

# BI-WEEKLY MARKET TRACKER

JUNE 25– JULY 8, 2012

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## WiFi in South Africa

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Operators will Test Wi-Fi Roaming and Simplified Login in Q4

Sweden's AnyFi Turns any Wi-Fi Network into a Small Cell



## FEATURE STORY – A BUZZ AROUND WI-FI IN SOUTH AFRICA

[Full Article>>](#)

Lately there has been a buzz around WiFi penetration in South Africa, as Cisco has been urging South African service providers to incorporate Wi-Fi as a means of driving business opportunities and dealing with an explosion of mobile data. It probably means Cisco wishes to gain control over the developing WiFi market in South Africa.

Cisco has recently conducted its 2012 Mobile User Survey, a research carried out by Cisco's Internet Business Solutions Group (IBSG). Cisco concluded that increased global demand for mobile devices and network connectivity will see WiFi and traditional mobile networks play a critical role in meeting consumers' needs.

In the Survey, Cisco has also predicted local growth in demand and usage of WiFi in South Africa, as part of the general global trend: as mobile users look at ways to save money, they will increasingly demand WiFi subscription options from their service providers. Cisco urges South African telecom operators to incorporate WiFi into their service offerings as the technology is set to become the main source of Internet access within the next two years.

### WiFi PENETRATION STATUS IN SOUTH AFRICA

SA has a mobile penetration rate of 105%, with 27% of rural users accessing the Internet on their mobile phones.

So far, South Africa hasn't seen vast adoption of WiFi services. hotspot visitors still usually have to pay for access, and while some hotspots offer free access, the service is still often erratic, because they have to find ways to manage the high bandwidth cost.

#### MUNICIPALITIES

Small towns in SA are setting the trend for free WiFi, while large metropolitan cities appear to be lagging behind. Stellenbosch has begun piloting a free WiFi network to everyone in the town. While large downloads are prohibited, all other services are supported.

Knysna has a network that uses WiFi at over 200 hotspots in most business districts and various suburbs. To date, the network has been operational for 18 months. There are currently no limits on the access times, but a daily time limit of 45 minutes per user, per day is to be introduced. In selected locations access is free.



## HOTELS

A number of local hotel groups have been offering their guests free WiFi since May, but usage is capped at 100MB.



## FINANCIAL INSTITUTIONS

South African banking institutions offer free WiFi access for customers at certain branches.



## AIRPLANES

The first WiFi-enabled flight in SA took place on 8 May, through a partnership between WirelessG, Mango and Vodacom.



## SERVICE PROVIDERS

- Vodacom's WiFi service is accessible at 650 WiFi hotspots locally. Vodacom contract, top-up and prepaid customers who have WiFi-enabled laptops, cellphones and personal digital assistants, but do not have 3G/HSDPA devices (or are in poor 3G/HSDPA coverage areas), can access broadband services using the network's WiFi.
- Local WiFi service provider RedButton has devised a model that enables coffee shops and other WiFi hotspots to offer free wireless access. RedButton has 162 hotspot sites, with almost 25% of these offering free Internet access.



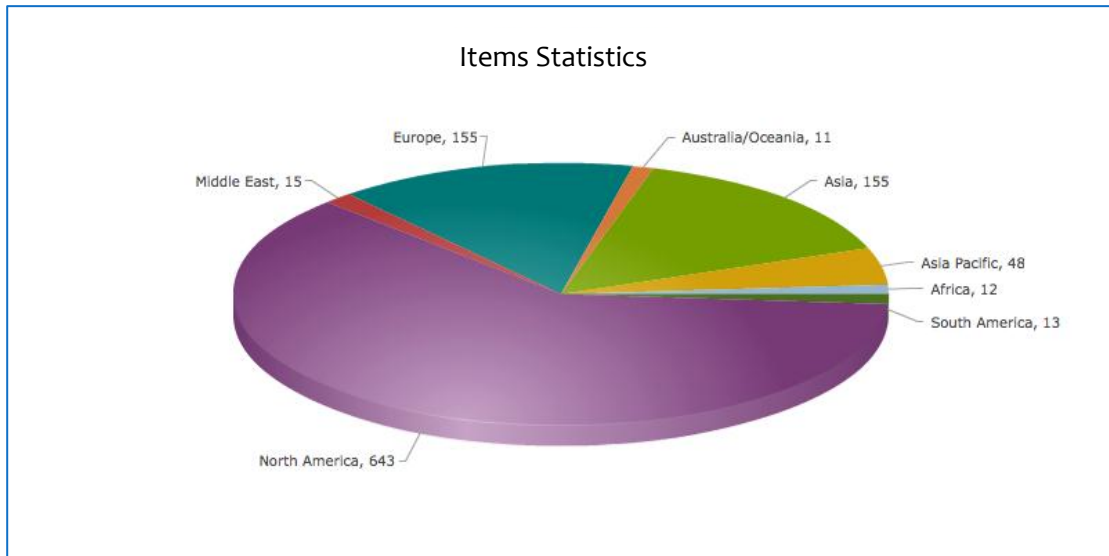
## STRATEGIES FOR SERVICE PROVIDERS

Cisco outlined several considerations, implications and potential strategies for service providers to capture Wi-Fi Opportunities in South Africa:

- Offering free public Wi-Fi access with a home broadband subscription will become an important factor in how service providers in South Africa can capture Wi-Fi business opportunities to retain existing customers and attract new ones.
- South African service providers will need to incorporate Wi-Fi as an integral part of their portfolio utilising pricing, marketing, and new technological solutions to create offers and solutions of value to mobile users.

- Targeting Wi-Fi use in the home by creating solutions and incentives, service providers in South Africa can encourage users to offload mobile traffic at home, while retaining the ability to provide a unique and differentiated customer experience.
  
- Deliver on the New Mobile. Align network architectures and deploy appropriate technologies to deliver a seamless, integrated mobile Wi-Fi user experience. As demand for mobile devices and network connectivity continues to grow in South Africa, both Wi-Fi and traditional mobile networks will be critical to meeting the needs of mobility-enabled consumers.

## COMPETITION



### TOP 4 TELECOM OPERATORS IN APAC SIGN CISCO FOR IP TRANSFORMATION

[Full Article>>](#)

Four telecom operators in the Asia Pacific region have signed up with Cisco for IP transformation.

Cisco has a strong presence in Indian telecom market. It works with Bharti Airtel, Tata Teleservices, etc.

Though Ericsson, Nokia Siemens Networks, Alcatel-Lucent, ZTE and Huawei are end-to-end telecom infrastructure players, Cisco is not keen to become an end-to-end player by offering radio and tower solutions which are currently missing in Cisco portfolio.

Focus on IP is expected to strengthen Cisco's service provider business as major companies are focusing on LTE 4G.

## **WESTIN DIPLOMAT AND SHERATON VISTANA RESORT HAVE DEPLOYED RUCKUS SMART WI-FI SYSTEMS**

[Full Article>>](#)

Ruckus Wireless announced that Starwood Hotels and Resorts Worldwide, Inc., have certified the Ruckus ZoneFlex™ Smart Wi-Fi system as one of their recommended solutions for delivering wireless access. In addition, the Westin Diplomat Resort and Spa in Hollywood, FL, and the Sheraton Vistana Resort in Orlando, FL, are the latest of the Starwood properties to select and deploy Ruckus Wi-Fi.

## **NAWRAS PICKS HUAWEI FOR 3G+, 4G AND WIMAX EXPANSION**

[Full Article>>](#)

Oman operator Nawras signed an agreement with Huawei to upgrade its radio access network to enhanced 3G+ and increase coverage. The contract also marks the roll-out of LTE on the Nawras network

Around 30 percent of sites will be upgraded before the end of 2012. The LTE network will cover all major areas of Muscat Governate including Ruwi, Central Business District, Wadi Kabir, Muttrah, Qurm, Azaiba, Al Khuwair, Ghala, Baushar, Mawaleh and The Wave, by the end of the year. All major cities will enjoy LTE coverage by June 2013.

In addition to the launch of LTE, 3G+ population coverage will rise from 53 percent to 97 percent over the next three years, including greater coverage in remote areas across Oman. The Wimax home broadband network also will be extended further.

## **UBIQUITI NETWORKS INTRODUCES mFi: A MACHINE-TO-MACHINE COMMUNICATIONS PLATFORM**

[Full Article>>](#)

Ubiquiti Networks had announced mFi, a machine-to-machine communications technology platform.

"Machine Fidelity" (mFi) is a platform consisting of a family of hardware devices that combine environment reporting and remote machine control and configuration across a unified IP network with an intuitive, powerful and customizable software experience.

"We believe mFi will significantly accelerate the realization of the popular smart building concept, which traditionally has been too expensive and complex to deploy and too confusing to operate. [...]" said Robert J. Pera, Founder and Chief Executive Officer of Ubiquiti Networks.

## **ZTE BEATS HUAWEI TO BAG CHINA TELECOM CONTRACT**

[Full Article>>](#)

China's ZTE Corporation has bagged a key contract for supplying broadband equipment to the state-run China Telecom Corporation.

The development puts ZTE in a stronger position to compete with Huawei Technologies.

Under the contract, ZTE will deliver M6000 high-end router to China Telecom for use in the infrastructure project. The order will involve several technologies, including broadband remote access servers, service routers, multi-service edge, aggregation switches, and high-end routing switches.

## **ALCATEL-LUCENT SIGNS 4G LTE DEAL WITH C SPIRE WIRELESS**

[Full Article>>](#)

Alcatel-Lucent has inked a 4G LTE deal with regional U.S. wireless provider C Spire Wireless, which will tap ALU to build and deploy the \$60 million initial phase of the high-speed mobile broadband network.

The network will cover 20 Mississippi markets beginning in September, accounting for 2,700 square miles, a population of 1.2 million and more than 360 cell sites. The new service will make C Spire the first provider to make 4G widely available in the state.

C Spire is using ALU's end-to-end 4G LTE infrastructure, including base stations, IP mobile backhaul for 4G LTE and existing 3G CDMA traffic, Wireless Packet Core (WPC) and a complete IMS network core, which will allow C Spire to develop and offer a portfolio of IP-based services, such as Voice-over-LTE (VoLTE),

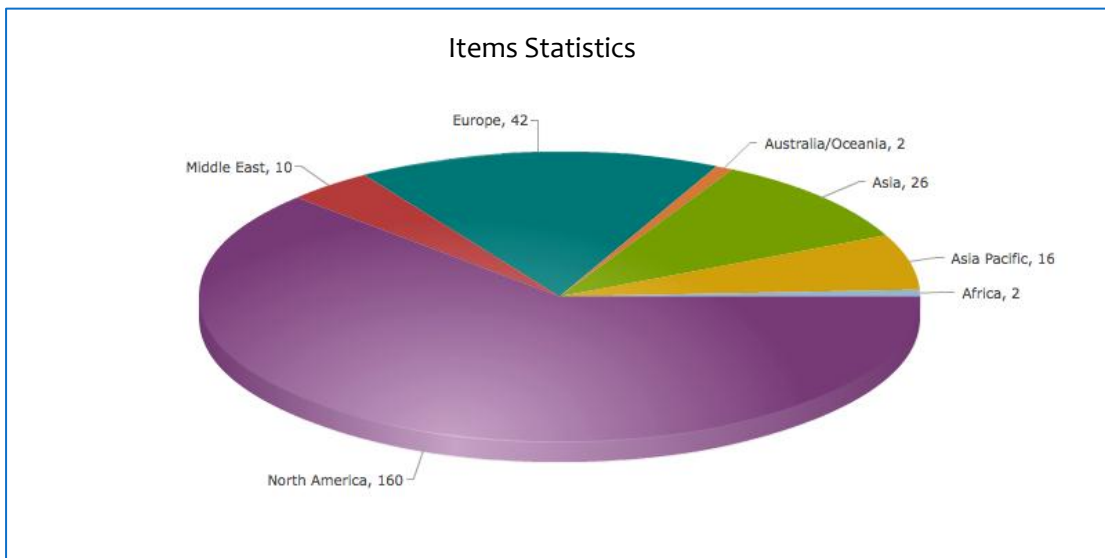
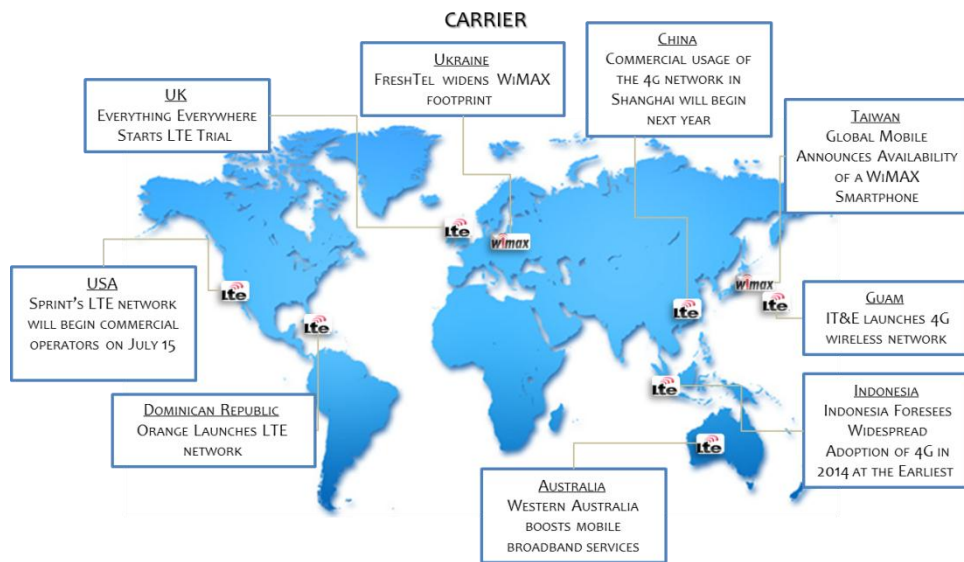
## **NOKIA SIEMENS SIGNS A DEAL WITH INDIAN RAILWAYS**

[Full Article>>](#)

Nokia Siemens Networks (NSN) has bagged Rs 200 Cr worth of contracts from Indian railways.

It is reportedly said that Nokia-Siemens Network has to supply network equipment that will enable mobile communication between trains and railway regulation control centers.

# LICENSED WIRELESS BROADBAND





## WESTERN AUSTRALIA BOOSTS MOBILE BROADBAND SERVICES

[Full Article>>](#)

The State Government of Western Australia (WA) is tackling the “tyranny of distance” with mobile broadband services that connect communities across regional and remote areas.

An ambitious US\$106 million (AUD\$106 million) Regional Mobile Communications Project (RMCP) is delivering the benefits of mobile broadband to “outback” Australia.

The RMCP initiative, being rolled out over three years, brings together Western Australia’s Department of Commerce, the Department of Regional Development and Lands and telco carrier, Telstra. These partners will fund the mobile broadband network which will be based on 4th generation (4G) communications infrastructure.

Among its benefits, mobile broadband helps connect major mining areas across the Kimberley and Pilbara.

The RMCP will provide near-continuous mobile telephone and broadband access along isolated highways and areas in Western Australia.

## INDONESIA FORESEES WIDESPREAD ADOPTION OF 4G IN 2014 AT THE EARLIEST

[Full Article>>](#)

The government estimates that the widespread adoption of 4G technology in Indonesia could only take place by 2014 at the earliest, an official said.

He said one of the issues was the matter of frequencies and the government needed to first study the application of the 4G system in other countries, especially which band would be more appropriate for Indonesia.

The Ministry of Communications and Information Technology in 2010 said the 2.3 Ghz broadband wireless frequency would be set as the infrastructure of 4G technology in the country.

Heru Sutadi, a former member of the Indonesian Telecommunication Regulatory Body, said the best option was to reform the 1,800 Mhz frequency or use the 2.5 Ghz one for 4G.

## **SPRINT'S LTE NETWORK WILL BEGIN COMMERCIAL OPERATORS ON JULY 15**

[Full Article>>](#)

Sprint CEO Dan Hesse said this week that their LTE network will begin commercial operators on July 15 in Atlanta, Dallas, Houston, Kansas City and San Antonio.

Sprint is building an all-new, nationwide 3G and 4G LTE network through the Network Vision program, which consolidates 3G and 4G radios into single basestations and shared antennas.

By the end of 2013, Sprint expects to have largely completed the build out of its all-new 4G LTE nationwide network. It uses the 1.9 GHz PCS band with 5 Mhz x 2.

Sprint has already launched five 4G LTE-capable devices.

## **UKRAINE: FRESHTEL WIDENS WiMAX FOOTPRINT AROUND DONETSK AND KHERSON**

[Full Article>>](#)

Ukrainian WiMAX broadband wireless network operator Ukrainian High Technologies (FreshTel) has enlarged its coverage in the Kherson oblast region, extending its mobile WiMAX internet services to Bilozerka, Komyschany and Chernobaevka, while it also revealed short-term plans to expand its network to Yasynuvata (Donetsk oblast).

## **EVERYTHING EVERYWHERE STARTS LTE TRIAL IN CUMBRIA, UK**

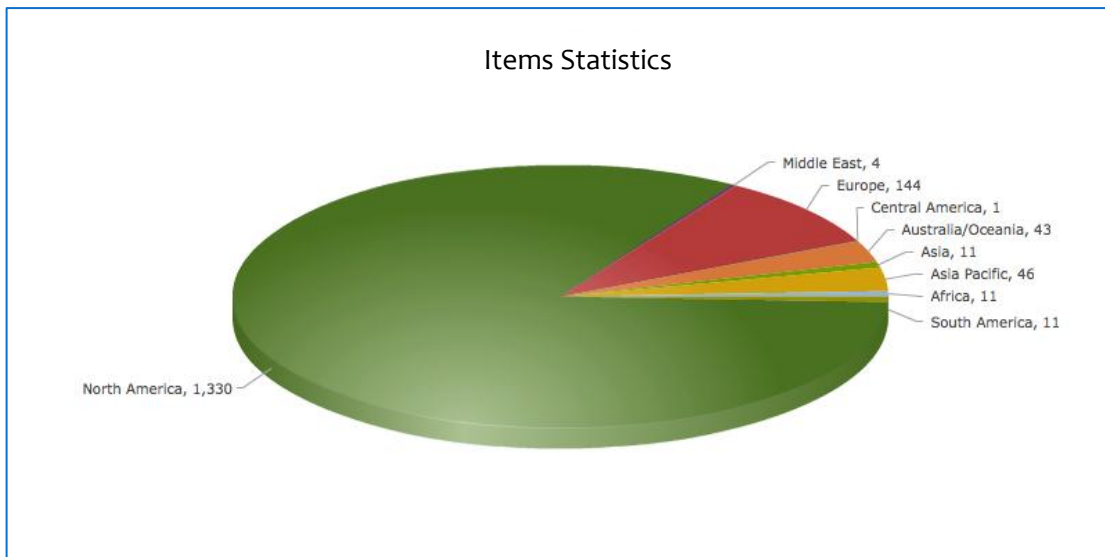
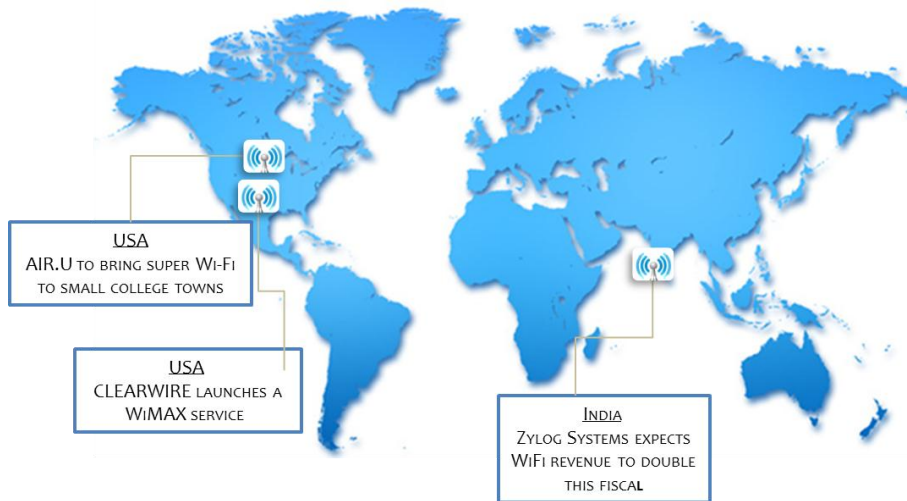
[Full Article>>](#)

Everything Everywhere has started customer LTE trial in Cumbria in the North of England. Employees of various local businesses in the Threlkeld area are testing 4G LTE using both dongles and routers.

The triallists include a regional office of United Utilities, the Blencathra Centre field studies educational facility situated on the side of Blencathra Mountain, the King Kong Climbing Wall, a manufacturing company and multiple web developers.

The trial service is running on existing 1800 MHz airwaves used by the Orange and T-Mobile mobile networks and will provide Everything Everywhere with additional learnings on the performance of 4G LTE over 1800 MHz in rural areas.

# UNLICENSED WIRELESS BROADBAND



## **INDIA: ZYLOG SYSTEMS EXPECTS WiFi REVENUE TO DOUBLE THIS FISCAL**

[Full Article>>](#)

Zylog Systems Ltd is expecting a revenue growth in its Wireless Fidelity (WiFi) business from Rs 30 crore, last year, to Rs 65 crore this year along with doubling its retail customer base for the business. The company is planning to invest around Rs 80 crore this financial year, in the WiFi business, said senior executives from the company.

“We have a retail subscriber base of 52,000 customers for the WiFi business now. Our plan is to increase it to 100,000 customers by March 31, 2012,” said S P Srihari, global chief financial officer, Zylog Systems Ltd.

The company is present in seven states including Tamil Nadu, Karnataka, Andhra Pradesh, Punjab, Gujarat, Haryana and Madhya Pradesh.

The company also expects double the revenue for its e-governance business in India.

Going forward, the target is to grow the WiFi business to Rs 500 crore in next five years and the e-governance to around Rs 300 crore in next two to three years, they said.

## **CLEARWIRE LAUNCHES WiMAX SERVICE**

[Full Article>>](#)

Clearwire is planning to launch its WiMAX service in Los Angeles, Miami, St. Louis, Cincinnati, Cleveland, Pittsburgh and Salt Lake City later this year.

Apple iPad users using Clear Spot wireless router are also allowed by the company to connect to the Clearwire 4G network while on the go.

The service will offer a faster browsing experience for iPad users and can also create a personal hotspot which can be used by upto eight users.

Clearwire is also supporting 30 WiMax-enabled computers with the release of the Dell Inspiron Mini 10 Netbook.

## **AIR.U TO BRING SUPER WiFi TO SMALL COLLEGE TOWNS, MICROSOFT AND GOOGLE TO BE PART OF THE PROCESS**

[Full Article>>](#)

A consortium of higher education associations, public interest groups and high-tech companies today announced a partnership named AIR.U (Advanced Internet Regions) to deploy Super Wi-Fi networks to upgrade the broadband available to underserved campuses

AIR.U will use Super Wi-Fi networks on the white space spectrum. This initiative hopes to bring between 20 and 100Mbps of wireless connectivity to rural educational institutions, which will then provide internet access to local communities.

## CARRIER GRADE WiFi

### OPERATORS WILL TEST WI-FI ROAMING, SIMPLIFIED LOGIN IN Q4

[Full Article>>](#)

The Wi-Fi Alliance has begun certifying products that simplify access to hotspots and roaming between different mobile service operators; providers and equipment vendors are expected to test these products in the fourth quarter.

Users will be able to authenticate with a SIM card and move between mobile networks and Wi-Fi hotspots from different providers both at home and abroad.

The Wi-Fi Alliance announced it had started certifying the underlying products as part of the organization's Passpoint program, which is based on technology defined in its Hotspot 2.0 specification.

According to the Wi-Fi Alliance, there is now finally a single industry-wide solution for seamless access to Wi-Fi-based mobile broadband,

The first products to be certified include access points, controllers and clients from BelAir Networks, which is owned by Ericsson, Broadcom, Cisco Systems, Intel, Marvell, MediaTek, Qualcomm and Ruckus Wireless.

Thirty-seven operators and 24 vendors will take part in the trial, according to the WBA. The first group includes AT&T, China Mobile, Orange and Time Warner Cable while the vendors list includes companies such as Cisco Systems, Ericsson and Intel.

### BERLIN BRANDENBURG AIRPORT SELECTS BOINGO WIRELESS AS WI-FI PROVIDER

[Full Article>>](#)

Boingo Wireless announced that it has been chosen as Wi-Fi provider for the new Berlin Brandenburg Airport Willy Brandt. Boingo's Wi-Fi services will be available timed to the airport's opening on March 17, 2013.

Wi-Fi access plans available to Berlin Brandenburg travelers will include Boingo Europe Plus, providing unlimited access at more than 200,000 hotspots throughout the Europe, Middle East and Africa region, and Boingo Global, providing flat rate access. Hourly and day passes will also be available for purchase.

The airport network may also be accessible to future regional and international roaming and platform service partners.

## SWEDEN'S ANYFI TURNS ANY WI-FI NETWORK INTO A SMALL CELL

[Full Article>>](#)

Swedish startup Anyfi Networks has developed a technology that potentially turns any access point into an extension of a customer's home wireless LAN. Anyfi's technology breaks the tie between the physical radio and the Wi-Fi network, connecting your device to myriad access points and public hotspots you have never encountered before. According to co-founder and CEO Björn Smedman, Anyfi automatically spawns "virtual hotspots" that your device treats just as it would your home network.

Every device sees the totality of an operator's 'network,' whether it's the Wi-Fi embedded in its own or a public hotspot network with Anyfi's software installed, said Smedman, co-founder and CEO. "Whenever it sees that network it will automatically connect," Smedman said. "We're creating virtual access points that make every Wi-Fi access point accessible to every network."

Smedman said the technology could be used in any a number of scenarios. For example, a cable operator like Time Warner could sell that access to a wireless operator looking to offload traffic from its 3G or 4G networks.

## CANADA: TIM HORTONS ADDING FREE WI-FI

[Full Article>>](#)

Tim Hortons Inc. is adding free wireless network access service to more than 2,000 of its Canadian restaurants.

Tims has already started rolling out the high-speed Wi-Fi and said it will offer the free service in more than 90% of its traditional eat-in Canadian restaurants by September. Bell Mobility will be the service provider.

Plus, he added, customers using free Wi-Fi inside a retail outlet may reduce the load on a carrier's cellular network, allowing them to manage their capital investment.

## CHICAGO TO GET HYPER-CONNECTED UNDER RAHM EMANUEL'S GRAND WI-FI PLAN

[Full Article>>](#)

Rahm Emanuel, the mayor of Chicago, is planning to turn downtown Chicago into a wireless network zone. Under the plans, the city's traffic and street lights would be turned into smart polls, ensuring unbroken internet access throughout the city centre that would be extended underground across the entire CTA subway system.

The plans would give Chicago, Emanuel believes, a huge strategic advantage. "We are the broadband backbone of America, right here. That's a physical fact, and I have to use that advantage to its maximum capacity, both in the city and in terms of connectivity with the rest of the world."

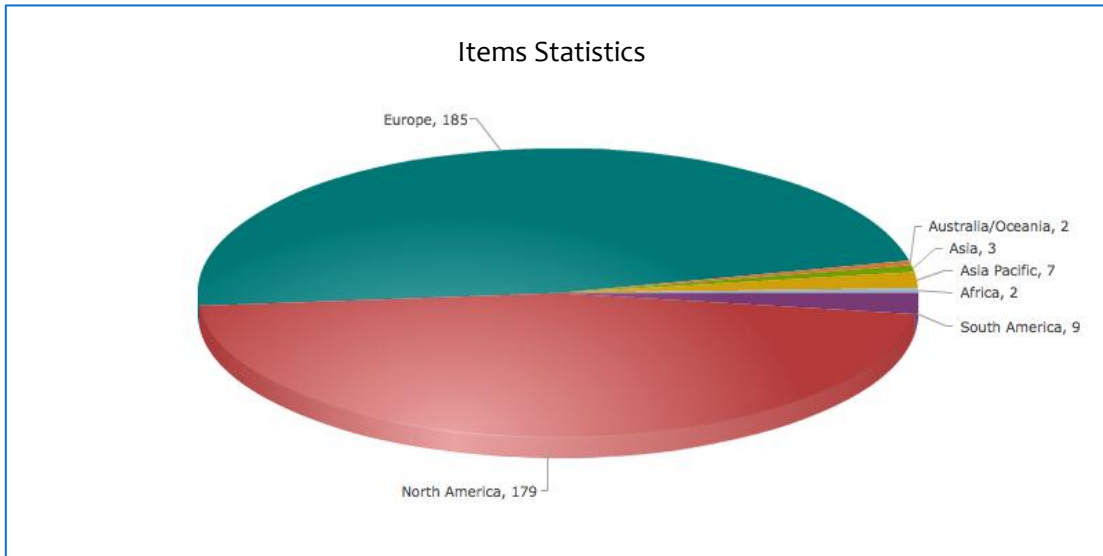
### **UK: VIRGIN MEDIA UNDERGROUND WI-FI HITS 40TH STATION, 100,000 USERS**

[Full Article>>](#)

Virgin Media has brought Wi-Fi to 41 London Underground stations, getting 100,000 people online in the first month of service.

By the end of 2012, Virgin Media intends to have 120 London Underground stations hooked up to the information superhighway, although free browsing will come to an end in autumn.





## PALO ALTO: CITY'S CELL-TOWER PLAN MEETS COOL RECEPTION FROM AT&T

[Full Article>>](#)

A proposal by Palo Alto officials to create a citywide plan for cell towers is unlikely to prevent AT&T from installing dozens of antennas at local neighborhoods in the coming months.

The City Council directed staff to solicit proposals from communication companies that would help the city come up with the wireless-communication plan. The plan will likely rely largely on large "macro" cell towers on the city's substations to boost Palo Alto's cell reception and data capacity and could prompt revisions to the zoning ordinance to make these towers legal.

The plan is Palo Alto's response to a proposal by AT&T to install about 80 small antennas on existing utility poles throughout the city. In recent discussions, council members have been leaning toward allowing fewer towers of larger sizes rather than the scattering of DAS equipment.

AT&T submitted a letter to the city arguing that the proposal to install the macro towers would not "obviate the need for the pending DAS nodes and additional macro sites to address coverage and capacity needs within the city." They also argued that it is too "optimistic" to expect the city to revise its height limits to allow the cell towers in a "timely manner."

## OPPORTUNITIES

<u>Segment</u>	<u>Country / Region</u>	<u>Opportunity</u>
Broadband	India	<a href="#">Design and construction of broadband networks in Lenvik municipal services including telephony-internet and TV / video.</a>
Broadband	India	<a href="#">Tenders are invited for a broadband project in KwaZulu-Natal municipalities. The demand is for innovative networks and services with high capacity for households, businesses and municipal entities.</a>
Broadband	USA	<a href="#">Niagara and Orleans counties plan a survey on which areas lack internet coverage in the hope to rectify that and offer wireless broadband access as a municipal service.</a>
Video Surveillance	USA	<a href="#">15 wireless video cameras will be installed at Schenectady County in addition to 109 cameras that are already installed.</a>
Broadband	Canada	<a href="#">An initiative to build a municipal broadband network in Nelson appears to be gaining traction</a>
Video Surveillance	Pakistan	<a href="#">Karachi Metropolitan Corporation has approved a Rs31.62 billion tax free budget for the next fiscal year 2012-13. Rs400 million from that budget are for wireless video surveillance system phase-II</a>
Broadband	Poland	<a href="#">Tender for construction and extension of the Municipal Broadband Network for the City of Gliwice</a>

## FREQUENCY, REGULATION AND GENERAL MARKET

### **NAMIBIA AND BOTSWANA INAUGURATE FAST BROADBAND CABLE**

[Full Article>>](#)

Namibia and Botswana on Tuesday inaugurated their links to a 14,000 kilometre (8,700 mile) underground cable system that provides Internet connectivity.

Telecom Namibia will operate and manage the landing station, one of 15 points of the cable which runs between Britain and South Africa.

Land-locked neighbour Botswana shared the \$75 million local costs of the cable with Namibia.

### **KENYA'S WANANCHI CLOSES \$140M FUNDING FOR BROADBAND ROLLOUT**

[Full Article>>](#)

Kenyan broadband Internet infrastructure developer Wananchi Group Holdings has closed on \$140 million as part of a push from investors to bridge the digital divide in Africa and to sell services to the new consumer class emerging among the continent's high-growth economies.

With a \$68 million equity commitment from its existing investors and a \$72 million debt investment from the Overseas Private Investment Corp., Wananchi Group is hoping to expand its high-speed Internet services across most of sub-Saharan East Africa, according to Wananchi Chief Executive Richard Bell.

### **LATIN AMERICA WILL ACCOUNT FOR OVER 50 MILLION 4G SUBSCRIBERS BY END OF 2017**

[Full Article>>](#)

Latin America will account for 51 million 4G subscribers by the end of 2017, according to the most recent report published by Maravedis-Rethink entitled "4G Latin America Analysis and Forecasts 2012-2017."

"[...] 4G market adoption is rather slow and dominated by LTE" said Cintia Garza, author of the report. "4G market adoption will continue to be slow in the next two years due to a

number of factors, including a slow spectrum allocation process, a rather conservative attitude by dominant mobile carriers towards 4G, a low ARPU and the dominance of prepaid in the region."

## **AT&T CEO CALLS ON FCC TO FREE MORE WIRELESS SPECTRUM**

[Full Article>>](#)

AT&T CEO Randall Stephenson is taking aim at the FCC's plan to unleash spectrum for wireless broadband deployment. AT&T CEO claims that the US is not keeping pace with other countries when it comes to finding spectrum for carriers to use to roll out broadband service.

According to Stephenson, demand for spectrum has greatly outpaced supply - leading to a crisis which will jeopardize President Obama's goal to provide 4G/LTE service to 98% of Americans within the next few years.

Stephenson proposes three specific actions to solve the spectrum shortage problem:

- Require spectrum holders to put the airwaves to work. If a buyer hasn't used the spectrum within a reasonable time period they would either have to put it up for sale, lease it or find a partner who can build it out.
- Quickly get spectrum where consumers need it most. Which means the FCC will need to approve buying and selling deals much faster.
- Establish a national model for the local approval process that's required when wireless carriers need to build new mobile infrastructure. The process needs to balance community concerns with the significant public benefit of adding new antennas and improving wireless coverage in local markets.

## UPCOMING EVENTS

### CONNECTED HEALTH ASIA 2012

[Full Article>>](#)

The event will take place between 16 July 2012 2:00 AM to 19 July 2012 10:00 AM, in Singapore.

It will focus on critical issues in healthcare delivery and how it can be improved through connectivity – whether mobile, electronic or tele.

### MOBILE BROADBAND WORLD

[Full Article>>](#)

The event will take place between 24-27 September, at the Canary Wharf Hilton in London. The event will focus on mobile broadband, finance and efficiency, the impact of regulations, implementation, offload and backhaul.