Making Central Asia central to Asia's Internet

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Postcard from Africa (1)

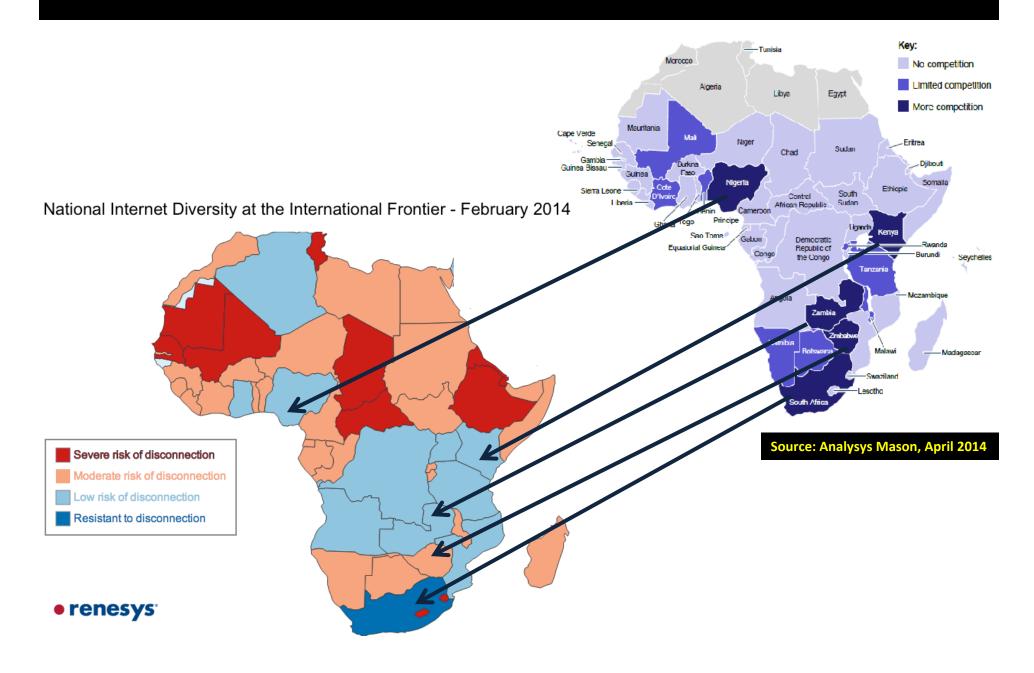
- In Africa, 35 of the 48 countries have no competition among national fiber providers.
- Eight have <u>limited competition</u> that is, two providers besides the mobile companies, usually the incumbent fixed-line operator and either the government or the electricity transmission company.
- Only five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

Morocco No competition imited competition Libya Egypt More competition Mauritania Cape Verde Mali Niger Chad Durkina South Central African Republic Principe Togo Democratic Republic of Sevehelles

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

Source: Analysys Mason, April 2014

Postcard from Africa (2)



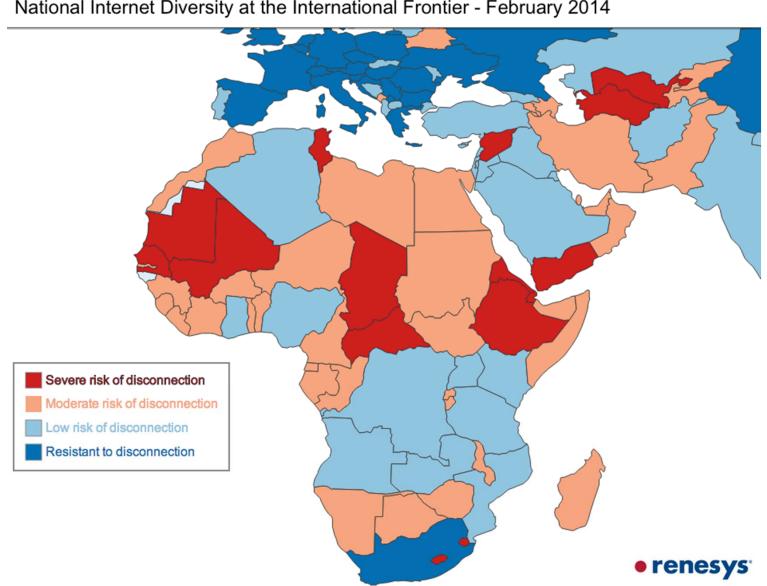
Problems in Africa's terrestrial networks

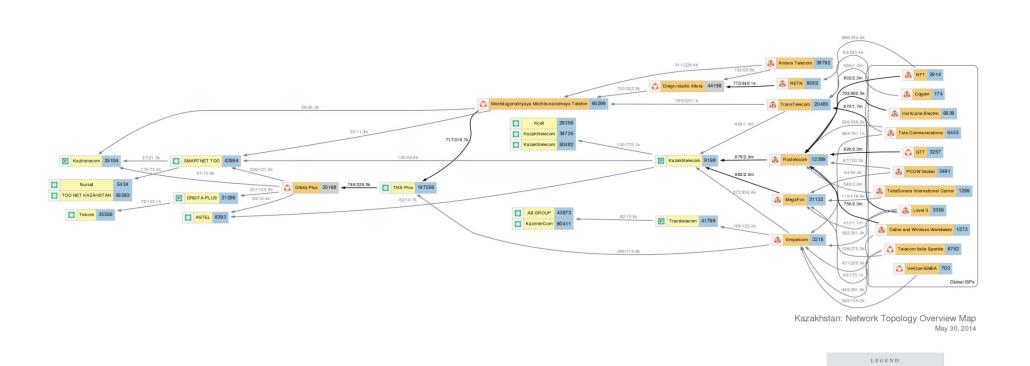
- Fiber not being buried deep enough
 - Frequent physical damage (accidental and deliberate).
- Poor quality splicing
 - Intermittent faults and reduction in throughput
- Poor maintenance of manholes
 - Leads to flooding and cable damage.
- Poor systems and processes for fault management
 - Sometimes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

Source: Philip Bates, Analysys Mason, April 2014

Central Asia largely mirrors Africa

National Internet Diversity at the International Frontier - February 2014

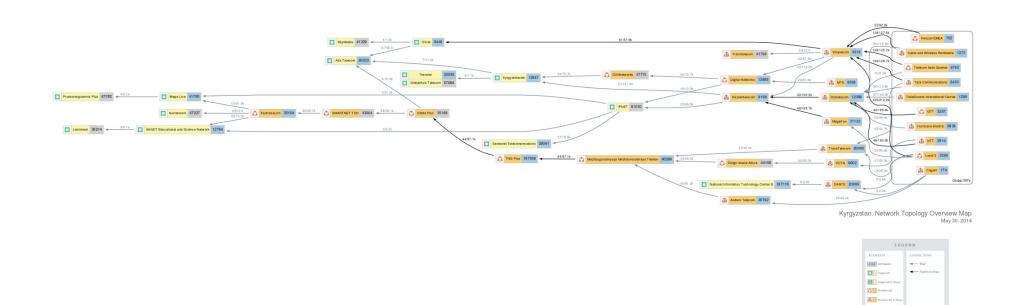




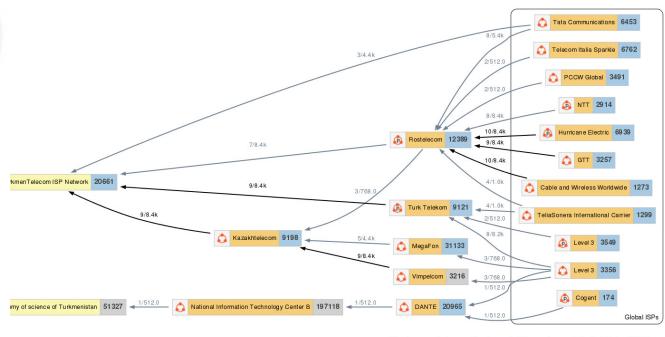
Provider AS

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The Internet of Kazahkstan is served by numerous providers. Kazakhtelecom is the dominant incumbent while smaller ISPs such as Asket, Smartnet and Orbita-Plus are competing. Nearly all international transit for Kazakhstan comes through Russia, specifically from the major Russian providers (Rostelecom, Transtelecom, RETN, Megafon and Vimpelcom).



The Internet of Kyrgyzstan is served by several providers including incumbent KyrgyzTelecom and mobile providers SkyMobile and Megacom. International transit primarily comes through Kazakh providers Kaztranscom and Kazakhtelecom.



Turkmenistan: Network Topology High Detail Map May 30, 2014





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