لللجنة الاقتصادية والاجتماعية لغربي آسيا (الإسكوا)
إدارة تكنولوجيا المعلومات والاتصالات

اجتماع الخبراء حول توحيد قياس مجتمع المعلومات في منطقة الإسكوا
بيت الأمم المتحدة، 3-4 أيار/مايو 2011، بيروت - لبنان

Telecom indicators Measurement in Jordan

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Contents

TRC - Jordan

Telecommunications Market: An Overview

Annual and Quarterly Indicators

Importance of data and Indicators In Telecom

Data collections Obstacles and Challenges

Data Collection Methods, examples
TRC tasks

- The Telecommunications Regulatory Commission (TRC) was established by means of the Telecommunications Law No. 13 of 1995.

To gather information related to the telecommunication and information technology sectors in order to prepare and publish reports, pamphlets, and guidelines for Beneficiaries, as well as to prepare media programs required to increase the public awareness of the importance of these sectors and the extent to which these may positively impact the economic and social development in the Kingdom.

<table>
<thead>
<tr>
<th>Class</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Operators</td>
<td>Zain, Orange Mobile, Umniyah and Xpress</td>
</tr>
<tr>
<td>Fixed Network</td>
<td>Orange Fixed</td>
</tr>
<tr>
<td>Cable TV</td>
<td>Jordan Cable TV.</td>
</tr>
<tr>
<td>3G license</td>
<td>Zain, Orange Mobile</td>
</tr>
<tr>
<td>MVNO license (FBWA license)</td>
<td>Friendly</td>
</tr>
<tr>
<td>ISP</td>
<td>Witrile, Mada, Umniyah, Kulacom and Blue Zone</td>
</tr>
<tr>
<td>DSL</td>
<td>Including all internet service providers</td>
</tr>
<tr>
<td>13 Operators</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Vtel, Jordan Cable and Dama Max</td>
</tr>
<tr>
<td>11</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td></td>
</tr>
</tbody>
</table>
**Broadband Current Telecom Markets Categories**

- **Broadband**
  - Retail fixed broadband Internet access
  - Wholesale physical network infrastructure access
  - Wholesale broadband access

- **Narrowband**
  - Wholesale terminating segments of DC up 2 Mbps; and wholesale terminating segments of DC above 2 Mbps; and wholesale trunk segments of DC and retail local and national DC services up to 2 Mbps; retail international DC services up to including 2 Mbps;

- **Mobile**
  - Retail mobile services
  - Wholesale mobile voice call termination
  - Wholesale SMS termination
  - Wholesale mobile access and call origination

- **Dedicated Capacity**
  - Wholesale terminating segments of DC up 2 Mbps; and wholesale terminating segments of DC above 2 Mbps; and wholesale trunk segments of DC and retail local and national DC services up to 2 Mbps; retail international DC services up to including 2 Mbps; retail fixed telephony access connections; the market for retail fixed domestic telephone calls.
The Penetration Rates 2010

8% 38% 108%
Fixed Internet Mobile

Annual Indicators

- Fixed Phone subscribers and penetration rate
- Mobile Phone and Radio Trunking subscribers & penetration rate
- Internet Users and penetration rate
- Telecommunications investment
- Telecommunications employment
Quarterly Indicators

- Fixed Phone Subscribers
- Mobile Phone and Radio Trunking Subscribers
- Internet Users and Penetration Rate

Importance of data and Indicators In Telecom

- Ex ante and Ex post regulations (anti-competitive practices)
- Market review analysis
- Costing Methodology (FAC, LRIC)
- Account Separations and pricing methods
- Financial assessments for operators to get new / transfer licenses (Individual, class)
Policy Makers

Policy Makers heavily depend on indicators to issue or amend regulations and Laws, i.e., issuance licences, Remedies – penalties.

Identifying SMP (Dominance)

Indicators are used by regulators to identify whether there exists any operator or operators on that relevant market which can, by their market power, effectively distort the dynamics of competition in that relevant market.
SMP (Dominance)

How to designate operators with SMP?

<table>
<thead>
<tr>
<th>Market Share</th>
<th>Presumption of dominant</th>
<th>Subject to be dominant</th>
<th>Presumption of non-dominant</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>&gt;50%</td>
<td>25-50%</td>
<td>&lt;25%</td>
</tr>
<tr>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td></td>
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</tr>
</tbody>
</table>

Competition Safeguards identifies 3 thresholds:

Help Investor in exploring niche markets

Indicators are essential for investor analysis and studies to invest / expand.
Data collections Obstacles and challenges

- Operators resistance to release some sensitive data (dominance, complaints)
- Lengthy time to get data from them
- Explanations process with any new services or decisions need new data
- Traditional system for collecting data (letters), no electronic connections
- No database to maintain data just Excel files
- Different official indicators release

Data Collection Methods

- Regular data submission (quarterly and annually) as indicated in the License instruction
- Irregular data submissions upon needs / projects / complaints
- Surveys and questioners
Surveys and questioners

- Telecom markets indicators
- Customer Satisfactions
- Customer Awareness of TRC Role
- Operators Satisfaction of TRC role

Surveys methodology and process

- Identify the purpose of the survey
- project plan
- questioner Design
- Researcher training
- Questioner testing – amendments
- Field questioner and quality testing
- Data Entry
- Analysis and results
Customer Satisfaction Questioner

2011

- To measure customer satisfaction level and quality of operators services
- Sample of 3288, 33.5% for fixed telephony, 33.6% for mobile and 32.9% for ADSL and Wimax
Monthly Average expenditure on Fixed telephony

Monthly Average expenditure on Fixed is 21.9 Dinar, 36% spend more than 20 Dinars and 35% spend between 11-20 Dinars

Fixed telephony services

<table>
<thead>
<tr>
<th>Priority</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Voice quality</td>
</tr>
<tr>
<td>2</td>
<td>Services prices</td>
</tr>
<tr>
<td>3</td>
<td>Maintenance</td>
</tr>
<tr>
<td>4</td>
<td>Customer Services office availability</td>
</tr>
</tbody>
</table>
THANK YOU