

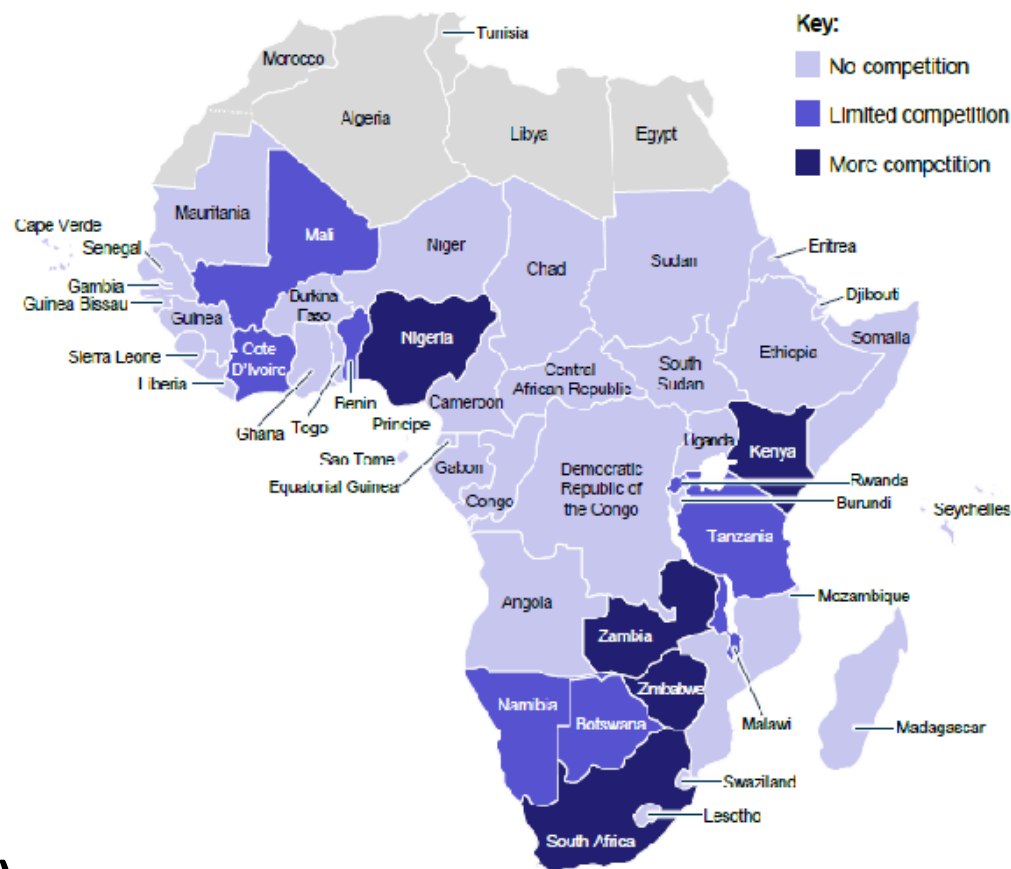
Making Central Asia central to Asia's Internet

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**@ High-level Regional Roundtable on
Telecommunications Connectivity in Central Asia
Almaty, Kazakhstan
June 3, 2014**

Postcard from Africa (1)

- In Africa, 35 of the 48 countries have no competition among national fiber providers.
- Eight have limited competition – that is, two providers besides the mobile companies, usually the incumbent fixed-line operator and either the government or the electricity transmission company.
- Only five countries (**Kenya, Nigeria, South Africa, Zambia and Zimbabwe**) can be said to have effective competition among multiple players.

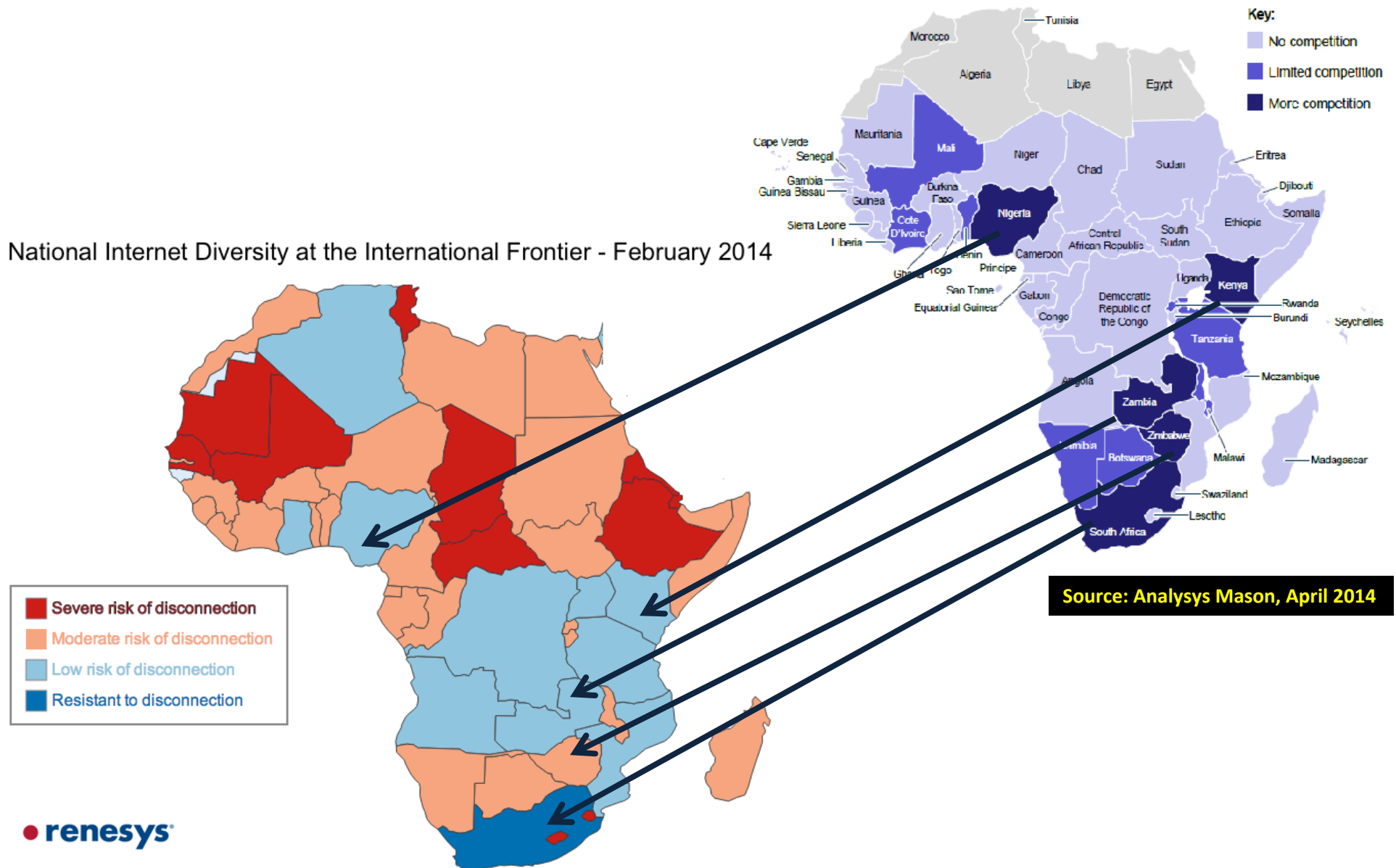


Source: Analysys Mason, April 2014

In countries that lack effective competition, fiber connectivity in cities that are far removed from submarine cable landing stations often costs five or six times as much as it does at the landing station

Postcard from Africa (2)

National Internet Diversity at the International Frontier - February 2014



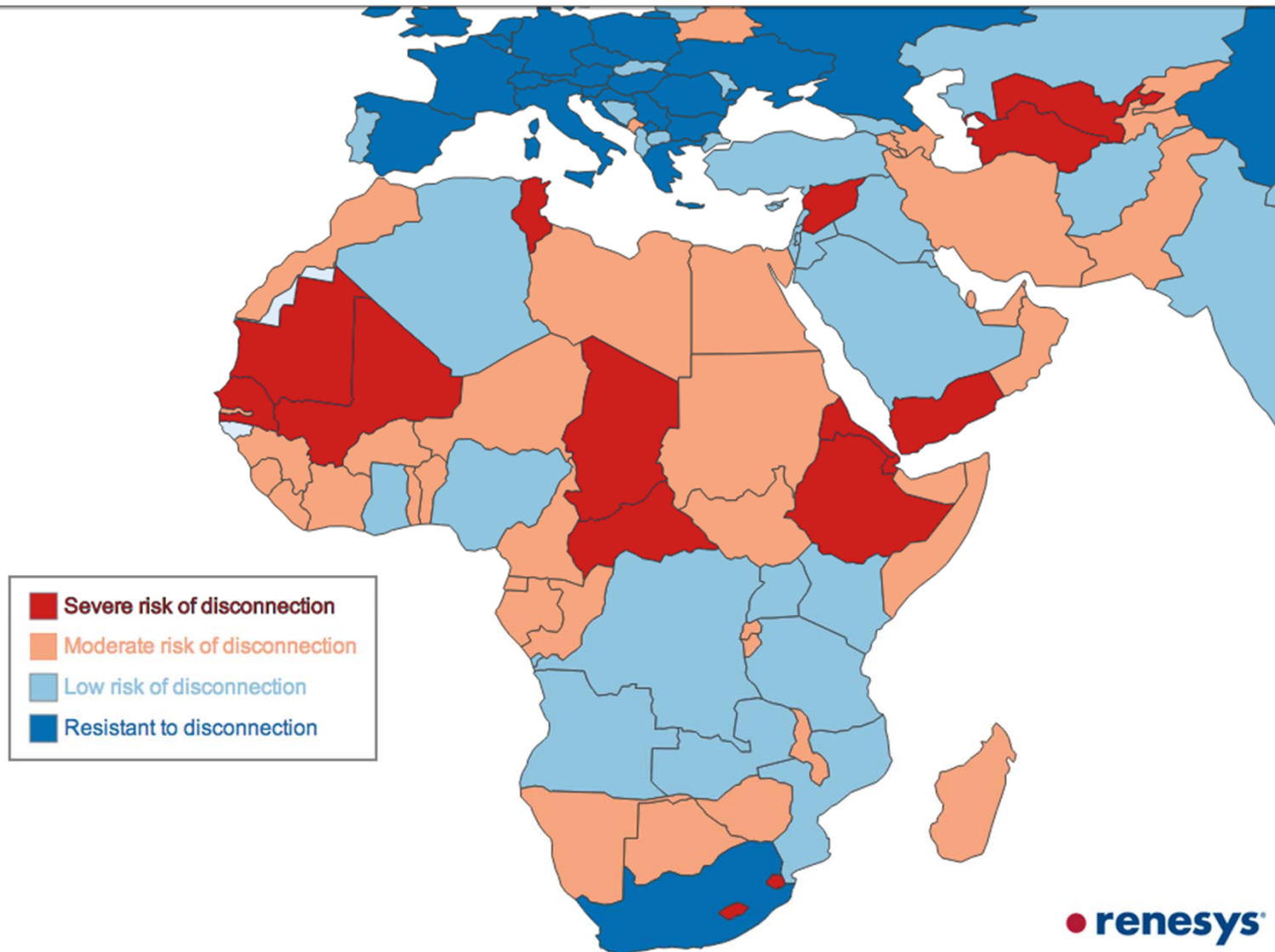
Problems in Africa's terrestrial networks

- Fiber not being buried deep enough
 - Frequent physical damage (accidental and deliberate).
- Poor quality splicing
 - Intermittent faults and reduction in throughput
- Poor maintenance of manholes
 - Leads to flooding and cable damage.
- Poor systems and processes for fault management
 - Sometimes the maintenance companies deliberately sabotage cables to create work for themselves.

Source: Philip Bates, Analysys Mason, April 2014

Central Asia largely mirrors Africa

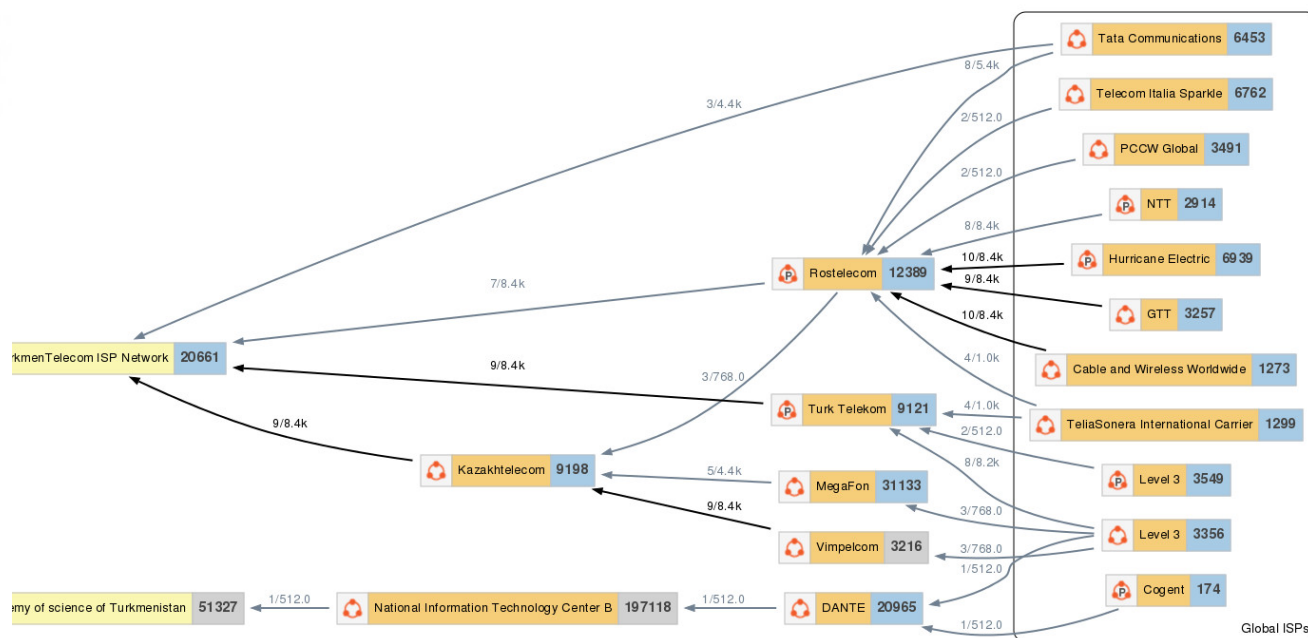
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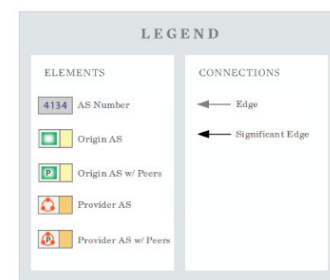


https://www.yunbaogao.cn/report/index/report?reportId=5_5432

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Turkmenistan: Network Topology High Detail Map
May 30, 2014



the smallest of the Internets in central Asia. All connections to the TurkmenTelecom. When TurkmenTelecom suffers an outage, as it did, the country is completely without Internet service.