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**THE TELECOMMUNICATION PROFILE
OF THE ESCWA REGION**

Prepared by
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Standardization in the Arab Countries
Amman, Jordan, 2-5 February 1999

The Telecommunication Profile of the ESCWA Region

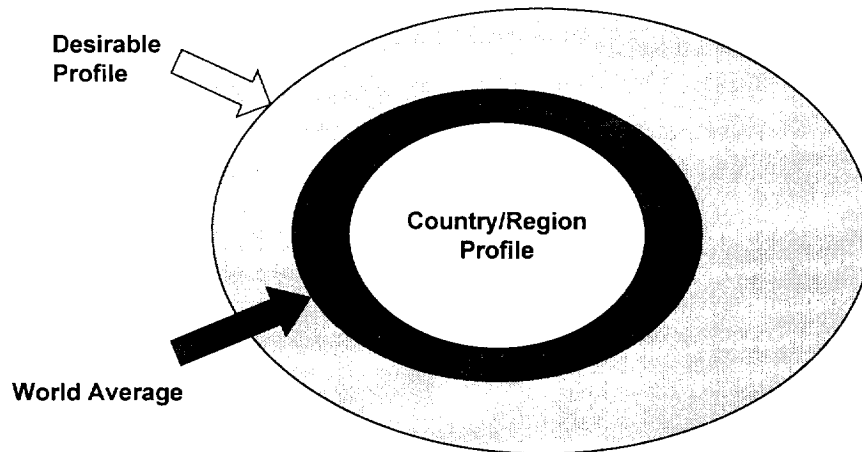
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Definition



A “telecommunication profile” is a set of indicators derived by ITU to represent the state of telecommunications in a country or a region

Profile Transformation



ESCWA Countries



■ 6 Gulf States

- Bahrain
- Kuwait
- Qatar
- Oman
- Saudi Arabia
- United Arab Emirates

■ 7 non- Gulf States

- Egypt
- Iraq
- Jordan
- Lebanon
- West Bank and Gaza
- Syria
- Yemen



Income Categories

■ High

- Kuwait
- Qatar
- UAE

■ Upper Middle

- Bahrain
- Oman
- Saudi Arabia

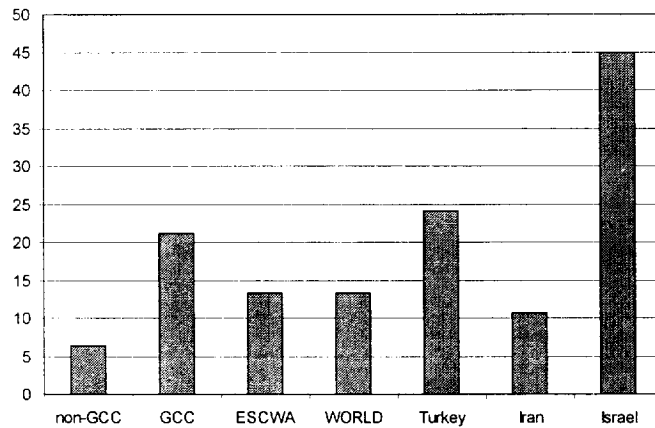
■ Lower Middle

- Egypt
- Iraq
- Jordan
- Lebanon
- West Bank & Gaza
- Syria
- Lower
- Yemen

World Telecommunication Indicators (1996 - 1997)

Indicators (1996 - 1997)		World	ESCWA	GCC	Non-GCC
1	Population (m)	5 871	1 54	2 7	1 27
2	Population density/km ²	4 3	6 93	1 85	1 13 0
Basic Service					
3	Total telephone lines (m)	7 80	10 6	4 0	6 5
4	Teledensity	13 3	13 3	21 2	6 5
5	Waiting time (months)	1 0	4 2	2 4	7 7
6	% Residential	7 2	6 9	6 9	7 0
7	% Household	4 0	5 7	7 1	2 1
8	Urban teledensity	8	1 6	2 7	7
9	Rural teledensity	1 24	6 32	4 52	7 7
10	Tariff % of GDP	8 6	1 7	1 0	2 5
Cellular Mobile					
11	Cellular subscribers (m)	2 10	1 3	1 1	2 68
12	Cellular teledensity	3 6	5	8	1 7
13	Cellular % of land lines	2 0	1 9	2 5	1 3
Others					
14	International outgoing traffic/subscriber/min	9 4	3 16	5 09	1 24
15	Main lines/telecom employee	6 3	7 8	7 7	7 9
16	Revenue % of GDP	2 1	2 1	2 2	1 9
17	Equipment import (m \$)	7 20 00	7 38	5 72	1 66
Information Technology					
18	Internet users (k)	5 00 00	9 9	5 2	4 7
19	Users/10 000 inhabitants	9 2	3 2	5 3	6 6
20	PC's total (m)	2 34	1 6	1 1	4 9
21	PC's/100 inhabitants	4 7	3 6	5 3	9 7
Year 2000 Growth					
22	Total lines (m)	10 00	13 1	4 5	8 6
23	Teledensity	16 5	16 3	2 3	9 7

Teledensity - Regions and Neighbours 1997



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Mobile Cellular



- Security concerns
- Capacity constraints
- High tariff
- Government high taxation
- Limited private sector involvement

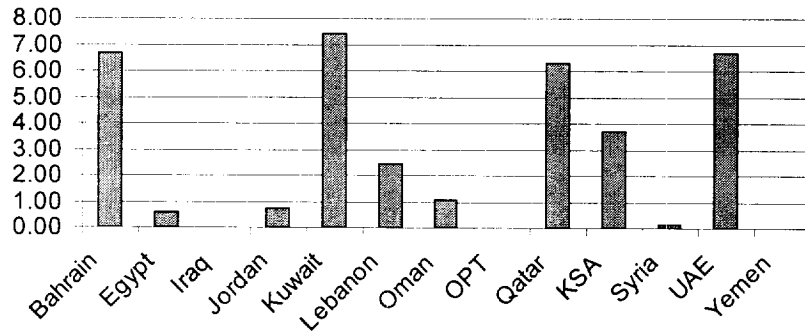
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PC Density per 100 Inhabitants - 1996



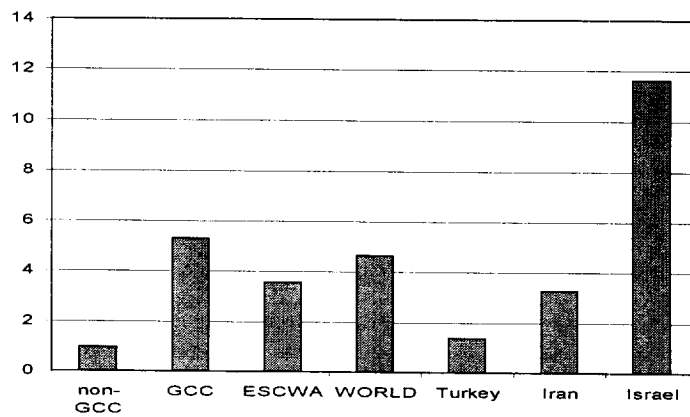
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PC's per 100 inhabs - Regions and Neighbours 1996

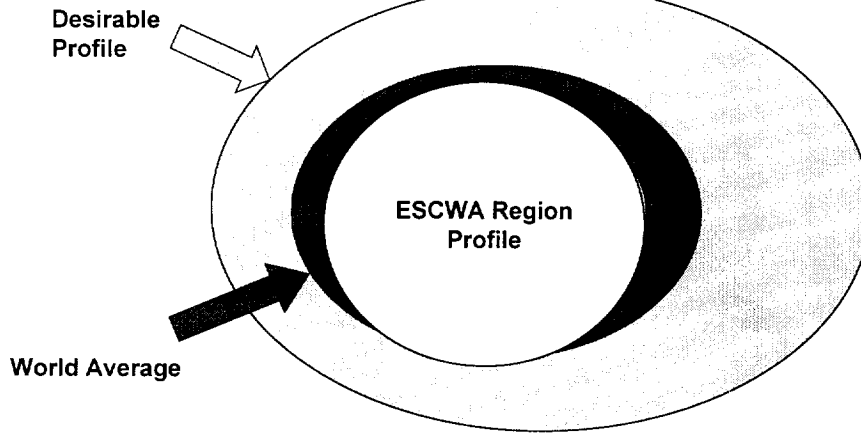


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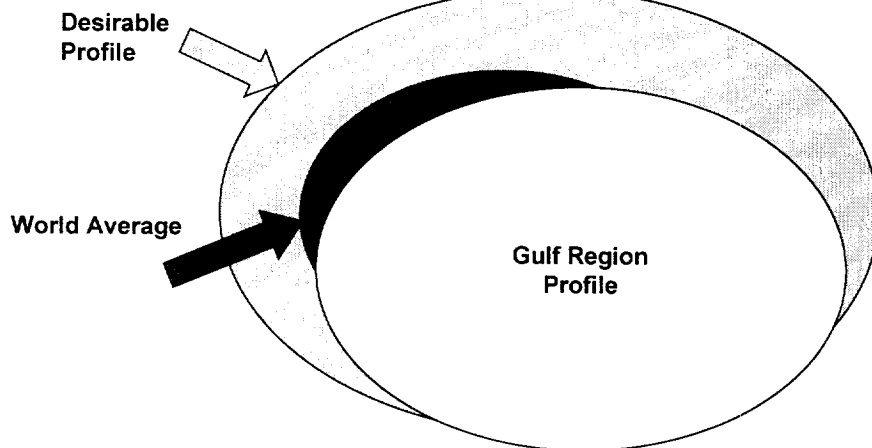
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Profile Transformation ESCWA Region



Profile Transformation Gulf Region



Government Policies



- Restructuring
- Liberalization
- Deregulation
- Privatization
- WTO Telecom Agreement

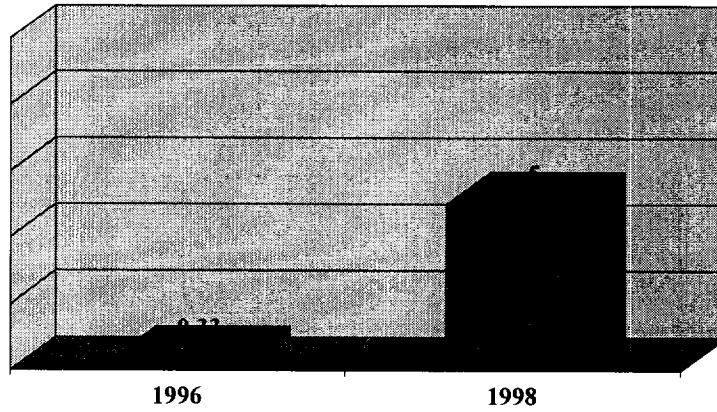
Field Visits



- Egypt
- Jordan
- Lebanon
- Qatar
- UAE



Egypt - Internet per 10000 (115% growth)



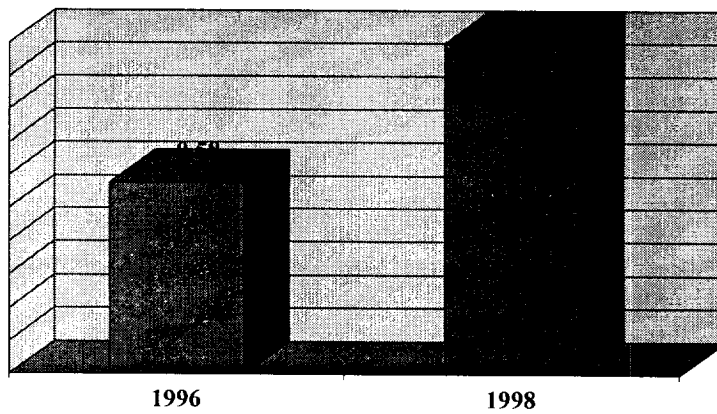
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Egypt - PC's per 100 (30% growth)



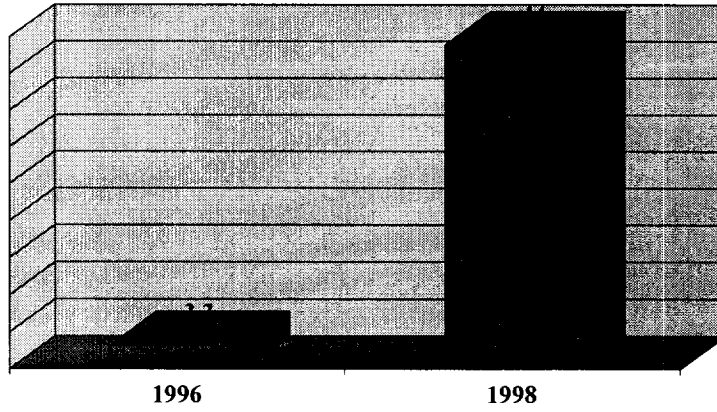
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Jordan - Internet per 10000 (265% growth)



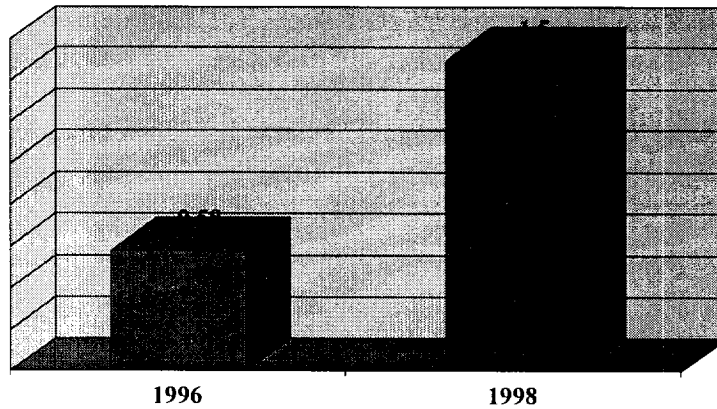
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Jordan - PC's per 100 (30% growth)



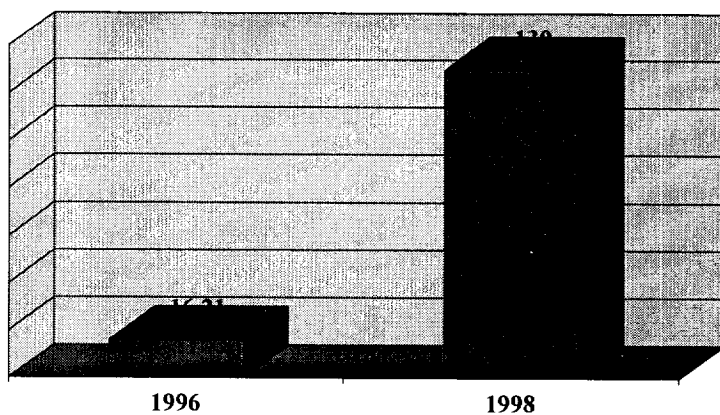
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Lebanon - Internet per 10000 (183% growth)



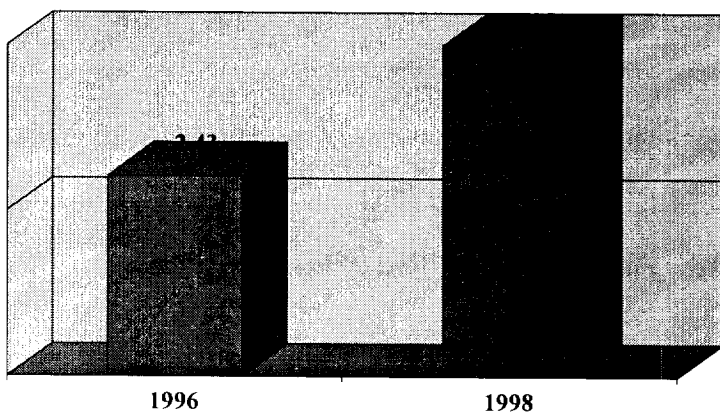
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Lebanon - PC's per 100 (28% growth)



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Common issues



- Regional integration and cooperation
 - political
 - financial
 - technical
- Regional platform
 - regional agencies collaborating rather than competing

Common issues



- The rural dimension
 - communications
 - agriculture
 - education
 - health
 - information

Conclusions



- Regional harmonization in developing regions is crucial - The role of regional and international agencies in providing the right platform and offering the right advice

Conclusions



- Monitoring and updating information related to the telecommunication profile at regional and country levels

Conclusions



- The telecommunication profile reflects the country/region's readiness for the new technology or service

Conclusions



- Governments in developing regions, haunted by security considerations, have to bear the responsibility of allowing or preventing global technologies and services

Common issues



- Monitoring the telecommunication profile
- Restructuring
- Liberalization
- Deregulation
- Privatization
- WTO telecommunications agreement

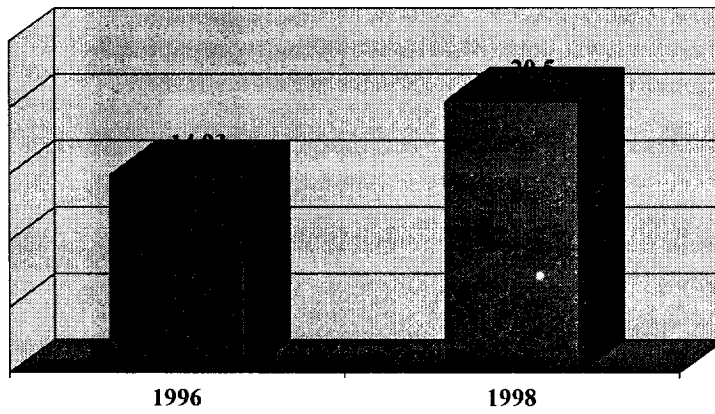
Common issues



- Tariff restructuring
- Frequency management
- Interconnection
- Partnership and financing
- Regional versus international partners



Lebanon - Teledensity (17% growth)



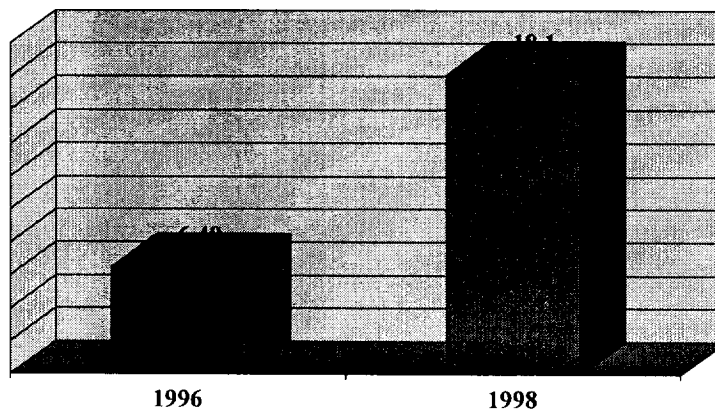
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Lebanon - Cellular Density (67% growth)

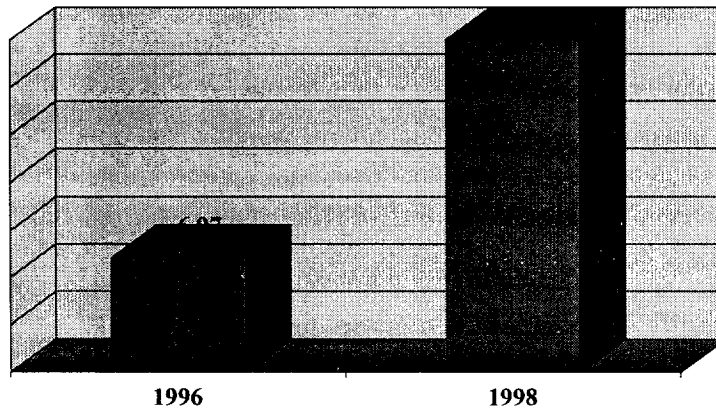


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Jordan - Teledensity (1.6% growth)

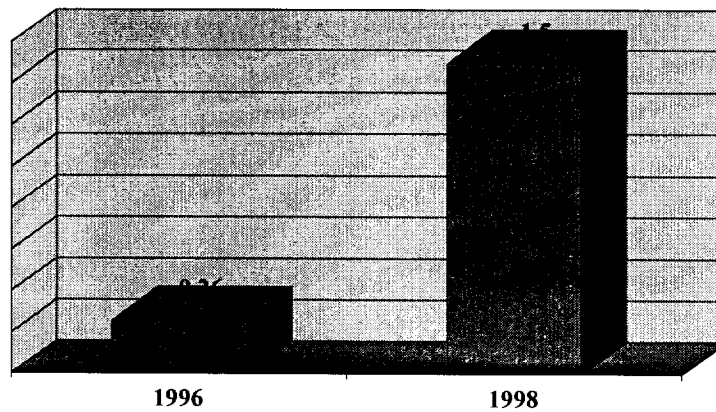


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Jordan - Cellular Density (140% growth)

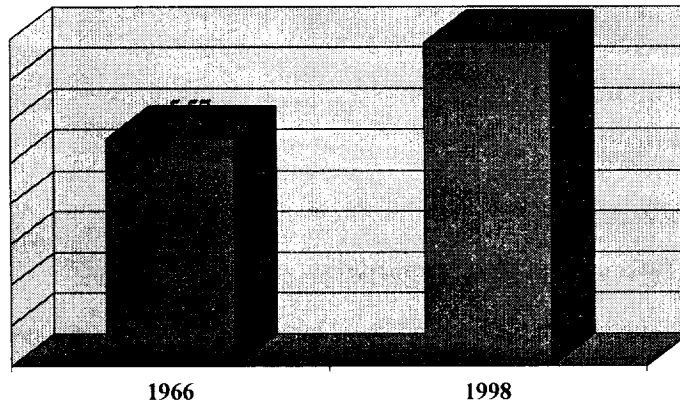


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Egypt - Teledensity (19% growth)

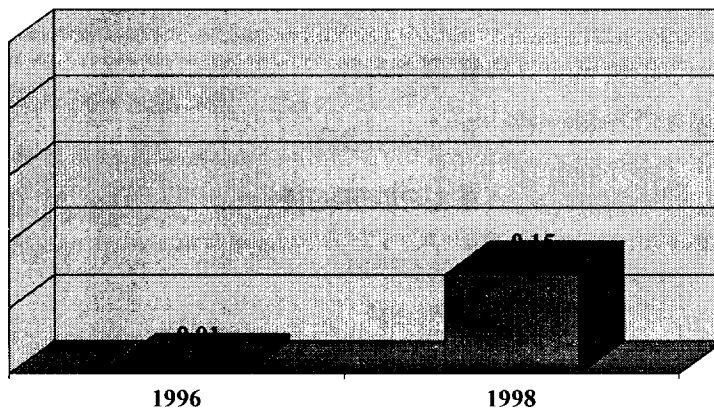


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Egypt - Cellular Density (287% growth)

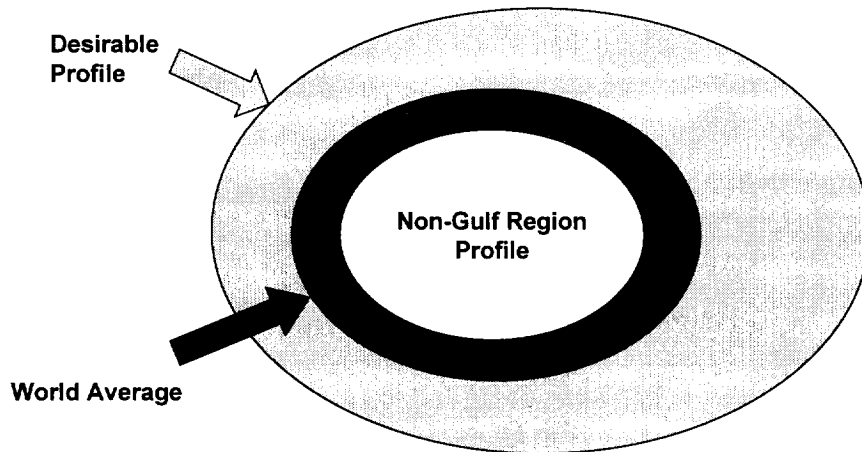


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Profile Transformation non-Gulf Region



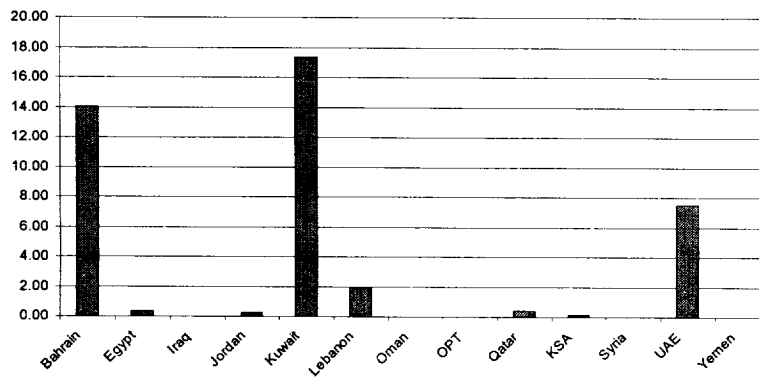
Cultural Issues



- The social system
- Arabic - the language
 - Content
 - Tool



Internet Density per 10000 Inhabitants - 1996



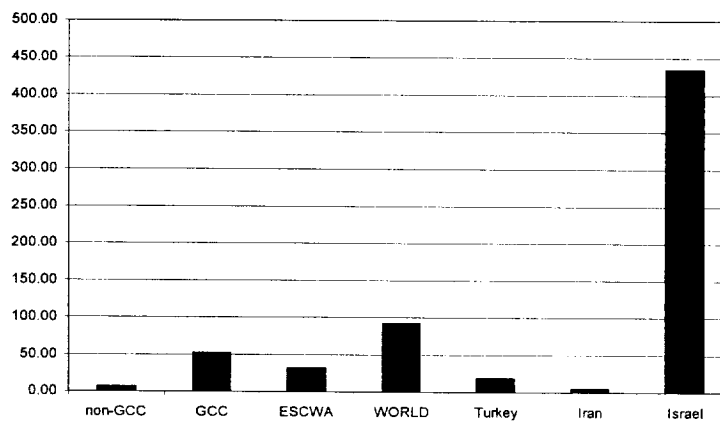
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Internet Density per 10000 Inhabitants Regions and Neighbours - 1996



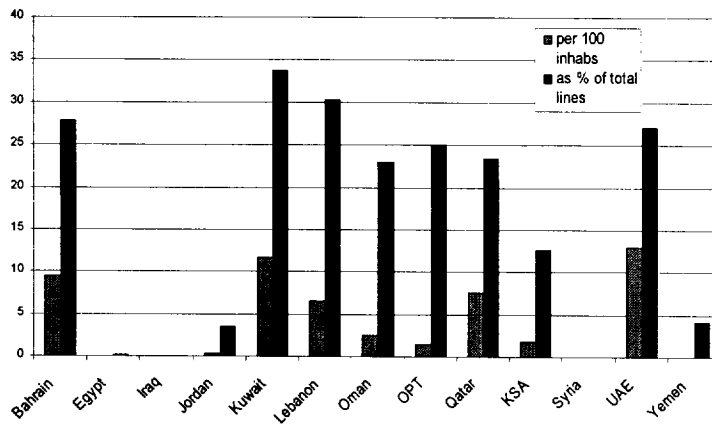
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Cellular Density - 1997



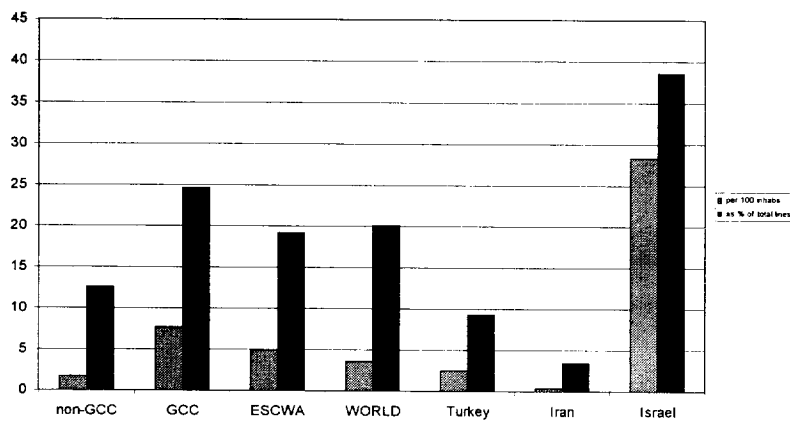
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Cellular Density - Regions and Neighbours 1997

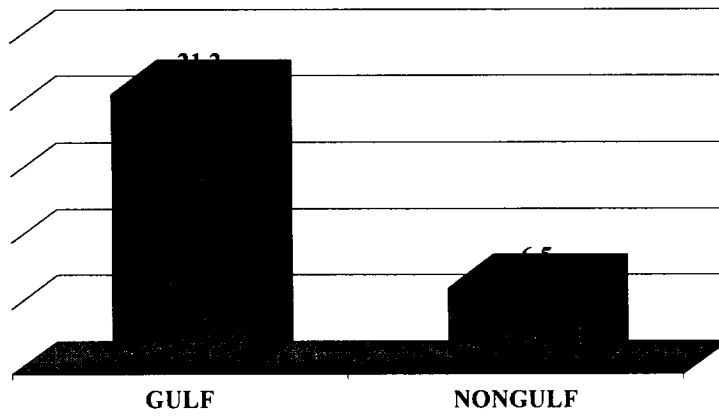


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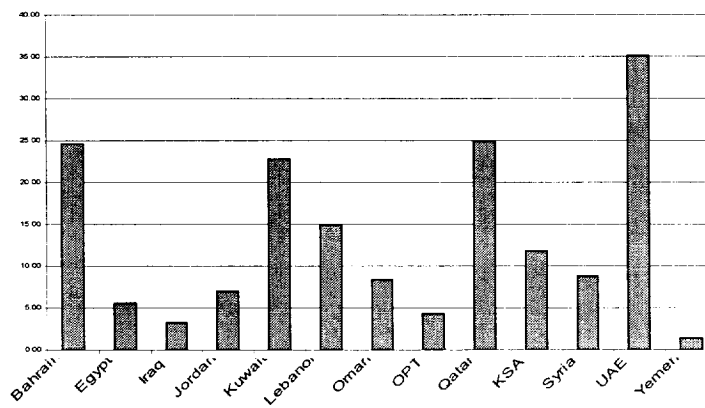
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Teledensity - 1996



Teledensity 1997



ESCWA Population



■ Population: 154 m

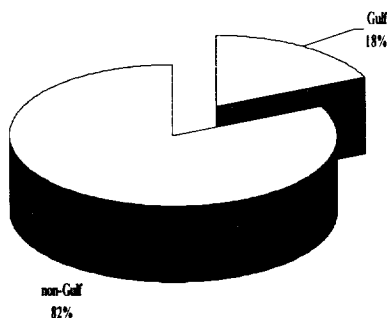
■ Gulf: 27 m

■ non-Gulf: 127 m

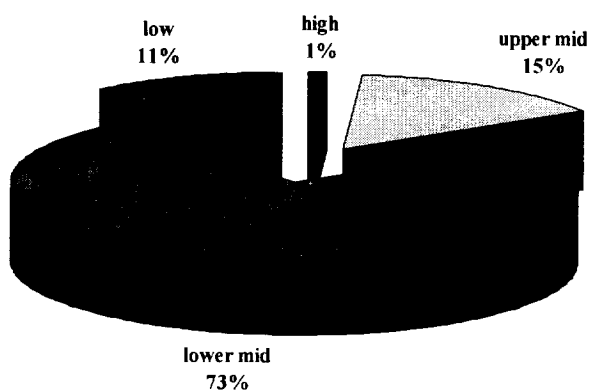
■ Population Density:
693/km²

■ Gulf: 185/ km²

■ non-Gulf: 1130/ km²



Population Distribution according to Economy



Basic assumptions



one

A country/region telecom profile has to undergo a “paradigm shift” from a certain unacceptable state to a state of readiness for new applications

Basic assumptions



two

The development of GII is directly dependant upon the state of the telecom profile