	9
Comoros	-	-	-	-	-
Djibouti	16	16	16	16	16
Egypt	2	2	3	3	3
Iraq	-	-	-	-	-
Jordan	12	12	12	12	11
Kuwait	-	-	-	-	-
Lebanon	4	4	2	2	2
Libya	3	3	4	4	4
Mauritania	-	-	-	-	-
Morocco	13	14	15	15	15
Oman	7	7	7	6	6
Palestine	11	11	11	11	10
Qatar	6	6	6	7	7
Saudi Arabia	8	8	8	8	8
Somalia	-	-	-	-	-
Sudan	-	-	-	17	17
Syria	1	1	1	1	1
Tunisia	14	13	13	13	12
UAE	9	9	9	9	14
Yemen	15	15	14	14	13

■ Least expensive
■ Most expensive



OECD leased line basket 34 Mb/s ranking

Total results for 34 Mb/s leased line basket
Results in US\$PPP excluding VAT

	2010	2011	2012	2013	2015
Algeria					12,383
Bahrain					
Comoros					
Djibouti					
Egypt	5,103	5,103	5,103	5,103	5,103
Iraq					
Jordan					
Kuwait					
Lebanon					
Libya					
Mauritania					
Morocco	36,341	36,341	36,341	36,289	36,289
Oman		16,739	16,739	16,739	16,739
Palestine					
Qatar	5,109	5,109	5,109	5,109	5,109
Saudi Arabia	13,080	13,080	13,080	13,080	13,080
Somalia					
Sudan					
Syria					
Tunisia					
UAE					24,269
Yemen		51,511	40,370	40,370	40,370

Arab average	14,908	21,314	19,457	19,448	19,168
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■ Below Arab average
■ Above Arab average

Ranking for 34 Mb/s leased line basket

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	3
Bahrain	-	-	-	-	-
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	1	1	1	1	1
Iraq	-	-	-	-	-
Jordan	-	-	-	-	-
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	-
Morocco	4	5	5	5	7
Oman	-	4	4	4	5
Palestine	-	-	-	-	-
Qatar	2	2	2	2	2
Saudi Arabia	3	3	3	3	4
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	-	-	-
UAE	-	-	-	-	6
Yemen	-	6	6	6	8

■ Least expensive
■ Most expensive



OECD leased line basket 155 Mb/s ranking

Total results for 155 Mb/s leased line basket
Results in US\$PPP excluding VAT

	2010	2011	2012	2013	2015
Algeria					22226
Bahrain					
Comoros					
Djibouti					
Egypt	10206	10206	10206	10206	10206
Iraq					
Jordan					
Kuwait					
Lebanon					
Libya					
Mauritania					
Morocco					
Oman		28784	28784	28784	28784
Palestine					
Qatar	19929	19929	19929	18613	18613
Saudi Arabia	26719	26719	26719	26719	26719
Somalia					
Sudan					
Syria					
Tunisia					
UAE					36407
Yemen					

Arab average	18951	21409	21409	21080	23826
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■ Below Arab average
■ Above Arab average

Ranking for 155 Mb/s leased line basket

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	3
Bahrain	-	-	-	-	-
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	1	1	1	1	1
Iraq	-	-	-	-	-
Jordan	-	-	-	-	-
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	-
Morocco	-	-	-	-	-
Oman	-	4	4	4	5
Palestine	-	-	-	-	-
Qatar	2	2	2	2	2
Saudi Arabia	3	3	3	3	4
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	-	-	-
UAE	-	-	-	-	6
Yemen	-	-	-	-	-

■ Least expensive
■ Most expensive



Fixed broadband basket 2015 results (using OECD 2014 baskets)

Fixed broadband basket methodology

- Research covering 270 fixed broadband service offerings from the incumbent ISP* in 19 Arab countries
- Costs are derived using the OECD broadband basket methodology, and are based on the new baskets that were defined by OECD in 2014, which consider a number of speed ranges and usage levels (18 in total). The new baskets are shown in the table below. As most ISPs in the Arab countries do not offer services in the highest two speed categories (greyed out in the table), results for these have not been included.
 - As of June 2015, only four of the Arab countries had broadband services >100 Mb/s; Bahrain, Qatar, Saudi Arabia and UAE
 - Costs are shown separately for both residential and business services
- Total monthly cost calculated based on usage profiles, which are dependent on the speed of service, as shown below (12 of the total 18) :

Service speeds		Usage volume (GB/month)		
Download speed (Mb/s)	Minimum upload speed (Mb/s)	Low	Medium	High
≤1.5/2.0	0.256	5	10	20
>1.5/2.0 – 10	0.512	5	15	50
>10 – 25/30	0.768	10	25	100
>25/30 – 100	1	15	50	200
>100 – 1000	3	25	100	400
>1000	10	100	250	1000

The OECD data shown refer to the incumbent ISP* fixed broadband services in the 34 OECD countries

- Tariff data cover the cheapest form of installation, amortized over three years, modem cost (if applicable), monthly rental, usage allowances and any usage charges. Additional information on speed, web-space, email addresses, penalties with excess usage, and contract term duration is also included in the basic data and presented along with the cost results.
 - To the extent this information is published by the provider

* Incumbent ISP will normally mean the ISP owned by the incumbent operator in the country.



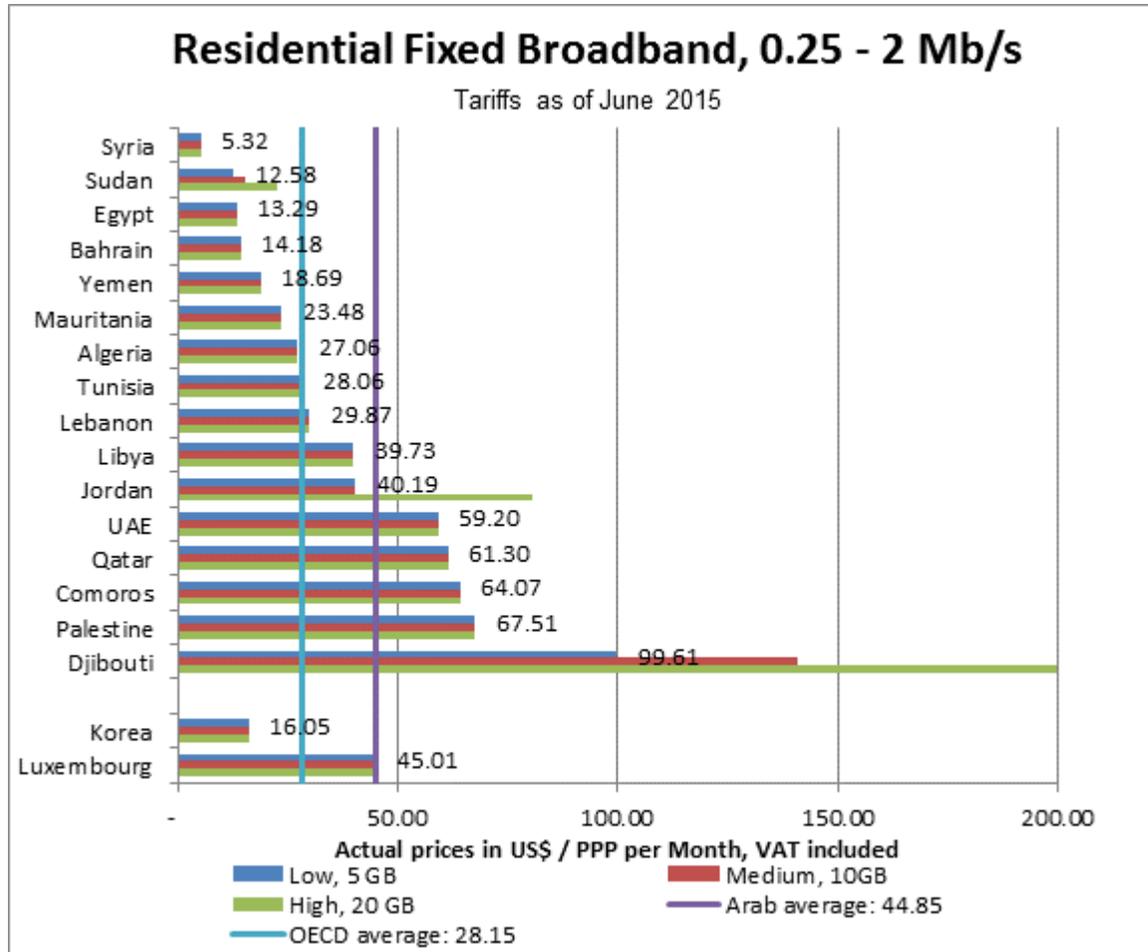
Fixed broadband data issues

- Price data is not available for broadband services in:
 - Iraq
 - Kuwait
 - Somalia
- Speeds have continued to increase, with no ISPs having offerings below 256 kb/s. Maximum speeds have increased dramatically.
 - Speeds above 2 Mb/s are available in 18 of the 19 countries. Only Libya has broadband speeds not exceeding 2 Mb/s (only 256 kb/s is available)
 - Advertised maximum download speeds of 8 Mb/s, 16 Mb/s and even 40 Mb/s are much more commonplace.
 - Average speed across the Arab countries up from 21.9 Mb/s in 2013 to 23.7 Mb/s in 2015

Note: the average speed is a simple average across the packages, and does not take into account the distribution of customers across available plans. Information on customer distribution is not available, and hence a weighted average is not possible.



Residential fixed broadband very low speed OECD 2014 basket > 256 kb/s up to 2 Mb/s



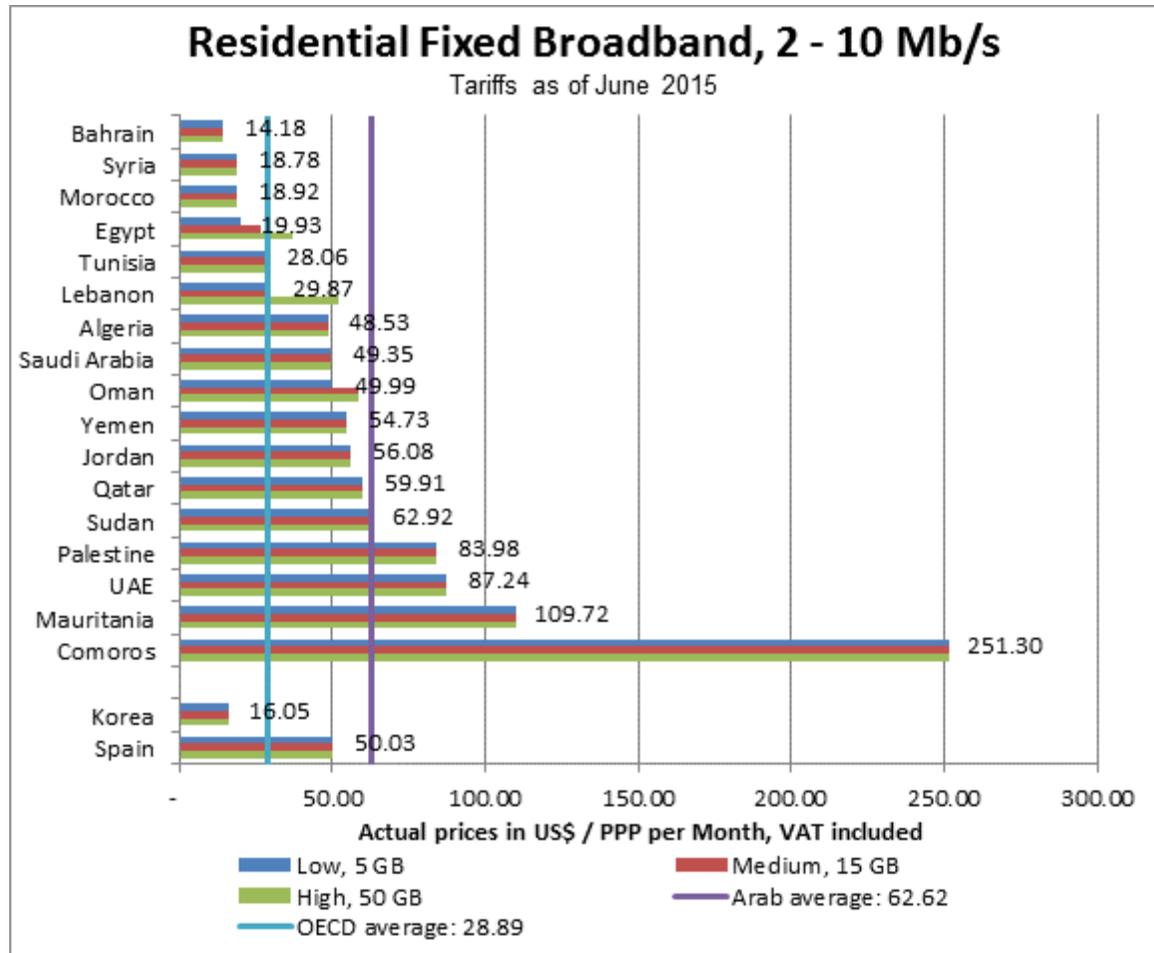
Total monthly cost calculated based on two usage baskets:

Low usage: 5 GB
Medium usage: 10 GB
High usage: 20 GB.

Average lines are based on average across the overall results for the 3 usage levels.



Residential fixed broadband low speed OECD 2014 basket > 2 Mb/s up to 10 Mb/s



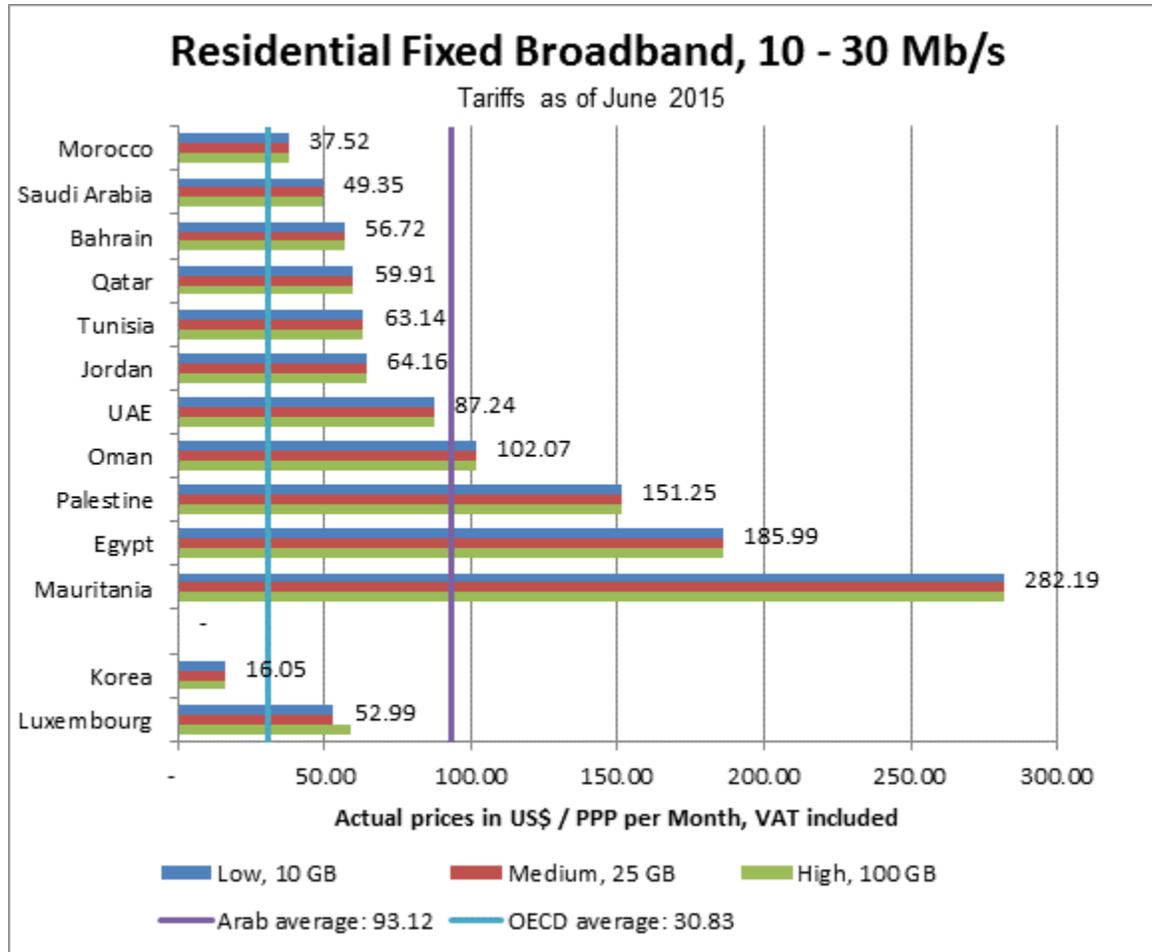
Total monthly cost calculated based on two usage baskets:

- Low usage:** 5 GB
- Medium usage:** 15 GB
- High usage:** 50 GB.

Average lines are based on average across the overall results for the 3 usage levels.



Residential fixed broadband medium speed OECD 2014 basket > 10 Mb/s up to 30 Mb/s



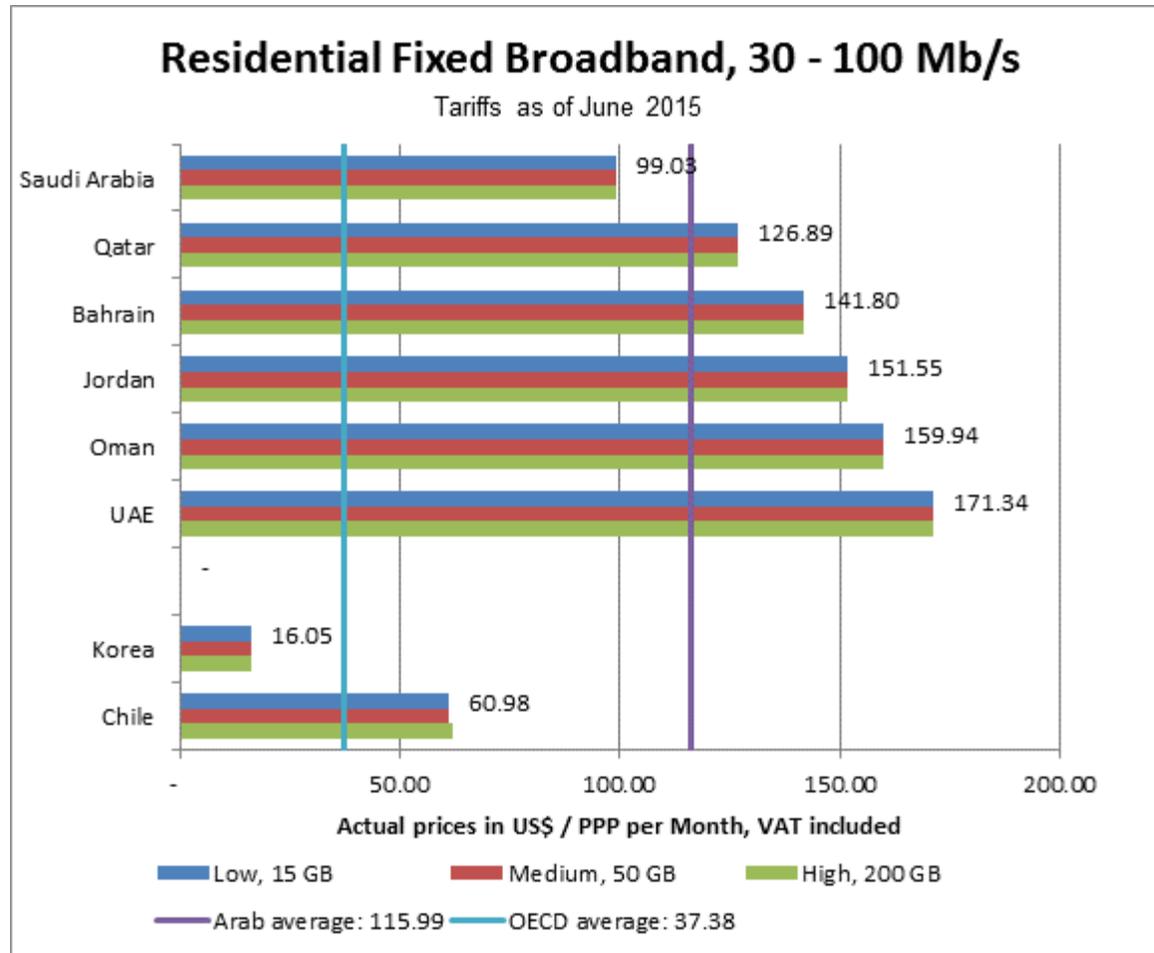
Total monthly cost calculated based on two usage baskets:

Low usage: 10 GB
Medium usage: 25 GB
High usage: 100 GB.

Average lines are based on average across the overall results for the 3 usage levels.



Residential fixed broadband high speed OECD 2014 basket > 30 Mb/s up to 100 Mb/s



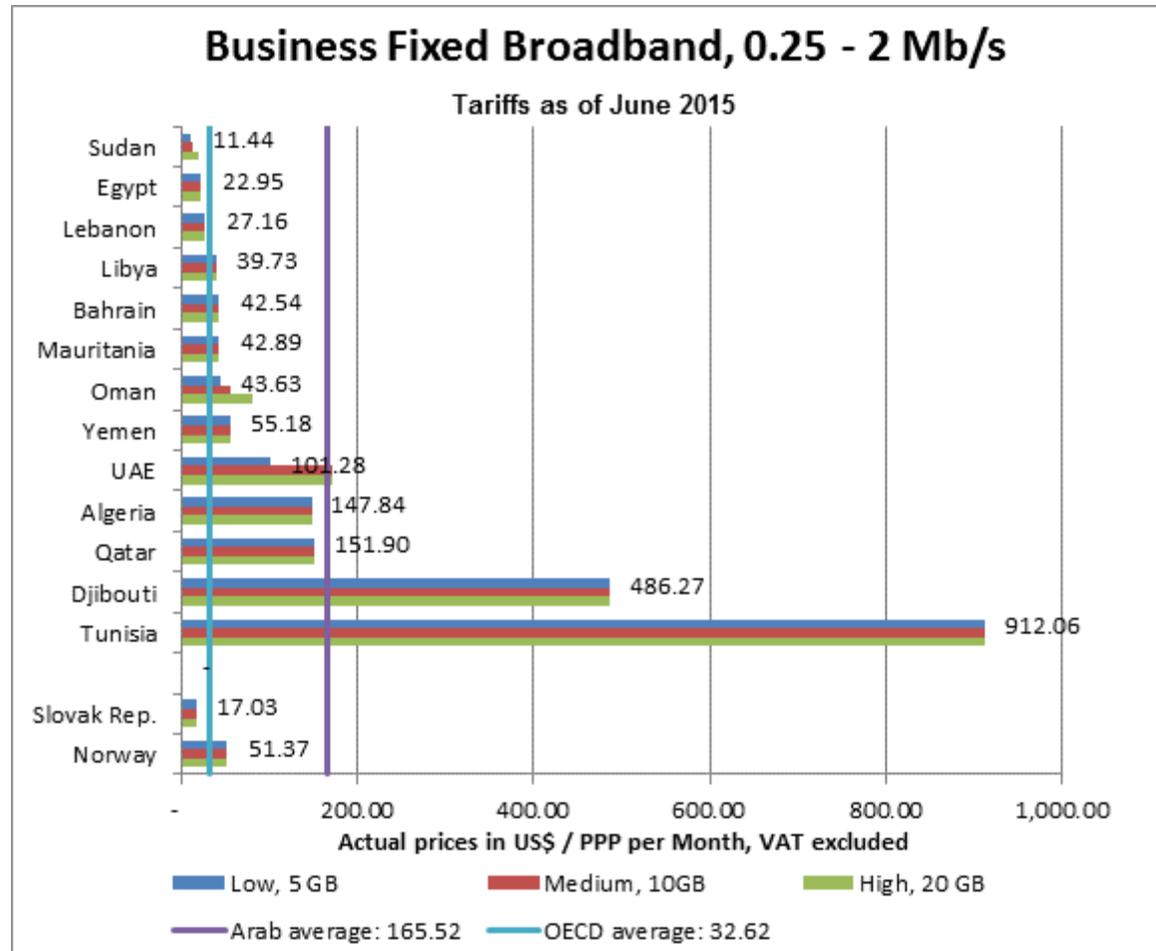
Total monthly cost calculated based on two usage baskets:

Low usage: 15 GB
Medium usage: 50 GB
High usage: 200 GB.

Average lines are based on average across the overall results for the 3 usage levels.



Business fixed broadband very low speed OECD 2014 basket > 256 kb/s up to 2 Mb/s



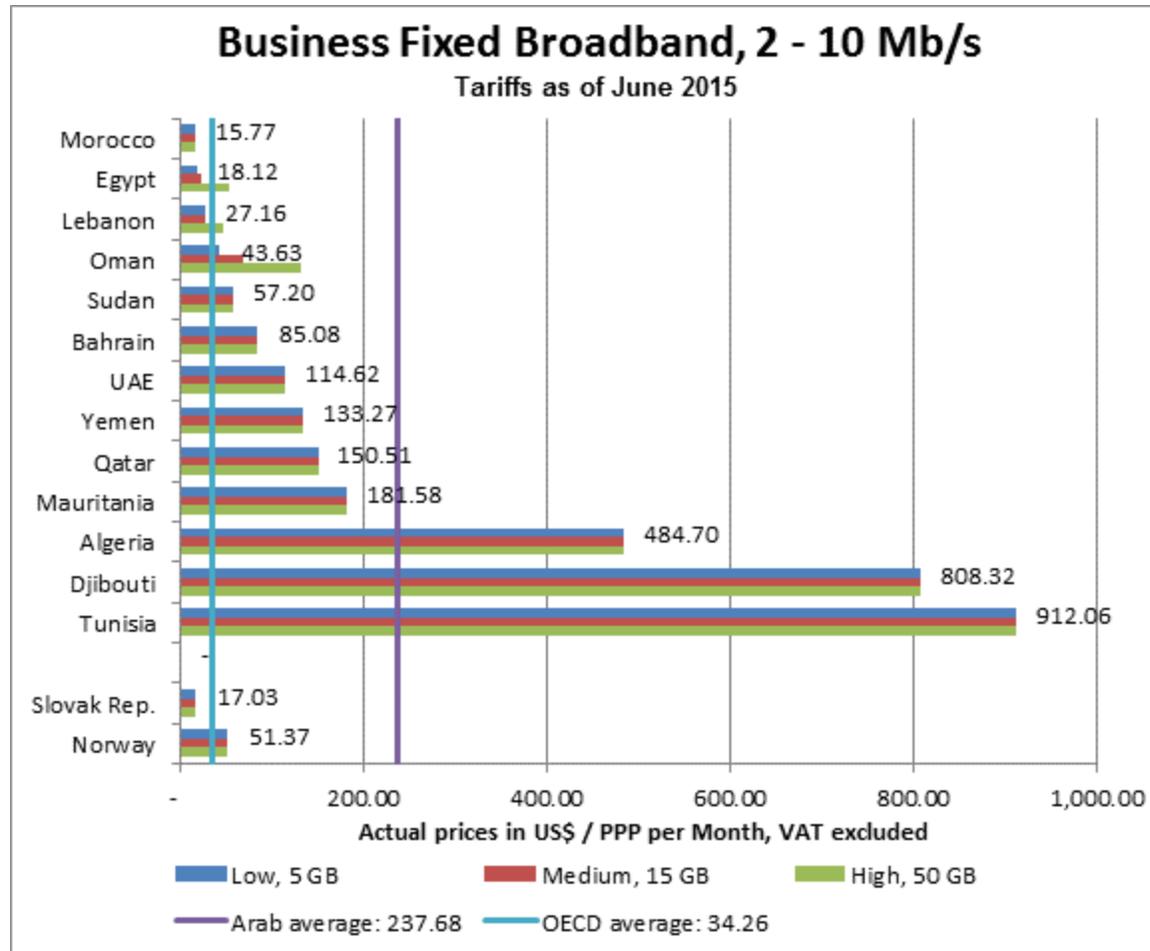
Total monthly cost calculated based on two usage baskets:

- Low usage:** 5 GB
- Medium usage:** 10 GB
- High usage:** 20 GB.

Average lines are based on average across the overall results for the 3 usage levels.



Business fixed broadband low speed OECD 2014 basket > 2 Mb/s up to 10 Mb/s



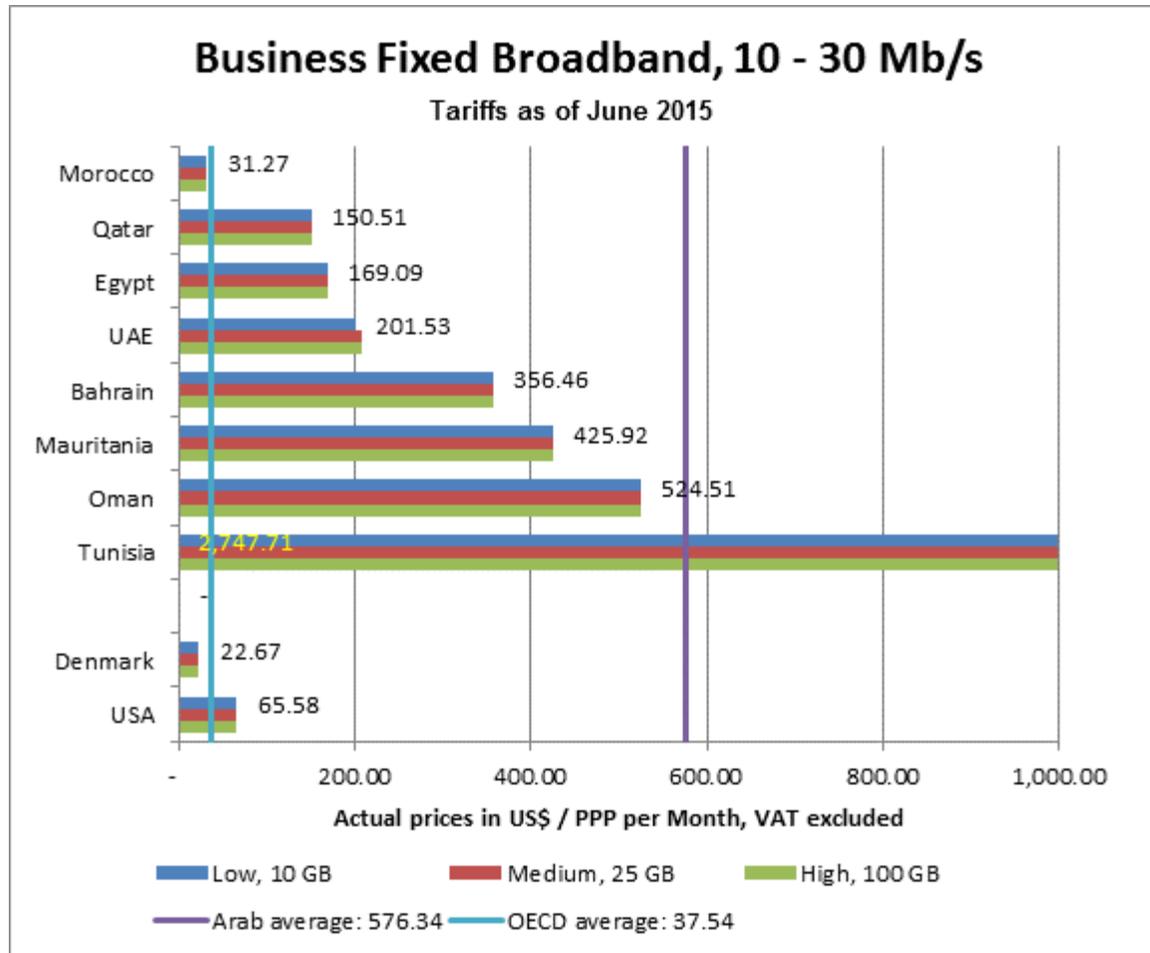
Total monthly cost calculated based on two usage baskets:

- Low usage:** 5 GB
- Medium usage:** 15 GB
- High usage:** 50 GB.

Average lines are based on average across the overall results for the 3 usage levels.



Business fixed broadband medium speed OECD 2014 basket > 10 Mb/s up to 30 Mb/s



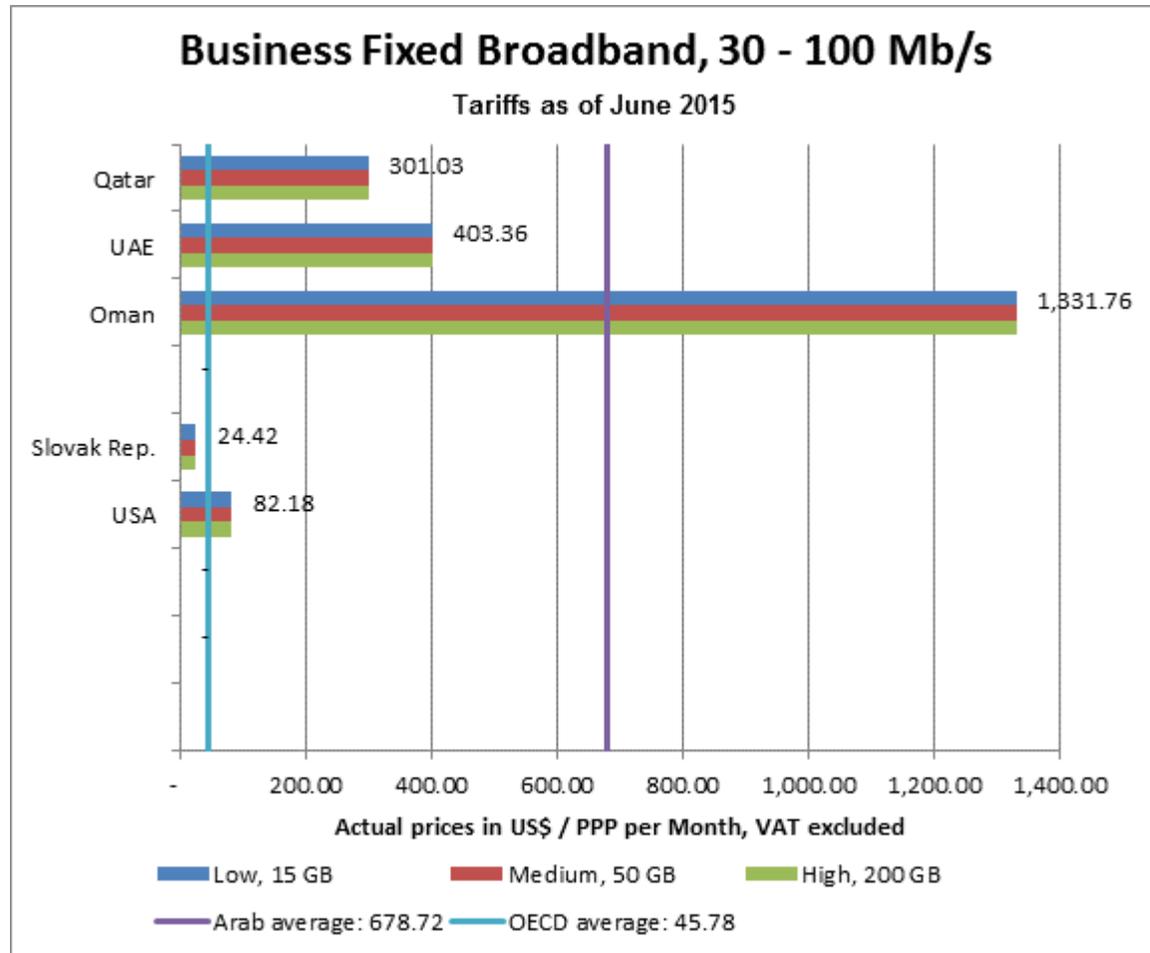
Total monthly cost calculated based on two usage baskets:

Low usage: 10 GB
Medium usage: 25 GB
High usage: 100 GB.

Average lines are based on average across the overall results for the 3 usage levels.



Business fixed broadband high speed OECD 2014 basket > 30 Mb/s up to 100 Mb/s



Total monthly cost calculated based on two usage baskets:

Low usage: 15 GB
Medium usage: 50 GB
High usage: 200 GB.

Average lines are based on average across the overall results for the 3 usage levels.



Observations from fixed broadband basket results

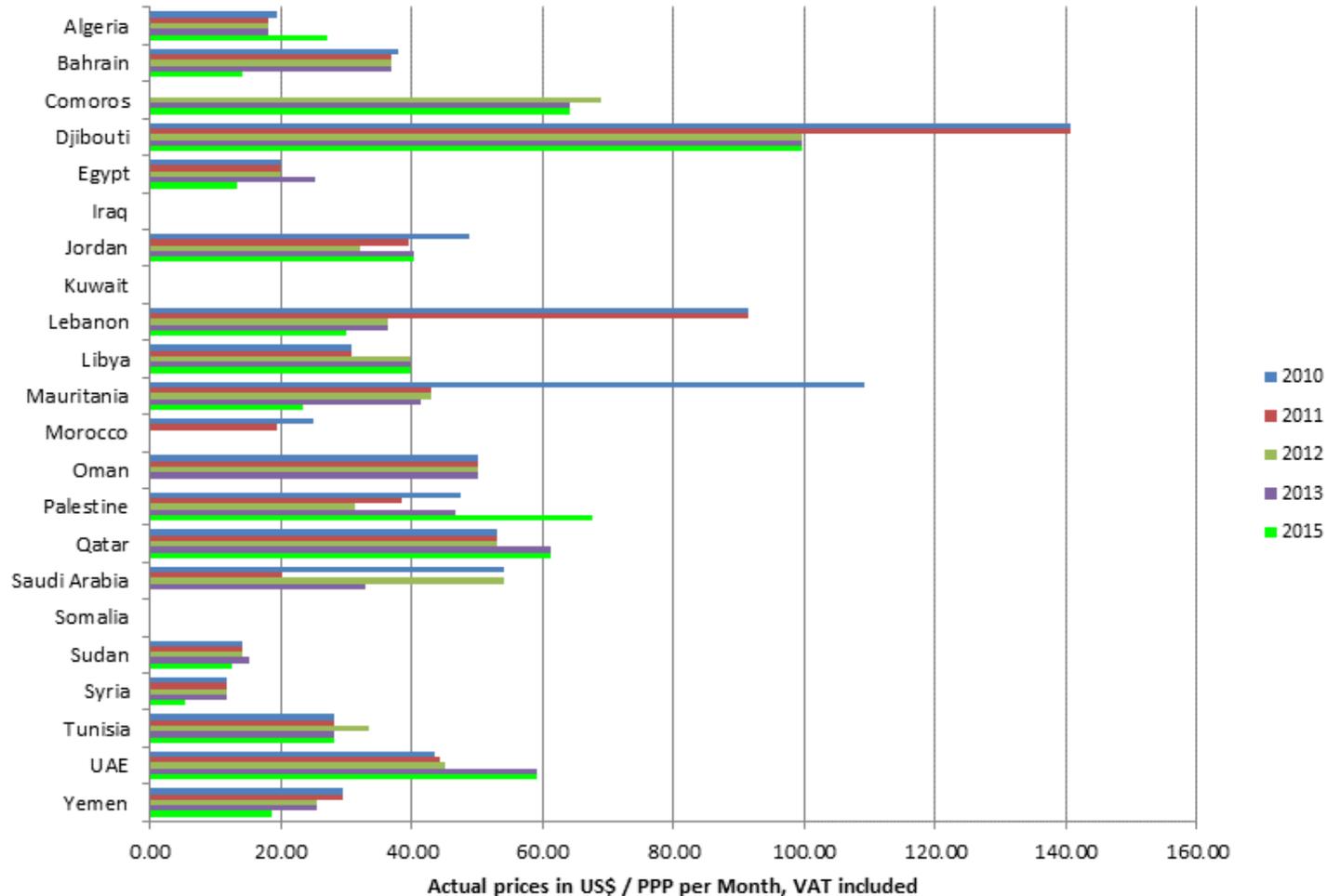
- There is a large variation in ranking according to the speed of service. For lower speed residential services (up to 10 Mb/s), Syria, Sudan, Bahrain, Morocco and Egypt are among the cheapest, while for higher speed services, Bahrain, Saudi Arabia and Qatar are more prominent.
- For lower speed business services, it is a similar picture (although there are no business offers for Syria). Only Qatar, Oman and UAE offer business services above 30 Mb/s.
- Speeds of 4 Mb/s and above are now offered in 18 of the countries:
 - Algerian, Bahrain, Comoros, Djibouti, Egypt, Jordan, Lebanon, Mauritania, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, UAE and Yemen.
 - For higher speed services, above 30 Mb/s only 6 of the 19 countries have residential offerings in this speed category, and only 4 have business offerings
 - There continues to be a wide variation in prices between countries
- The number of Arab countries that are below the OECD average depends on the speed of service, and, for some countries, on the usage level.
 - For the lowest speed category, 8 Arab countries are cheaper. The for the low speed basket for residential services (a significant uplift from the one last year)
 - For speeds above 10 Mb/s, no Arab country is cheaper than the OECD average.
 - Business services show a similar trend, although notably Morocco has very competitively priced business offers up to 30 Mb/s
- The Arab average residential cost is up to 3.1 times higher than the average OECD cost. In 2013, the gap between OECD and Arab residential service costs was much greater. For business services, the average is up to 15 times higher.
 - The residential figure continues to be skewed by particularly high costs in a number of countries, in particular, Djibouti, Mauritania and Comoros. For business services, the Arab average is heavily skewed by the Djibouti and Tunisian costs, and, for the highest speed category, Oman.
- Usage based charges are still prevalent, and appear in offers across 6 of the Arab countries. In spite of this, usage-based charges have had limited impact on the basket results, and flat rate services have featured as the cheapest. . In many OECD countries, usage-based charges often only apply for a very few ISPs, and at quite high levels of usage.



Fixed broadband time series analysis (2014 version of OECD baskets)

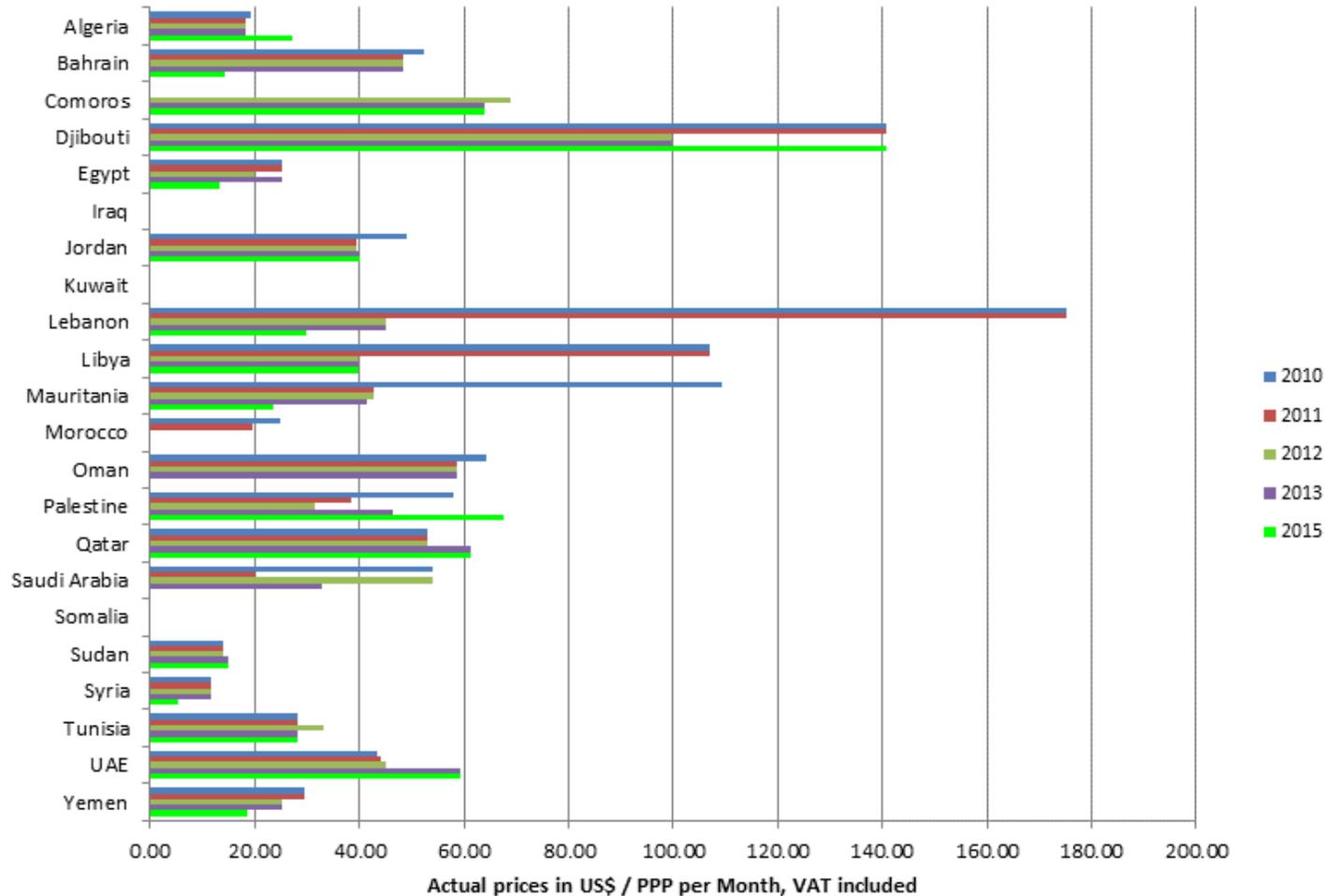
2014 OECD residential fixed broadband time series, >256 kb/s up to 2 Mb/s, low usage

Residential Fixed Broadband OECD L1: 0.25-2Mb/s, 5GB



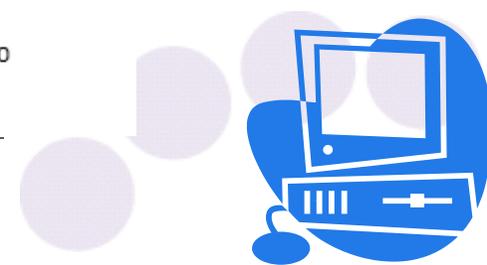
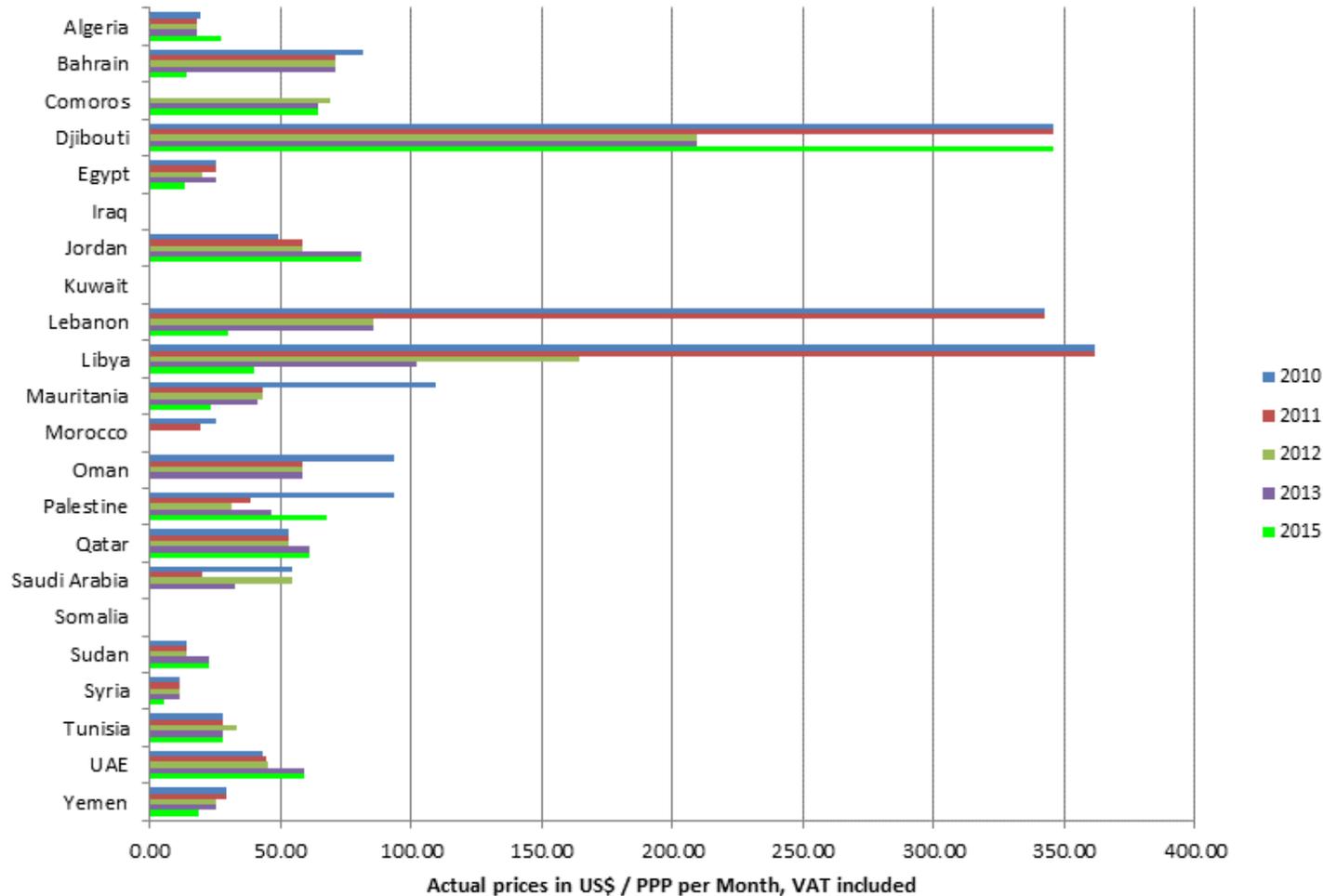
2014 OECD residential fixed broadband time series, >256 kb/s up to 2 Mb/s, medium usage

Residential Fixed Broadband OECD M1: 0.25-2Mb/s, 10GB



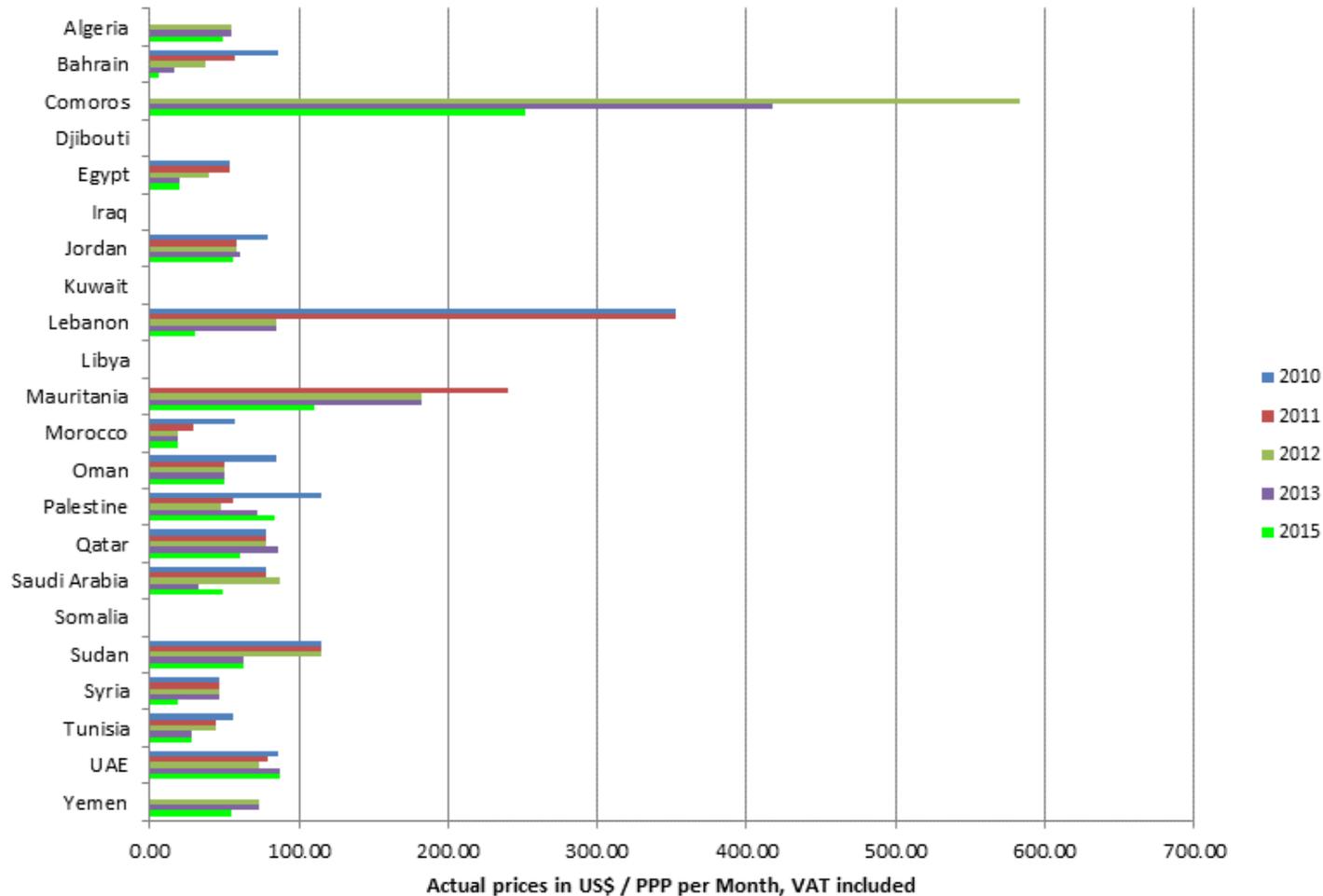
2014 OECD residential fixed broadband time series, >256 kb/s up to 2 Mb/s, high usage

Residential Fixed Broadband OECD H1: 0.25-2Mb/s, 20GB



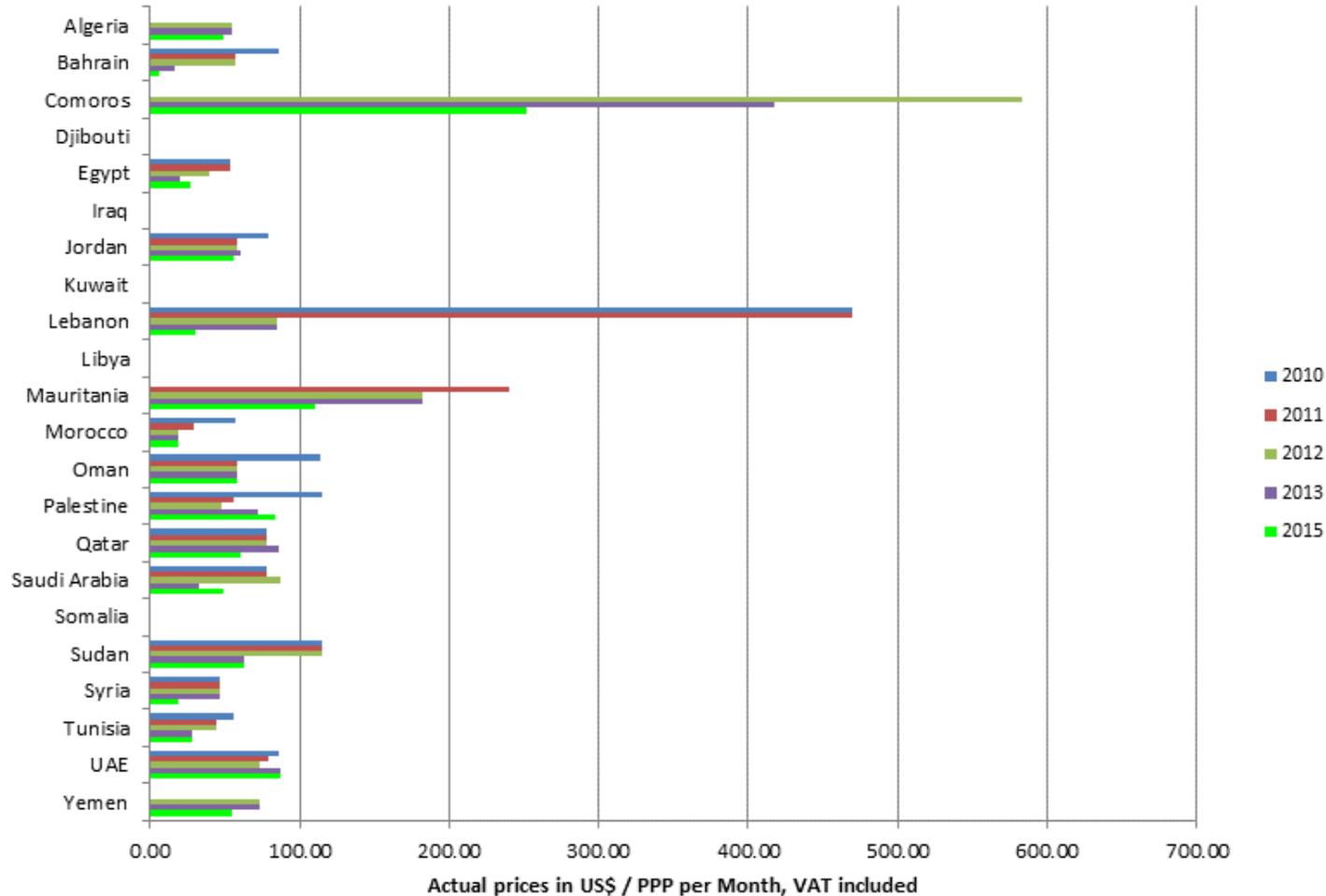
2014 OECD residential fixed broadband time series, >2 Mb/s up to 10 Mb/s, low usage

Residential Fixed Broadband OECD L2: 2-10Mb/s, 5GB



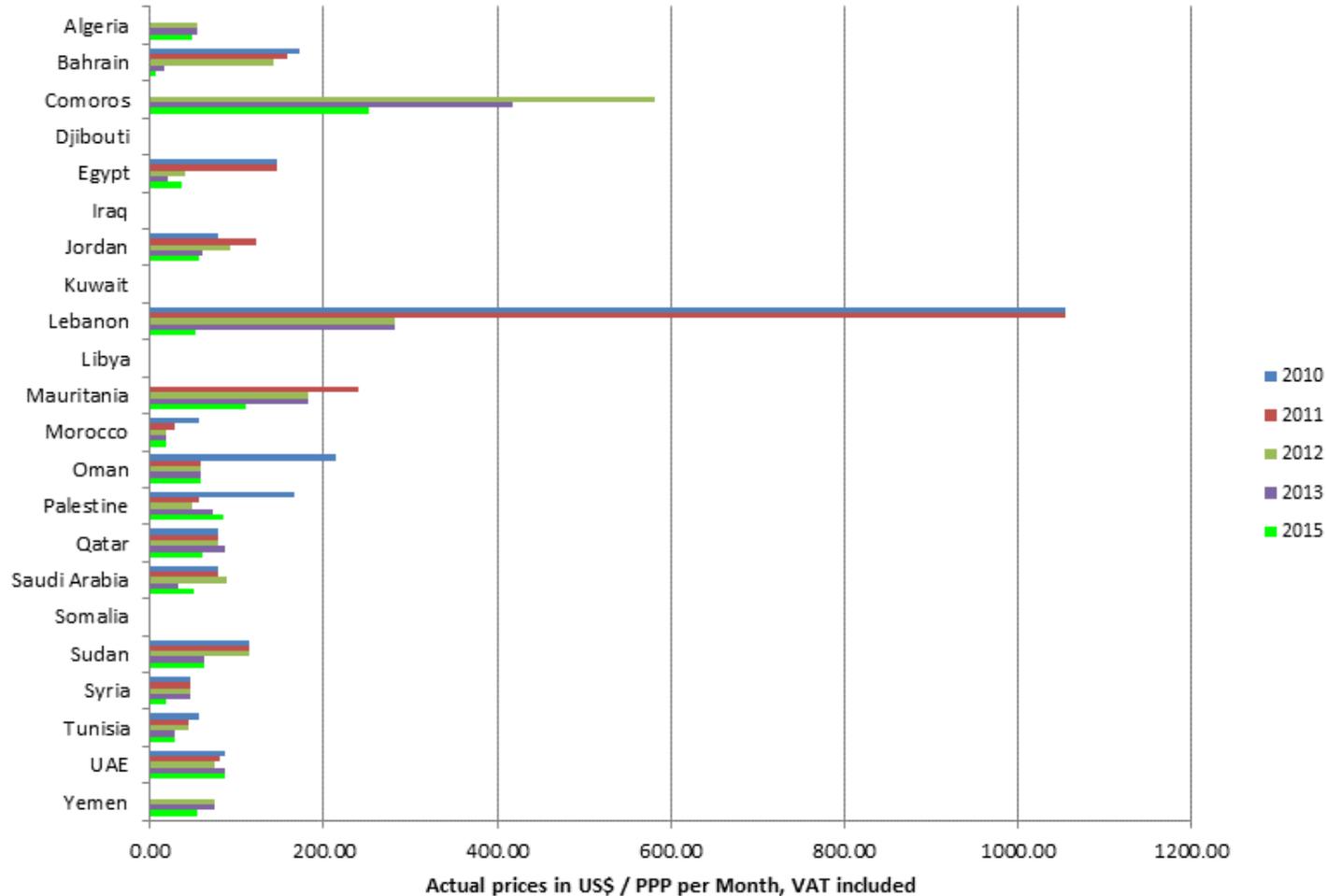
2014 OECD residential fixed broadband time series, >2 Mb/s up to 10 Mb/s, medium usage

Residential Fixed Broadband OECD M2: 2-10Mb/s, 15GB



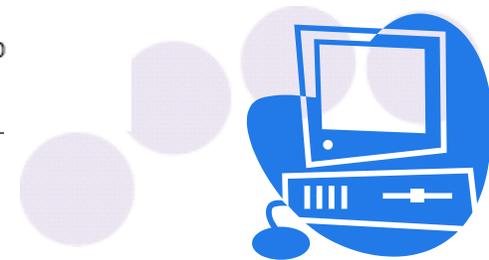
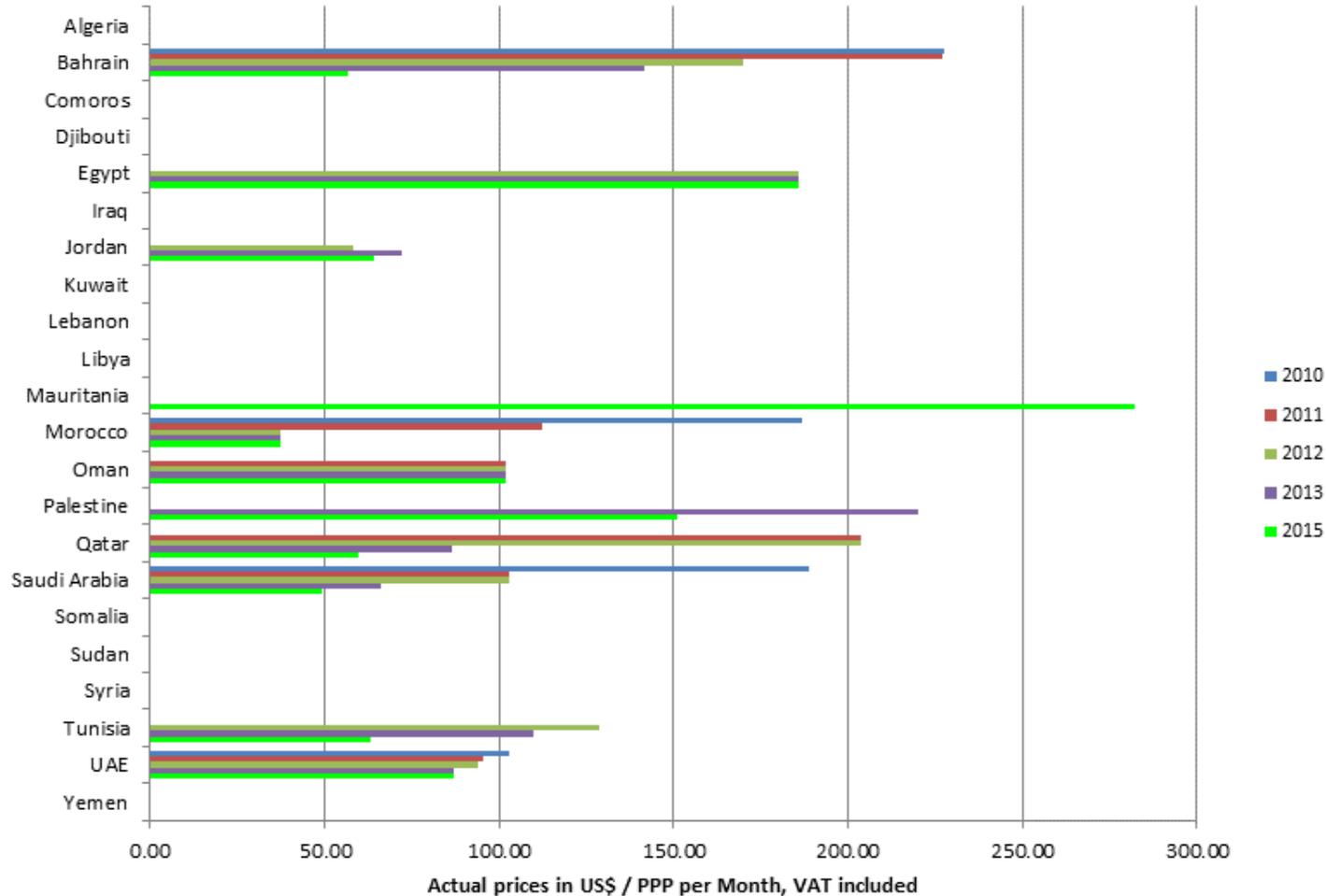
2014 OECD residential fixed broadband time series, >2 Mb/s up to 10 Mb/s, high usage

Residential Fixed Broadband OECD H2: 2-10Mb/s, 50GB



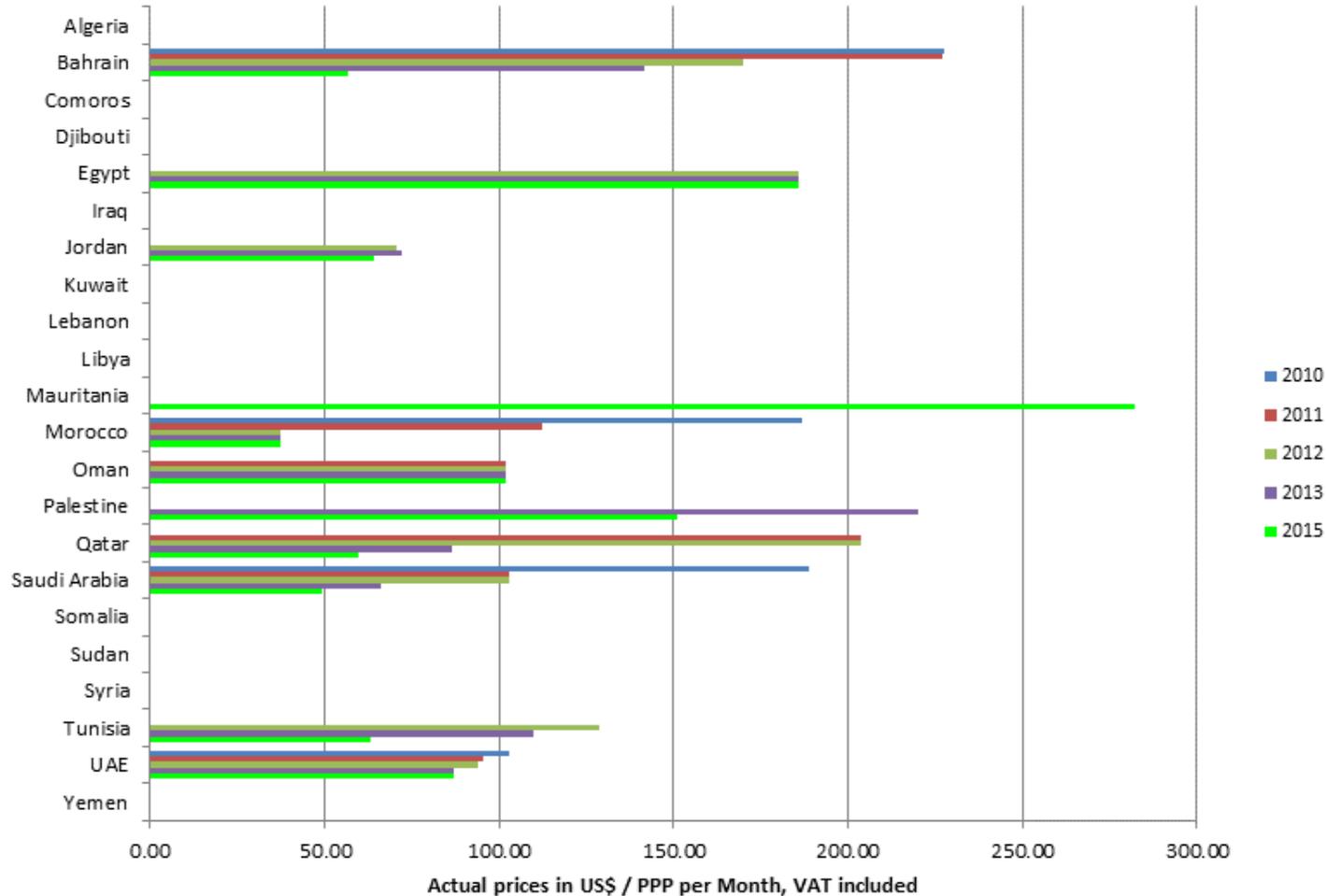
2014 OECD residential fixed broadband time series, >10 Mb/s up to 30 Mb/s, low usage

Residential Fixed Broadband OECD L3: 10-30Mb/s, 10GB



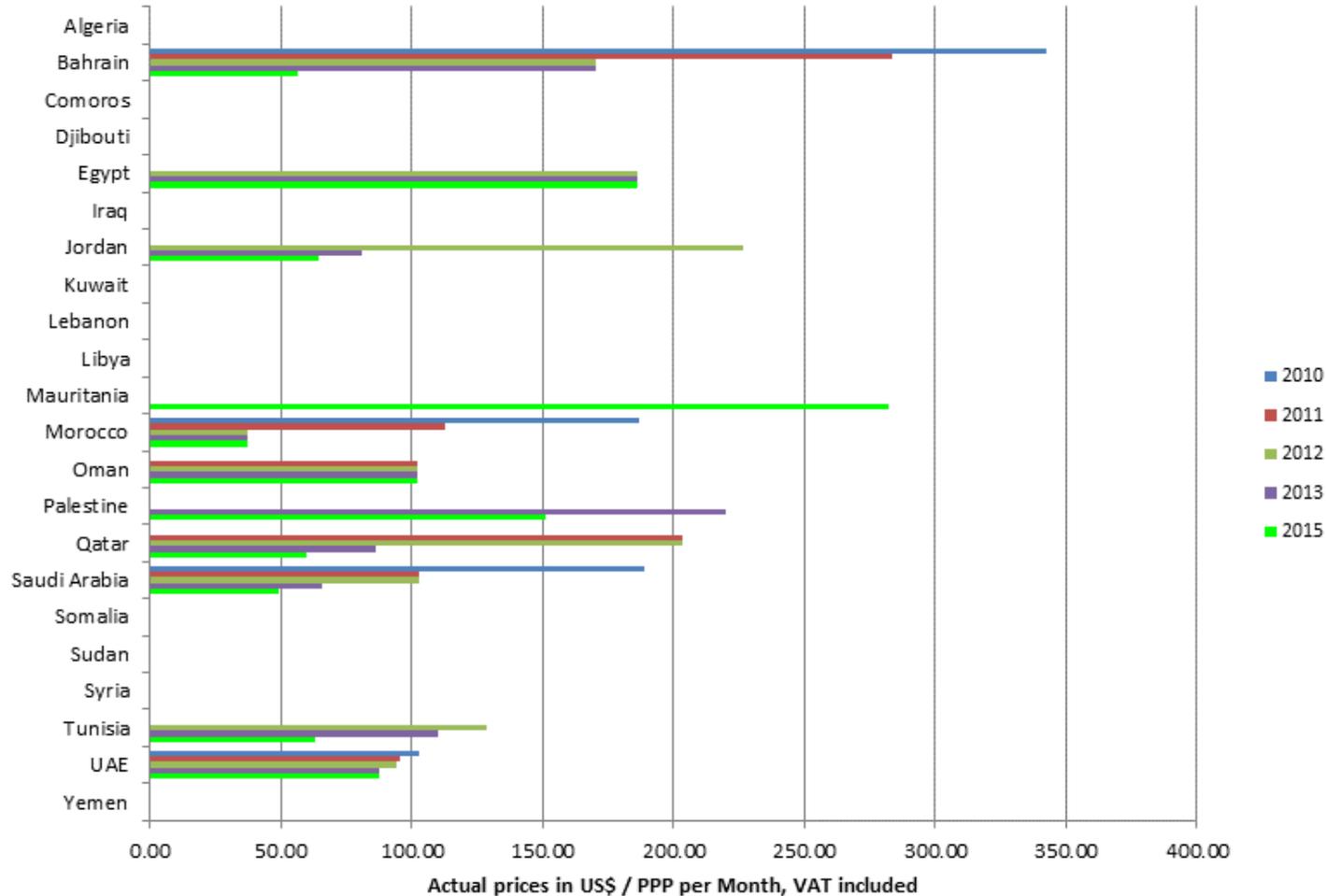
2014 OECD residential fixed broadband time series, >10 Mb/s up to 30 Mb/s, medium usage

Residential Fixed Broadband OECD M3: 10-30Mb/s, 25GB



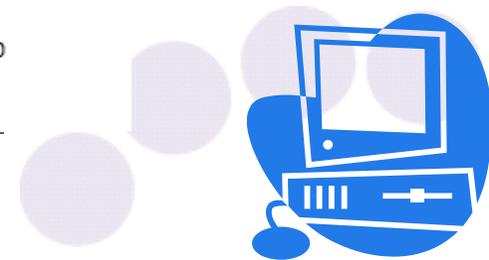
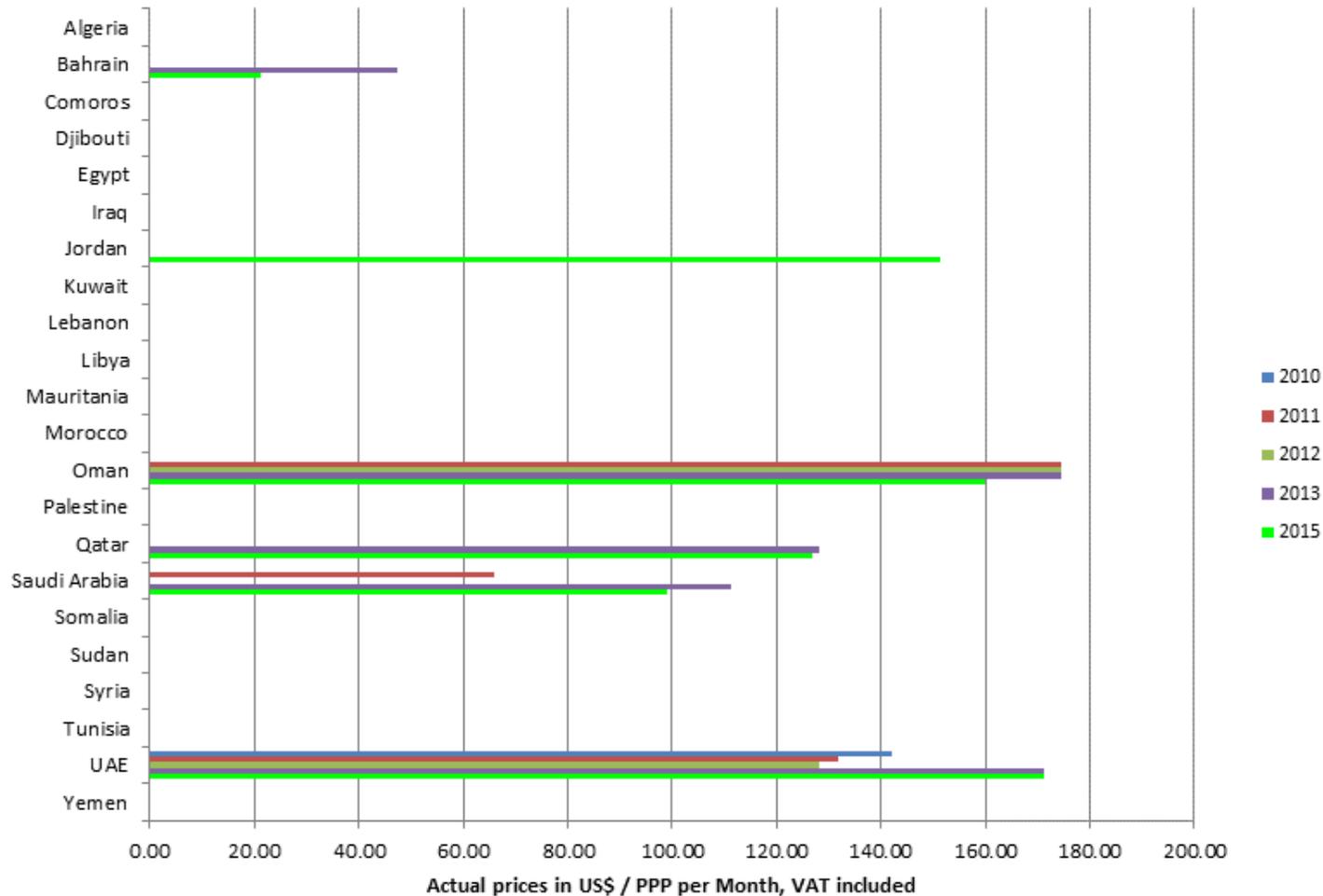
2014 OECD residential fixed broadband time series, >10 Mb/s up to 30 Mb/s, high usage

Residential Fixed Broadband OECD H3: 10-30Mb/s, 100GB



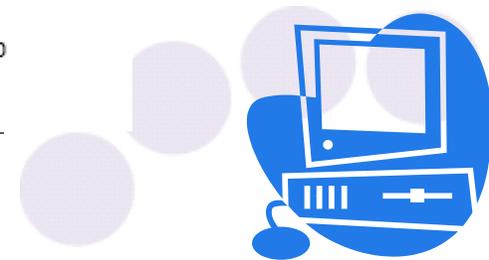
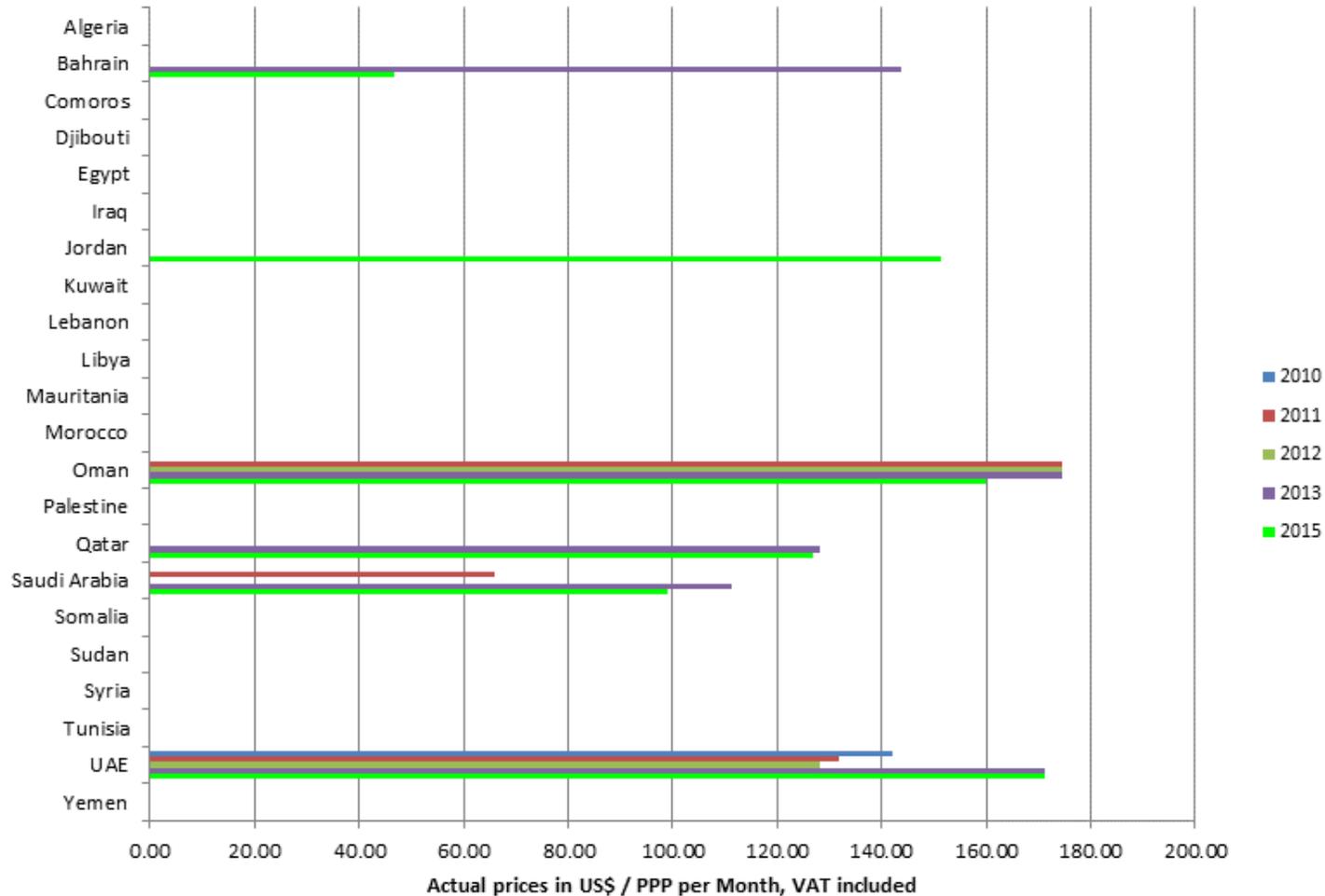
2014 OECD residential fixed broadband time series, >30 Mb/s up to 100 Mb/s, low usage

Residential Fixed Broadband OECD L4: 30-100Mb/s, 15GB



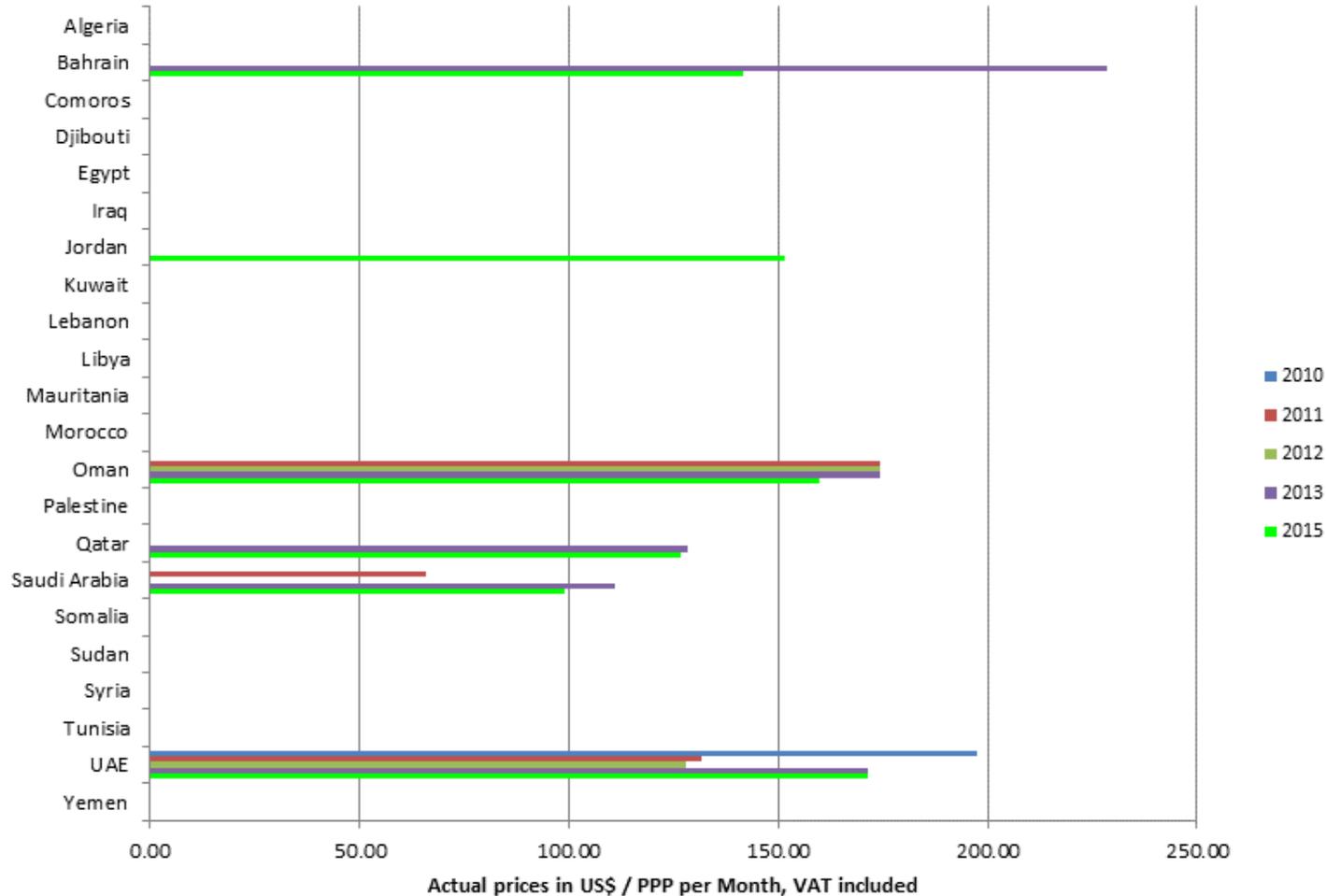
2014 OECD residential fixed broadband time series, >30 Mb/s up to 100 Mb/s, medium usage

Residential Fixed Broadband OECD M4: 30-100Mb/s, 50GB



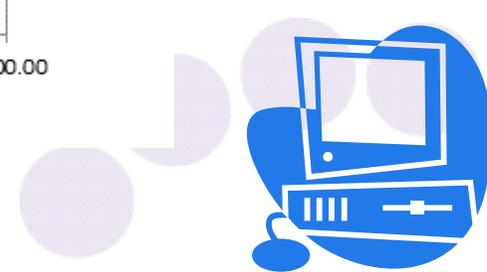
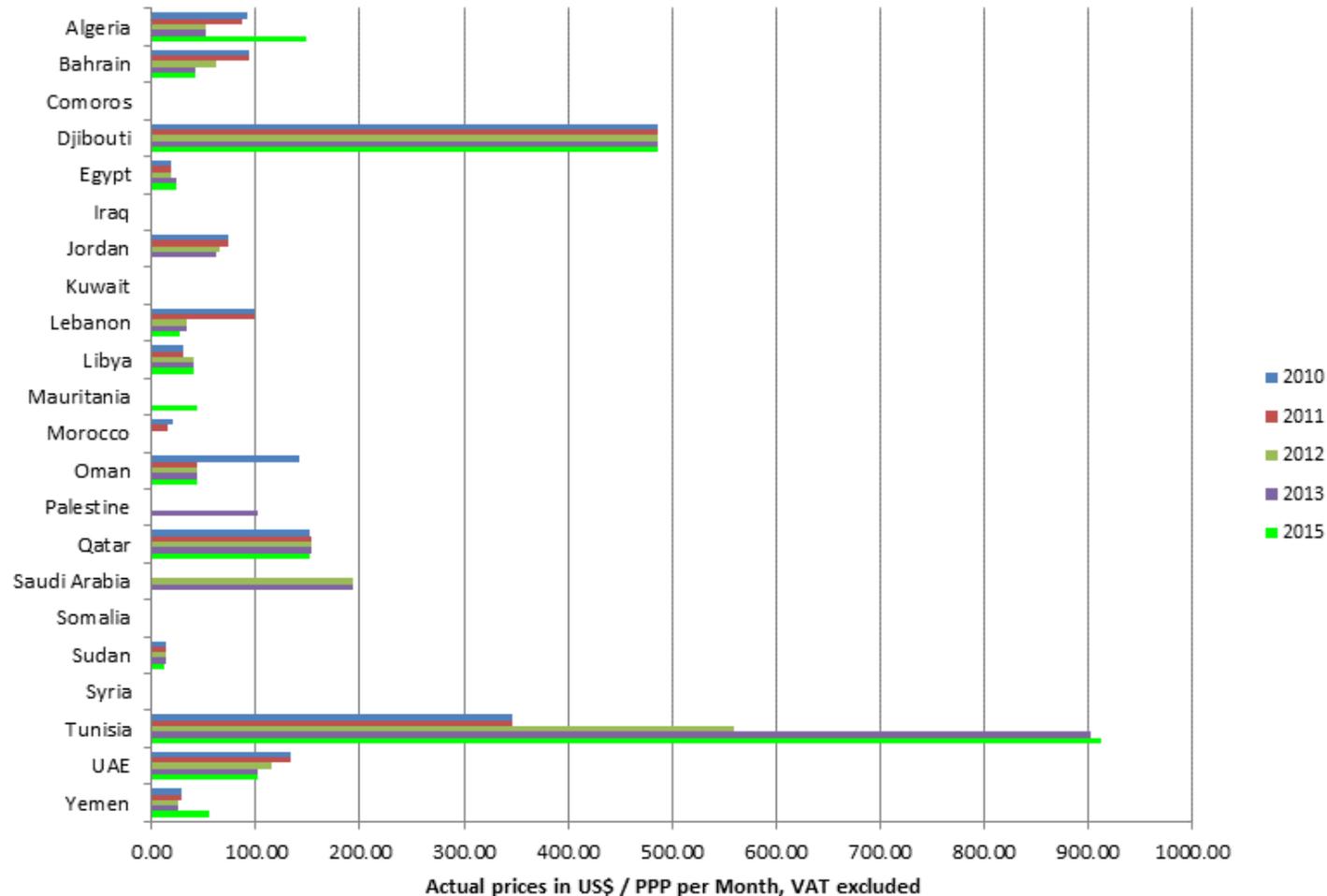
2014 OECD residential fixed broadband time series, >30 Mb/s up to 100 Mb/s, high usage

Residential Fixed Broadband OECD H4: 30-100Mb/s, 200GB



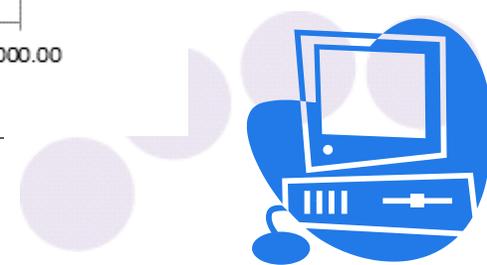
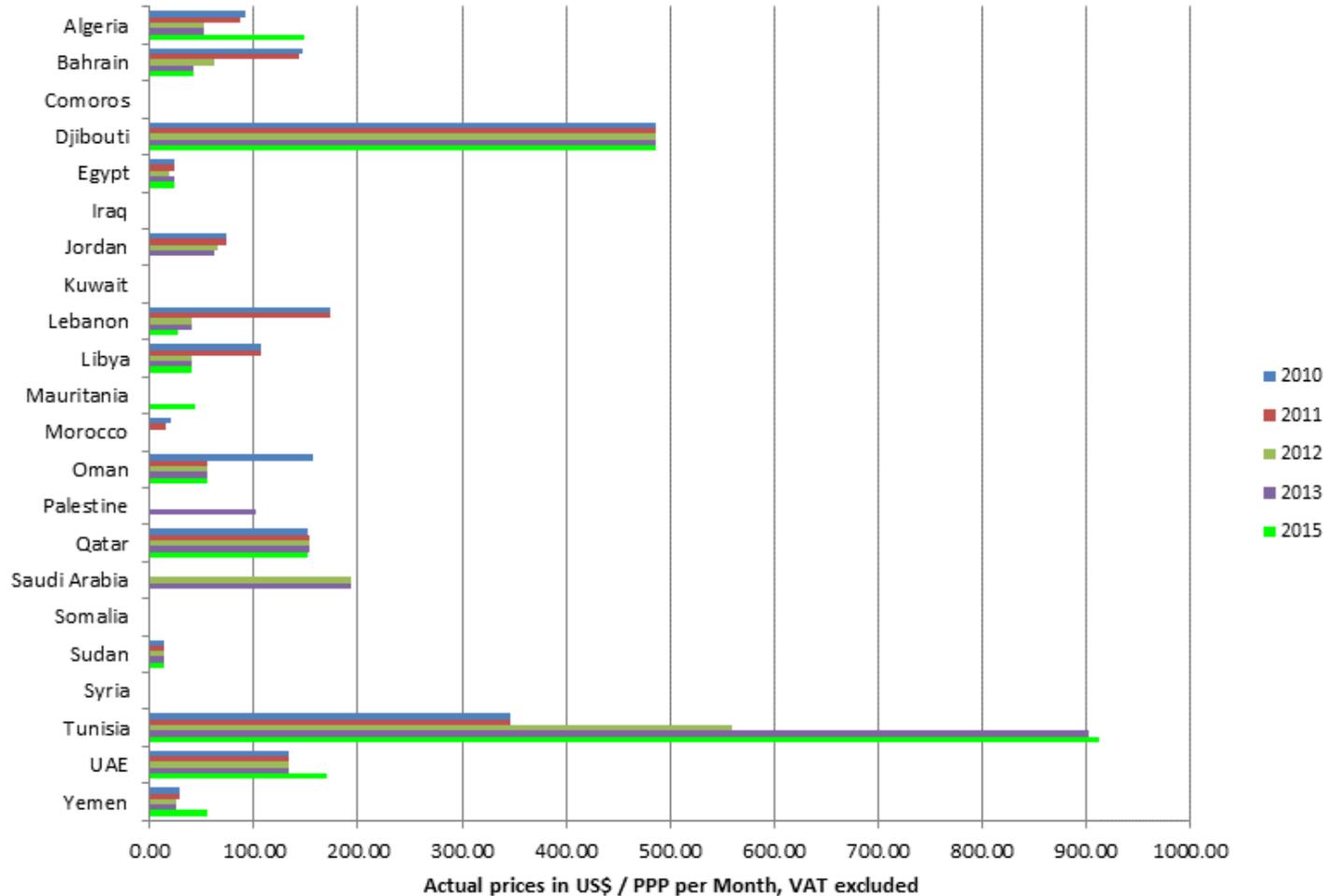
2014 OECD business fixed broadband time series, >256 kb/s up to 2 Mb/s, low usage

Business Fixed Broadband OECD L1: 0.25-2Mb/s, 5GB



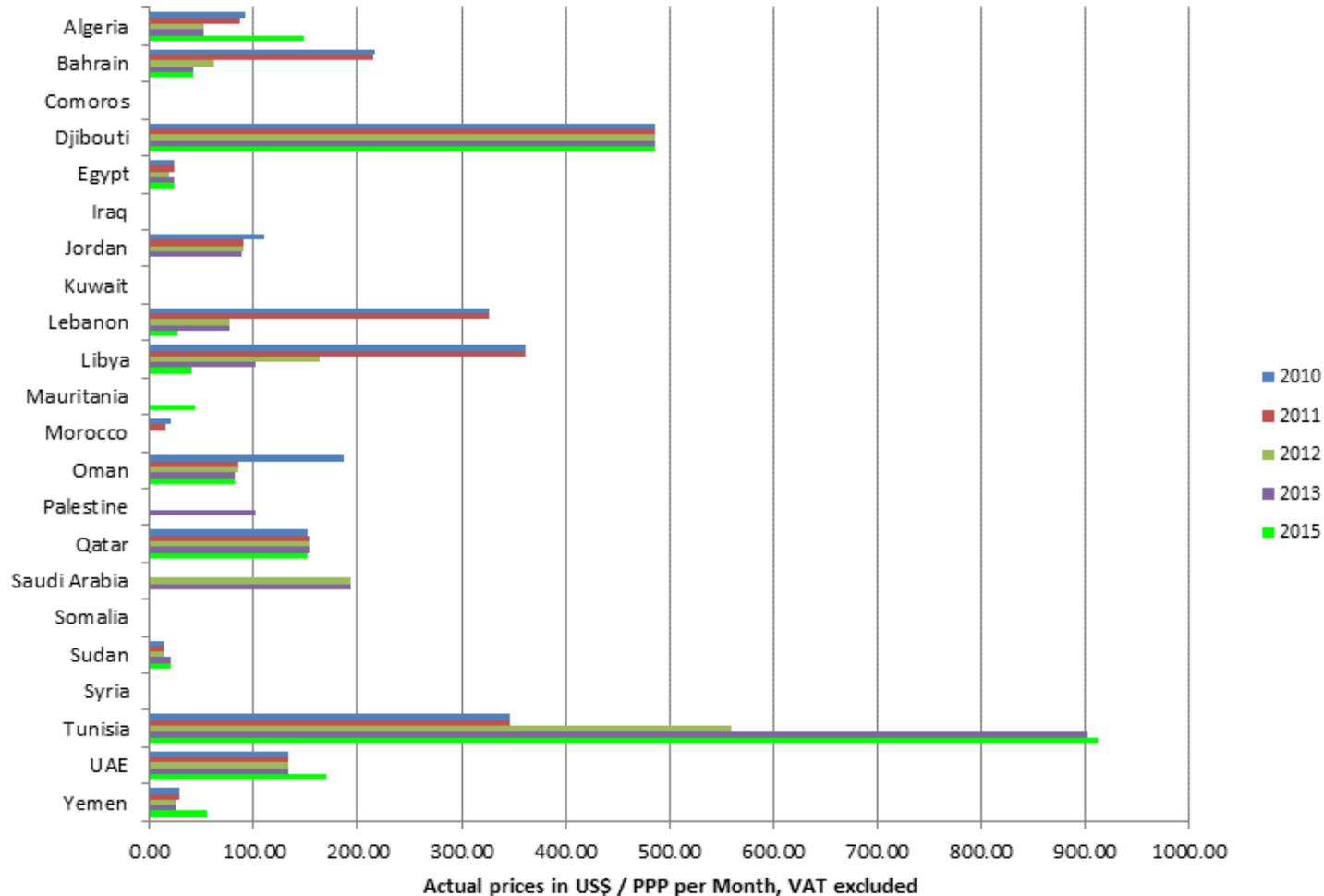
2014 OECD business fixed broadband time series, >256 kb/s up to 2 Mb/s, medium usage

Business Fixed Broadband OECD M1: 0.25-2Mb/s, 10GB



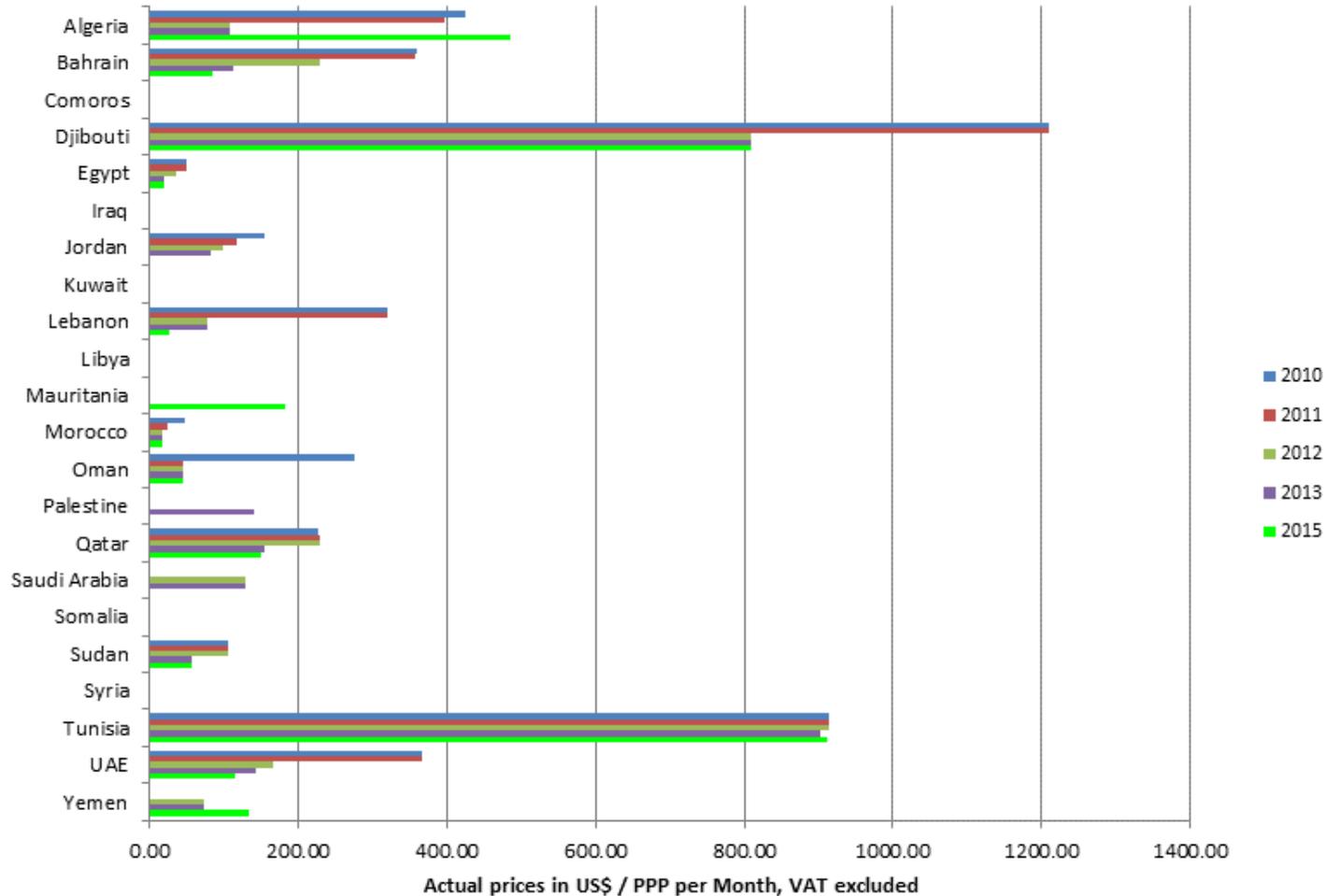
2014 OECD business fixed broadband time series, >256 kb/s up to 2 Mb/s, high usage

Business Fixed Broadband OECD H1: 0.25-2Mb/s, 20GB



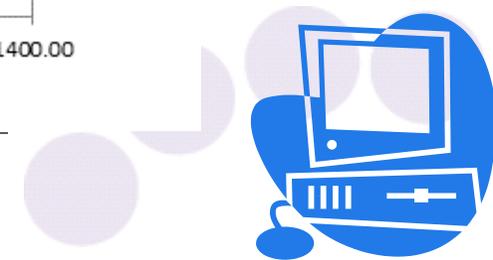
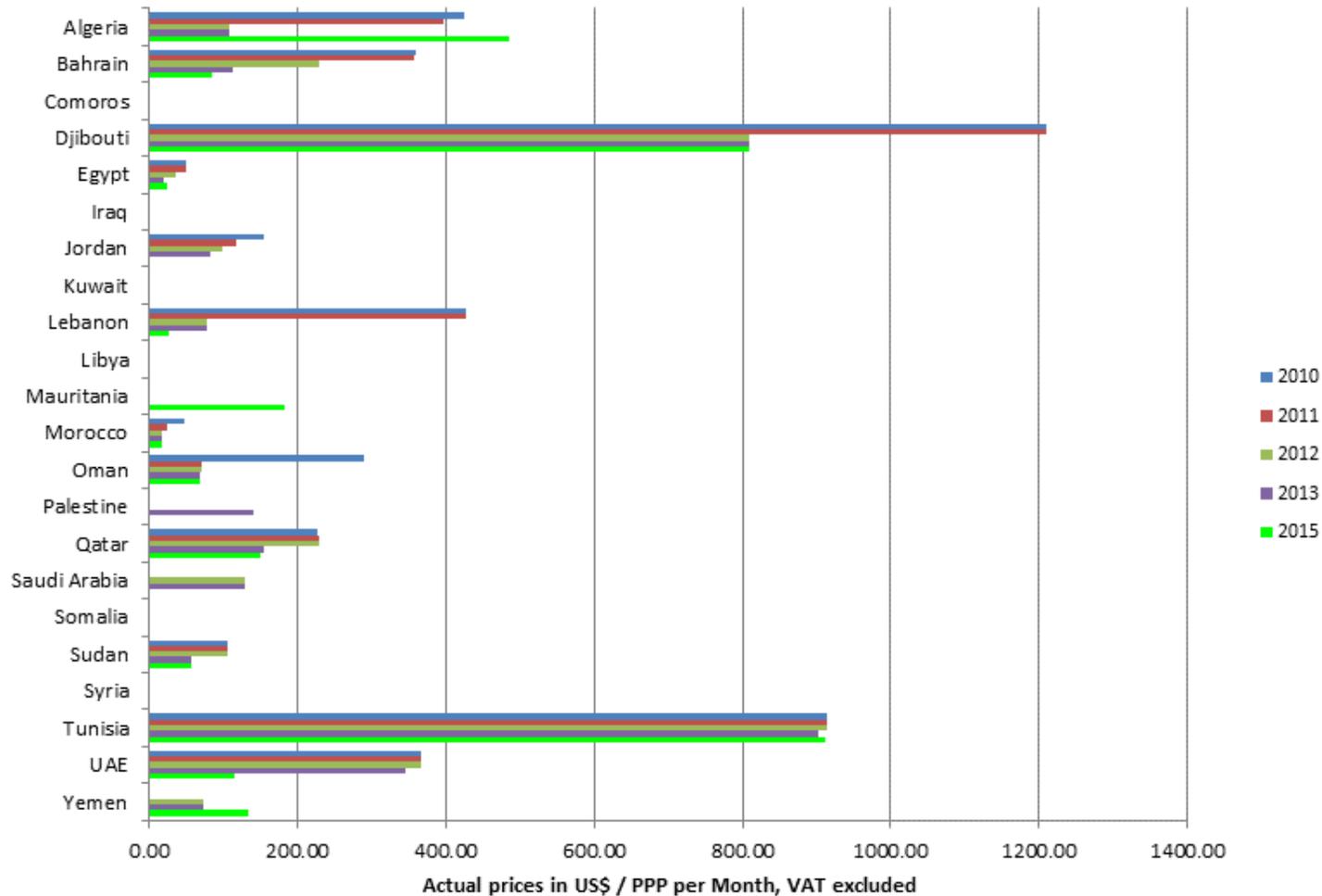
2014 OECD business fixed broadband time series, >2 Mb/s up to 10 Mb/s, low usage

Business Fixed Broadband OECD L2: 2-10Mb/s, 5GB



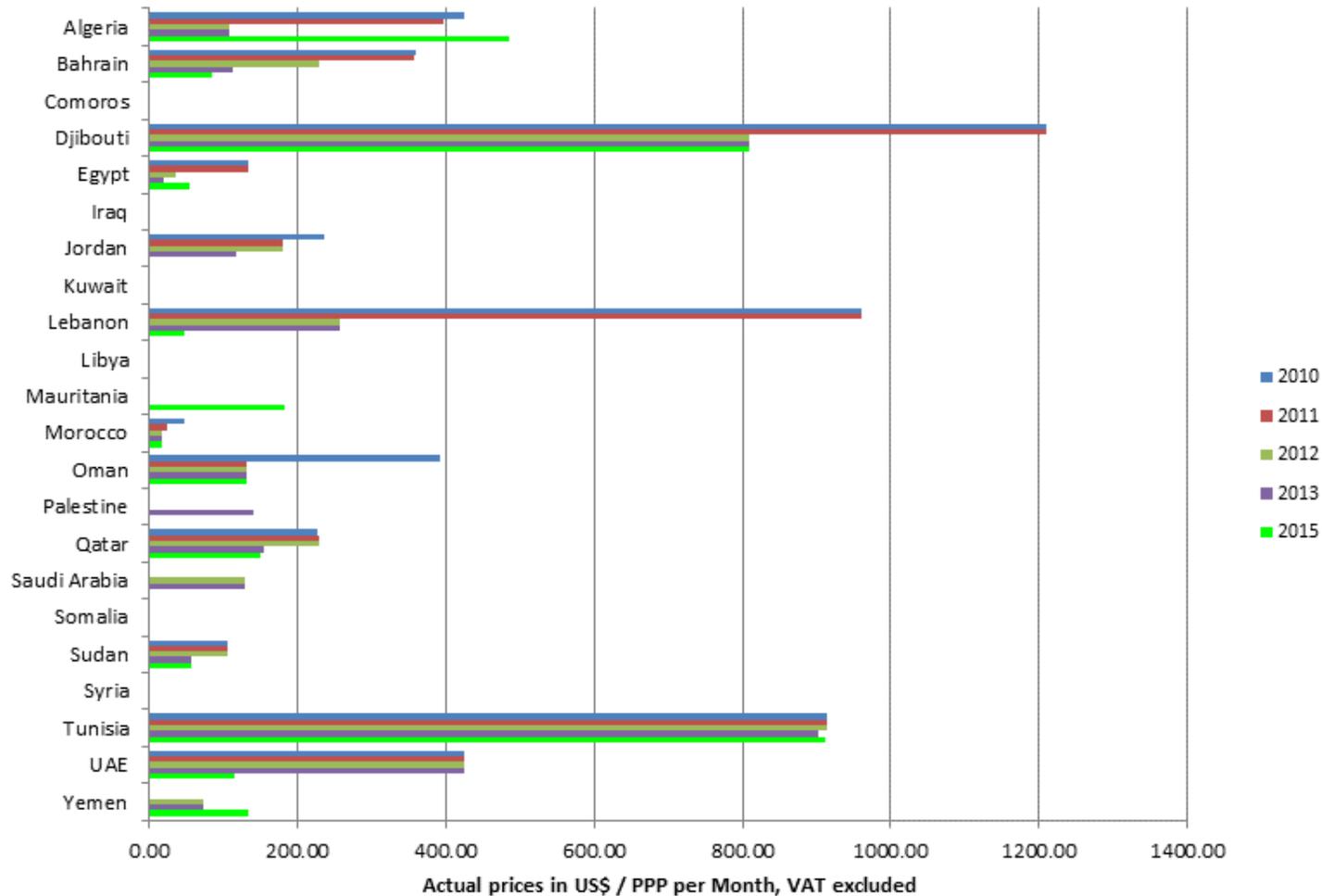
2014 OECD business fixed broadband time series, >2 Mb/s up to 10 Mb/s, medium usage

Business Fixed Broadband OECD M2: 2-10Mb/s, 15GB



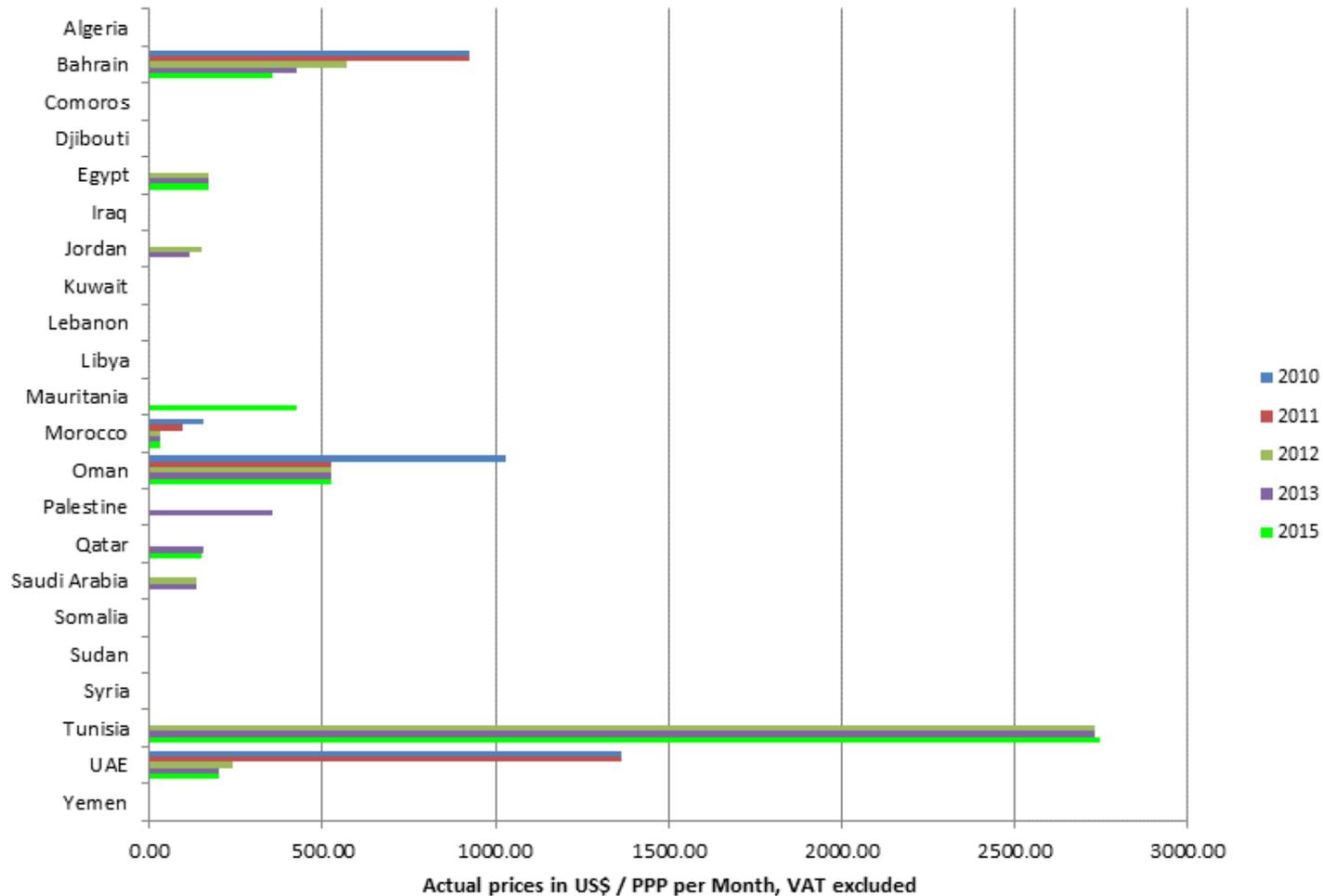
2014 OECD business fixed broadband time series, >2 Mb/s up to 10 Mb/s, high usage

Business Fixed Broadband OECD H2: 2-10Mb/s, 50GB



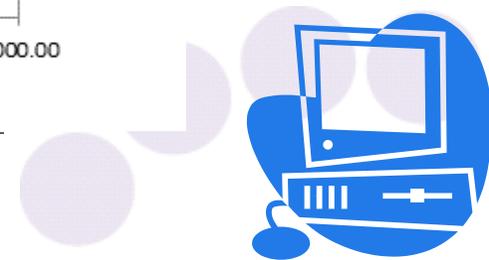
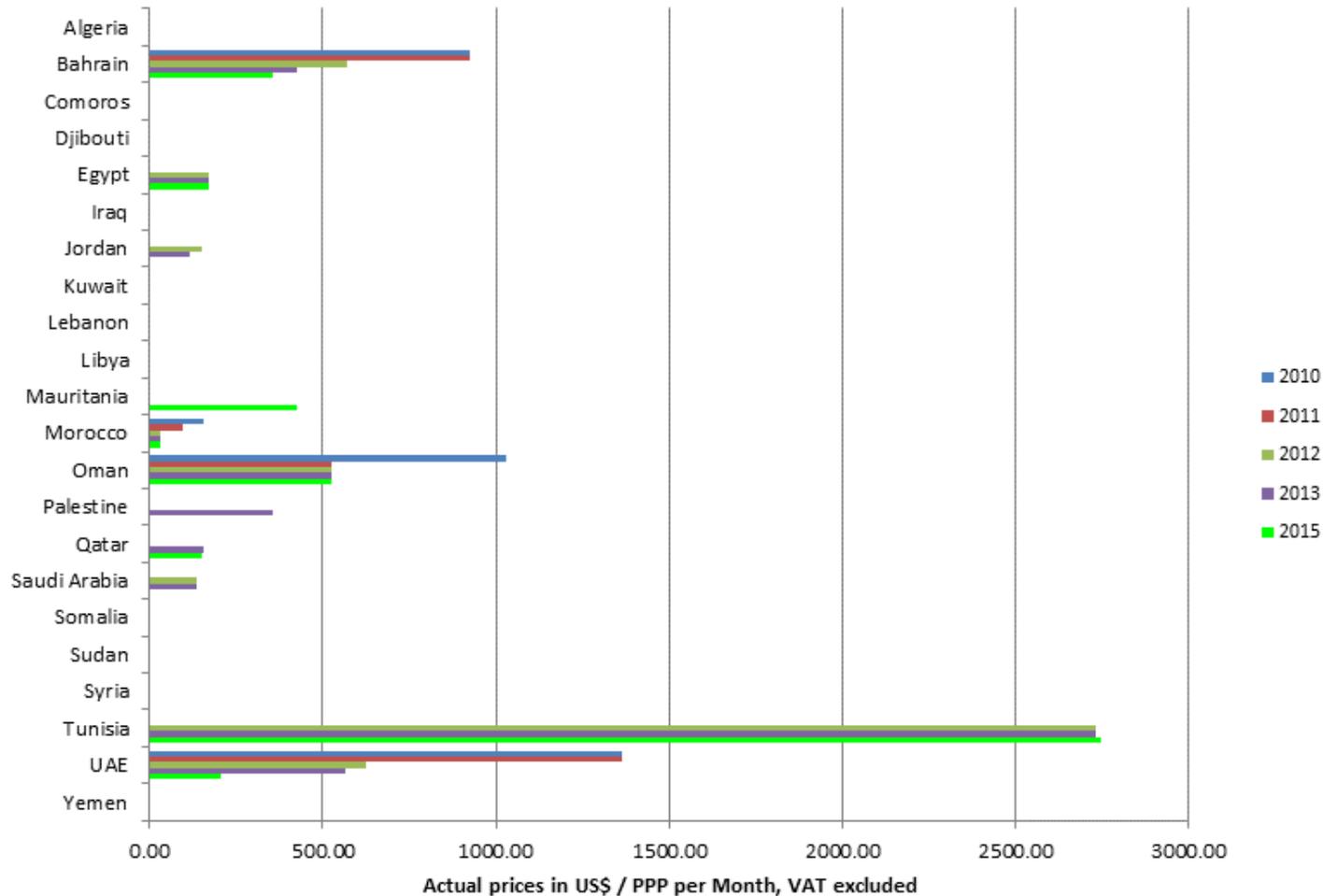
2014 OECD business fixed broadband time series, >10 Mb/s up to 30 Mb/s, low usage

Business Fixed Broadband OECD L3: 10-30Mb/s, 10GB



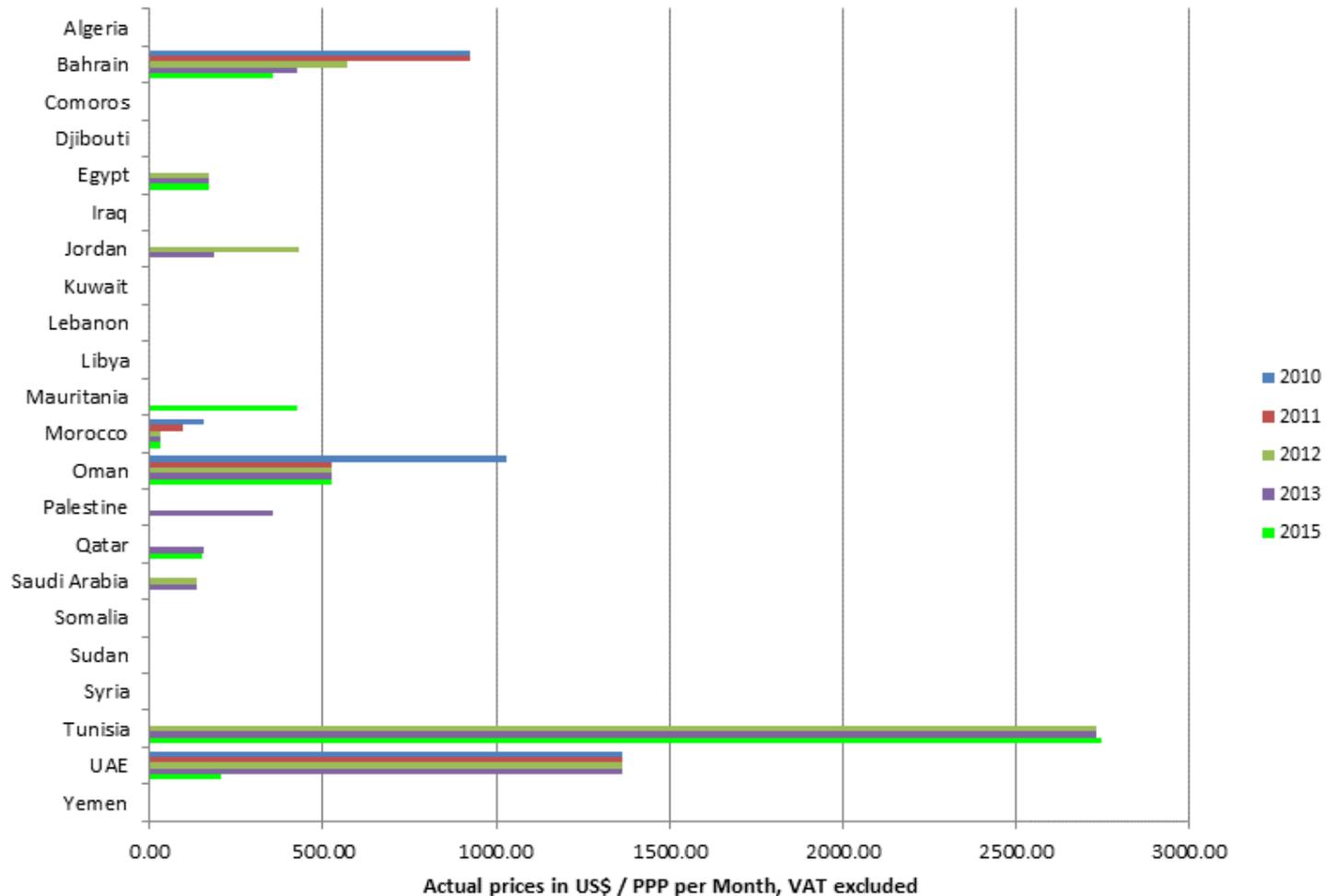
2014 OECD business fixed broadband time series, >10 Mb/s up to 30 Mb/s, medium usage

Business Fixed Broadband OECD M3: 10-30Mb/s, 25GB



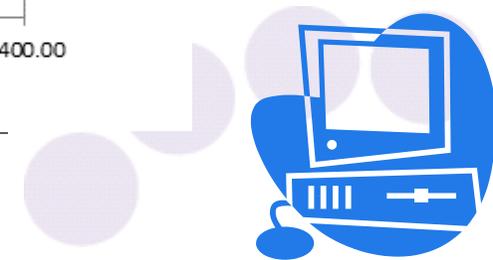
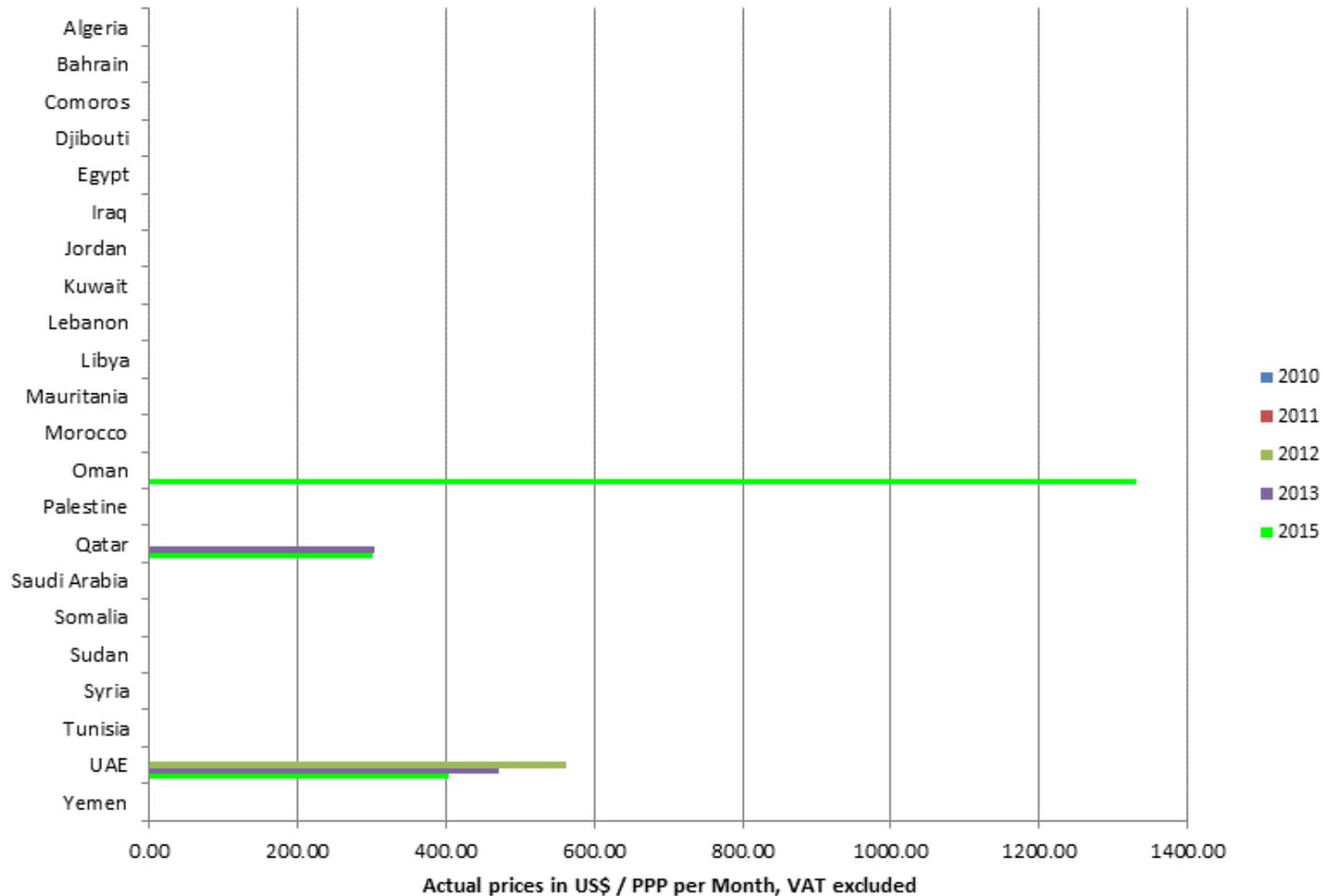
2014 OECD business fixed broadband time series, >10 Mb/s up to 30 Mb/s, high usage

Business Fixed Broadband OECD H3: 10-30Mb/s, 100GB



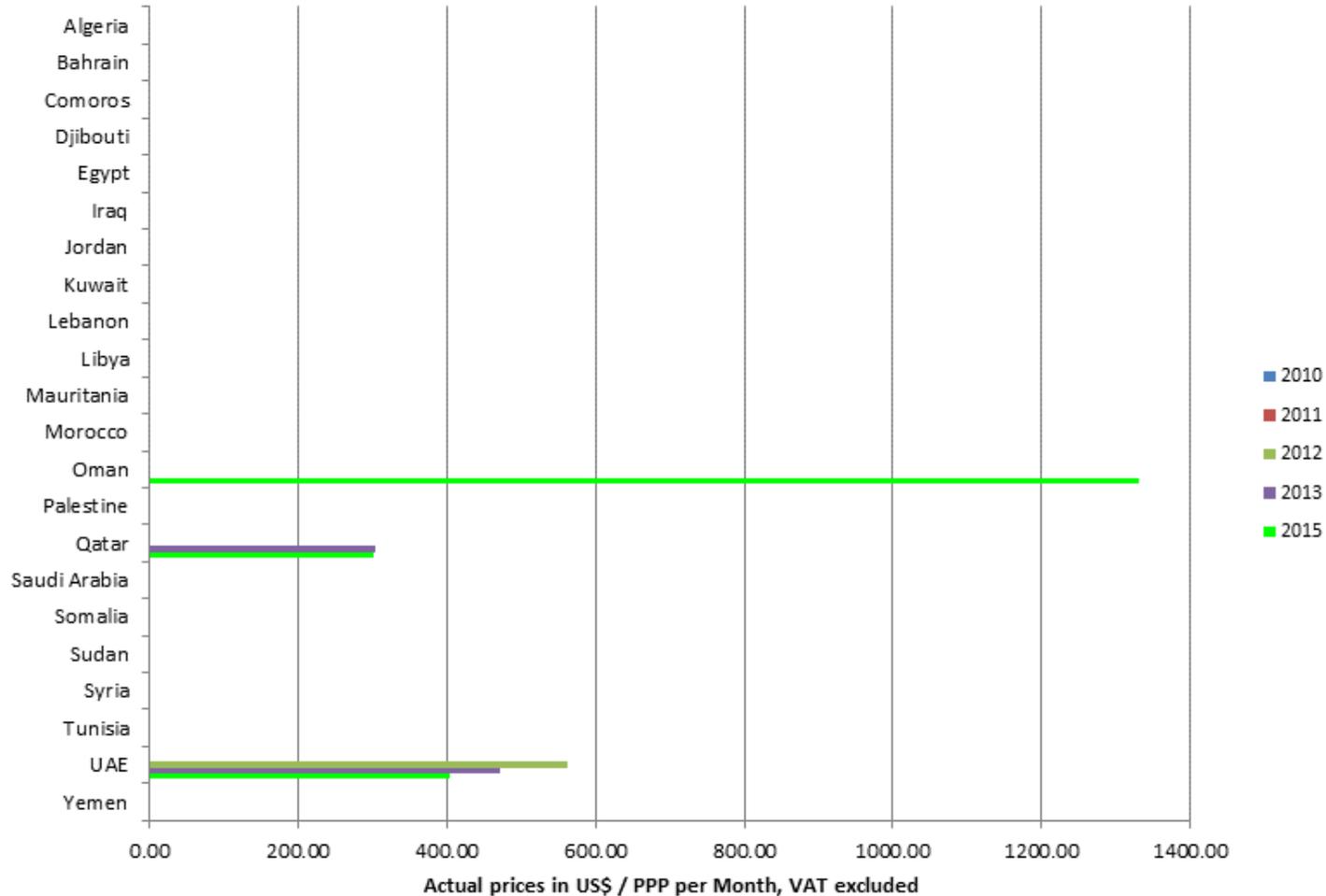
2014 OECD business fixed broadband time series, >30 Mb/s up to 100 Mb/s, low usage

Business Fixed Broadband OECD L4: 30-100Mb/s, 15GB



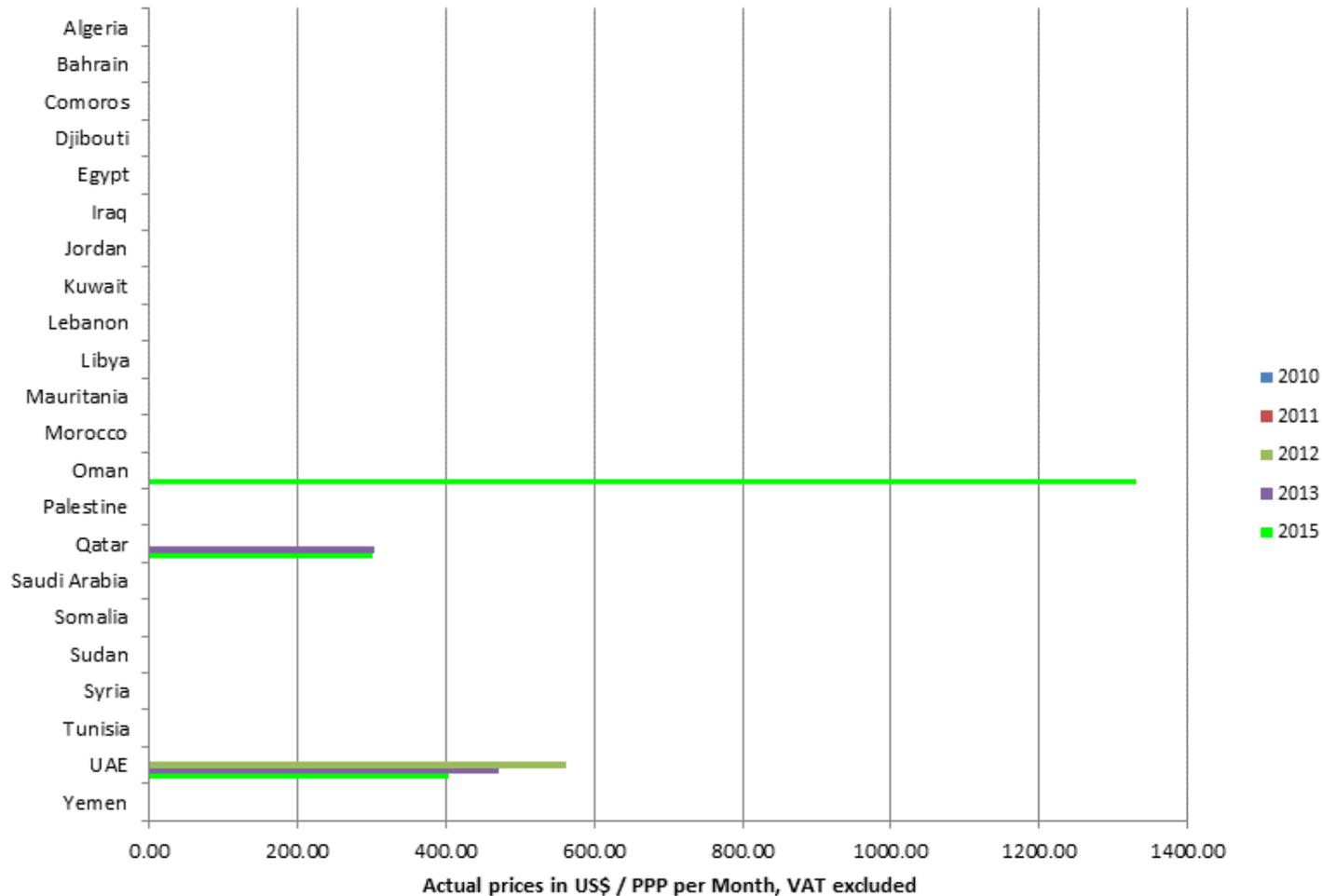
2014 OECD business fixed broadband time series, >30 Mb/s up to 100 Mb/s, medium usage

Business Fixed Broadband OECD M4: 30-100Mb/s, 50GB



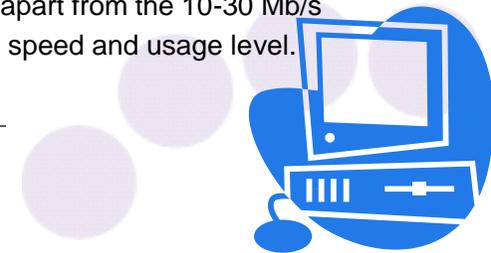
2014 OECD business fixed broadband time series, >30 Mb/s up to 100 Mb/s, high usage

Business Fixed Broadband OECD H4: 30-100Mb/s, 200GB



Observations from fixed broadband time series results

- There were price changes in a number of Arab countries. The more notable changes are:
 - Algeria: the number of published offers was reduced, with a number of the lowest speed offering being removed, some new higher speed offers being introduced, and rentals of existing services increasing.
 - Bahrain: change in range of offers, including increased speeds, and increased allowances on capped packages. Highest speed available for residential customers is now 300 Mb/s. Resulting impact is significant reduction across almost all baskets types and usage levels.
 - Comoros: Rental reduction for the 2 Mb/s offering, resulting in a cost reduction in the 2-10 Mb/s residential basket.
 - Egypt: Removal of some lower speed packages, and the addition of some higher speed services, resulting in a significant decrease in the very low speed baskets, but a corresponding increase in the mid speed baskets. A similar increase was seen for business services for low/mid-speed services (2-10 Mb/s) due to revised allowances and pricing on some services.
 - Jordan: an introduction of new service speeds (16 Mb/s and an 80 Mb/s fibre service), along with some price changes to existing services, resulting in a decrease in the residential baskets. Business tariffs are no longer published.
 - Lebanon: while some lower speed services were removed (the DSL 1 Mb/s service), and router and incumbent access charges were increased, allowances were also increased and overage charges reduced, resulting in an overall, and significant decrease in a number of baskets.
 - Qatar: Introduction of a 25 Mb/s fibre service for residential users, along with some other minor changes, resulting in an effective decrease in some of the baskets, most notably the 10-30 Mb/s basket.
 - Saudi Arabia: reduction in the number of offerings, and a consolidation of speeds offered, to remove speeds below 10 Mb/s, resulting in an increase in the 2-10 Mb/s baskets, but a decrease in all other baskets (the exception to this is the 0.25-2 Mb/s basket, where there are now no results for Saudi Arabia). Business pricing is no longer published, and no results are shown for 2015.
 - Tunisia: A reduction in incumbent monthly rental, resulting in a decrease in the 2-10 Mb/s basket costs for residential users. Removal of some lower speed packages and a reduction in rental for higher speed ones, resulting in a cost reduction across all relevant baskets, with greater reductions for higher speed baskets.
 - UAE: A change in business offering, with new speeds, resulting in an effective decrease in some baskets.
- Prices of residential broadband services in Arab countries have continued to fall over the past year. The average decrease depends a lot on the speed and usage level ranges between 3% and 11% for most baskets, the exception are the 2-10 Mb/s basket (all usage levels), and the 30-100 Mb/s basket, high usage, which decreased by between 26 and 43%.
- By contrast, the average cost for business broadband services has increased across all baskets and speeds apart from the 10-30 Mb/s high usage basket, which saw a small decrease. For the other baskets, the increase varies depending on the speed and usage level. Low speed services generally increased less than higher speeds.



Fixed broadband ranking tables, 2010-2015

Fixed broadband OECD 256 kb/s - 2 Mb/s basket ranking, low usage, residential offers

Total results for OECD L1: 0.25-2Mb/s, 5GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

	2010	2011	2012	2013	2015
Algeria	19.34	18.19	18.19	18.19	27.06
Bahrain	37.86	36.93	36.93	36.93	14.18
Comoros			69.04	64.07	64.07
Djibouti	140.67	140.67	99.61	99.61	99.61
Egypt	19.93	19.93	19.93	25.24	13.29
Iraq					
Jordan	48.91	39.51	31.99	40.19	40.19
Kuwait					
Lebanon	91.53	91.53	36.22	36.22	29.87
Libya	30.75	30.75	39.73	39.73	39.73
Mauritania	109.19	42.89	42.89	41.45	23.48
Morocco	25.02	19.44			
Oman	49.99	49.99	49.99	49.99	
Palestine	47.42	38.45	31.41	46.58	67.51
Qatar	53.02	53.02	53.02	61.30	61.30
Saudi Arabia	54.13	20.24	54.13	32.79	
Somalia					
Sudan	14.05	14.05	14.05	15.10	12.58
Syria	11.67	11.67	11.67	11.67	5.32
Tunisia	28.06	28.06	33.32	28.06	28.06
UAE	43.39	44.17	45.20	59.20	59.20
Yemen	29.37	29.37	25.36	25.36	18.69

Arab average	47.46	40.49	39.59	40.65	37.76
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■ Below Arab average
■ Above Arab average

Ranking for OECD L1: 0.25-2Mb/s, 5GB, residential offers

	2010	2011	2012	2013	2015
Algeria	3	3	3	3	7
Bahrain	9	10	10	9	4
Comoros	-	-	17	17	14
Djibouti	18	18	18	18	16
Egypt	4	5	4	4	3
Iraq	-	-	-	-	-
Jordan	12	12	7	11	11
Kuwait	-	-	-	-	-
Lebanon	16	17	9	8	9
Libya	8	9	11	10	10
Mauritania	17	13	12	12	6
Morocco	5	4	-	-	-
Oman	13	15	14	14	-
Palestine	11	11	6	13	15
Qatar	14	16	15	16	13
Saudi Arabia	15	6	16	7	-
Somalia	-	-	-	-	-
Sudan	2	2	2	2	2
Syria	1	1	1	1	1
Tunisia	6	7	8	6	8
UAE	10	14	13	15	12
Yemen	7	8	5	5	5

■ Least expensive
■ Most expensive



Fixed broadband OECD 256 kb/s - 2 Mb/s basket ranking, medium usage, residential offers

Total results for OECD M1: 0.25-2Mb/s, 10GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

	2010	2011	2012	2013	2015
Algeria	19.34	18.19	18.19	18.19	27.06
Bahrain	52.38	48.35	48.35	48.35	14.18
Comoros			69.04	64.07	64.07
Djibouti	140.67	140.67	99.61	99.61	140.67
Egypt	25.24	25.24	19.93	25.24	13.29
Iraq					
Jordan	48.91	39.51	39.51	40.19	40.19
Kuwait					
Lebanon	175.29	175.29	44.94	44.94	29.87
Libya	107.17	107.17	39.73	39.73	39.73
Mauritania	109.19	42.89	42.89	41.45	23.48
Morocco	25.02	19.44			
Oman	64.46	58.67	58.67	58.67	
Palestine	58.07	38.45	31.41	46.58	67.51
Qatar	53.02	53.02	53.02	61.30	61.30
Saudi Arabia	54.13	20.24	54.13	32.79	
Somalia					
Sudan	14.05	14.05	14.05	15.10	15.10
Syria	11.67	11.67	11.67	11.67	5.32
Tunisia	28.06	28.06	33.32	28.06	28.06
UAE	43.39	44.17	45.20	59.20	59.20
Yemen	29.37	29.37	25.36	25.36	18.69

Arab average	58.86	50.80	41.61	42.25	40.48
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■ Below Arab average
■ Above Arab average

Ranking for OECD M1: 0.25-2Mb/s, 10GB, residential offers

	2010	2011	2012	2013	2015
Algeria	3	3	3	3	7
Bahrain	10	13	13	13	3
Comoros	-	-	17	17	14
Djibouti	17	17	18	18	16
Egypt	5	6	4	4	2
Iraq	-	-	-	-	-
Jordan	9	10	8	9	11
Kuwait	-	-	-	-	-
Lebanon	18	18	11	11	9
Libya	15	16	9	8	10
Mauritania	16	11	10	10	6
Morocco	4	4	-	-	-
Oman	14	15	16	14	-
Palestine	13	9	6	12	15
Qatar	11	14	14	16	13
Saudi Arabia	12	5	15	7	-
Somalia	-	-	-	-	-
Sudan	2	2	2	2	4
Syria	1	1	1	1	1
Tunisia	6	7	7	6	8
UAE	8	12	12	15	12
Yemen	7	8	5	5	5

■ Least expensive
■ Most expensive



Fixed broadband OECD 256 kb/s - 2 Mb/s basket ranking, high usage, residential offers

Total results for OECD H1: 0.25-2Mb/s, 20GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

Ranking for OECD H1: 0.25-2Mb/s, 20GB, residential offers

	2010	2011	2012	2013	2015
Algeria	19.34	18.19	18.19	18.19	27.06
Bahrain	81.42	71.24	71.24	71.24	14.18
Comoros			69.04	64.07	64.07
Djibouti	345.98	345.98	209.11	209.11	345.98
Egypt	25.24	25.24	19.93	25.24	13.29
Iraq					
Jordan	48.91	58.50	58.50	80.58	80.58
Kuwait					
Lebanon	342.81	342.81	85.29	85.29	29.87
Libya	361.91	361.91	164.12	101.92	39.73
Mauritania	109.19	42.89	42.89	41.45	23.48
Morocco	25.02	19.44			
Oman	93.39	58.67	58.67	58.67	
Palestine	93.58	38.45	31.41	46.58	67.51
Qatar	53.02	53.02	53.02	61.30	61.30
Saudi Arabia	54.13	20.24	54.13	32.79	
Somalia					
Sudan	14.05	14.05	14.05	22.65	22.65
Syria	11.67	11.67	11.67	11.67	5.32
Tunisia	28.06	28.06	33.32	28.06	28.06
UAE	43.39	44.17	45.20	59.20	59.20
Yemen	29.37	29.37	25.36	25.36	18.69

	2010	2011	2012	2013	2015
Algeria	3	3	3	2	7
Bahrain	12	15	15	14	3
Comoros	-	-	14	13	13
Djibouti	17	17	18	18	16
Egypt	5	6	4	4	2
Iraq	-	-	-	-	-
Jordan	9	13	12	15	15
Kuwait	-	-	-	-	-
Lebanon	16	16	16	16	9
Libya	18	18	17	17	10
Mauritania	15	10	8	8	6
Morocco	4	4	-	-	-
Oman	13	14	13	10	-
Palestine	14	9	6	9	14
Qatar	10	12	10	12	12
Saudi Arabia	11	5	11	7	-
Somalia	-	-	-	-	-
Sudan	2	2	2	3	5
Syria	1	1	1	1	1
Tunisia	6	7	7	6	8
UAE	8	11	9	11	11
Yemen	7	8	5	5	4

Arab average	98.92	87.99	59.17	57.97	56.31
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■ Below Arab average
■ Above Arab average

■ Least expensive
■ Most expensive



Fixed broadband OECD 2 Mb/s - 10 Mb/s basket ranking, low usage, residential offers

Total results for OECD L2: 2-10Mb/s, 5GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

Ranking for OECD L2: 2-10Mb/s, 5GB, residential offers

	2010	2011	2012	2013	2015
Algeria			54.91	54.91	48.53
Bahrain	85.87	56.72	36.93	36.93	14.18
Comoros			582.70	417.00	251.30
Djibouti					
Egypt	53.14	53.14	39.86	19.93	19.93
Iraq					
Jordan	78.99	58.50	58.50	60.39	56.08
Kuwait					
Lebanon	352.03	352.33	85.29	85.29	29.87
Libya					
Mauritania		240.08	181.58	181.58	109.72
Morocco	56.63	28.74	18.92	18.92	18.92
Oman	84.71	49.99	49.99	49.99	49.99
Palestine	115.17	56.06	47.67	71.63	83.98
Qatar	78.11	78.11	78.11	86.39	59.91
Saudi Arabia	78.31	78.31	87.25	32.79	49.35
Somalia					
Sudan	115.04	115.04	115.04	62.92	62.92
Syria	46.44	46.44	46.44	46.44	18.78
Tunisia	56.12	44.43	44.43	28.06	28.06
UAE	86.06	79.40	73.35	87.24	87.24
Yemen			73.42	73.42	54.73

	2010	2011	2012	2013	2015
Algeria	-	-	8	8	7
Bahrain	9	7	2	5	1
Comoros	-	-	17	17	17
Djibouti	-	-	-	-	-
Egypt	2	5	3	2	4
Iraq	-	-	-	-	-
Jordan	7	8	9	9	11
Kuwait	-	-	-	-	-
Lebanon	13	14	13	13	6
Libya	-	-	-	-	-
Mauritania	-	13	16	16	16
Morocco	4	1	1	1	3
Oman	8	4	7	7	9
Palestine	12	6	6	11	14
Qatar	5	9	12	14	12
Saudi Arabia	6	10	14	4	8
Somalia	-	-	-	-	-
Sudan	11	12	15	10	13
Syria	1	3	5	6	2
Tunisia	3	2	4	3	5
UAE	10	11	10	15	15
Yemen	-	-	11	12	10

Arab average	98.97	95.52	98.49	83.17	61.38
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Below Arab average
 Above Arab average

Least expensive
 Most expensive



Fixed broadband OECD 2 Mb/s - 10 Mb/s basket ranking, medium usage, residential offers

Total results for OECD M2: 2-10Mb/s, 15GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

Ranking for OECD M2: 2-10Mb/s, 15GB, residential offers

	2010	2011	2012	2013	2015
Algeria			54.91	54.91	48.53
Bahrain	85.87	56.72	56.72	56.72	14.18
Comoros			582.70	417.00	251.30
Djibouti					
Egypt	53.14	53.14	39.86	19.93	26.57
Iraq					
Jordan	78.99	58.50	58.50	60.39	56.08
Kuwait					
Lebanon	469.29	469.59	85.29	85.29	29.87
Libya					
Mauritania		240.08	181.58	181.58	109.72
Morocco	56.63	28.74	18.92	18.92	18.92
Oman	113.65	58.67	58.67	58.67	58.67
Palestine	115.17	56.06	47.67	71.63	83.98
Qatar	78.11	78.11	78.11	86.39	59.91
Saudi Arabia	78.31	78.31	87.25	32.79	49.35
Somalia					
Sudan	115.04	115.04	115.04	62.92	62.92
Syria	46.44	46.44	46.44	46.44	18.78
Tunisia	56.12	44.43	44.43	28.06	28.06
UAE	86.06	79.40	73.35	87.24	87.24
Yemen			73.42	73.42	54.73

	2010	2011	2012	2013	2015
Algeria	-	-	6	6	7
Bahrain	8	6	7	7	1
Comoros	-	-	17	17	17
Djibouti	-	-	-	-	-
Egypt	2	4	2	2	4
Iraq	-	-	-	-	-
Jordan	7	7	8	9	10
Kuwait	-	-	-	-	-
Lebanon	13	14	13	13	6
Libya	-	-	-	-	-
Mauritania	-	13	16	16	16
Morocco	4	1	1	1	3
Oman	10	8	9	8	11
Palestine	12	5	5	11	14
Qatar	5	9	12	14	12
Saudi Arabia	6	10	14	4	8
Somalia	-	-	-	-	-
Sudan	11	12	15	10	13
Syria	1	3	4	5	2
Tunisia	3	2	3	3	5
UAE	9	11	10	15	15
Yemen	-	-	11	12	9

Arab average	110.22	104.52	100.17	84.84	62.28
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■ Below Arab average
■ Above Arab average

■ Least expensive
■ Most expensive



Fixed broadband OECD 2 Mb/s - 10 Mb/s basket ranking, high usage, residential offers

Total results for OECD H2: 2-10Mb/s, 50GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

Ranking for OECD H2: 2-10Mb/s, 50GB, residential offers

	2010	2011	2012	2013	2015
Algeria			54.91	54.91	48.53
Bahrain	172.98	157.68	143.16	143.16	14.18
Comoros			582.70	417.00	251.30
Djibouti					
Egypt	146.14	146.14	39.86	19.93	37.20
Iraq					
Jordan	78.99	121.38	92.86	60.39	56.08
Kuwait					
Lebanon	1055.61	1055.91	281.61	281.61	51.68
Libya					
Mauritania		240.08	181.58	181.58	109.72
Morocco	56.63	28.74	18.92	18.92	18.92
Oman	214.91	58.67	58.67	58.67	58.67
Palestine	165.63	56.06	47.67	71.63	83.98
Qatar	78.11	78.11	78.11	86.39	59.91
Saudi Arabia	78.31	78.31	87.25	32.79	49.35
Somalia					
Sudan	115.04	115.04	115.04	62.92	62.92
Syria	46.44	46.44	46.44	46.44	18.78
Tunisia	56.12	44.43	44.43	28.06	28.06
UAE	86.06	79.40	73.35	87.24	87.24
Yemen			73.42	73.42	54.73

	2010	2011	2012	2013	2015
Algeria	-	-	6	6	6
Bahrain	11	12	14	14	1
Comoros	-	-	17	17	17
Djibouti	-	-	-	-	-
Egypt	9	11	2	2	5
Iraq	-	-	-	-	-
Jordan	6	10	12	8	10
Kuwait	-	-	-	-	-
Lebanon	13	14	16	16	8
Libya	-	-	-	-	-
Mauritania	-	13	15	15	16
Morocco	3	1	1	1	3
Oman	12	5	7	7	11
Palestine	10	4	5	10	14
Qatar	4	6	10	12	12
Saudi Arabia	5	7	11	4	7
Somalia	-	-	-	-	-
Sudan	8	9	13	9	13
Syria	1	3	4	5	2
Tunisia	2	2	3	3	4
UAE	7	8	8	13	15
Yemen	-	-	9	11	9

Arab average	180.84	164.74	118.82	101.47	64.19
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Below Arab average
 Above Arab average

Least expensive
 Most expensive



Fixed broadband OECD 10 Mb/s - 30 Mb/s basket ranking, low usage, residential offers

Total results for OECD L3: 10-30Mb/s, 10GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

	2010	2011	2012	2013	2015
Algeria					
Bahrain	227.66	226.87	170.15	141.80	56.72
Comoros					
Djibouti					
Egypt			185.99	185.99	185.99
Iraq					
Jordan			58.31	72.05	64.16
Kuwait					
Lebanon					
Libya					
Mauritania					282.19
Morocco	186.81	112.42	37.52	37.52	37.52
Oman		102.07	102.07	102.07	102.07
Palestine				219.88	151.25
Qatar		203.54	203.54	86.39	59.91
Saudi Arabia	188.59	102.82	102.82	65.91	49.35
Somalia					
Sudan					
Syria					
Tunisia			128.61	109.91	63.14
UAE	102.88	95.38	94.10	87.24	87.24
Yemen					

Arab average	176.49	140.52	120.35	110.87	103.59
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■ Below Arab average
■ Above Arab average

Ranking for OECD L3: 10-30Mb/s, 10GB, residential offers

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	4	6	7	8	3
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	8	9	10
Iraq	-	-	-	-	-
Jordan	-	-	2	3	6
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	11
Morocco	2	4	1	1	1
Oman	-	2	4	6	8
Palestine	-	-	-	10	9
Qatar	-	5	9	4	4
Saudi Arabia	3	3	5	2	2
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	6	7	5
UAE	1	1	3	5	7
Yemen	-	-	-	-	-

■ Least expensive
■ Most expensive



Fixed broadband OECD 10 Mb/s - 30 Mb/s basket ranking, medium usage, residential offers

Total results for OECD M3: 10-30Mb/s, 25GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

Ranking for OECD M3: 10-30Mb/s, 25GB, residential offers

	2010	2011	2012	2013	2015
Algeria					
Bahrain	227.66	226.87	170.15	141.80	56.72
Comoros					
Djibouti					
Egypt			185.99	185.99	185.99
Iraq					
Jordan			70.79	72.05	64.16
Kuwait					
Lebanon					
Libya					
Mauritania					282.19
Morocco	186.81	112.42	37.52	37.52	37.52
Oman		102.07	102.07	102.07	102.07
Palestine				219.88	151.25
Qatar		203.54	203.54	86.39	59.91
Saudi Arabia	188.59	102.82	102.82	65.91	49.35
Somalia					
Sudan					
Syria					
Tunisia			128.61	109.91	63.14
UAE	102.88	95.38	94.10	87.24	87.24
Yemen					

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	4	6	7	8	3
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	8	9	10
Iraq	-	-	-	-	-
Jordan	-	-	2	3	6
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	11
Morocco	2	4	1	1	1
Oman	-	2	4	6	8
Palestine	-	-	-	10	9
Qatar	-	5	9	4	4
Saudi Arabia	3	3	5	2	2
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	6	7	5
UAE	1	1	3	5	7
Yemen	-	-	-	-	-

Arab average	176.49	140.52	121.73	110.87	103.59
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■ Below Arab average
■ Above Arab average

■ Least expensive
■ Most expensive



Fixed broadband OECD 10 Mb/s - 30 Mb/s basket ranking, high usage, residential offers

Total results for OECD H3: 10-30Mb/s, 100GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

	2010	2011	2012	2013	2015
Algeria					
Bahrain	342.46	283.59	170.15	170.15	56.72
Comoros					
Djibouti					
Egypt			185.99	185.99	185.99
Iraq					
Jordan			226.87	80.58	64.16
Kuwait					
Lebanon					
Libya					
Mauritania					282.19
Morocco	186.81	112.42	37.52	37.52	37.52
Oman		102.07	102.07	102.07	102.07
Palestine				219.88	151.25
Qatar		203.54	203.54	86.39	59.91
Saudi Arabia	188.59	102.82	102.82	65.91	49.35
Somalia					
Sudan					
Syria					
Tunisia			128.61	109.91	63.14
UAE	102.88	95.38	94.10	87.24	87.24
Yemen					

Arab average	205.19	149.97	139.07	114.56	103.59
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■ Below Arab average
■ Above Arab average

Ranking for OECD H3: 10-30Mb/s, 100GB, residential offers

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	4	6	6	8	3
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	7	9	10
Iraq	-	-	-	-	-
Jordan	-	-	9	3	6
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	11
Morocco	2	4	1	1	1
Oman	-	2	3	6	8
Palestine	-	-	-	10	9
Qatar	-	5	8	4	4
Saudi Arabia	3	3	4	2	2
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	5	7	5
UAE	1	1	2	5	7
Yemen	-	-	-	-	-

■ Least expensive
■ Most expensive



Fixed broadband OECD 30 Mb/s - 100 Mb/s basket ranking, low usage, residential offers

Total results for OECD L4: 30-100Mb/s, 15GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

	2010	2011	2012	2013	2015
Algeria					
Bahrain				212.69	141.80
Comoros					
Djibouti					
Egypt					
Iraq					
Jordan					151.55
Kuwait					
Lebanon					
Libya					
Mauritania					
Morocco					
Oman		174.41	174.41	174.41	159.94
Palestine					
Qatar				128.28	126.89
Saudi Arabia		65.91		111.17	99.03
Somalia					
Sudan					
Syria					
Tunisia					
UAE	142.13	131.82	128.11	171.34	171.34
Yemen					

Arab average	142.13	124.05	151.26	159.58	141.76
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■ Below Arab average
■ Above Arab average

Ranking for OECD L4: 30-100Mb/s, 15GB, residential offers

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	-	-	-	5	3
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	-	-	-
Iraq	-	-	-	-	-
Jordan	-	-	-	-	4
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	-
Morocco	-	-	-	-	-
Oman	-	3	2	4	5
Palestine	-	-	-	-	-
Qatar	-	-	-	2	2
Saudi Arabia	-	1	-	1	1
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	-	-	-
UAE	1	2	1	3	6
Yemen	-	-	-	-	-

■ Least expensive
■ Most expensive



Fixed broadband OECD 30 Mb/s - 100 Mb/s basket ranking, medium usage, residential offers

Total results for OECD M4: 30-100Mb/s, 50GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

	2010	2011	2012	2013	2015
Algeria					
Bahrain				212.69	141.80
Comoros					
Djibouti					
Egypt					
Iraq					
Jordan					151.55
Kuwait					
Lebanon					
Libya					
Mauritania					
Morocco					
Oman		174.41	174.41	174.41	159.94
Palestine					
Qatar				128.28	126.89
Saudi Arabia		65.91		111.17	99.03
Somalia					
Sudan					
Syria					
Tunisia					
UAE	142.13	131.82	128.11	171.34	171.34
Yemen					

Arab average	142.13	124.05	151.26	159.58	141.76
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■ Below Arab average
■ Above Arab average

Ranking for OECD M4: 30-100Mb/s, 50GB, residential offers

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	-	-	-	5	3
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	-	-	-
Iraq	-	-	-	-	-
Jordan	-	-	-	-	4
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	-
Morocco	-	-	-	-	-
Oman	-	3	2	4	5
Palestine	-	-	-	-	-
Qatar	-	-	-	2	2
Saudi Arabia	-	1	-	1	1
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	-	-	-
UAE	1	2	1	3	6
Yemen	-	-	-	-	-

■ Least expensive
■ Most expensive



Fixed broadband OECD 30 Mb/s - 100 Mb/s basket ranking, high usage, residential offers

Total results for OECD H4: 30-100Mb/s, 200GB, residential offers
Results in US\$ / PPP VAT included, lowest per country

Ranking for OECD H4: 30-100Mb/s, 200GB, residential offers

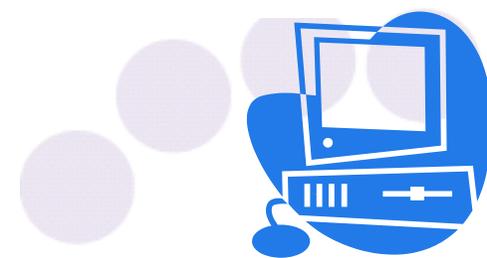
	2010	2011	2012	2013	2015
Algeria					
Bahrain				648.29	141.80
Comoros					
Djibouti					
Egypt					
Iraq					
Jordan					151.55
Kuwait					
Lebanon					
Libya					
Mauritania					
Morocco					
Oman		174.41	174.41	174.41	159.94
Palestine					
Qatar				128.28	126.89
Saudi Arabia		65.91		111.17	99.03
Somalia					
Sudan					
Syria					
Tunisia					
UAE	197.57	131.82	128.11	171.34	171.34
Yemen					

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	-	-	-	5	3
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	-	-	-
Iraq	-	-	-	-	-
Jordan	-	-	-	-	4
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	-
Morocco	-	-	-	-	-
Oman	-	3	2	4	5
Palestine	-	-	-	-	-
Qatar	-	-	-	2	2
Saudi Arabia	-	1	-	1	1
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	-	-	-
UAE	1	2	1	3	6
Yemen	-	-	-	-	-

Arab average	2010	2011	2012	2013	2015
	197.57	124.05	151.26	246.70	141.76

Least expensive
Most expensive

Below Arab average
Above Arab average



Fixed broadband OECD 256 kb/s - 2 Mb/s basket ranking, low usage, business offers

Total results for OECD L1: 0.25-2Mb/s, 5GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

	2010	2011	2012	2013	2015
Algeria	92.35	86.46	52.39	52.39	147.84
Bahrain	93.81	93.02	62.39	42.54	42.54
Comoros					
Djibouti	486.27	486.27	486.27	486.27	486.27
Egypt	18.12	18.12	18.12	22.95	22.95
Iraq					
Jordan	72.97	72.97	66.00	61.49	
Kuwait					
Lebanon	98.08	98.08	32.92	32.92	27.16
Libya	30.75	30.75	39.73	39.73	39.73
Mauritania					42.89
Morocco	20.85	16.06			
Oman	142.58	44.20	44.20	43.63	43.63
Palestine				101.98	
Qatar	151.90	153.36	153.36	153.36	151.90
Saudi Arabia			193.97	193.97	
Somalia					
Sudan	12.77	12.77	12.77	13.73	11.44
Syria					
Tunisia	347.10	347.10	559.57	903.32	912.06
UAE	134.25	134.25	115.30	101.28	101.28
Yemen	29.37	29.37	25.36	25.36	55.18

Arab average	123.65	115.91	133.03	151.66	160.37
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Below Arab average
 Above Arab average

Ranking for OECD L1: 0.25-2Mb/s, 5GB, business offers

	2010	2011	2012	2013	2015
Algeria	7	8	7	8	10
Bahrain	8	9	8	6	5
Comoros	-	-	-	-	-
Djibouti	14	14	13	14	12
Egypt	2	3	2	2	2
Iraq	-	-	-	-	-
Jordan	6	7	9	9	-
Kuwait	-	-	-	-	-
Lebanon	9	10	4	4	3
Libya	5	5	5	5	4
Mauritania	-	-	-	-	6
Morocco	3	2	-	-	-
Oman	11	6	6	7	7
Palestine	-	-	-	11	-
Qatar	12	12	11	12	11
Saudi Arabia	-	-	12	13	-
Somalia	-	-	-	-	-
Sudan	1	1	1	1	1
Syria	-	-	-	-	-
Tunisia	13	13	14	15	13
UAE	10	11	10	10	9
Yemen	4	4	3	3	8

Least expensive
 Most expensive



Fixed broadband OECD 256 kb/s - 2 Mb/s basket ranking, medium usage, business offers

Total results for OECD M1: 0.25-2Mb/s, 10GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

	2010	2011	2012	2013	2015
Algeria	92.35	86.46	52.39	52.39	147.84
Bahrain	146.52	143.77	62.39	42.54	42.54
Comoros					
Djibouti	486.27	486.27	486.27	486.27	486.27
Egypt	22.95	22.95	18.12	22.95	22.95
Iraq					
Jordan	72.97	72.97	66.00	61.49	
Kuwait					
Lebanon	174.23	174.23	40.86	40.86	27.16
Libya	107.17	107.17	39.73	39.73	39.73
Mauritania					42.89
Morocco	20.85	16.06			
Oman	157.05	55.78	55.78	55.78	55.78
Palestine				101.98	
Qatar	151.90	153.36	153.36	153.36	151.90
Saudi Arabia			193.97	193.97	
Somalia					
Sudan	12.77	12.77	12.77	13.73	13.73
Syria					
Tunisia	347.10	347.10	559.57	903.32	912.06
UAE	134.25	134.25	134.25	134.25	170.69
Yemen	29.37	29.37	25.36	25.36	55.18

Arab average	139.70	131.61	135.77	155.20	166.82
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■ Below Arab average
■ Above Arab average

Ranking for OECD M1: 0.25-2Mb/s, 10GB, business offers

	2010	2011	2012	2013	2015
Algeria	6	7	6	7	9
Bahrain	9	10	8	6	5
Comoros	-	-	-	-	-
Djibouti	14	14	13	14	12
Egypt	3	3	2	2	2
Iraq	-	-	-	-	-
Jordan	5	6	9	9	-
Kuwait	-	-	-	-	-
Lebanon	12	12	5	5	3
Libya	7	8	4	4	4
Mauritania	-	-	-	-	6
Morocco	2	2	-	-	-
Oman	11	5	7	8	8
Palestine	-	-	-	10	-
Qatar	10	11	11	12	10
Saudi Arabia	-	-	12	13	-
Somalia	-	-	-	-	-
Sudan	1	1	1	1	1
Syria	-	-	-	-	-
Tunisia	13	13	14	15	13
UAE	8	9	10	11	11
Yemen	4	4	3	3	7

■ Least expensive
■ Most expensive



Fixed broadband OECD 256 kb/s - 2 Mb/s basket ranking, high usage, business offers

Total results for OECD H1: 0.25-2Mb/s, 20GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

Ranking for OECD H1: 0.25-2Mb/s, 20GB, business offers

	2010	2011	2012	2013	2015
Algeria	92.35	86.46	52.39	52.39	147.84
Bahrain	217.42	214.66	62.39	42.54	42.54
Comoros					
Djibouti	486.27	486.27	486.27	486.27	486.27
Egypt	22.95	22.95	18.12	22.95	22.95
Iraq					
Jordan	109.85	89.68	89.68	89.35	
Kuwait					
Lebanon	326.52	326.52	77.54	77.54	27.16
Libya	361.91	361.91	164.12	101.92	39.73
Mauritania					42.89
Morocco	20.85	16.06			
Oman	185.98	84.71	84.71	81.82	81.82
Palestine				101.98	
Qatar	151.90	153.36	153.36	153.36	151.90
Saudi Arabia			193.97	193.97	
Somalia					
Sudan	12.77	12.77	12.77	20.59	20.59
Syria					
Tunisia	347.10	347.10	559.57	903.32	912.06
UAE	134.25	134.25	134.25	134.25	170.69
Yemen	29.37	29.37	25.36	25.36	55.18

	2010	2011	2012	2013	2015
Algeria	5	6	4	5	9
Bahrain	10	10	5	4	5
Comoros	-	-	-	-	-
Djibouti	14	14	13	14	12
Egypt	3	3	2	2	2
Iraq	-	-	-	-	-
Jordan	6	7	8	8	-
Kuwait	-	-	-	-	-
Lebanon	11	11	6	6	3
Libya	13	13	11	9	4
Mauritania	-	-	-	-	6
Morocco	2	2	-	-	-
Oman	9	5	7	7	8
Palestine	-	-	-	10	-
Qatar	8	9	10	12	10
Saudi Arabia	-	-	12	13	-
Somalia	-	-	-	-	-
Sudan	1	1	1	1	1
Syria	-	-	-	-	-
Tunisia	12	12	14	15	13
UAE	7	8	9	11	11
Yemen	4	4	3	3	7

Arab average	178.53	169.00	151.04	165.84	169.35
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■ Below Arab average
■ Above Arab average

■ Least expensive
■ Most expensive



Fixed broadband OECD 2 Mb/s - 10 Mb/s basket ranking, low usage, business offers

Total results for OECD L2: 2-10Mb/s, 5GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

	2010	2011	2012	2013	2015
Algeria	425.37	397.69	106.99	106.99	484.70
Bahrain	359.22	356.46	228.84	113.44	85.08
Comoros					
Djibouti	1210.88	1210.88	808.32	808.32	808.32
Egypt	48.31	48.31	36.23	18.12	18.12
Iraq					
Jordan	154.97	115.80	99.08	82.38	
Kuwait					
Lebanon	320.03	320.30	77.54	77.54	27.16
Libya					
Mauritania					181.58
Morocco	47.16	23.80	16.20	15.77	15.77
Oman	275.67	44.20	44.20	43.63	43.63
Palestine				139.85	
Qatar	227.16	228.62	228.62	153.36	150.51
Saudi Arabia			127.73	127.73	
Somalia					
Sudan	104.58	104.58	104.58	57.20	57.20
Syria					
Tunisia	913.23	913.23	913.23	903.32	912.06
UAE	366.92	366.92	165.76	143.33	114.62
Yemen			73.42	73.42	133.27

Arab average	371.12	344.23	216.48	190.96	233.23
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■ Below Arab average
■ Above Arab average

Ranking for OECD L2: 2-10Mb/s, 5GB, business offers

	2010	2011	2012	2013	2015
Algeria	10	10	8	8	11
Bahrain	8	8	12	9	6
Comoros	-	-	-	-	-
Djibouti	12	12	13	14	12
Egypt	2	3	2	2	2
Iraq	-	-	-	-	-
Jordan	4	5	6	7	-
Kuwait	-	-	-	-	-
Lebanon	7	7	5	6	3
Libya	-	-	-	-	-
Mauritania	-	-	-	-	10
Morocco	1	1	1	1	1
Oman	6	2	3	3	4
Palestine	-	-	-	11	-
Qatar	5	6	11	13	9
Saudi Arabia	-	-	9	10	-
Somalia	-	-	-	-	-
Sudan	3	4	7	4	5
Syria	-	-	-	-	-
Tunisia	11	11	14	15	13
UAE	9	9	10	12	7
Yemen	-	-	4	5	8

■ Least expensive
■ Most expensive



Fixed broadband OECD 2 Mb/s - 10 Mb/s basket ranking, medium usage, business offers

Total results for OECD M2: 2-10Mb/s, 15GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

Ranking for OECD M2: 2-10Mb/s, 15GB, business offers

	2010	2011	2012	2013	2015
Algeria	425.37	397.69	106.99	106.99	484.70
Bahrain	359.22	356.46	228.84	113.44	85.08
Comoros					
Djibouti	1210.88	1210.88	808.32	808.32	808.32
Egypt	48.31	48.31	36.23	18.12	24.16
Iraq					
Jordan	154.97	115.80	99.08	82.38	
Kuwait					
Lebanon	426.63	426.90	77.54	77.54	27.16
Libya					
Mauritania					181.58
Morocco	47.16	23.80	16.20	15.77	15.77
Oman	290.14	70.24	70.24	68.80	68.80
Palestine				139.85	
Qatar	227.16	228.62	228.62	153.36	150.51
Saudi Arabia			127.73	127.73	
Somalia					
Sudan	104.58	104.58	104.58	57.20	57.20
Syria					
Tunisia	913.23	913.23	913.23	903.32	912.06
UAE	366.92	366.92	366.92	345.05	114.62
Yemen			73.42	73.42	133.27

	2010	2011	2012	2013	2015
Algeria	9	9	8	8	11
Bahrain	7	7	11	9	6
Comoros	-	-	-	-	-
Djibouti	12	12	13	14	12
Egypt	2	2	2	2	2
Iraq	-	-	-	-	-
Jordan	4	5	6	7	-
Kuwait	-	-	-	-	-
Lebanon	10	10	5	6	3
Libya	-	-	-	-	-
Mauritania	-	-	-	-	10
Morocco	1	1	1	1	1
Oman	6	3	3	4	5
Palestine	-	-	-	11	-
Qatar	5	6	10	12	9
Saudi Arabia	-	-	9	10	-
Somalia	-	-	-	-	-
Sudan	3	4	7	3	4
Syria	-	-	-	-	-
Tunisia	11	11	14	15	13
UAE	8	8	12	13	7
Yemen	-	-	4	5	8

Arab average	2010	2011	2012	2013	2015
	381.21	355.29	232.71	206.09	235.63

Least expensive
Most expensive

Below Arab average
Above Arab average



Fixed broadband OECD 2 Mb/s - 10 Mb/s basket ranking, high usage, business offers

Total results for OECD H2: 2-10Mb/s, 50GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

	2010	2011	2012	2013	2015
Algeria	425.37	397.69	106.99	106.99	484.70
Bahrain	359.22	356.46	228.84	113.44	85.08
Comoros					
Djibouti	1210.88	1210.88	808.32	808.32	808.32
Egypt	132.85	132.85	36.23	18.12	53.14
Iraq					
Jordan	235.48	180.64	180.64	117.20	
Kuwait					
Lebanon	959.65	959.92	256.01	256.01	46.98
Libya					
Mauritania					181.58
Morocco	47.16	23.80	16.20	15.77	15.77
Oman	391.41	131.01	131.01	131.01	131.01
Palestine				139.85	
Qatar	227.16	228.62	228.62	153.36	150.51
Saudi Arabia			127.73	127.73	
Somalia					
Sudan	104.58	104.58	104.58	57.20	57.20
Syria					
Tunisia	913.23	913.23	913.23	903.32	912.06
UAE	424.39	424.39	424.39	424.39	114.62
Yemen			73.42	73.42	133.27

Arab average	452.61	422.01	259.73	229.74	244.17
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■ Below Arab average
■ Above Arab average

Ranking for OECD H2: 2-10Mb/s, 50GB, business offers

	2010	2011	2012	2013	2015
Algeria	9	8	5	5	11
Bahrain	6	7	10	6	5
Comoros	-	-	-	-	-
Djibouti	12	12	13	14	12
Egypt	3	4	2	2	3
Iraq	-	-	-	-	-
Jordan	5	5	8	7	-
Kuwait	-	-	-	-	-
Lebanon	11	11	11	12	2
Libya	-	-	-	-	-
Mauritania	-	-	-	-	10
Morocco	1	1	1	1	1
Oman	7	3	7	9	7
Palestine	-	-	-	10	-
Qatar	4	6	9	11	9
Saudi Arabia	-	-	6	8	-
Somalia	-	-	-	-	-
Sudan	2	2	4	3	4
Syria	-	-	-	-	-
Tunisia	10	10	14	15	13
UAE	8	9	12	13	6
Yemen	-	-	3	4	8

■ Least expensive
■ Most expensive



Fixed broadband OECD 10 Mb/s - 30 Mb/s basket ranking, low usage, business offers

Total results for OECD L3: 10-30Mb/s, 10GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

	2010	2011	2012	2013	2015
Algeria					
Bahrain	926.40	923.64	569.15	427.36	356.46
Comoros					
Djibouti					
Egypt			169.09	169.09	169.09
Iraq					
Jordan			151.31	117.20	
Kuwait					
Lebanon					
Libya					
Mauritania					425.92
Morocco	155.67	93.54	31.70	31.27	31.27
Oman	1027.95	524.51	524.51	524.51	524.51
Palestine				354.63	
Qatar				153.36	150.51
Saudi Arabia			134.35	134.35	
Somalia					
Sudan					
Syria					
Tunisia			2733.62	2733.62	2747.71
UAE	1363.49	1363.49	240.77	201.53	201.53
Yemen					

Arab average	868.38	726.29	569.31	484.69	575.87
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■ Below Arab average
■ Above Arab average

Ranking for OECD L3: 10-30Mb/s, 10GB, business offers

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	2	3	7	8	5
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	4	5	3
Iraq	-	-	-	-	-
Jordan	-	-	3	2	-
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	6
Morocco	1	1	1	1	1
Oman	3	2	6	9	7
Palestine	-	-	-	7	-
Qatar	-	-	-	4	2
Saudi Arabia	-	-	2	3	-
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	8	10	8
UAE	4	4	5	6	4
Yemen	-	-	-	-	-

■ Least expensive
■ Most expensive



Fixed broadband OECD 10 Mb/s - 30 Mb/s basket ranking, medium usage, business offers

Total results for OECD M3: 10-30Mb/s, 25GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

Ranking for OECD M3: 10-30Mb/s, 25GB, business offers

	2010	2011	2012	2013	2015
Algeria					
Bahrain	926.40	923.64	569.15	427.36	356.46
Comoros					
Djibouti					
Egypt			169.09	169.09	169.09
Iraq					
Jordan			151.31	117.20	
Kuwait					
Lebanon					
Libya					
Mauritania					425.92
Morocco	155.67	93.54	31.70	31.27	31.27
Oman	1027.95	524.51	524.51	524.51	524.51
Palestine				354.63	
Qatar				153.36	150.51
Saudi Arabia			134.35	134.35	
Somalia					
Sudan					
Syria					
Tunisia			2733.62	2733.62	2747.71
UAE	1363.49	1363.49	625.27	565.00	207.13
Yemen					

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	2	3	6	7	5
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	4	5	3
Iraq	-	-	-	-	-
Jordan	-	-	3	2	-
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	6
Morocco	1	1	1	1	1
Oman	3	2	5	8	7
Palestine	-	-	-	6	-
Qatar	-	-	-	4	2
Saudi Arabia	-	-	2	3	-
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	8	10	8
UAE	4	4	7	9	4
Yemen	-	-	-	-	-

Arab average	868.38	726.29	617.38	521.04	576.57
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Below Arab average
 Above Arab average

Least expensive
 Most expensive



Fixed broadband OECD 10 Mb/s - 30 Mb/s basket ranking, high usage, business offers

Total results for OECD H3: 10-30Mb/s, 100GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

Ranking for OECD H3: 10-30Mb/s, 100GB, business offers

	2010	2011	2012	2013	2015
Algeria					
Bahrain	926.40	923.64	569.15	427.36	356.46
Comoros					
Djibouti					
Egypt			169.09	169.09	169.09
Iraq					
Jordan			427.96	186.84	
Kuwait					
Lebanon					
Libya					
Mauritania					425.92
Morocco	155.67	93.54	31.70	31.27	31.27
Oman	1027.95	524.51	524.51	524.51	524.51
Palestine				354.63	
Qatar				153.36	150.51
Saudi Arabia			134.35	134.35	
Somalia					
Sudan					
Syria					
Tunisia			2733.62	2733.62	2747.71
UAE	1363.49	1363.49	1363.49	1363.49	207.13
Yemen					

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	2	3	6	7	5
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	3	4	3
Iraq	-	-	-	-	-
Jordan	-	-	4	5	-
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	6
Morocco	1	1	1	1	1
Oman	3	2	5	8	7
Palestine	-	-	-	6	-
Qatar	-	-	-	3	2
Saudi Arabia	-	-	2	2	-
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	8	10	8
UAE	4	4	7	9	4
Yemen	-	-	-	-	-

Arab average	868.38	726.29	744.23	607.85	576.57
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■ Below Arab average
■ Above Arab average

■ Least expensive
■ Most expensive



Fixed broadband OECD 30 Mb/s - 100 Mb/s basket ranking, low usage, business offers

Total results for OECD L4: 30-100Mb/s, 15GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

Ranking for OECD L4: 30-100Mb/s, 15GB, business offers

	2010	2011	2012	2013	2015
Algeria					
Bahrain					
Comoros					
Djibouti					
Egypt					
Iraq					
Jordan					
Kuwait					
Lebanon					
Libya					
Mauritania					
Morocco					
Oman					1331.76
Palestine					
Qatar				303.88	301.03
Saudi Arabia					
Somalia					
Sudan					
Syria					
Tunisia					
UAE			563.15	470.64	403.36
Yemen					

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	-	-	-	-	-
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	-	-	-
Iraq	-	-	-	-	-
Jordan	-	-	-	-	-
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	-
Morocco	-	-	-	-	-
Oman	-	-	-	-	3
Palestine	-	-	-	-	-
Qatar	-	-	-	1	1
Saudi Arabia	-	-	-	-	-
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	-	-	-
UAE	-	-	1	2	2
Yemen	-	-	-	-	-

Arab average	#DIV/0!	#DIV/0!	563.15	387.26	678.72
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Least expensive
Most expensive

Below Arab average
Above Arab average



Fixed broadband OECD 30 Mb/s - 100 Mb/s basket ranking, medium usage, business offers

Total results for OECD M4: 30-100Mb/s, 50GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

Ranking for OECD M4: 30-100Mb/s, 50GB, business offers

	2010	2011	2012	2013	2015
Algeria					
Bahrain					
Comoros					
Djibouti					
Egypt					
Iraq					
Jordan					
Kuwait					
Lebanon					
Libya					
Mauritania					
Morocco					
Oman					1331.76
Palestine					
Qatar				303.88	301.03
Saudi Arabia					
Somalia					
Sudan					
Syria					
Tunisia					
UAE			563.15	470.64	403.36
Yemen					

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	-	-	-	-	-
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	-	-	-
Iraq	-	-	-	-	-
Jordan	-	-	-	-	-
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	-
Morocco	-	-	-	-	-
Oman	-	-	-	-	3
Palestine	-	-	-	-	-
Qatar	-	-	-	1	1
Saudi Arabia	-	-	-	-	-
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	-	-	-
UAE	-	-	1	2	2
Yemen	-	-	-	-	-

Arab average	#DIV/0!	#DIV/0!	563.15	387.26	678.72
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■ Below Arab average
■ Above Arab average

■ Least expensive
■ Most expensive



Fixed broadband OECD 30 Mb/s - 100 Mb/s basket ranking, high usage, business offers

Total results for OECD H4: 30-100Mb/s, 200GB, business offers
Results in US\$ / PPP VAT excluded, lowest per country

Ranking for OECD H4: 30-100Mb/s, 200GB, business offers

	2010	2011	2012	2013	2015
Algeria					
Bahrain					
Comoros					
Djibouti					
Egypt					
Iraq					
Jordan					
Kuwait					
Lebanon					
Libya					
Mauritania					
Morocco					
Oman					1331.76
Palestine					
Qatar				303.88	301.03
Saudi Arabia					
Somalia					
Sudan					
Syria					
Tunisia					
UAE			563.15	470.64	403.36
Yemen					

	2010	2011	2012	2013	2015
Algeria	-	-	-	-	-
Bahrain	-	-	-	-	-
Comoros	-	-	-	-	-
Djibouti	-	-	-	-	-
Egypt	-	-	-	-	-
Iraq	-	-	-	-	-
Jordan	-	-	-	-	-
Kuwait	-	-	-	-	-
Lebanon	-	-	-	-	-
Libya	-	-	-	-	-
Mauritania	-	-	-	-	-
Morocco	-	-	-	-	-
Oman	-	-	-	-	3
Palestine	-	-	-	-	-
Qatar	-	-	-	1	1
Saudi Arabia	-	-	-	-	-
Somalia	-	-	-	-	-
Sudan	-	-	-	-	-
Syria	-	-	-	-	-
Tunisia	-	-	-	-	-
UAE	-	-	1	2	2
Yemen	-	-	-	-	-

Arab average	#DIV/0!	#DIV/0!	563.15	387.26	678.72
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Least expensive
Most expensive

Below Arab average
Above Arab average



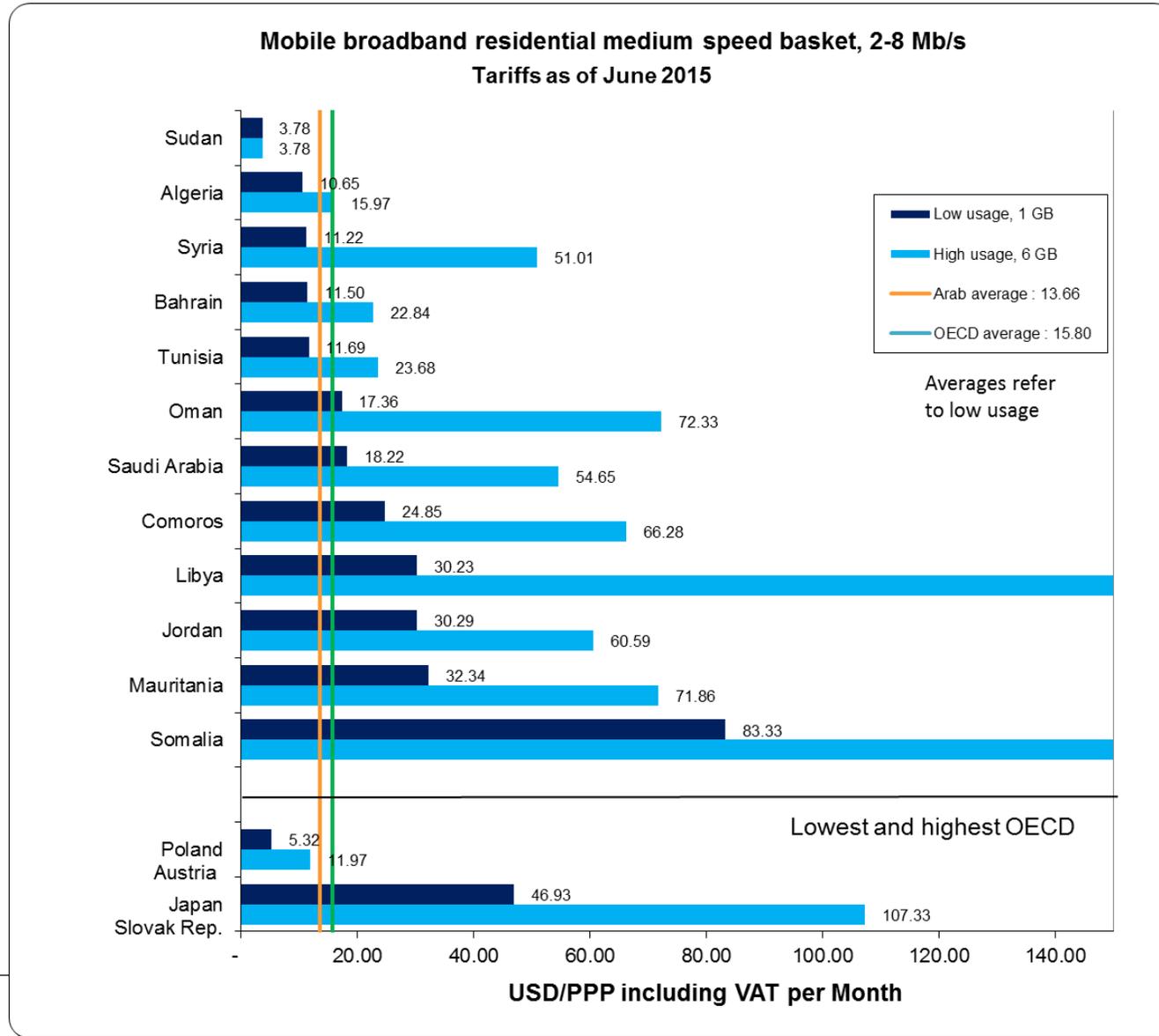
Mobile broadband basket 2015 results

Mobile broadband data issues

- Data collected refers to dedicated mobile broadband packages (i.e. not mobile broadband bundled with or added to mobile voice packages)
- Data was available for all countries, however, not all providers specify speeds of service, so results may not be available for some countries where a speed designation is applied to the basket.
- For countries where data was available, up to three operators were considered
- Total monthly cost calculated based on two usage baskets from the modified OECD baskets:
 - **Low usage:** 1 GB and 5 hours per month.
 - **High usage:** 6 GB and 30 hours per month.
 - Please note that the OECD baskets do not consider time (i.e. hours of usage). This has been added to avoid exclusion of any time related tariffs in this study.
- Two speeds were considered for each usage level:
 - **Medium speed:** 2-8 Mb/s
 - **High speed:** >8 Mb/s
 - Please note that the OECD baskets do not distinguish on speed, but rather includes all speeds above 256 Kb/s. The two speed ranges were included to be able to analyse developments in mobile broadband speeds.
- In addition, a calculation has been included for the same low and high usage levels, for both business and residential services, but not taking into account any speed limitations,
- This captures tariffs which are published but without any download speed information, and which would otherwise not have been considered for the analysis
 - This calculation is especially important for this update, as there are a lot more mobile broadband offers in the market, many of which do not specify the speed of service.
- Results were compared to the recent OECD results covering 34 OECD countries, using the same usage baskets described above
 - The new OECD baskets for mobile broadband were adopted in June 2012



Residential medium speed mobile broadband (2-8 Mb/s)



Low usage: 1 GB and 5 hours per month over 15 days
High usage: 6 GB and 30 hours over 30 days

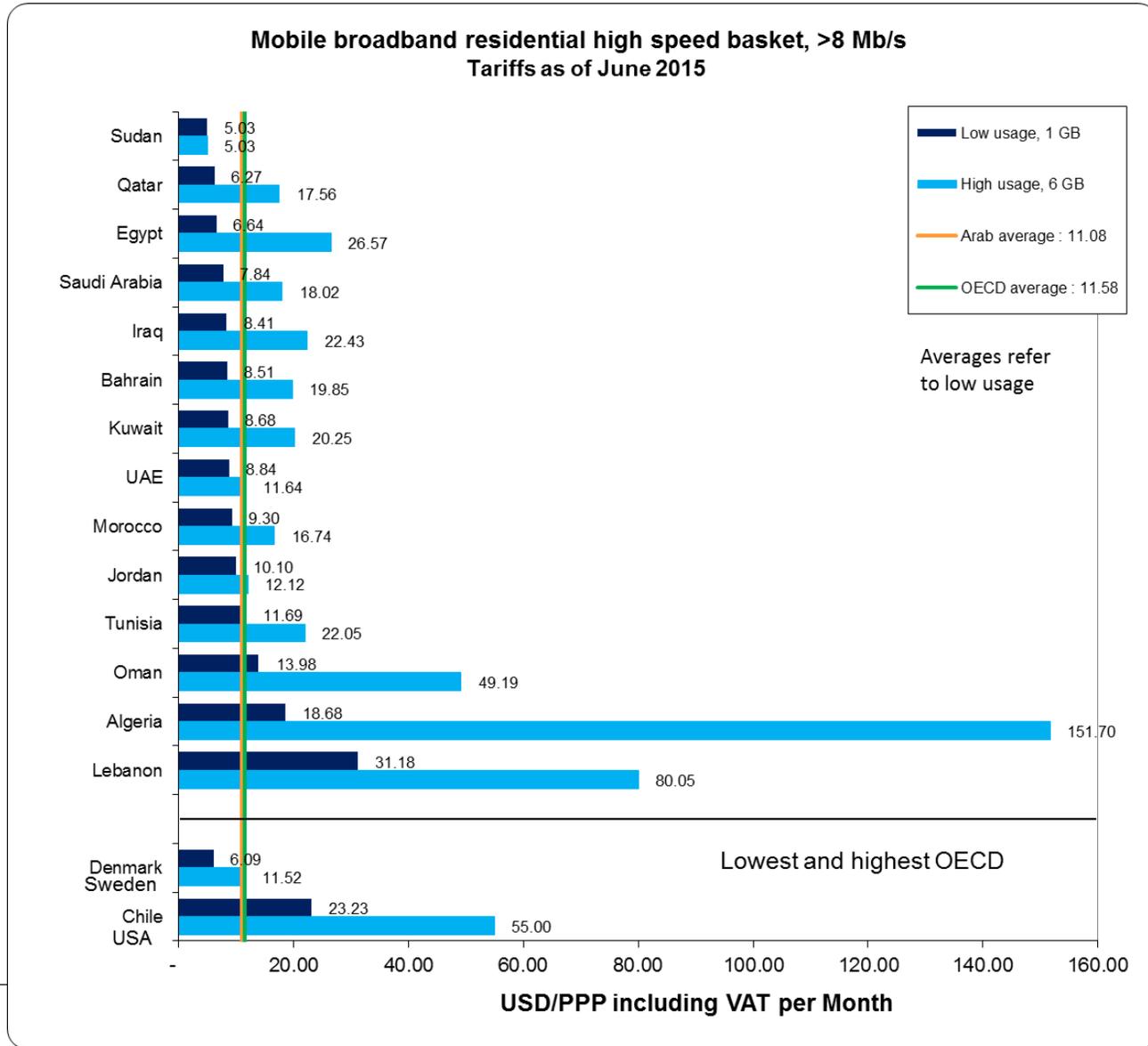
Mobile broadband is much more likely to vary with usage than fixed broadband

Average lines are based on low usage results

UAE results have been excluded as the costs for service in this speed range are very high, and distort the overall results



Residential high speed mobile broadband (>8 Mb/s)



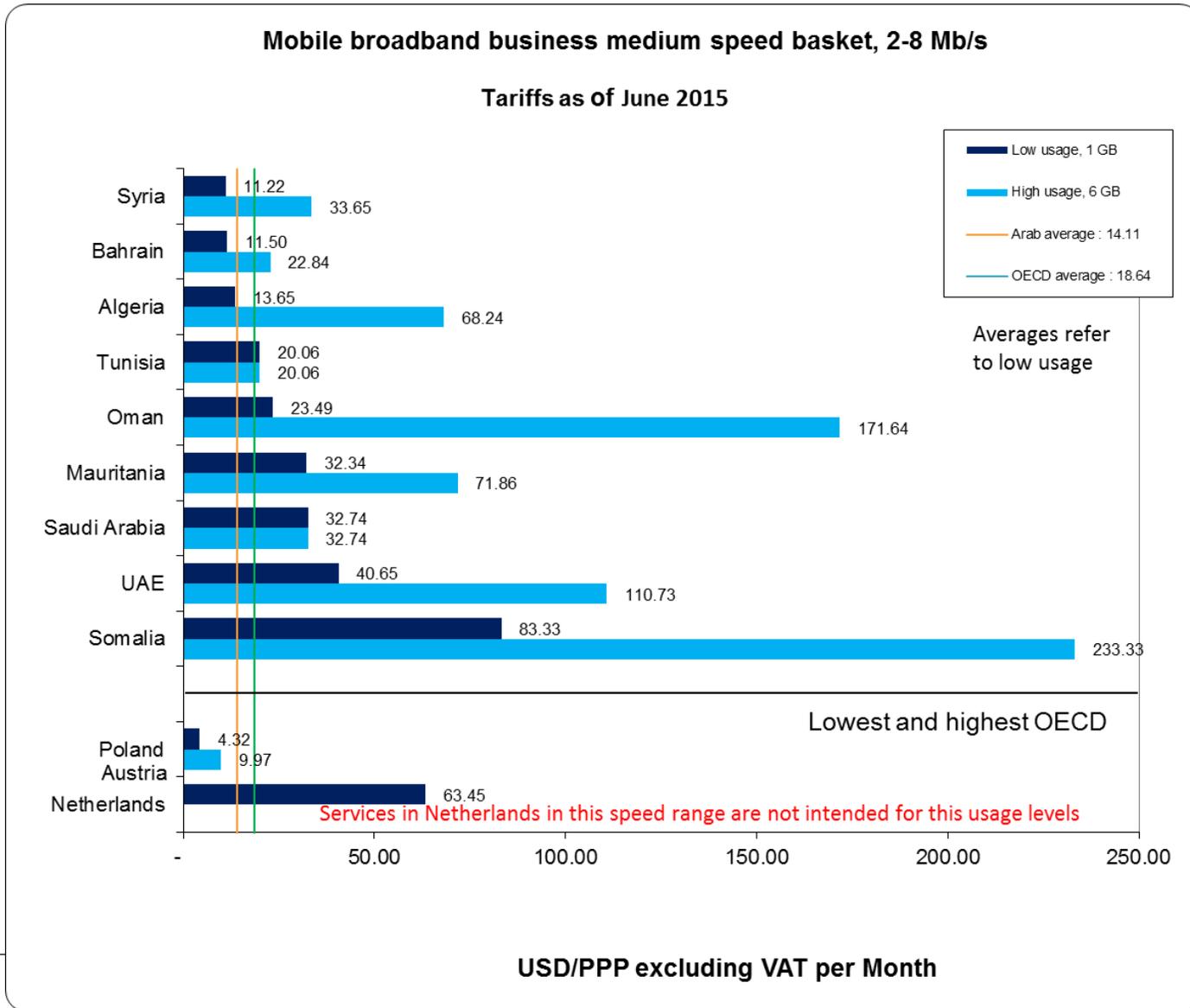
Low usage: 1 GB and 5 hours per month over 15 days
High usage: 6 GB and 30 hours over 30 days

Fewer Arab providers offer speeds above 8 Mb/s

Average lines are based on low usage results



Business medium speed mobile broadband (2-8 Mb/s)



- Low usage, 1 GB
- High usage, 6 GB
- Arab average : 14.11
- OECD average : 18.64

Averages refer to low usage

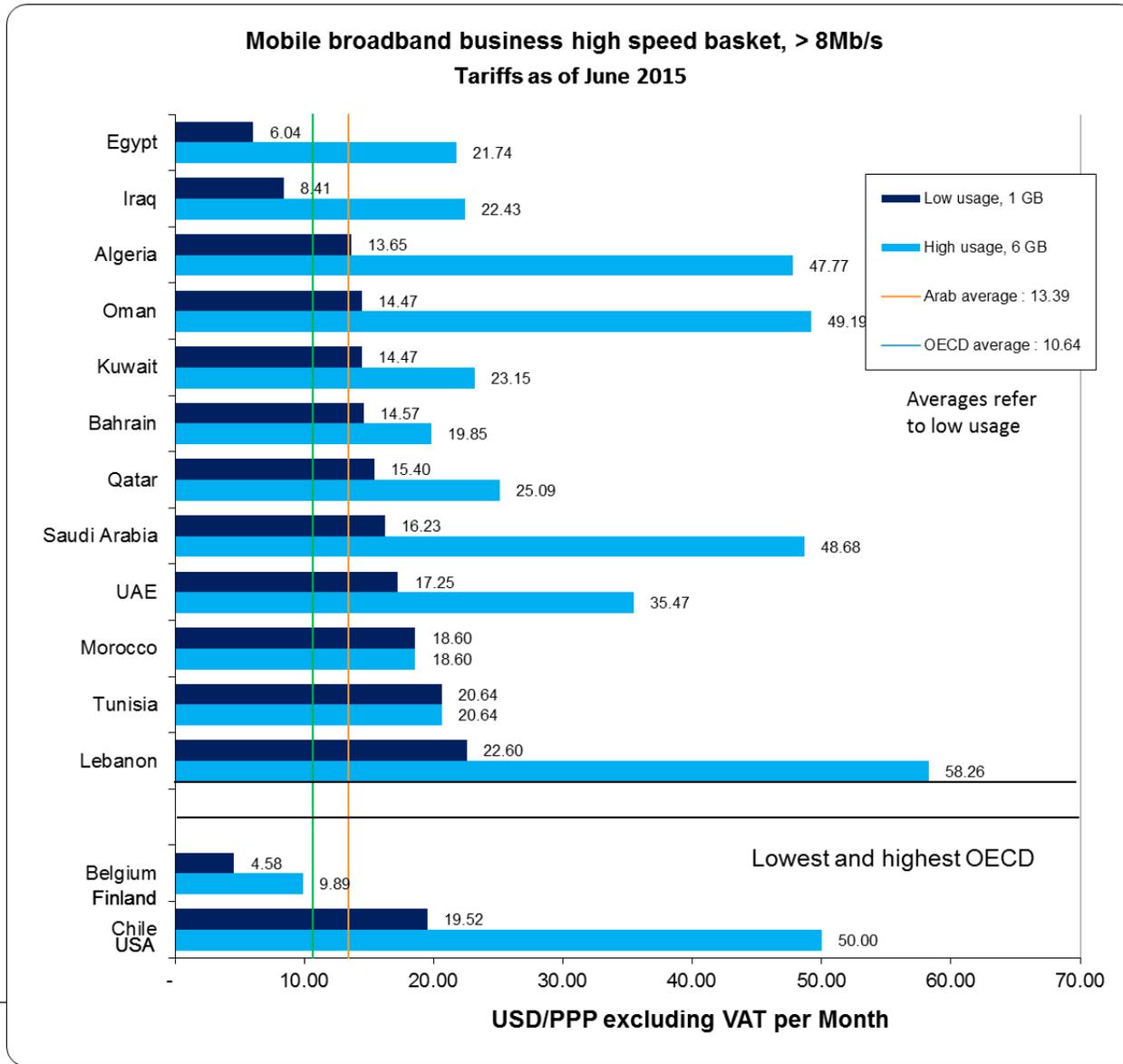
Low usage: 1 GB and 5 hours per month over 15 days
High usage: 6 GB and 30 hours over 30 days

Mobile broadband is much more likely to vary with usage than fixed broadband

Average lines are based on low usage results



Business high speed mobile broadband (>8 Mb/s)



Low usage: 1 GB and 5 hours per month over 15 days
High usage: 6 GB and 30 hours over 30 days

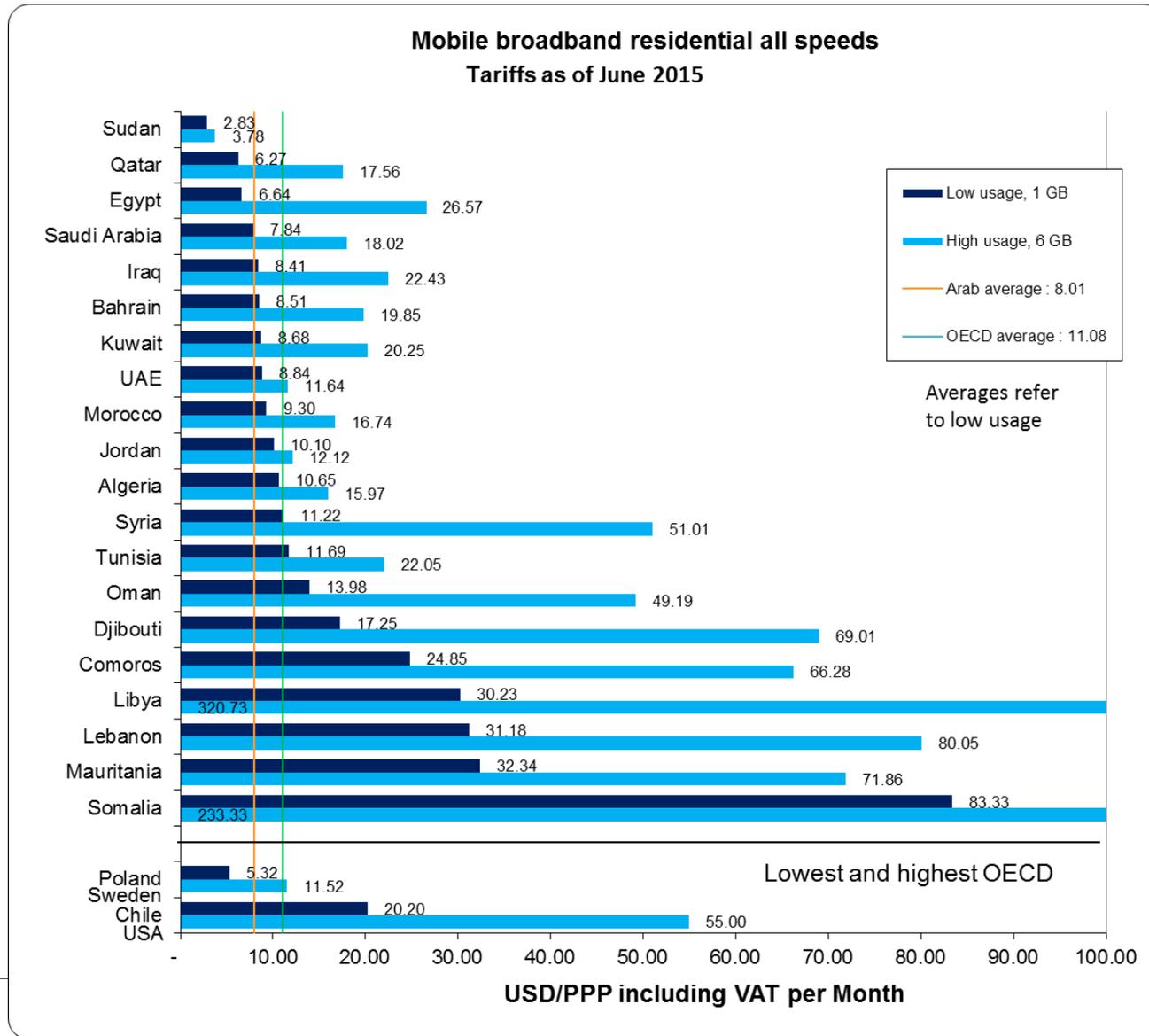
Fewer Arab providers offer speeds above 8 Mb/s

Mobile broadband is much more likely to vary with usage than fixed broadband

Average lines are based on low usage results



Residential mobile broadband all speeds



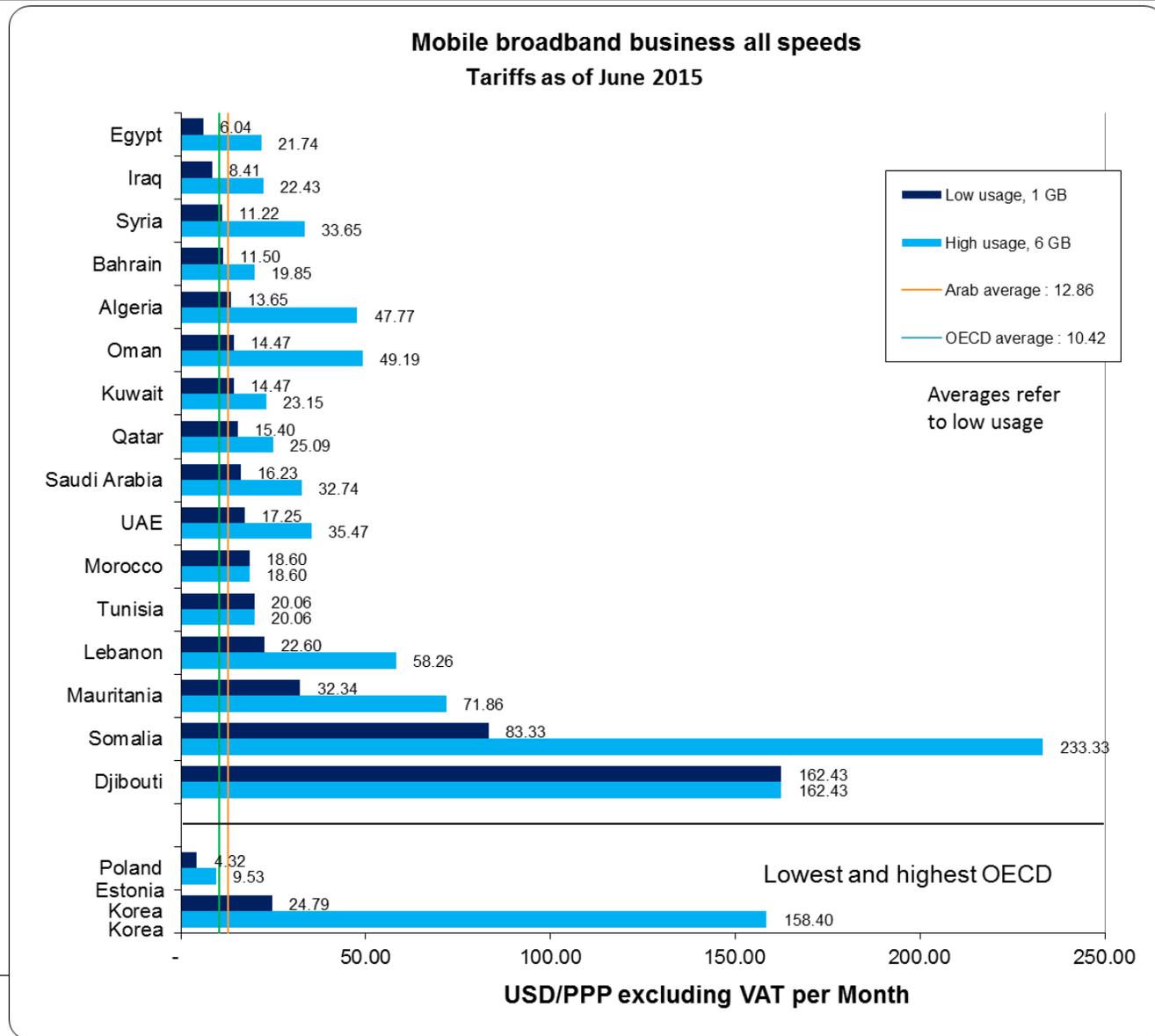
Low usage: 1 GB and 5 hours per month over 15 days

High usage: 6 GB and 30 hours over 30 days

Average lines are based on low usage results



Business mobile broadband all speeds



Low usage: 1 GB and 5 hours per month over 15 days
High usage: 6 GB and 30 hours over 30 days

Average lines are based on low usage results



Observations from mobile broadband basket results

- Mobile broadband services are available across all the Arab countries.
 - The average advertised download speed is just over 63 Mb/s, up from 34 Mb/s in 2013, illustrating the continued rollout of 4G services across many countries.
 - Higher speeds are much more commonplace in some countries than last year, with speeds in excess of 7.2 Mb/s available in 14 of the Arab countries.
 - Very low speeds of < 1Mb/s have all but disappeared in the Arab countries. Only Djibouti still offers a low speed – 0.5 Mb/s – service (which was also available last year).
- Sudan is the cheapest country for residential broadband services at all speeds, all usage levels. When speed isn't considered, Qatar and Egypt are among the cheapest for low usage, and UAE and Jordan for high usage.
- For business services, Syria, Bahrain, Algeria and to a lesser extent, Algeria, Tunisia and Oman are competitively positioned for 2-8 Mb/s services, although as usage increases, the competitive position decreases, with the exception of Tunisia and to a lesser extent, Bahrain.
- For high speed services, Egypt and Iraq are the most competitively priced. As with the lower speed results, the competitive position is reduced as usage increases, and countries such as Morocco and Tunisia, where there is little or no difference in cost between low and high usage, feature as the cheapest for high usage.
- There is much more parity between Arab and OECD averages, compared to last year, most notably for higher speed services, where over half of the Arab countries fall below the OECD average for residential services.
- The average cost of mobile broadband services for both residential and business customers in the Arab countries compared to the OECD average is shown in the table below. Generally, pricing across the Arab countries is on parity with OECD averages..

Arab/OECD average

Arab/OECD residential
Arab/OECD business

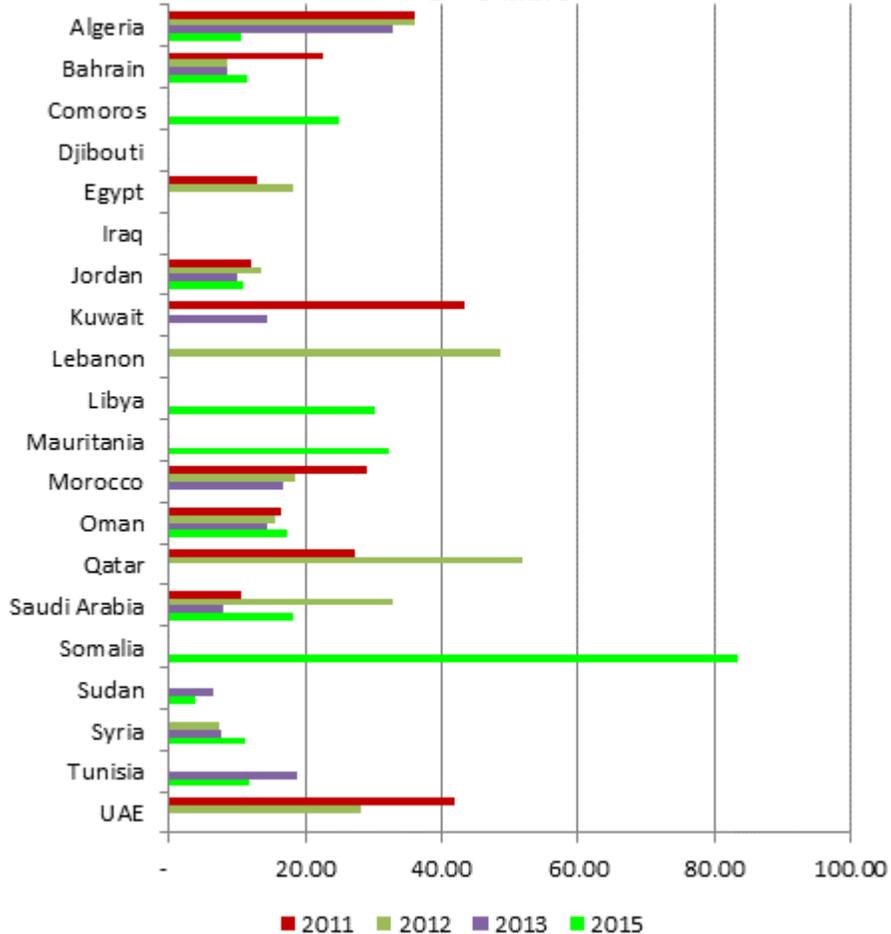
Low usage		High usage		Low usage	High usage
2-8 Mb/s	>8 Mb/s	2-8 Mb/s	>8 Mb/s	All speeds	All speeds
0.86	0.96	0.86	1.36	0.72	0.66
0.76	1.26	0.48	1.09	1.23	0.96



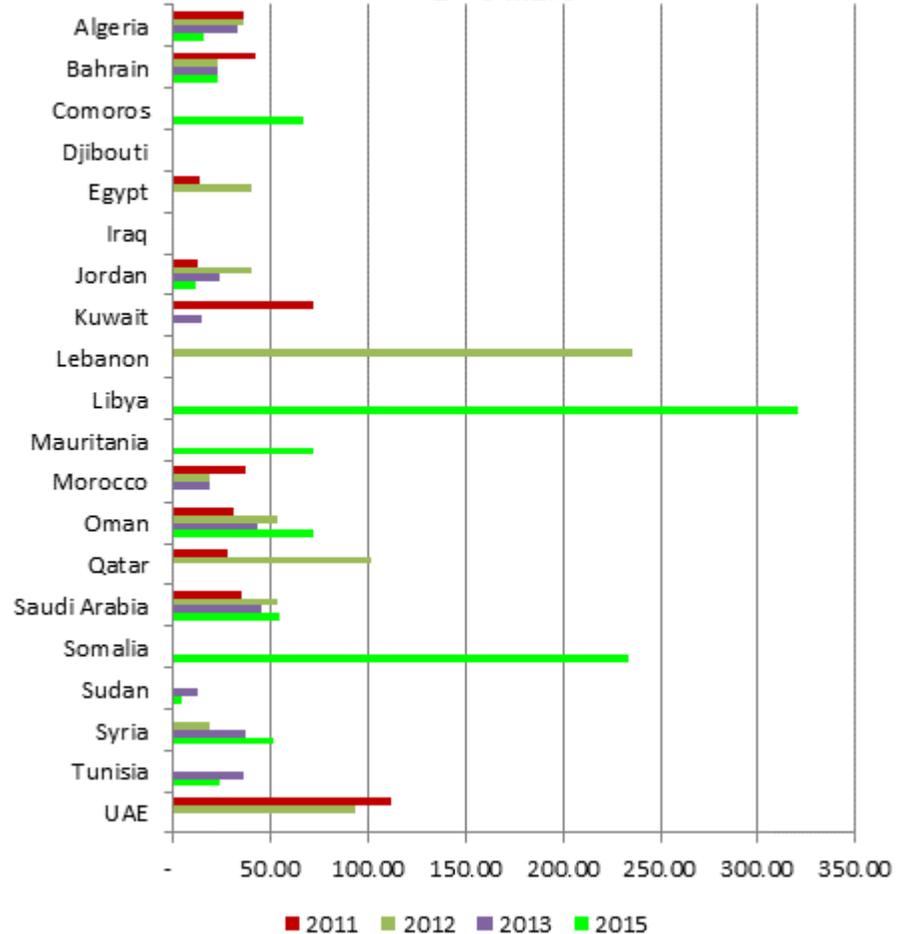
Mobile broadband time series, 2011-2015

Residential Mobile Broadband, Medium speed time series, 2-8 Mb/s

Basket 3: 1GB, Residential
2 - 8 Mb/s

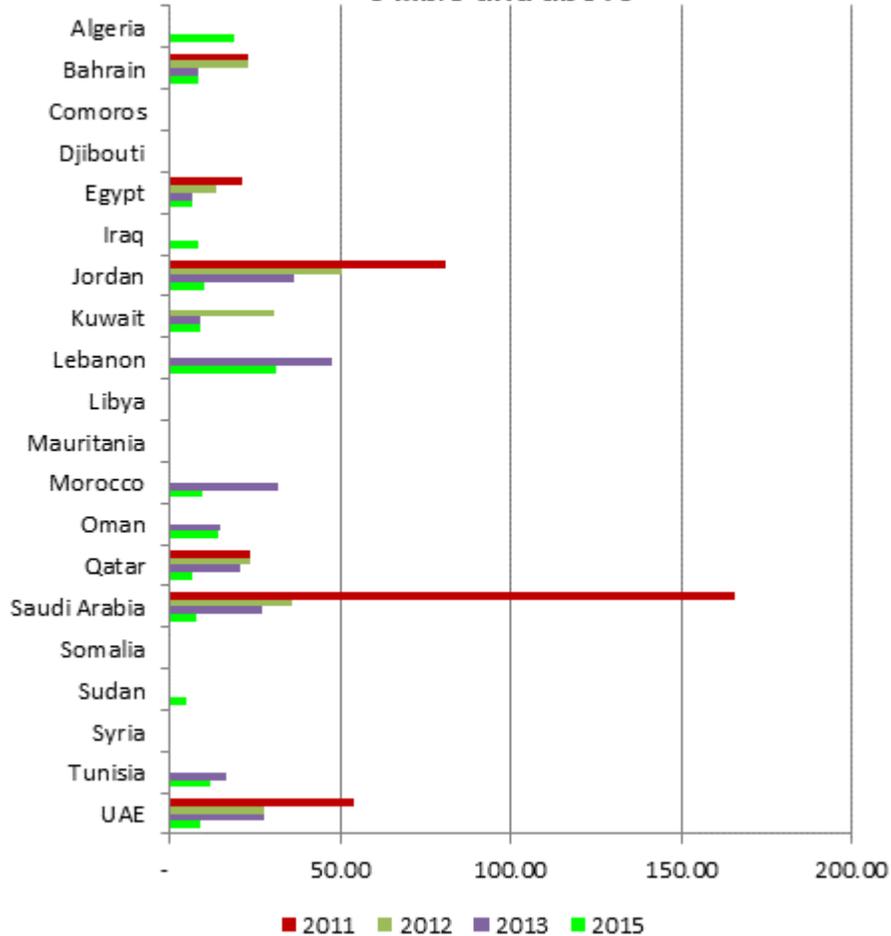


Basket 6: 6GB, Residential
2 - 8 Mb/s

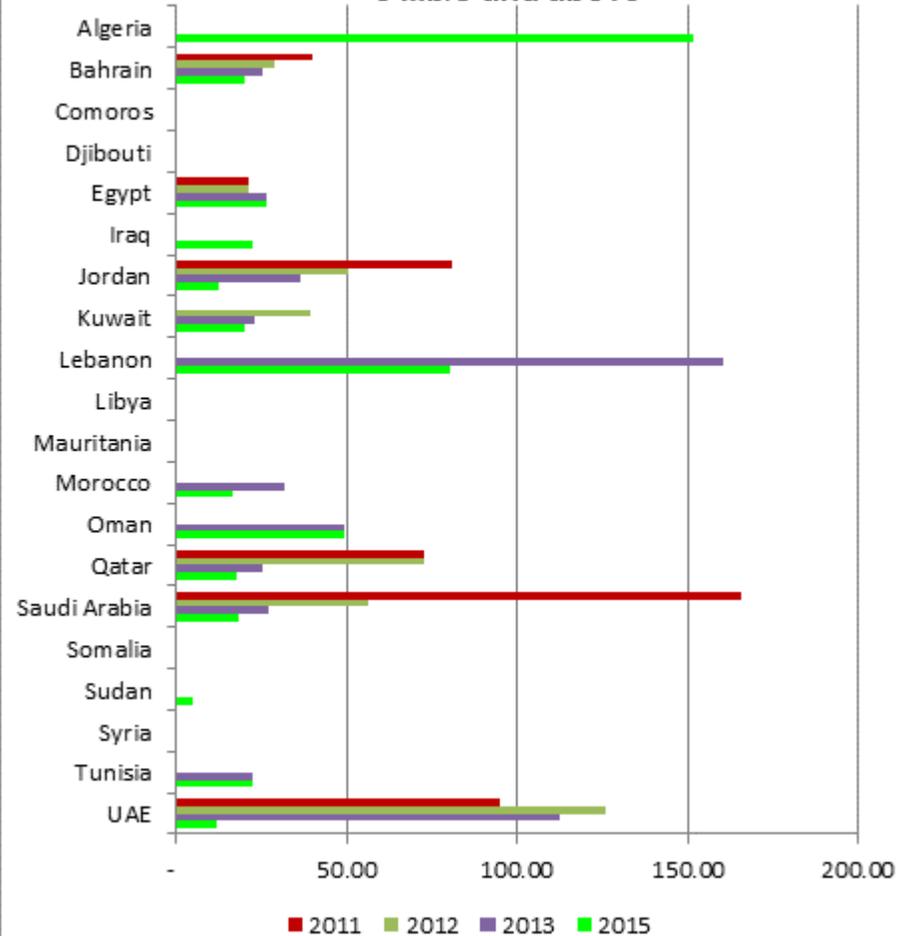


Residential Mobile Broadband, High speed time series, > 8 Mb/s

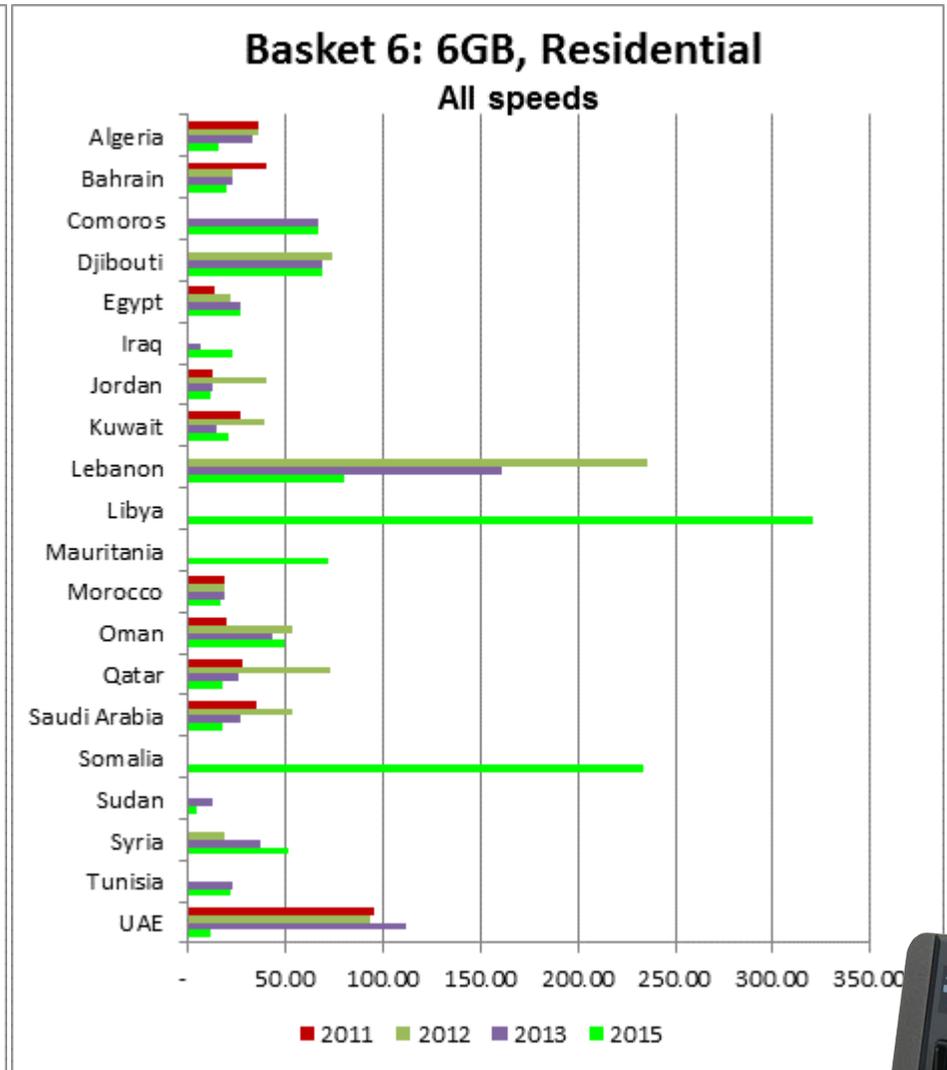
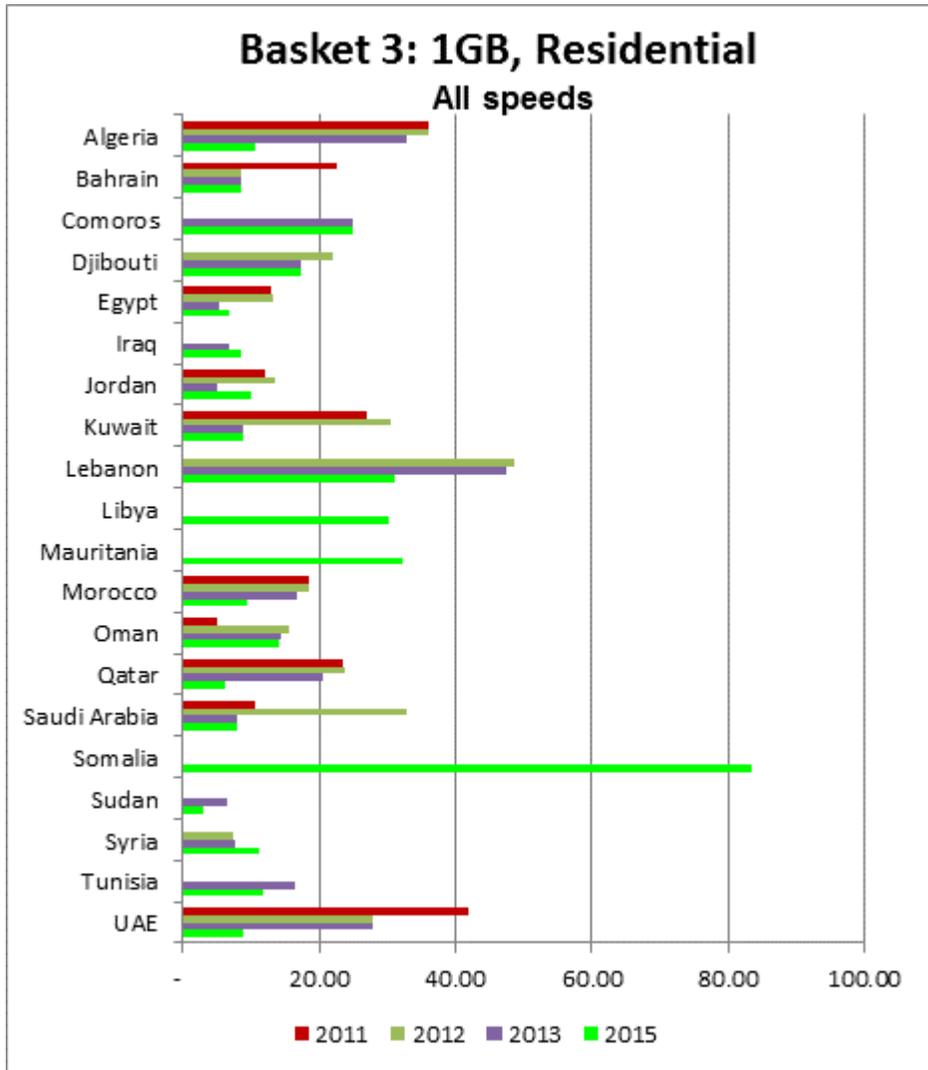
Basket 3: 1GB, Residential
8 Mb/s and above



Basket 6: 6GB, Residential
8 Mb/s and above

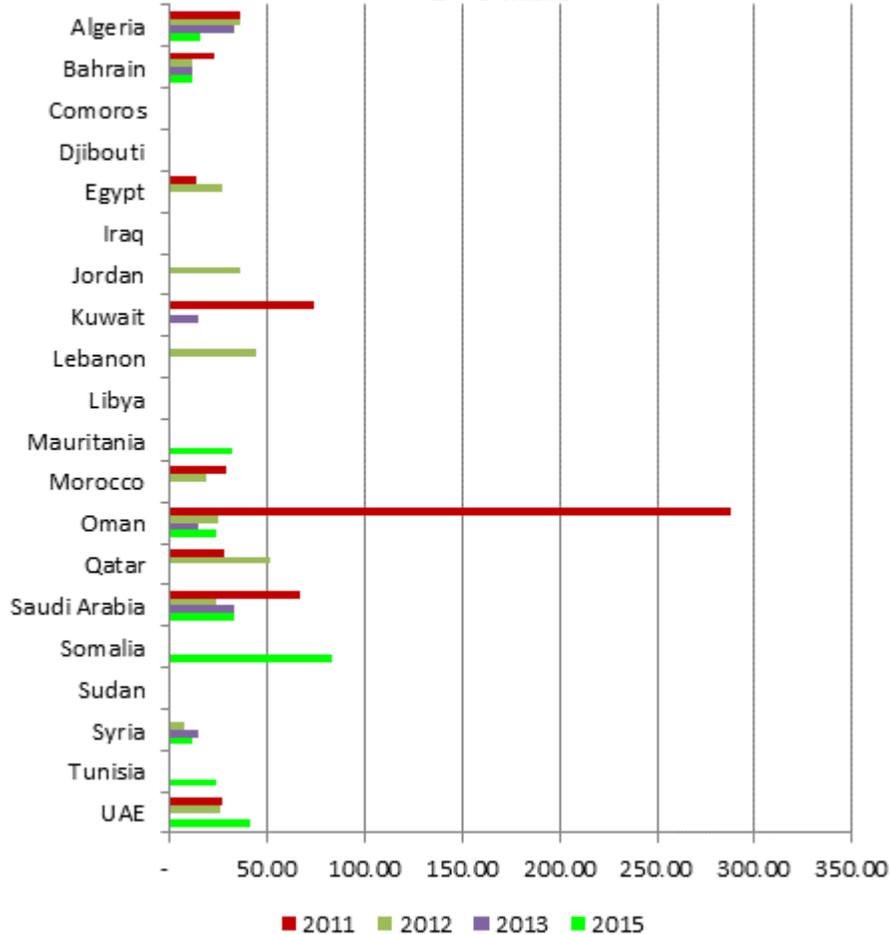


Residential Mobile Broadband, All speeds time series

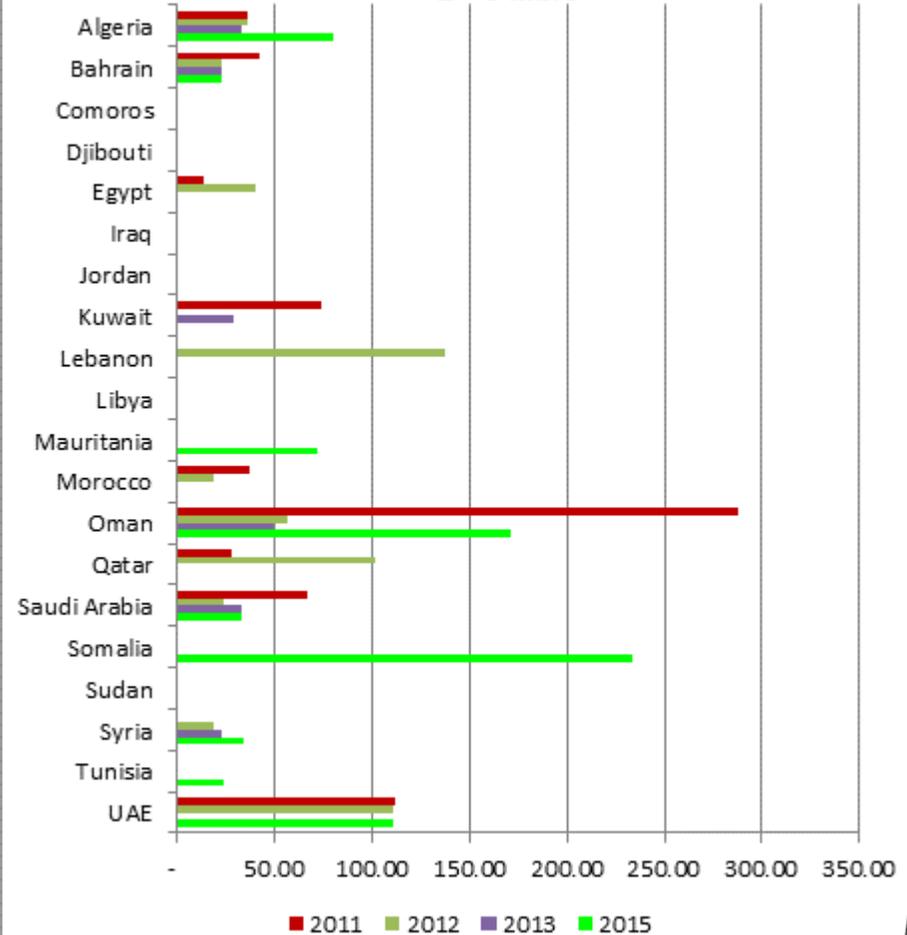


Business Mobile Broadband, Medium speed time series, 2-8 Mb/s

Basket 3: 1GB, Business
2 - 8 Mb/s

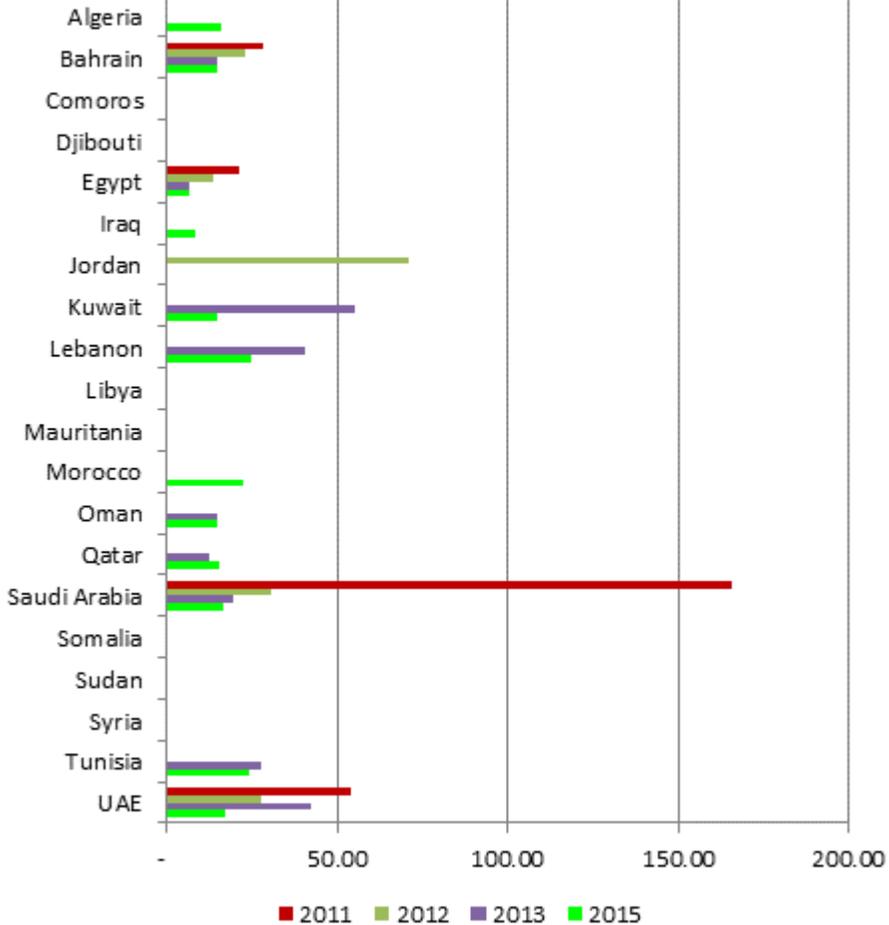


Basket 6: 6GB, Business
2 - 8 Mb/s

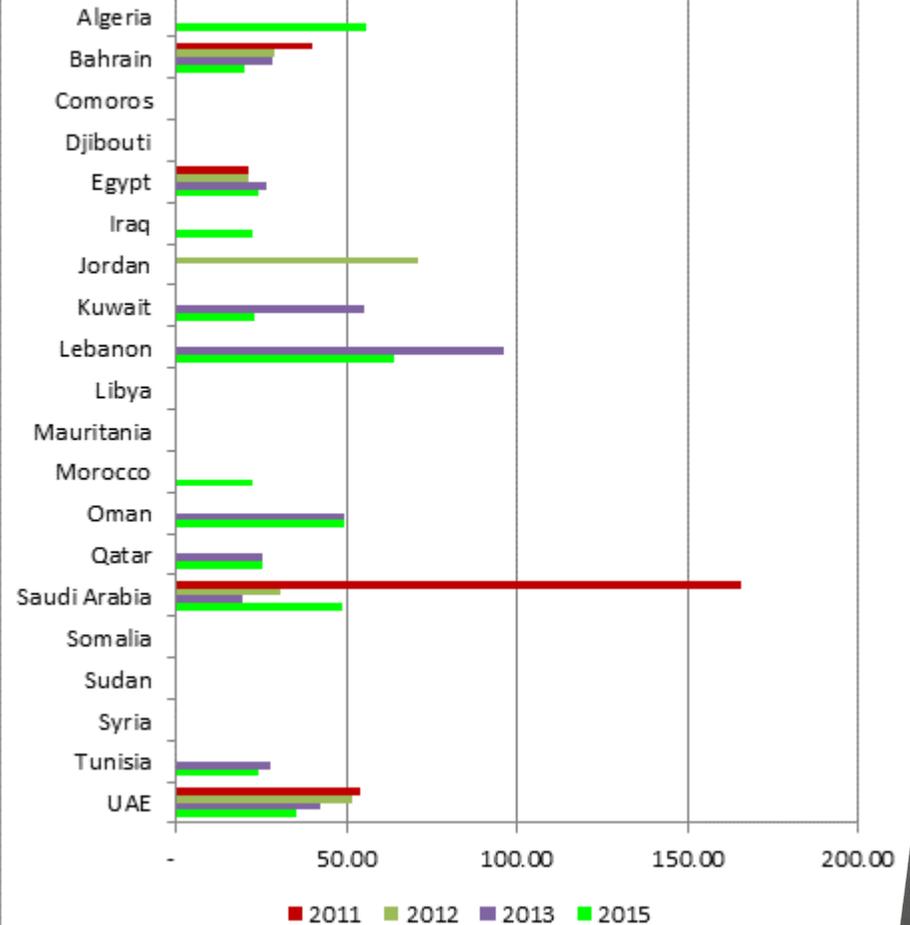


Business Mobile Broadband, High speed time series, >8 Mb/s

Basket 3: 1GB, Business
8 Mb/s and above

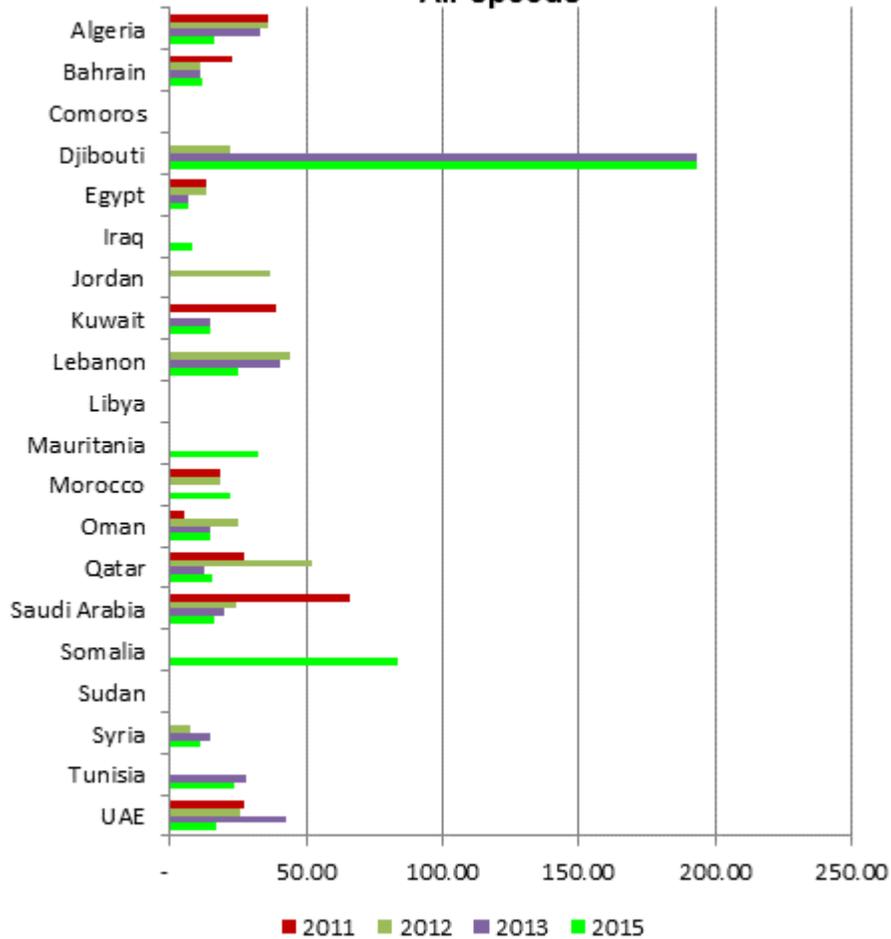


Basket 6: 6GB, Business
8 Mb/s and above

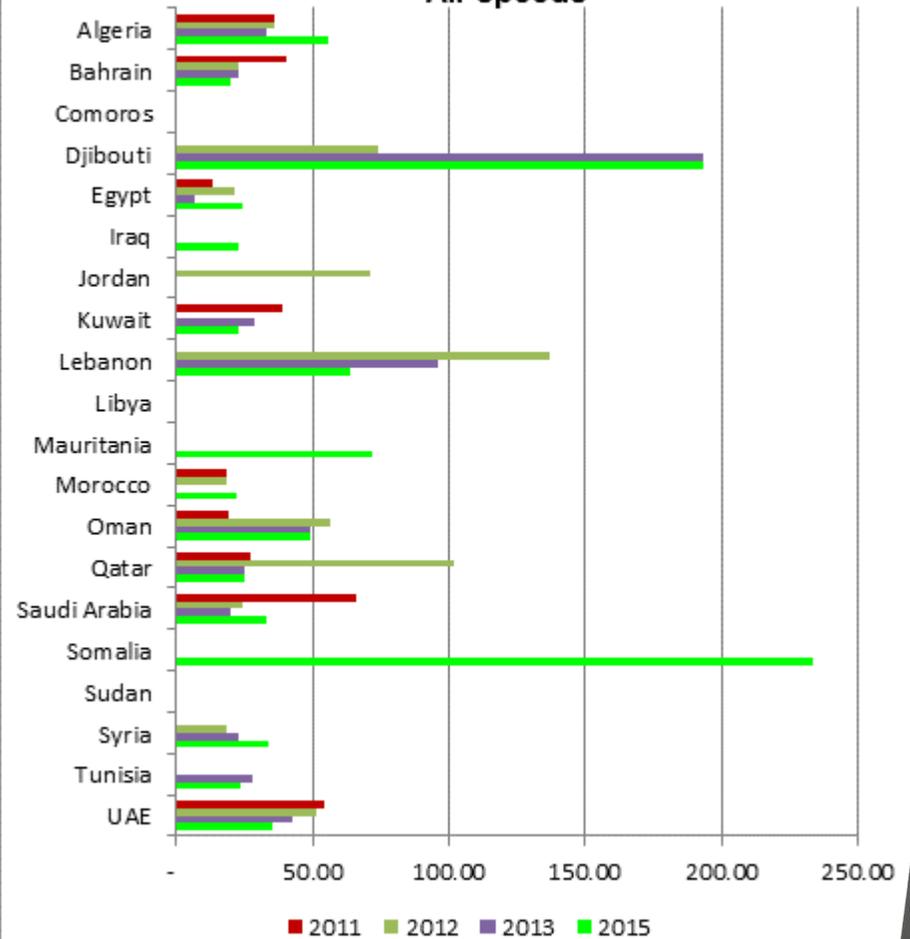


Business Mobile Broadband, All speeds time series

Basket 3: 1GB, Business
All speeds



Basket 6: 6GB, Business
All speeds



Observations from mobile broadband time series results

- In addition to more providers and countries for this year, there were price and service changes from most of the Arab providers:
 - Algeria: Revised plans across all providers, with the total number of plans increasing from 17 in 2013 to 44 in 2015. Introduction of higher speed services (in 2013, only speeds of 3. were available, and most offers were prepaid).
 - Bahrain: expansion in range of offers, including additional 4G offers from all providers, and broader range of allowances. Batelco has introduced allowances ranging from 5GB per month to 500GB, plus a range of shared packages. Similarly, wider range of 4G offers from Zain, and in particular VIVA, where most offerings are now 4G.
 - Iraq: inclusion of offers from Zain and Korek (not available in 2013) in addition to offers from AsiaCell.
 - Jordan: Revision of offerings to include larger and wider range of allowances. Rollout of 4G services, with speeds up to 100 Mb/s depending on service and provider.
 - Kuwait: Broader range of offers, and introduction of shared plans. Increase in speeds of service, with most plans offered at 42 Mb/s or 100 Mb/s .
 - Lebanon: Changes to some allowances for some plans only.
 - Libya: Introduction of tariffs for Libyana
 - Mauritania: Introduction of plans for Mattel, Mauritel and Chinguitel
 - Morocco: Most services now offered at 14.4, up from 7.2 in 2013
 - Qatar: Extended range of plans from Vodafone, plus introduction of new postpaid plans (additional allowances) from Ooredoo. All services in Qatar now offered at a minimum 100 Mb/s.
 - Saudi Arabia: Revision and extension to tariff portfolio for all providers. Number of plans increased from 115 in 2013 to 170 in 2015. Increase in number of 4G offers.
 - Somalia: Introduction of tariffs for Hormuud
 - Sudan: Introduction of tariffs for Zain and MTN
 - UAE: Introduction of wider range of plans allowing more choice on monthly allowances.
- The change in costs since 2013 has faced a mixed bag, for both residential and business pricing, with the average cost of some baskets falling while others have increased. Much of this can be attributed to the increase in 4G offers, which often come with larger allowances, but are consequently priced higher.



Mobile broadband ranking tables, 2013

Residential medium speed mobile broadband (2-8 Mb/s), low usage ranking

	Basket 3: 1GB, Residential			
	2011	2012	2013	2015
Algeria	35.93	35.93	32.74	10.65
Bahrain	22.69	8.51	8.51	11.50
Comoros				24.85
Djibouti				
Egypt	13.02	18.07		
Iraq				
Jordan	12.12	13.46	10.10	10.94
Kuwait	43.40		14.47	
Lebanon		48.62		
Libya				30.23
Mauritania				32.34
Morocco	28.92	18.41	16.74	
Oman	16.48	15.67	14.47	17.36
Qatar	27.34	51.73		
Saudi Arabia	10.61	32.79	7.95	18.22
Somalia				83.33
Sudan			6.54	3.78
Syria		7.48	7.54	11.22
Tunisia			18.84	11.69
UAE	41.82	28.03		

Average	25.23	25.34	13.79	22.18
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Below average
Above average

	Basket 3: 1GB, Residential			
	2011	2012	2013	2015
Algeria	8	9	10	2
Bahrain	5	2	4	5
Comoros				9
Djibouti				
Egypt	3	5		
Iraq				
Jordan	2	3	5	3
Kuwait	10		7	
Lebanon		10		
Libya				10
Mauritania				11
Morocco	7	6	8	
Oman	4	4	6	7
Qatar	6	11		
Saudi Arabia	1	8	3	8
Somalia				12
Sudan			1	1
Syria		1	2	4
Tunisia			9	6
UAE	9	7		

Lowest price
Highest price



Residential medium speed mobile broadband (2-8 Mb/s), high usage ranking

	Basket 6: 6GB, Residential			
	2011	2012	2013	2015
Algeria	35.93	35.93	32.74	15.97
Bahrain	42.54	22.69	22.69	22.84
Comoros				66.28
Djibouti				
Egypt	13.02	39.59		
Iraq				
Jordan	12.12	40.19	24.03	10.94
Kuwait	72.33		14.47	
Lebanon		235.22		
Libya				320.73
Mauritania				71.86
Morocco	37.01	18.41	18.41	
Oman	30.94	53.29	43.40	72.33
Qatar	27.34	101.90		
Saudi Arabia	34.73	53.47	45.70	54.65
Somalia				233.33
Sudan			12.08	3.78
Syria		18.69	37.39	51.01
Tunisia			36.38	23.68
UAE	111.90	92.94		

Average	41.79	64.76	28.73	78.95
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Below average
Above average

	Basket 6: 6GB, Residential			
	2011	2012	2013	2015
Algeria	6	4	6	3
Bahrain	8	3	4	4
Comoros				8
Djibouti				
Egypt	2	5		
Iraq				
Jordan	1	6	5	2
Kuwait	9		2	
Lebanon		11		
Libya				12
Mauritania				9
Morocco	7	1	3	
Oman	4	7	9	10
Qatar	3	10		
Saudi Arabia	5	8	10	7
Somalia				11
Sudan			1	1
Syria		2	8	6
Tunisia			7	5
UAE	10	9		

Lowest price
Highest price



Residential high speed mobile broadband (>8 Mb/s), low usage ranking

	Basket 3: 1GB, Residential			
	2011	2012	2013	2015
Algeria				18.68
Bahrain	23.08	23.08	8.51	8.51
Comoros				
Djibouti				
Egypt	21.26	13.29	6.64	6.64
Iraq				8.41
Jordan	80.58	50.49	36.35	10.10
Kuwait		30.54	8.68	8.68
Lebanon			47.47	31.18
Libya				
Mauritania				
Morocco			31.61	9.30
Oman			14.47	13.98
Qatar	23.41	23.76	20.42	6.27
Saudi Arabia	165.59	35.88	26.96	7.84
Somalia				
Sudan				5.03
Syria				
Tunisia			16.56	11.69
UAE	54.15	27.75	27.75	8.84

Average	61.35	29.26	22.31	11.08
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Below average
Above average

	Basket 3: 1GB, Residential			
	2011	2012	2013	2015
Algeria				13
Bahrain	2	2	2	6
Comoros				
Djibouti				
Egypt	1	1	1	3
Iraq				5
Jordan	5	7	10	10
Kuwait		5	3	7
Lebanon			11	14
Libya				
Mauritania				
Morocco			9	9
Oman			4	12
Qatar	3	3	6	2
Saudi Arabia	6	6	7	4
Somalia				
Sudan				1
Syria				
Tunisia			5	11
UAE	4	4	8	8

Lowest price
Highest price



Residential high speed mobile broadband (>8 Mb/s), high usage ranking

	Basket 6: 6GB, Residential			
	2011	2012	2013	2015
Algeria				151.70
Bahrain	40.10	28.75	25.52	19.85
Comoros				
Djibouti				
Egypt	21.26	21.26	26.57	26.57
Iraq				22.43
Jordan	80.58	50.49	36.35	12.12
Kuwait		39.22	23.15	20.25
Lebanon			160.50	80.05
Libya				
Mauritania				
Morocco			31.61	16.74
Oman			49.19	49.19
Qatar	72.51	72.86	25.43	17.56
Saudi Arabia	165.59	56.23	26.96	18.02
Somalia				
Sudan				5.03
Syria				
Tunisia			22.41	22.05
UAE	95.03	125.87	112.13	11.64

Average	79.18	56.38	49.08	33.80
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Below average
Above average

	Basket 6: 6GB, Residential			
	2011	2012	2013	2015
Algeria				14
Bahrain	2	2	4	7
Comoros				
Djibouti				
Egypt	1	1	5	11
Iraq				10
Jordan	4	4	8	3
Kuwait		3	2	8
Lebanon			11	13
Libya				
Mauritania				
Morocco			7	4
Oman			9	12
Qatar	3	6	3	5
Saudi Arabia	6	5	6	6
Somalia				
Sudan				1
Syria				
Tunisia			1	9
UAE	5	7	10	2

Lowest price
Highest price



Residential high speed mobile broadband (all speeds), low usage ranking

	Basket 3: 1GB, Residential			
	2011	2012	2013	2015
Algeria	35.93	35.93	32.74	10.65
Bahrain	22.69	8.51	8.51	8.51
Comoros			24.85	24.85
Djibouti		22.05	17.25	17.25
Egypt	13.02	13.29	5.31	6.64
Iraq			6.73	8.41
Jordan	12.12	13.46	5.05	10.10
Kuwait	27.09	30.54	8.68	8.68
Lebanon		48.62	47.47	31.18
Libya				30.23
Mauritania				32.34
Morocco	18.41	18.41	16.74	9.30
Oman	4.90	15.67	14.47	13.98
Qatar	23.41	23.76	20.42	6.27
Saudi Arabia	10.61	32.79	7.95	7.84
Somalia				83.33
Sudan			6.54	2.83
Syria		7.48	7.54	11.22
Tunisia			16.56	11.69
UAE	41.82	27.75	27.75	8.84

Average	21.00	22.94	16.15	17.21
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Below average
Above average

	Basket 3: 1GB, Residential			
	2011	2012	2013	2015
Algeria	9	12	16	11
Bahrain	6	2	7	6
Comoros			14	16
Djibouti		7	12	15
Egypt	4	3	2	3
Iraq			4	5
Jordan	3	4	1	10
Kuwait	8	10	8	7
Lebanon		13	17	18
Libya				17
Mauritania				19
Morocco	5	6	11	9
Oman	1	5	9	14
Qatar	7	8	13	2
Saudi Arabia	2	11	6	4
Somalia				20
Sudan			3	1
Syria		1	5	12
Tunisia			10	13
UAE	10	9	15	8

Lowest price
Highest price



Residential high speed mobile broadband (all speeds), low usage ranking

	Basket 6: 6GB, Residential			
	2011	2012	2013	2015
Algeria	35.93	35.93	32.74	15.97
Bahrain	40.10	22.69	22.69	19.85
Comoros			66.28	66.28
Djibouti		73.80	69.01	69.01
Egypt	13.02	21.26	26.57	26.57
Iraq			6.73	22.43
Jordan	12.12	40.19	12.12	10.94
Kuwait	27.09	39.22	14.47	20.25
Lebanon		235.22	160.50	80.05
Libya				320.73
Mauritania				71.86
Morocco	18.41	18.41	18.41	16.74
Oman	19.37	53.29	43.40	49.19
Qatar	27.34	72.86	25.43	17.56
Saudi Arabia	34.73	53.47	26.96	18.02
Somalia				233.33
Sudan			12.08	3.78
Syria		18.69	37.39	51.01
Tunisia			22.41	22.05
UAE	95.03	92.94	112.13	11.64

Average	32.31	59.84	41.72	57.36
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Below average
Above average

	Basket 6: 6GB, Residential			
	2011	2012	2013	2015
Algeria	8	5	11	4
Bahrain	9	4	7	8
Comoros			14	15
Djibouti		11	15	16
Egypt	2	3	9	12
Iraq			1	11
Jordan	1	7	3	2
Kuwait	5	6	4	9
Lebanon		13	17	18
Libya				20
Mauritania				17
Morocco	3	1	5	5
Oman	4	8	13	13
Qatar	6	10	8	6
Saudi Arabia	7	9	10	7
Somalia				19
Sudan			2	1
Syria		2	12	14
Tunisia			6	10
UAE	10	12	16	3

Lowest price
Highest price



Business medium speed mobile broadband (2-8 Mb/s), low usage ranking

	Basket 3: 1GB, Business			
	2011	2012	2013	2015
Algeria	30.71	30.71	27.98	13.65
Bahrain	22.69	11.34	11.34	11.50
Comoros				
Djibouti				
Egypt	11.84	23.91		
Iraq				
Jordan		31.34		
Kuwait	74.02		14.47	
Lebanon		40.28		
Libya				
Mauritania				32.34
Morocco	24.10	15.34		
Oman	287.97	25.05	14.47	23.49
Qatar	27.34	51.73		
Saudi Arabia	66.24	23.95	32.74	32.74
Somalia				83.33
Sudan				
Syria		7.48	14.95	11.22
Tunisia				20.06
UAE	27.29	25.70		40.65

Average	63.58	26.08	19.33	29.89
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Below average
Above average

	Basket 3: 1GB, Business			
	2011	2012	2013	2015
Algeria	6	8	5	3
Bahrain	2	2	1	2
Comoros				
Djibouti				
Egypt	1	4		
Iraq				
Jordan		9		
Kuwait	8		3	
Lebanon		10		
Libya				
Mauritania				6
Morocco	3	3		
Oman	9	6	2	5
Qatar	5	11		
Saudi Arabia	7	5	6	7
Somalia				9
Sudan				
Syria		1	4	1
Tunisia				4
UAE	4	7		8

Lowest price
Highest price



Business medium speed mobile broadband (2-8 Mb/s), high usage ranking

	Basket 6: 6GB, Business			
	2011	2012	2013	2015
Algeria	30.71	30.71	27.98	68.24
Bahrain	42.54	22.69	22.69	22.84
Comoros				
Djibouti				
Egypt	11.84	35.99		
Iraq				
Jordan				
Kuwait	74.02		28.93	
Lebanon		124.62		
Libya				
Mauritania				71.86
Morocco	30.84	15.34		
Oman	287.97	56.18	49.19	171.64
Qatar	27.34	101.90		
Saudi Arabia	66.24	23.95	32.74	32.74
Somalia				233.33
Sudan				
Syria		18.69	22.43	33.65
Tunisia				20.06
UAE	111.90	110.73		110.73

Average	75.93	54.08	30.66	85.01
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Below average
Above average

	Basket 6: 6GB, Business			
	2011	2012	2013	2015
Algeria	3	5	3	5
Bahrain	5	3	2	2
Comoros				
Djibouti				
Egypt	1	6		
Iraq				
Jordan				
Kuwait	7		4	
Lebanon		10		
Libya				
Mauritania				6
Morocco	4	1		
Oman	9	7	6	8
Qatar	2	8		
Saudi Arabia	6	4	5	3
Somalia				9
Sudan				
Syria		2	1	4
Tunisia				1
UAE	8	9		7

Lowest price
Highest price



Business high speed mobile broadband (>8 Mb/s), low usage ranking

	Basket 3: 1GB, Business			
	2011	2012	2013	2015
Algeria				13.65
Bahrain	28.44	23.08	14.57	14.57
Comoros				
Djibouti				
Egypt	19.32	12.08	6.04	6.04
Iraq				8.41
Jordan		60.94		
Kuwait			54.97	14.47
Lebanon			36.71	22.60
Libya				
Mauritania				
Morocco				18.60
Oman			14.47	14.47
Qatar			12.54	15.40
Saudi Arabia	165.59	30.36	19.60	16.23
Somalia				
Sudan				
Syria				
Tunisia			23.40	20.64
UAE	54.16	27.75	42.48	17.25

Average	66.88	30.84	24.98	15.19
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Below average
Above average

	Basket 3: 1GB, Business			
	2011	2012	2013	2015
Algeria				3
Bahrain	2	2	4	6
Comoros				
Djibouti				
Egypt	1	1	1	1
Iraq				2
Jordan		5		
Kuwait			9	5
Lebanon			7	12
Libya				
Mauritania				
Morocco				10
Oman			3	4
Qatar			2	7
Saudi Arabia	4	4	5	8
Somalia				
Sudan				
Syria				
Tunisia			6	11
UAE	3	3	8	9

Lowest price
Highest price



Business high speed mobile broadband (>8 Mb/s), high usage ranking

	Basket 6: 6GB, Business			
	2011	2012	2013	2015
Algeria				47.77
Bahrain	40.10	28.75	28.36	19.85
Comoros				
Djibouti				
Egypt	19.32	19.32	24.16	21.74
Iraq				22.43
Jordan		60.94		
Kuwait			54.97	23.15
Lebanon			87.06	58.26
Libya				
Mauritania				
Morocco				18.60
Oman			49.19	49.19
Qatar			25.09	25.09
Saudi Arabia	165.59	30.36	19.60	48.68
Somalia				
Sudan				
Syria				
Tunisia			23.40	20.64
UAE	54.16	51.39	42.48	35.47

Average	69.79	38.15	39.37	32.57
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Below average
Above average

	Basket 6: 6GB, Business			
	2011	2012	2013	2015
Algeria				9
Bahrain	2	2	5	2
Comoros				
Djibouti				
Egypt	1	1	3	4
Iraq				5
Jordan		5		
Kuwait			8	6
Lebanon			9	12
Libya				
Mauritania				
Morocco				1
Oman			7	11
Qatar			4	7
Saudi Arabia	4	3	1	10
Somalia				
Sudan				
Syria				
Tunisia			2	3
UAE	3	4	6	8

Lowest price
Highest price



Business high speed mobile broadband (all speeds), low usage ranking

	Basket 3: 1GB, Business			
	2011	2012	2013	2015
Algeria	30.71	30.71	27.98	13.65
Bahrain	22.69	11.34	11.34	11.50
Comoros				
Djibouti		18.53	162.43	162.43
Egypt	11.84	12.08	6.04	6.04
Iraq				8.41
Jordan		31.34		
Kuwait	38.66		14.47	14.47
Lebanon		40.28	36.71	22.60
Libya				
Mauritania				32.34
Morocco	15.34	15.34		18.60
Oman	4.90	25.05	14.47	14.47
Qatar	27.34	51.73	12.54	15.40
Saudi Arabia	66.24	23.95	19.60	16.23
Somalia				83.33
Sudan				
Syria		7.48	14.95	11.22
Tunisia			23.40	20.06
UAE	27.29	25.70	42.48	17.25

Average	27.22	24.46	32.20	29.25
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Below average
Above average

	Basket 3: 1GB, Business			
	2011	2012	2013	2015
Algeria	7	9	9	5
Bahrain	4	2	2	4
Comoros				
Djibouti		5	12	16
Egypt	2	3	1	1
Iraq				2
Jordan		10		
Kuwait	8		5	7
Lebanon		11	10	13
Libya				
Mauritania				14
Morocco	3	4		11
Oman	1	7	4	6
Qatar	6	12	3	8
Saudi Arabia	9	6	7	9
Somalia				15
Sudan				
Syria		1	6	3
Tunisia			8	12
UAE	5	8	11	10

Lowest price
Highest price



Business high speed mobile broadband (all speeds), low usage ranking

	Basket 6: 6GB, Business			
	2011	2012	2013	2015
Algeria	30.71	30.71	27.98	47.77
Bahrain	40.10	22.69	22.69	19.85
Comoros				
Djibouti		62.02	162.43	162.43
Egypt	11.84	19.32	6.04	21.74
Iraq				22.43
Jordan		60.94		
Kuwait	38.66		28.93	23.15
Lebanon		124.62	87.06	58.26
Libya				
Mauritania				71.86
Morocco	15.34	15.34		18.60
Oman	19.37	56.18	49.19	49.19
Qatar	27.34	101.90	25.09	25.09
Saudi Arabia	66.24	23.95	19.60	32.74
Somalia				233.33
Sudan				
Syria		18.69	22.43	33.65
Tunisia			23.40	20.06
UAE	54.16	51.39	42.48	35.47

Average	33.75	48.98	43.11	54.73
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Below average
Above average

	Basket 6: 6GB, Business			
	2011	2012	2013	2015
Algeria	5	6	7	11
Bahrain	7	4	4	2
Comoros				
Djibouti		10	12	15
Egypt	1	3	1	4
Iraq				5
Jordan		9		
Kuwait	6		8	6
Lebanon		12	11	13
Libya				
Mauritania				14
Morocco	2	1		1
Oman	3	8	10	12
Qatar	4	11	6	7
Saudi Arabia	9	5	2	8
Somalia				16
Sudan				
Syria		2	3	9
Tunisia			5	3
UAE	8	7	9	10

Lowest price
Highest price



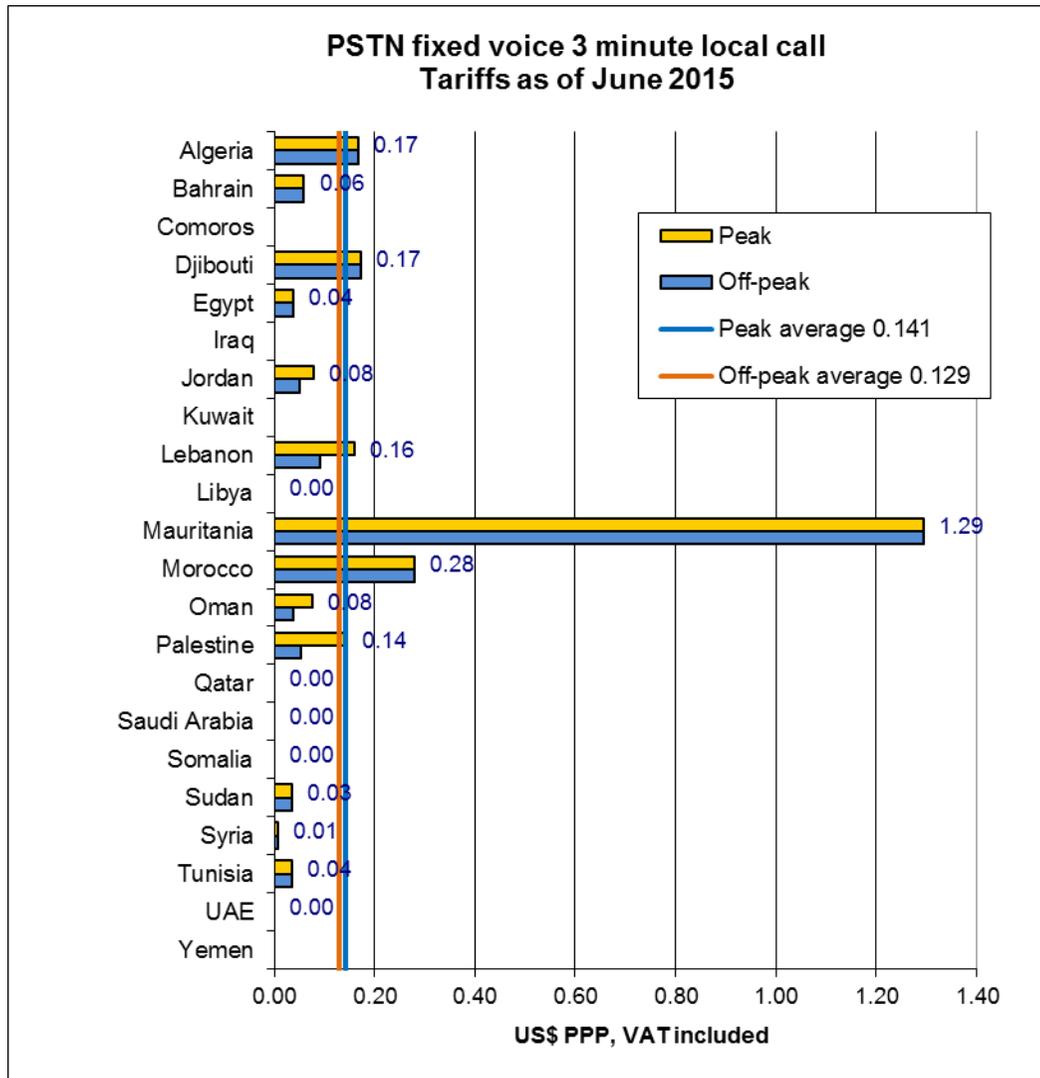
PSTN call cost comparison

Call cost comparison data issues

- The comparison of call cost is based on the actual cost of a 3 minute call.
- Costs are compared for local calls, national calls, F2M calls and calls to the USA
 - At peak and off-peak times
 - Off-peak meaning the lowest possible cost period
- These comparisons have a much simpler methodology than the basket comparisons shown elsewhere in this report, and will reflect the costs for specific call types.
- The results are presented with countries in alphabetical order as a ranking of these results is not necessarily useful.
 - Services with for example free calls (zero cost per call) may still have a higher total cost to the end user



Local call comparison

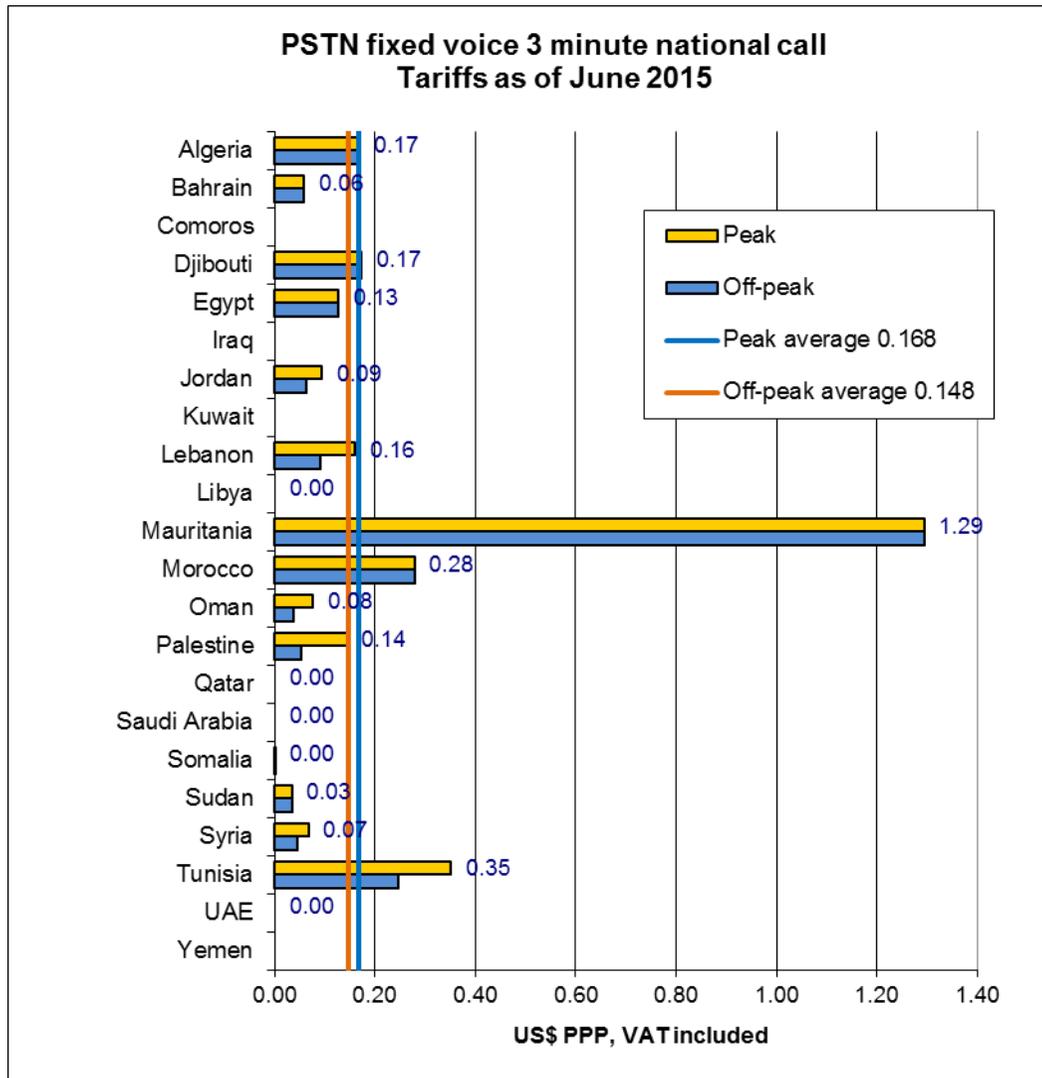


Many of the countries continue to have the same prices for peak and off peak calls.

Entries with call cost of 0.00 have free calling included in the monthly rental.



National call comparison

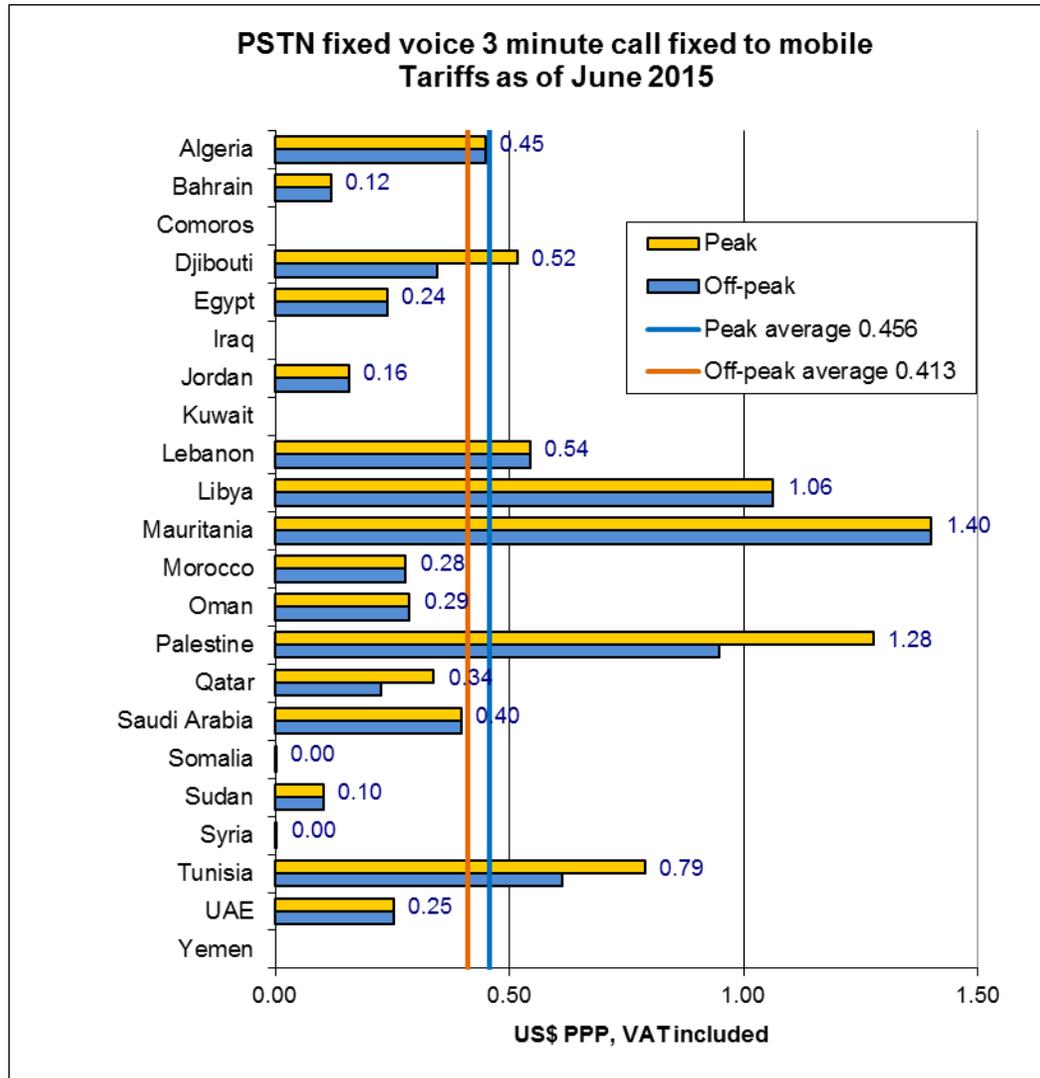


Similar to local calls, many of the countries continue to have the same prices for peak and off peak calls.

Entries with call cost of 0.00 have free calling included in the monthly rental.



Fixed to mobile (F2M) call comparison

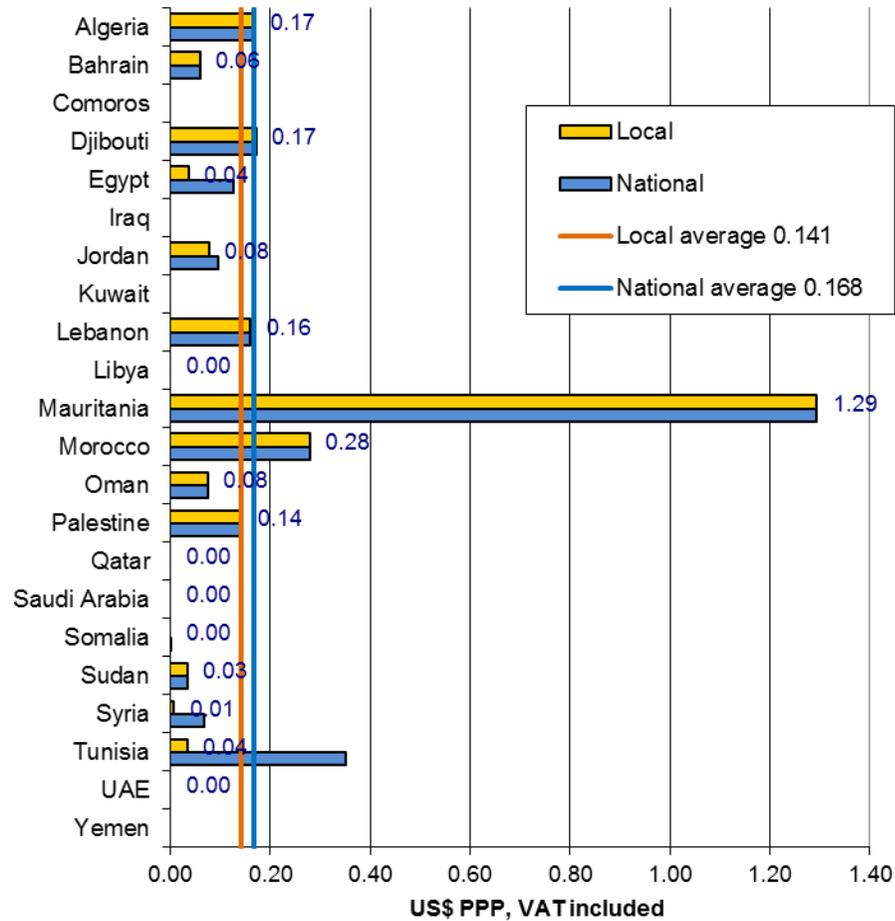


Entries with call cost of 0.00 have free calling included in the monthly rental.



Local vs. national PSTN

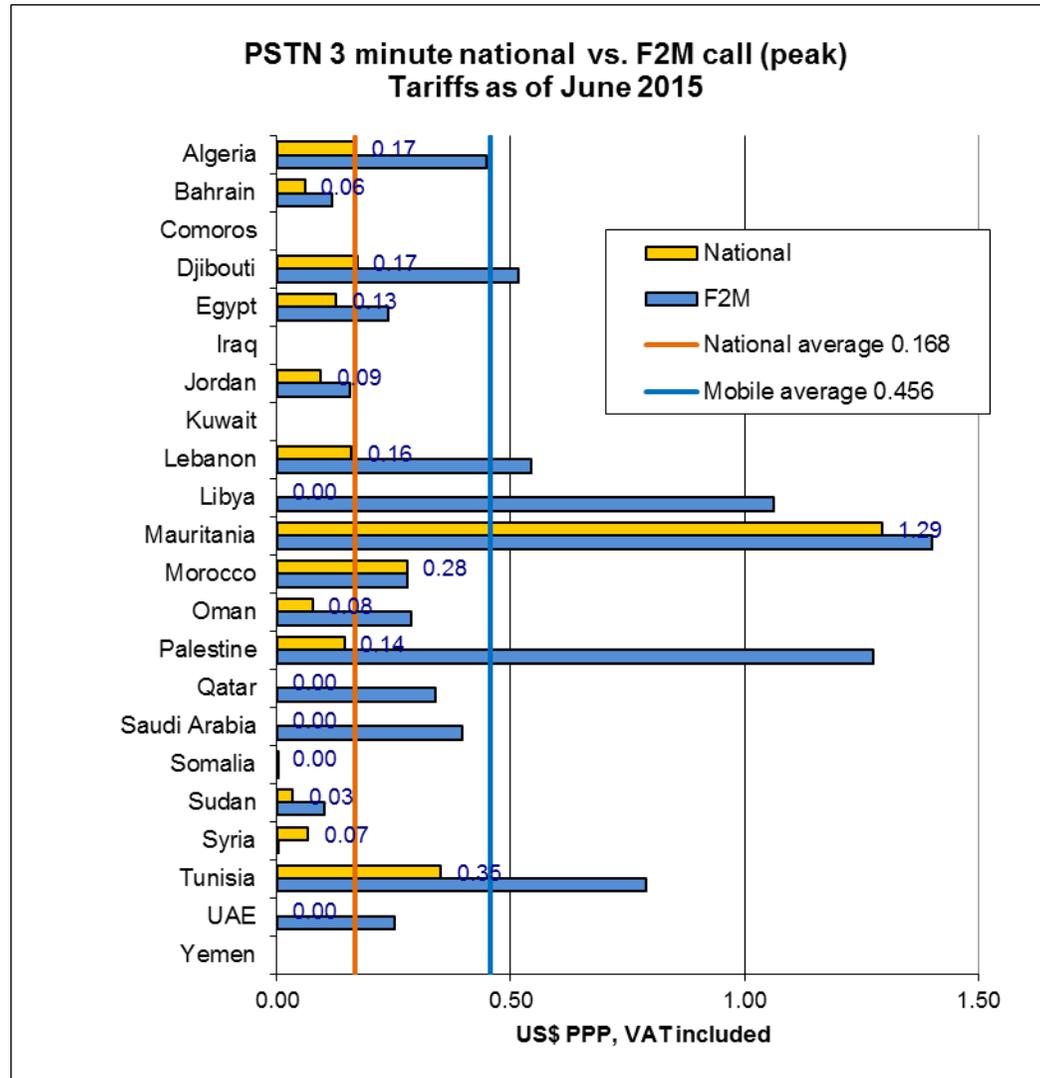
PSTN fixed voice 3 minute local vs. national call (peak)
Tariffs as of June 2015



In many countries, there is no difference between local and national call costs.



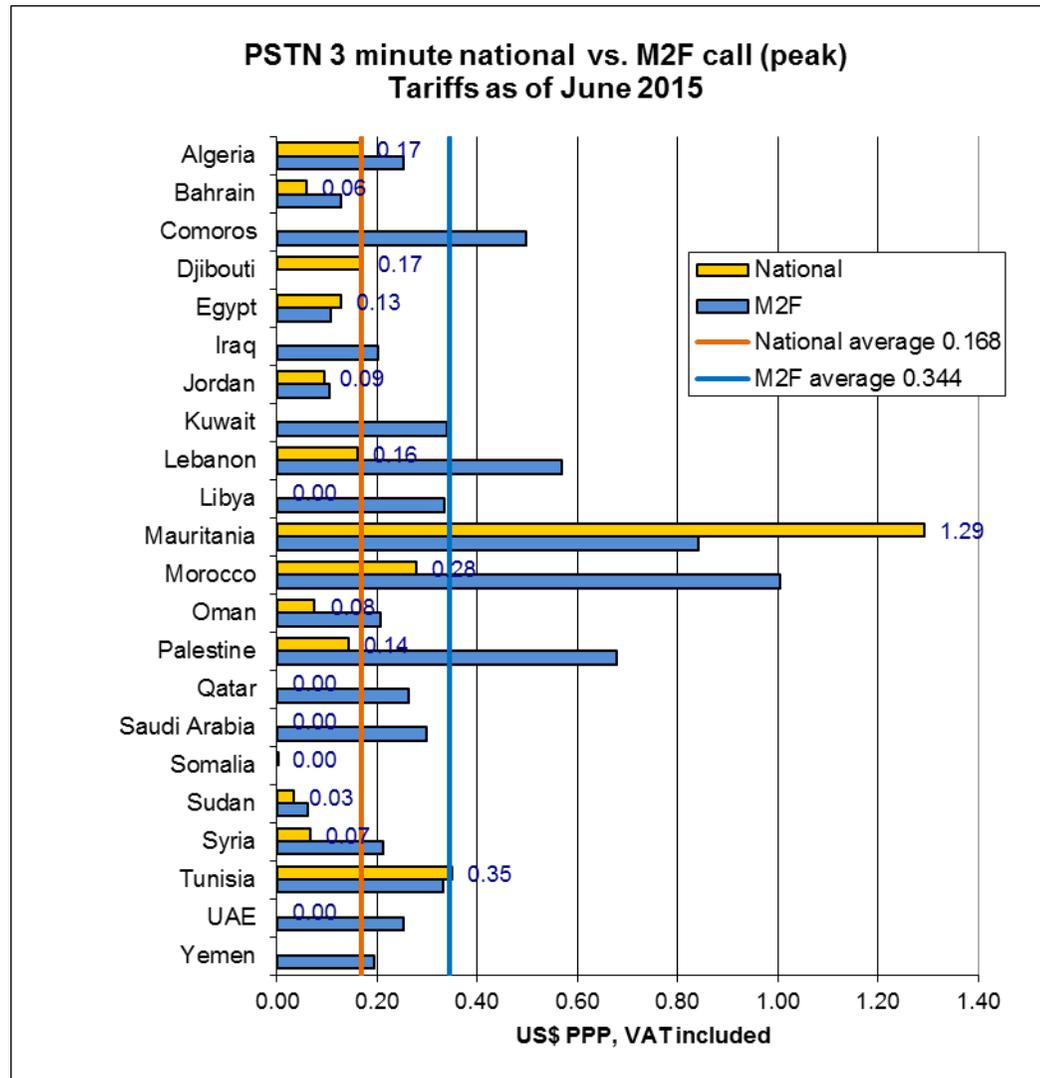
National PSTN vs. fixed-to-mobile (F2M)



The ratio of national to fixed to mobile charges varies dramatically across the Arab countries, with fixed to mobile calls being on average 2.7 times more expensive than national calls.



National PSTN vs. mobile-to-fixed (M2F)

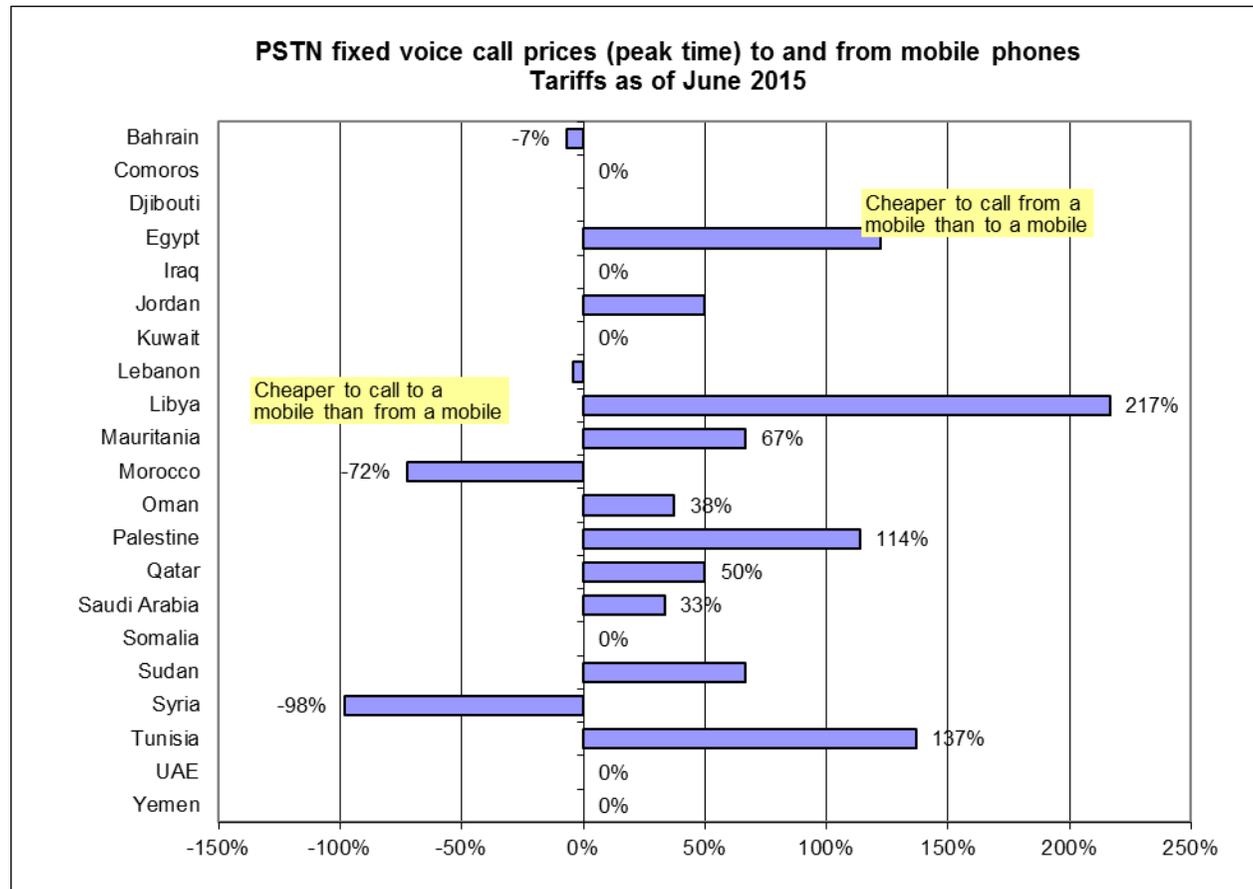


The ratio of national to mobile-to-fixed varies dramatically across the Arab countries, with fixed to mobile calls being on average 2 times more expensive than national calls. Mobile to fixed calls are generally cheaper than fixed-to-mobile calls.



Making and receiving calls to/from mobile

The relationship between prices of calls to a mobile phone and from a mobile phone varies a lot between countries, but calling from mobile to fixed is generally cheaper, often significantly, than calling from fixed to mobile.

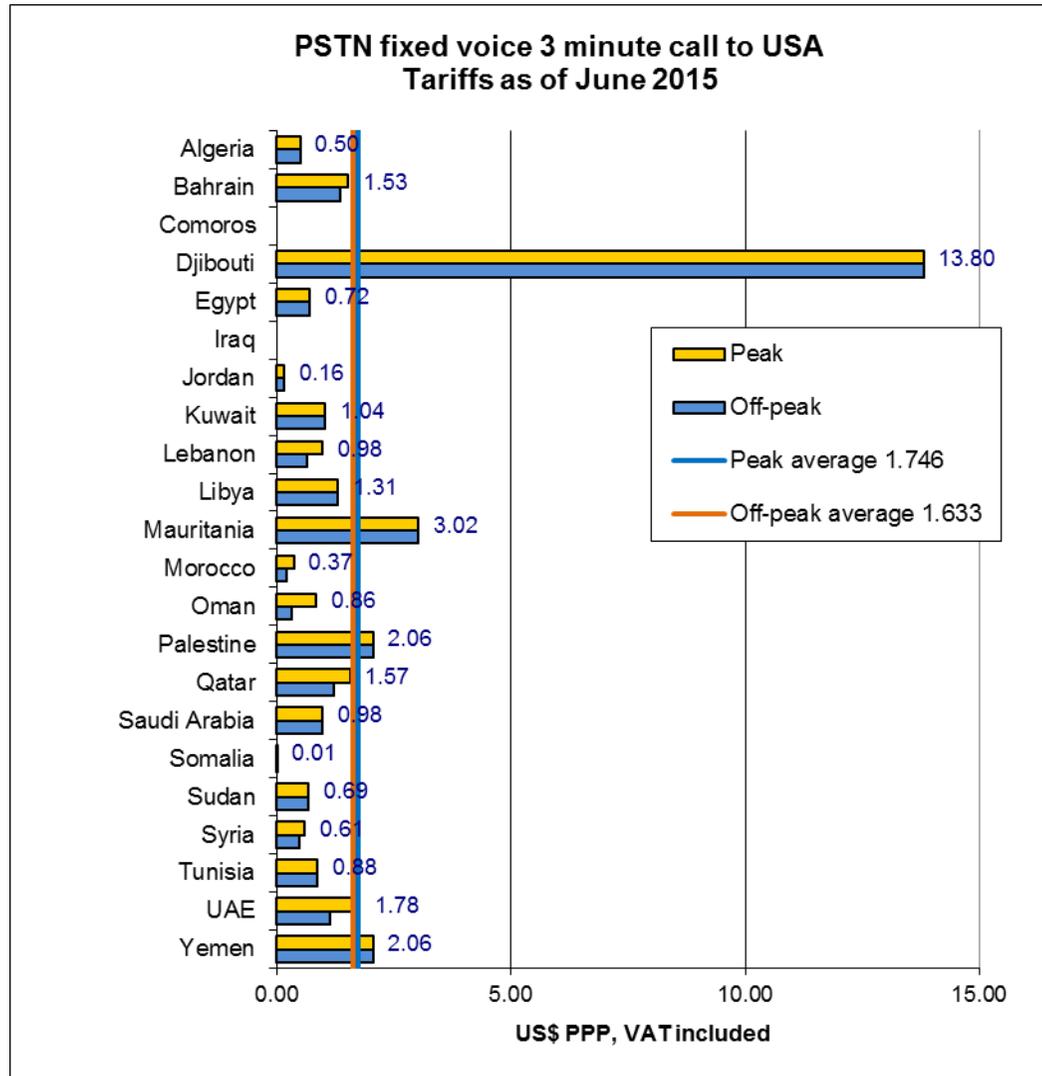


2015 To/From mobile		
	Peak	Off-peak
Algeria	78%	78%
Bahrain	-7%	-7%
Comoros		
Djibouti		
Egypt	122%	122%
Iraq		
Jordan	50%	50%
Kuwait		
Lebanon	-4%	18%
Libya	217%	217%
Mauritania	67%	67%
Morocco	-72%	-67%
Oman	38%	38%
Palestine	114%	59%
Qatar	50%	0%
Saudi Arab	33%	33%
Somalia		
Sudan	67%	67%
Syria	-98%	-98%
Tunisia	137%	84%
UAE	0%	0%
Yemen		
Average	-11%	-1%

+ means F2M higher than M2F
- means F2M lower than M2F



International call comparison (call to USA)

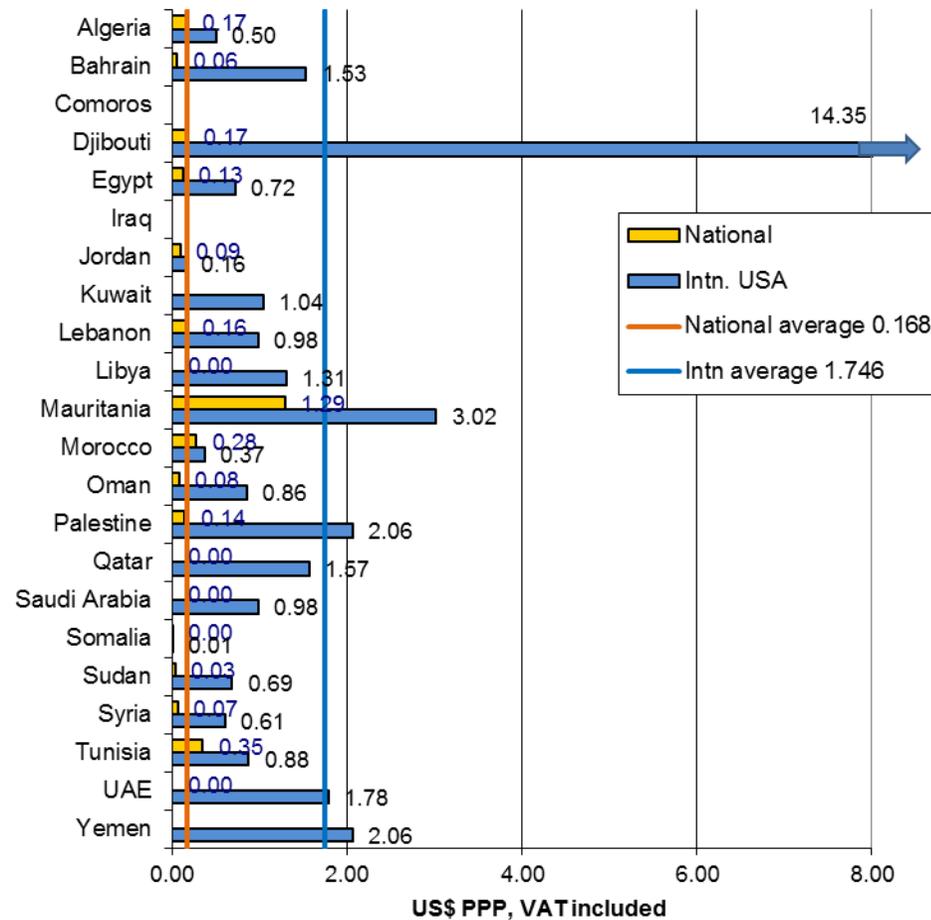


In many countries, there is no or little difference between peak and off-peak calling internationally (to the USA)



National vs. international to USA

PSTN fixed voice 3 minute National vs. International (peak)
Tariffs as of June 2015



International calls (to the USA) are significantly more expensive than national calls in the Arab countries – on average just over 10 times more expensive



Call costs 2013 - 2015

- There have not been many changes in call charges 2013 – 2015 for any of the countries covered, but where there were changes, some of these were very significant:
 - Local calls: Increase registered in Mauritania and Syria (peak and off-peak), and decrease in Tunisia (peak and off-peak)
 - National calls: Increase registered in Mauritania, Syria and Tunisia (peak and off-peak)
 - Fixed to mobile: Increase in Mauritania (peak and off-peak) and UAE (off-peak), and decrease in Syria (peak and off-peak), Tunisia (off-peak), and UAE (peak)
 - Mobile to fixed: Decrease registered in Algeria, Egypt, Iraq, Qatar and Sudan (peak and off-peak), and increase in Bahrain, Jordan, Kuwait, and Syria (peak and off-peak).
 - International (to USA): Decreases in Egypt, Lebanon, Tunisia (peak and off-peak) and Mauritania (peak only), and increase in Mauritania (off-peak)



Observations from the call cost comparison

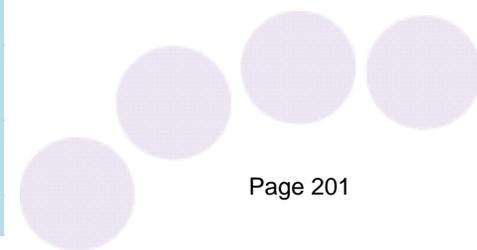
- Prices of calls vary considerably between countries
- Around half of the countries do not differentiate between peak and off-peak calling for local, national calls, calls to mobile or for international calls (to the USA)
- Similar to 2013, in some countries the local and/or national calls are “free”, i.e. included in the monthly rental.
 - Libya, Qatar, Somalia and UAE
- In some countries there are several tariff options available, with different call charges and fixed charges. This analysis is based on the so called “basic” packages.
- Ratios of national to international call prices remain very high, with little change from 2013, and indicate that rebalancing of call charges has still not taken place in many countries in the region



Summary of main findings from the benchmarking study (1)

- Fixed voice telephony
 - Costs for the business baskets in the Arab countries tend to be above the OECD average, particularly for the highest usage business basket, with the exception of Syria, Egypt, Bahrain and Oman. For the lower usage residential baskets, the Arab average is below the OECD average
 - Generally the Arab countries in North Africa are more expensive than the Arab countries in the Middle East.
 - As in previous years, the price range for the Arab countries (cheapest to most expensive) is wider than for the OECD countries
 - There remains a clear lack of rebalancing in several Arab countries, where the usage revenue covers a significant portion of the fixed line cost for the operators. Notably, some countries appear to have restructured their fixed line plans, with more focus on upfront charges with increased allowances or reduced/free local and national calls. International calls remain significantly more expensive than in OECD countries

		Arab average 2015 USD PPP	OECD average 2015 USD PPP	Arab average compared to OECD average
Fixed voice Residential	20 calls	14	25	● -44%
	60 calls	29	35	● -19%
	140 calls	55	50	● 11%
	420 calls	126	76	● 65%
Fixed voice Business	100 calls	40	38	● 5%
	260 calls	109	77	● 42%



Summary of main findings from the benchmarking study (2)

- Mobile telephony
 - The average result across all mobile baskets for the Arab countries is consistently higher than the OECD average, with the exception of the 30 calls baskets and 40 calls prepaid basket, where the Arab average is slightly lower than the OECD one.
 - For higher usage baskets, the Arab average is significantly higher than that of the OECD; for the 300 calls basket it is almost double, and for the 900 calls basket it is almost four times that of the OECD. For low and mid usage, and for the messages basket, the averages are much more on par
 - Baskets which incorporate handset data show a broad variation in price across the Arab providers – the difference becoming more marked for baskets with higher data requirements.
 - Similar to the voice baskets, the Arab average for the data baskets is typically much higher than the OECD one, although this is skewed by particularly expensive countries at the upper end.
 - The number of tariff packages offered by the Arab operators has increased steadily, with the average number of packages per operator increasing from 10.9 in 2011, to 15.6 in 2012, 19.1 in 2013, and 23.2 in 2015

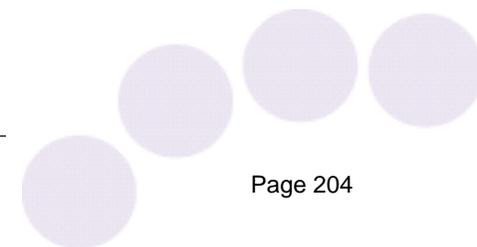
Summary of main findings from the benchmarking study (3)

		Arab average 2015 USD PPP	OECD average 2015 USD PPP	Arab average compared to OECD average
Mobile voice	30 calls basket	11	13	● -15%
	100 calls basket	23	22	● 5%
	300 calls basket	53	31	● 69%
	900 calls basket	136	38	● 261%
	40 calls prepaid basket	11	14	● -16%
	400 messages basket	16	16	● -4%
Mobile voice & data	30 calls + 100 MB	31	18	● 73%
	100 calls + 500 MB	70	27	● 159%
	300 calls + 1 GB	126	37	● 245%
	900 calls + 2 GB	265	44	● 499%
	100 calls + 2 GB	167	35	● 376%

Summary of main findings from the benchmarking study (4)

- Leased Lines
 - Prices for high speed circuits are generally higher than in OECD countries, with very little change since 2013
 - There continues to be a wide spread of prices between the Arab countries

		Arab average 2015 USD PPP	OECD average 2015 USD PPP	Arab average compared to OECD average
Leased Lines	64 Kb/s	501	N/A	
	256 kb/s	952	N/A	
	2 Mb/s	2699	2071	● 30%
	34 Mb/s	19168	9487	● 102%
	155 Mb/s	23826	N/A	



Summary of main findings from the benchmarking study (5)

- Fixed Broadband
 - The Arab average residential cost is up to 3.1 times higher than the average OECD cost. In 2013, the gap between OECD and Arab residential service costs was much greater. For business services, the average is up to 15 times higher. For both residential and business services, the averages continue to be skewed by particularly high costs in a number of countries.
 - Usage based charges are still prevalent, and appear in offers across 6 of the Arab countries. In spite of this, usage-based charges have had limited impact on the basket results, and flat rate services have featured as the cheapest. In many OECD countries, usage-based charges often only apply for a very few ISPs.
 - Prices of residential broadband services in Arab countries have continued to fall over the past year. The average decrease depends a lot on the speed and usage level, but with the exception of the 2-10 Mb/s basket (all usage levels), and the 30-100 Mb/s basket, high usage, which decreased by between 26 and 43%, the decreases for all other baskets ranged between 3 and 11%.
 - By contrast, the average cost for business broadband services has increased across all baskets and speeds apart from the 10-30 Mb/s high usage basket, which saw a small decrease. For the other baskets, the increase varies depending on the speed and usage level. Low speed services generally increased less than higher speeds.

Summary of main findings from the benchmarking study (6)

Residential Fixed Broadband		Arab average 2015 USD PPP	OECD average 2015 USD PPP	Arab average compared to OECD average
Very low speed	L1: 0.25-2Mb/s, 5GB	38	28	● 35%
	M1: 0.25-2Mb/s, 10GB	40	28	● 44%
	H1: 0.25-2Mb/s, 20GB	56	28	● 99%
Low speed	L2: 2-10Mb/s, 5GB	61	29	● 114%
	M2: 2-10Mb/s, 15GB	62	29	● 115%
	H2: 2-10Mb/s, 50GB	64	29	● 121%
Medium speed	L3: 10-30Mb/s, 10GB	104	31	● 239%
	M3: 10-30Mb/s, 25GB	104	31	● 237%
	H3: 10-30Mb/s, 100GB	104	31	● 232%
High speed	L4: 30-100Mb/s, 15GB	122	37	● 231%
	M4: 30-100Mb/s, 50GB	126	37	● 240%
	H4: 30-100Mb/s, 200GB	142	38	● 270%

Summary of main findings from the benchmarking study (7)

Business Fixed Broadband		Arab average 2015 USD PPP	OECD average 2015 USD PPP	Arab average compared to OECD average
Very low speed	L1: 0.25-2Mb/s, 5GB	160	32	● 395%
	M1: 0.25-2Mb/s, 10GB	167	32	● 415%
	H1: 0.25-2Mb/s, 20GB	169	33	● 412%
Low speed	L2: 2-10Mb/s, 5GB	233	34	● 590%
	M2: 2-10Mb/s, 15GB	236	34	● 587%
	H2: 2-10Mb/s, 50GB	244	35	● 604%
Medium speed	L3: 10-30Mb/s, 10GB	576	37	● 1461%
	M3: 10-30Mb/s, 25GB	577	38	● 1432%
	H3: 10-30Mb/s, 100GB	577	38	● 1414%
High speed	L4: 30-100Mb/s, 15GB	679	45	● 1409%
	M4: 30-100Mb/s, 50GB	679	45	● 1392%
	H4: 30-100Mb/s, 200GB	679	47	● 1347%

Note: The significant variation for High speed connections is due to low number of services available, and the inclusion of a new country in 2015.

Summary of main findings from the benchmarking study (8)

- Mobile broadband
 - Mobile broadband services are available across all the Arab countries, although not all providers specify download speed
 - The average advertised download speed is just over 63 Mb/s, up from 34 Mb/s in 2013, illustrating the continued rollout of 4G services across many countries. Higher speeds are much more commonplace in some countries than last year, with speeds in excess of 7.2 Mb/s available in 14 of the Arab countries.. By contrast, very low speeds of < 1Mb/s have all but disappeared
 - There is much more parity between Arab and OECD averages, compared to last year, most notably for higher speed services, where over half of the Arab countries fall below the OECD average for residential services
 - The change in costs since 2013 has faced a mixed bag, for both residential and business pricing, with the average cost of some baskets falling while others have increased. Much of this can be attributed to the increase in 4G offers, which often come with larger allowances, but are consequently priced higher.

Mobile Broadband for Laptops & Tablets		Arab average 2015 USD PPP	OECD average 2015 USD PPP	Arab average compared to OECD average
Residential	1GB, 15 days	17	11	● 55%
	6GB, 30 days	57	25	● 131%
Business	1GB, 15 days	29	10	● 181%
	6GB, 30 days	55	26	● 107%

Appendix

Exchange rates and VAT

Exchange rates and VAT

Country	VAT	Exchange rate into US\$	Exchange rate into BHD	PPP rate into US\$
Algeria	17.0%	0.01011	0.00378	0.0160
Bahrain	0.0%	2.67410	1.00000	2.8359
Comoros	0.0%	0.00228	0.00085	0.0033
Djibouti	19.0%	0.00563	0.00210	0.0115
Egypt	10.0%	0.13080	0.04891	0.2657
Iraq	0.0%	0.00087	0.00032	0.0006
Jordan	16.0%	1.41570	0.52941	1.7410
Kuwait	0.0%	3.31200	1.23855	2.8934
Lebanon	10.0%	0.00067	0.00025	0.0010
Libya	0.0%	0.74170	0.27736	1.2438
Mauritania	0.0%	0.00310	0.00116	0.0072
Morocco	20.0%	0.10340	0.03867	0.1860
Oman	0.0%	2.59370	0.96993	2.8934
Palestine	16.0%	0.26330	0.09846	0.5917
Qatar	0.0%	0.27620	0.10329	0.2509
Saudi Arabia	0.0%	0.26670	0.09973	0.3312
Somalia	0.0%	0.00149	0.00056	0.0050
Sudan	10.0%	0.16720	0.06253	0.2288
Syria	0.0%	0.00460	0.00172	0.0075
Tunisia	18.0%	0.51410	0.19225	1.1692
UAE	0.0%	0.27230	0.10183	0.2803
Yemen	0.0%	0.00466	0.00174	0.0076
UK	17.5%	1.56740	0.58614	1.5017
USA	10.0%	1.00000	0.37396	1.0000
France	19.6%	1.11590	0.41730	1.0130

VAT rate shown for Jordan is rate applied to businesses.
Rate for residential users is 8%

VAT rate for Palestine has increased since the previous study from 14.5% to 16%

Purchasing Power Parities (PPP)

- PPPs are used to incorporate not only the financial differences between exchange rates, but also the differences in the state of the economies as seen through the purchasing power of the citizens in each country.
 - PPPs are based on an assessment of the price levels for a corresponding basket of goods and services in each country. i.e. how much the same basket costs in different countries.
 - PPPs are normally stated based on the US\$ or some other reference currency, e.g. Euro. This study uses the US\$ PPPs calculated by the World Bank.
- In order to update these values the Comparative Price Level (CPL) is used. CPL is the relationship between the PPP and the reference market exchange rate at the time the PPP was calculated.
 - CPL is used together with updated, i.e. current, exchange rates to produce an “updated” PPP value.
 - $CPL = \text{Rate}_{\text{PPP}} / \text{Rate}_{\text{Reference}}$
 - $\text{PPP}_{\text{Current}} = \text{Rate}_{\text{Market}} * CPL$
- The advantage of using PPPs is that the results reflect the price differences as seen by the end users in each country based on their income and other costs.

Acronyms used in the context of this report

- OECD: Organisation of Economic Co-operation and Development
- OECD countries: Australia, Austria, Belgium, Canada, Chile, Czech Rep., Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Rep., Slovenia, Spain, Sweden, Switzerland, Turkey, UK, USA
- AREGNET: Arab Regulators Network.
- AREGNET member countries: Algeria, Bahrain, Comoros, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Somalia, Sudan, Syria, Tunisia, UAE, Yemen
- VAT: Value Added Tax, a consumption tax system used in most European countries and some Arab countries.
- PPP: Purchasing Power Parity, exchange rates adjusted for the purchasing power of consumers in each country. Used in international comparisons to adjust for market differences.
- CPL: Comparative Price level. The relative factor between market exchange rates and PPP. Used to calculate the PPPs from current market exchange rates.
- Service: A telecommunications service
- Basket: A theoretical usage profile describing the usage volumes across different types of calls and/or different kinds of usage. The basket includes all important elements of the service, including fixed cost elements.
- Tariff: The description of all the end user prices related to a service
- Tariff element: The part of a tariff describing the price(s) for a single type of call or service component.
- Basket calculation: The process where the Basket is applied to the individual tariff in order to calculate the cost of the individual tariff elements and the overall cost.
- Basket result: The cost of using the service as described in the Basket.
- Re-balancing: The process through which the prices are changed so that individual Tariff elements will cover their own cost, and not subsidise other Tariff elements.