



CommunicAsia2010 Summit

Two tracks: Profitable & New Revenue Opportunities with "Green" Workshop and Mobile Broadband Special Session

Mobile networks 'not ready for data'

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Spectrum issues could slow LTE rollouts, warn experts

by John C. Tanner

The pace of LTE rollouts could be slowed down by lack of spectrum availability and high speeds offered by HSPA+, according to industry experts.

Ronny Haraldsvik, marketing VP for SpiderCloud Wireless, said that operators planning on LTE will stay with HSPA+ for a long time.

"They'll have a lot of devices available and they'll be

looking for ways to drive network efficiencies and get as much capacity out of existing networks as possible, whether it's via indoor systems or something else," he said. "It's about capex and opex and leveraging what they have."

Haraldsvik added that while that wouldn't stop cellcos from launching LTE services completely, many will be much more likely to deploy it in pockets of coverage where it makes sense rather than push for large-scale rollouts.

"It's going to be at least ten years before you see full LTE-only coverage in any market," he told *Show Daily*.

Commenting on the debate

over whether HSPA cellcos should leapfrog to LTE or put it off by evolving to HSPA+, Dirk Wolter, Alcatel-Lucent CTO for North & Southeast Asia, said it would depend mainly on how much spectrum a given cellco has on hand.

"If you assume they use one carrier for HSPA, the upcoming mobile data traffic growth may be so high that no matter how they evolve to HSPA+ – by implementing 64QAM or MIMO – they may not have enough capacity regardless," he said at the CommunicAsia Summit Thursday. "In that case they will look at LTE for

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Augmented reality check for mobile marketing

by John C. Tanner

Augmented reality technology will take mobile marketing apps to whole new levels, says mobile marketing specialists i-POP.

Mobile devices and even flat-screen monitors can use augmented reality – 3G graphics superimposed over a live video image – to create more engaging point-of-sale campaigns for brands, said i-POP EVP and co-founder Colin Miles.

"This technology could unleash a host of new apps that go beyond barcodes to create a more interactive experience on any mobile device," Miles told *Show Daily*.

For example, the company's logo recognition app was at the center of a recent "virtual changing room" campaign for Adidas stores in several Southeast Asian markets, in which shoppers could wave a card with an Adidas logo in front of a "digital mirror" (i.e. a wall-mounted



screen with a webcam) and have virtual t-shirts imposed on their image.

"About 25% of the people who came in played around with it, took a photo with their virtual shirt and gave us their email address," said Ian Morrison, i-POP's product director for strategy, innovation and marketing. "So it generated a lot of good exposure for the client."

The next step is to take the app to mobile devices. Aim your cameraphone at a logo, and the app calls up text info and even a video mapped over the image of the real logo (see pic, above).

Both apps are being demonstrated at the i-POP stand (3L1-15) in the Mobile Entertainment Forum pavilion. *



YOU CAN STAND UNDER MY UMBRELLA, ETC: Doug Bewsher (left), CMO of Skype, and Juri Tammisto, president and CEO of Mobile Monday share an umbrella with booth staffers at the Skype stand (4B2-07).

Mobile networks still 'not ready for data': Altai

by Joseph Waring

Mobile operators are not ready for data demand because they have integrated voice and data over a single network, says Wi-Fi firm Altai.

Altai president Lin Chi Hung told *Show Daily* that operators have just added data to their voice architecture. "And they call it 3G. Voice and data have totally different requirements but they put them into a single architecture. I don't think it will work."

Said Lin: "There is no need to integrate at the network level, which is what make it so expensive. Why not let 2G handle the voice and let IP take care of data? It's probably a conspiracy because operators don't like IP offload."

Hong Kong-based Altai, a maker of Wi-Fi equipment, has seen soaring demand for its

Wi-Fi access points for 3G data offload as well as data backhaul.

The company started in the ISP market in emerging markets, but since data demand exploded last year, it has been targeting operators in developed countries. "There is huge demand for 3G offload from operators. It's a much larger market than with ISPs."

Lin said the advantage of Wi-Fi as an overlay to offload data is that the base stations can be co-located with existing cell sites and provide 80% coverage. He said expanding 3G capacity is ex-

pensive, "so telcos can use opex to build an overlay network without any additional investment."

For data offload and backhaul it is working with China Telecom and China Mobile as well as an unnamed Hong Kong operator.

By next year Lin said Altai will be involved in 15 citywide or nationwide projects in developing countries. It is working with an operator in Nepal to provide citywide coverage of Katmandu with about 100 base stations starting

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CALM, COOL AND CONNECTED:

Booth assistants Misty Chua (left) and Tan Kai Sin spread the word about Shilpi Cable Technologies (5F2-01).

ZTE wins \$146 million China Telecom optical deal

China Telecom has awarded a 1 billion yuan (\$146 million) passive optical network equipment contract to ZTE.

ZTE will supply its ZXA10 xPON passive access system to support China Telecom's City Optical Network project, which was launched in 2009.

The solution is based on triple-play service which provides multi-cast and DBA capabilities and supports high broadband subscriber access services such as HSI, VoIP, IPTV, and CATV, ZTE said.

China Telecom plans to deploy 20 million lines of fiber op-

tic equipment in order to provide 12Mbps broadband access to more than 70% of the rural areas and up to 100Mbps access speeds for major cities across the country.

In a separate announcement, ZTE said it has been contracted by Telekom Malaysia as one of the major suppliers for Malaysia's nationwide high-speed broadband network.

Under the deal, ZTE will provide Telekom Malaysia with multi-service access nodes as part of the phase one of the HSBB network development. *

Booth 5B2-01

...OVERNIGHT WIRE...

Mobile TV to take off from 2012

Mobile TV services will overcome the barriers inhibiting widespread deployment by 2012, growing to become a \$20 billion market in 2015. According to ABI Research, the three main factors hindering adoption are the lack of free and simulcast national TV programs, limited analog-to-digital adoption, and the latency and throughput limitations of 3G. Once these are overcome, the cost of entry into the market will be low - around \$100,000 per tower.

Free offerings threaten app store revenue

The proliferation of free apps could potentially limit the revenue generating potential of operator-branded app stores. Pyramid Research said the proportion of free to paid apps on app stores has grown from 30% in 2008 to 54% in 2009, and is expected to continue to grow until it hits 80% in 2014. The total download volume of app stores will meanwhile increase to 41.1 billion in 2014, from 5.7 billion today.

Bump in road for wireless packet core market

The wireless packet core market shrank 30% in Q1, but this was merely a bump in the road of ongoing growth, Dell'Oro has forecast. The market is expected to continue to grow in the remainder of 2010 - by an estimated 10% to \$2.1 billion. Rising data usage and smartphone penetration will be the primary drivers for this growth.

Wimax Forum members enhance 802.16e

The technical staff of 14 Wimax equipment vendors have joined forces under a Wimax Forum initiative to develop enhancements to the 802.16e mobile Wimax standard. These include an up to 70% improvement in spectral efficiency - potentially doubling peak data rates - new interference-reduction technologies and improvements in performance at the edge of a cell's coverage radius.

M-transactions to double in value by 2012

The value of global mobile payment transactions will double to a combined \$200 billion in just two years, Juniper Research expects. Both physical and digital goods will be purchased at successively higher rates. Improvements in mobile network and device speeds, as well as the user-friendliness of smartphone apps, will drive growth. But merchants must be up-front about the cost of mobile transactions or risk discouraging usage.

iPad's main rivals: HP, Dell, Archos, Asus

The strongest competitors to the iPad in the tablet space are shaping up to be HP, Asus, Dell and Archos. Frost & Sullivan said the tablet has the potential to drive innovations in mobile gaming and media, thanks to the broader potential capabilities of such devices, but are currently being marketed only to early adopters. A price cut will be needed before mass-market acceptance of the segment is achieved.

Mobile media market staved off the GFC

The global market for mobile media grew by over 10% in 2009, despite the prolonged global recession. According to the Strategy Analytics Mobile Media Index, the top performers in the market included service delivery company Acotel, with 102% revenue growth, and multimedia company Cellebrum, with 74% growth. By contrast, multimedia companies ill-prepared for the app store explosion, including Mobile Streams and game publisher THQ, lost out.

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IDA's 4G framework could delay LTE to 2015

By **Charice Wang, Ovum**

Singapore's Infocomm Development Authority (IDA) released a consultation paper on the spectrum framework for 4G. The move signals the IDA's desire to promote next-gen access deployment, both through fiber and also through wireless high-speed broadband using LTE. But commercial launches of LTE in Singapore could be delayed, given that under the current plan the 2.3/2.6-GHz spectrum will not become available until 2015 at the earliest. With this in mind, the IDA may have to consider an alternative approach to release spectrum as early as 2012.

The 2.6-GHz spectrum band in Singapore is primarily reserved for 4G services using either LTE or Wimax technology. Taiwan, Hong Kong and Japan have already auctioned spectrum for the provision of broadband wireless access (BWA) services. In India, the government last month announced that it will turn its attention to 4G licensing. So far, announcements around the world of 2.6-GHz auction plans have shown that there is high demand for 4G spectrum in this band.

Increasing regulatory certainty

In 2005 the IDA auctioned the 2.3- and 2.6-GHz bands specifically for Wimax services. Six successful bidders were awarded portions of a total 50 MHz in the 2.3-GHz band and 90 MHz in the 2.6-GHz band. However, there have not been any commercial Wimax launches to date, despite the rollout obligations for the successful bidders. The IDA initially intended to extend the licenses of the existing licensees for eventual LTE deployment, but is now considering holding another auction to ensure that this spectrum is awarded to those who value it the most. This is especially crucial given the limited amount of spectrum available, and the comparatively small size of the Singapore market.

Under the IDA's current

plans, the 2.3-GHz/2.6-GHz bands are unlikely to be available for reassignment in Singapore in the next two years, as the existing spectrum rights for Wimax

don't expire until 2015. Given that all three mobile networks operators are currently operating trial LTE services, this is a long wait until full commercial

launch. The IDA is likely to consider allocating spectrum in the 2.3- and 2.6-GHz bands earlier - perhaps in 2012 - by which time the trials are expected to have

demonstrated strong demand for LTE services in Singapore. *

Charice Wang is an analyst for Ovum's telecom regulation team

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At last, some action on roaming

A big shout to Singapore and Malaysia for getting in front of exorbitant roaming charges.

Communications ministers from the two countries announced at Commu-nicAsia this week they hope to bring down voice prices by 30% and text by as much as 50% over the next few months.

About time. Roaming is one of the world's great legal scams. It allows cel-lcos to gouge their customers with impu-nity. When customers complain, opera-tors shake their heads and pretend it's out of their hands.

Much of this ripoff goes on below the radar. No operator publishes explicit in-formation about its roaming revenue and margins. It's not small change, though. Hong Kong-based SmarTone blamed a 2% fall in revenue this past fiscal year in part on the decline in roaming business.

Asian voice roaming rates may have fallen in recent years, but they are still hefty compared with domestic prices.

A SingTel roaming customer in Ma-laysia pays S\$0.70 per minute for an in-coming call and S\$0.50 for an outgoing local call. Text messages cost S\$0.61 to send, while data downloads cost S\$22 per MB. Those customers who want automa-tic roaming will have to pay a \$10 monthly subscription fee.

But the voice charges are nothing compared to the great new blag, which is data roaming.

To give one example: a customer of Hutchison 3 in Hong Kong can get an unlimited mobile data plan as part of a HK\$198 (\$25) monthly package. If the customer roams to mainland China, 3's partner Unicom will offer a daily rate of 68 yuan, or HK\$78. That's right, for around a

third of the monthly charge a customer can buy one day's service on the mainland.

The defense operators commonly give is that only business customers use roam-ing services – as though it's somehow OK for businesses to overcharge other busi-nesses. Naturally, this merely reminds us that the nosebleed prices drive away ordi-nary consumers.

The EU has capped prices for inter-nal European roaming, although the bat-tle it has taken four years.

Diverse Asia is a different beast, however. Regulators in Singapore and Malaysia play with a strong hand, given the dominance of state-linked operators in those markets.

But high roaming prices are a market failure. Consumers do not have adequate information and they can't hold their service providers to account. If that's not

a case for regulatory intervention one doesn't exist.

Given the popularity of the mobile phone, and the unpopularity of roaming rates and the way they are charged, the only surprise is that governments have been so reluctant to act.

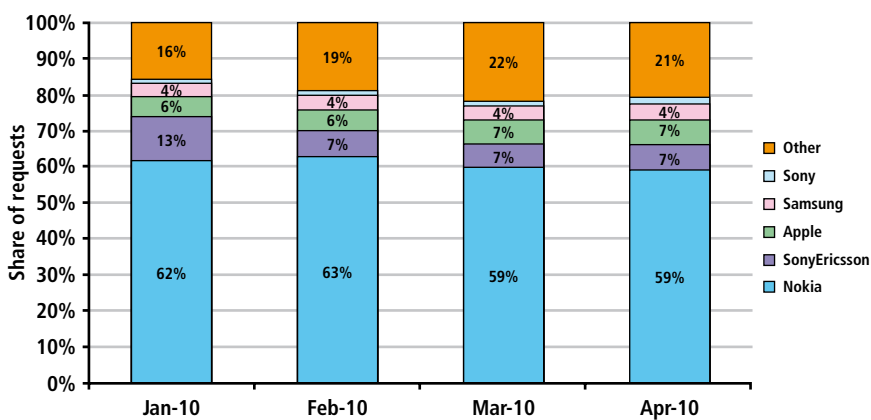
The bilateral approach being pio-neered by Singapore and Malaysia is a measured, achievable one. There's no reason why other neighbors, such as Australia and New Zealand, Japan and Taiwan, and Hong Kong and Macau, should not follow suit.

As an added bonus, the outcomes and lessons learned can be shared through the usually sleepy APEC telecoms and infor-mation working group.

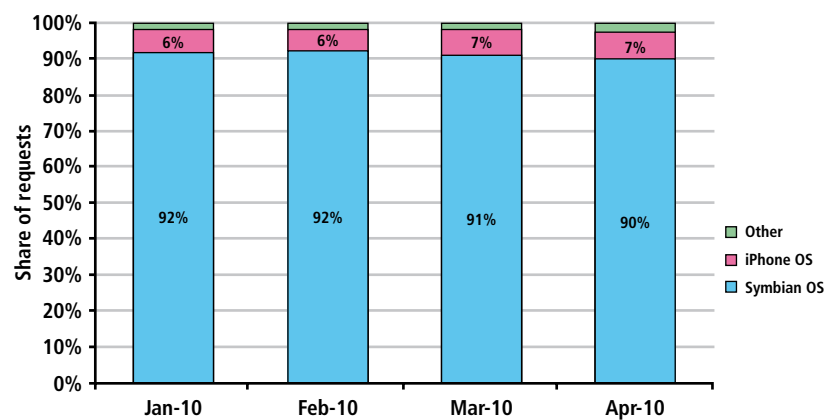
High roaming rates are a burden on Asian businesses. It's time to cut them down to size. *

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Philippines ad requests by device manufacturer



Philippines ad requests by OS (smartphones)



Source: AdMob Mobile Metrics Report, April 2010



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