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1. Voice Telephony

1.1 Subscription of Voice Telephony Service

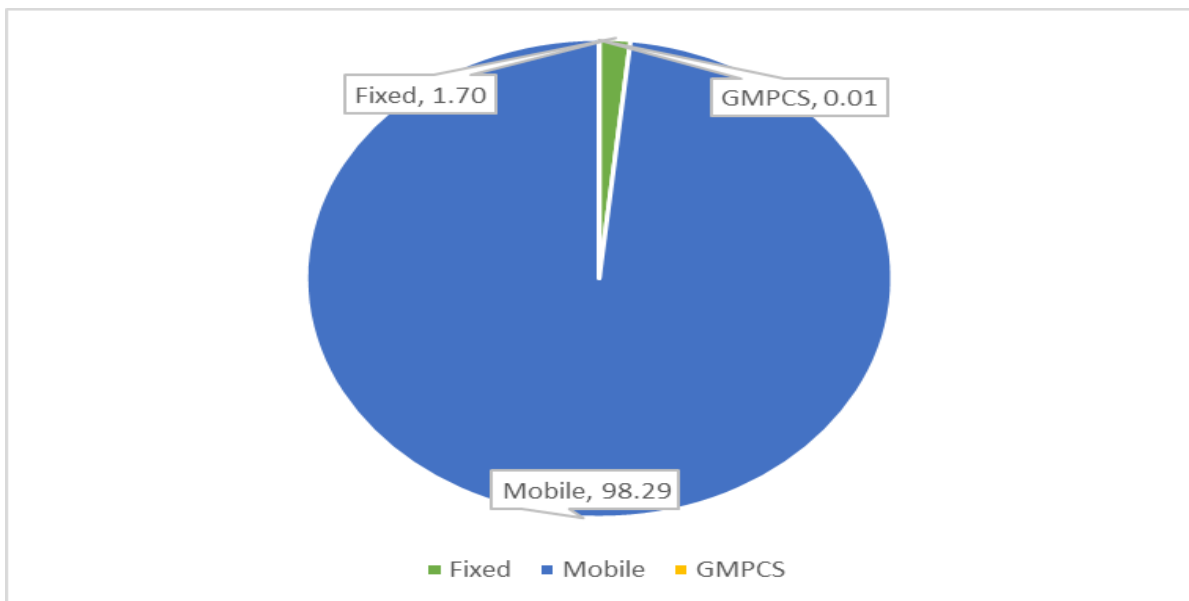
| Operator | Service | Technology | Total | |
|--------------------------------|---------|------------|------------|------------|
| Nepal Doorsanchar Company Ltd. | Fixed | PSTN | 252967 | 610,875 |
| | | FTTH Voice | 357908 | |
| | | VSAT | 0 | |
| | | WLL# | | |
| Ncell Axiata Ltd. | Mobile | CDMA | | 35275631 |
| | | GSM/IMT | 22098348 | |
| | | GSM/IMT | 13,177,283 | |
| Others | GMPCS | GMPCS | 2986 | 2,986 |
| Total | | | | 35,889,492 |

Population Projection (2011-2031): 2,91,64,578 (Source: cbs.gov.np)

CDMA/ WLL service phased out by Nepal Telecom from Shrawan, 2080.

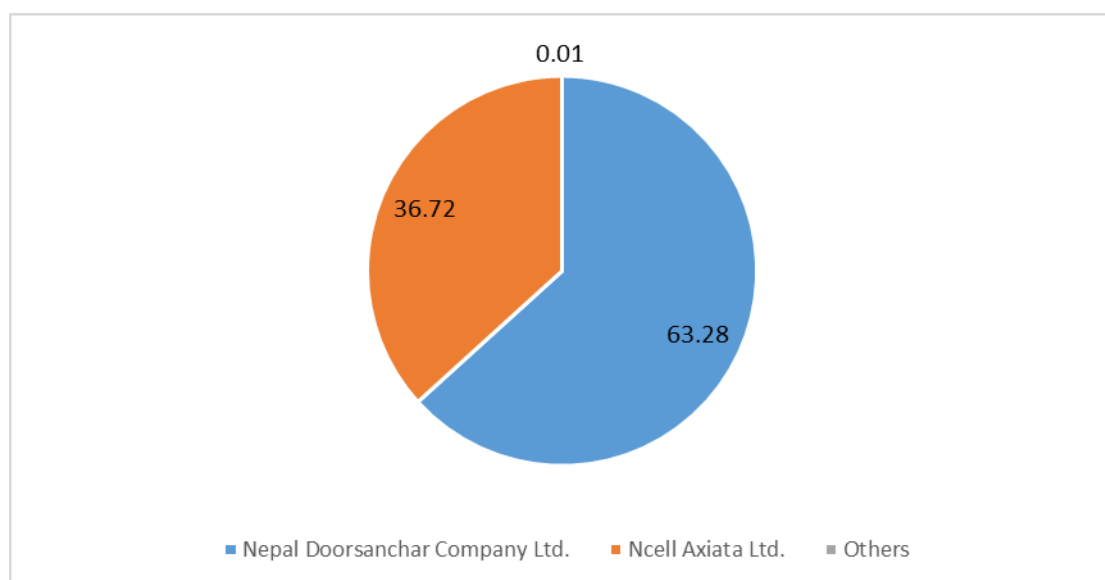
1.2 Service wise Market Proportion of Voice Service (Based on Subscription)

| Voice Telephony Service | Number of Subscriber | Market Proportion (%) |
|-------------------------|----------------------|-----------------------|
| Fixed | 610875 | 1.70 |
| Mobile | 35275631 | 98.29 |
| GMPCS | 2986 | 0.01 |
| Total | 35889492 | 100.00 |



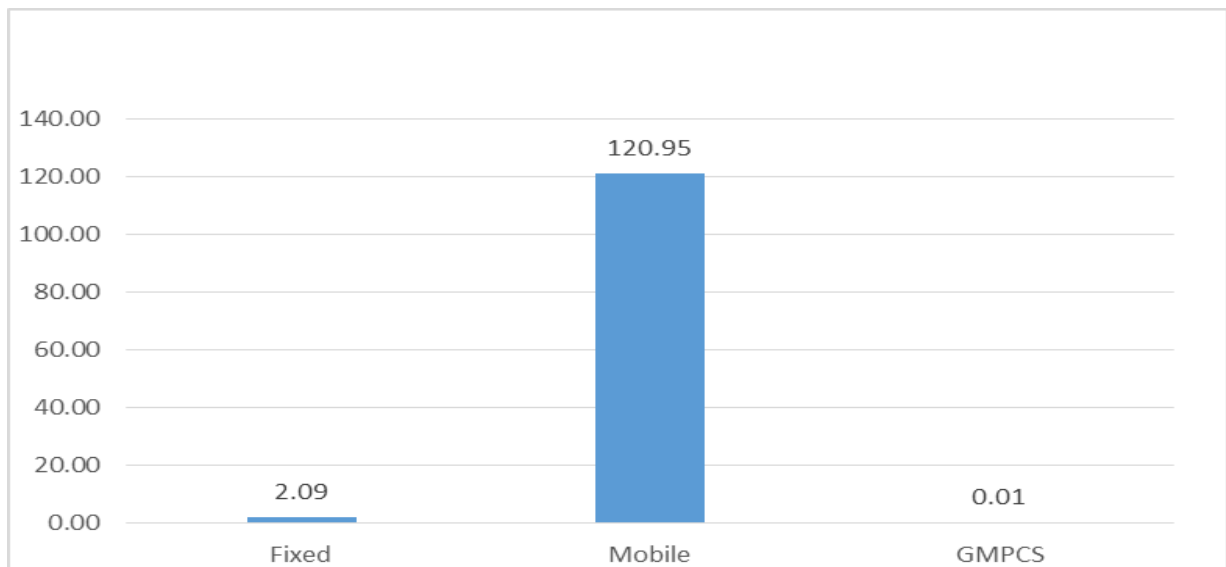
1.3 Operator-wise Market Proportion of Voice Service (Based on Sim Subscription)

| Operator | Number of Subscriber | Market Proportion (%) |
|--------------------------------|----------------------|-----------------------|
| Nepal Doorsanchar Company Ltd. | 22709223 | 63.28 |
| Ncell Axiata Ltd. | 13177283 | 36.72 |
| Others | 2986 | 0.01 |
| Total | 35889492 | 100.00 |



1.4 Population Penetration (%) of Voice Service (Based on Subscription)

| Voice Telephony Service | Number of Subscriber | Population Penetration (%) |
|-------------------------|----------------------|----------------------------|
| Fixed | 610875 | 2.09 |
| Mobile | 35275631 | 120.95 |
| GMPCS | 2986 | 0.01 |
| Total | 35889492 | 123.06 |



2. Internet Service

2.1 Subscription of Broadband Internet Service

| Services | | Users | | | Total |
|----------------------------|--------------|--------------------------------|-------------------|-----------|------------|
| | | Nepal Doorsanchar Company Ltd. | Ncell Axiata Ltd. | ISPs | |
| Fixed Broadband (Wired) | ADSL/ Cable | 7,453 | - | 531 | 7,984 |
| | FTTH | 298,260 | - | 2,406,264 | 2,704,524 |
| Fixed Broadband (Wireless) | Radio (WIFI) | - | - | 6,183 | 6,183 |
| Mobile Broadband | 2G | 1,471,995 | | | 1,471,995 |
| | 3G | 5656526 | 1,530,582 | - | 7,187,108 |
| | 4G | 14969827 | 7,012,196 | - | 21,982,023 |
| | EVDO | | | | - |
| Total | | 22,404,061 | 8,542,778 | 2,412,978 | 33,359,817 |

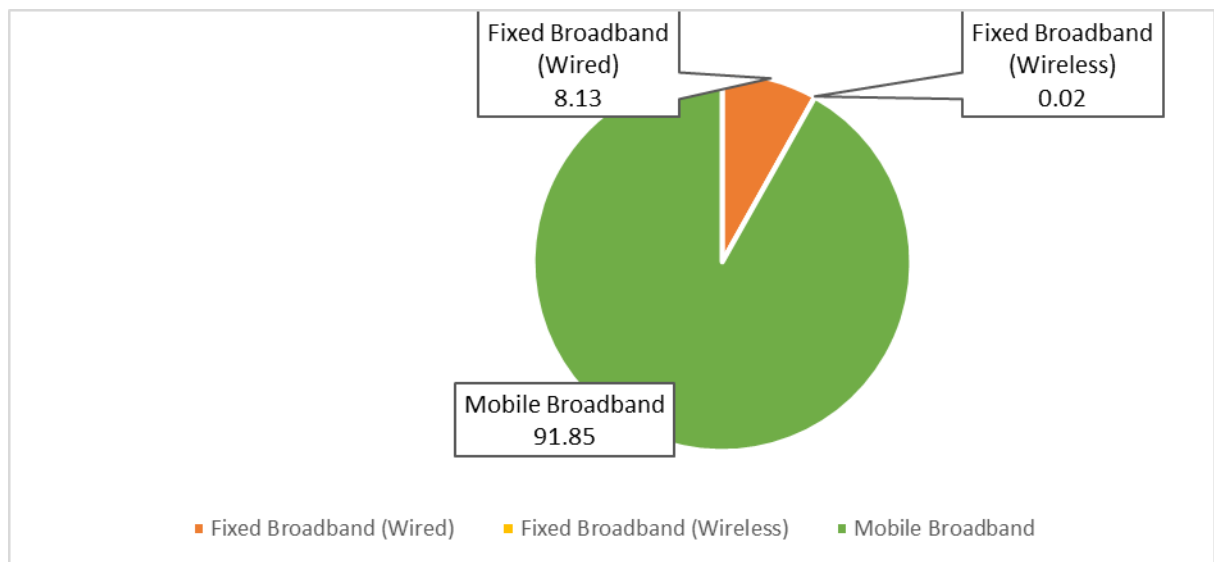
Note: Data/Internet Service through GPRS Service is excluded in Broadband subscription.

1 Connection equal to 4.37 subscribers for fixed broadband (Source: cbs.gov.np)

EVDO service phased out by Nepal Telecom from Shrawan, 2080.

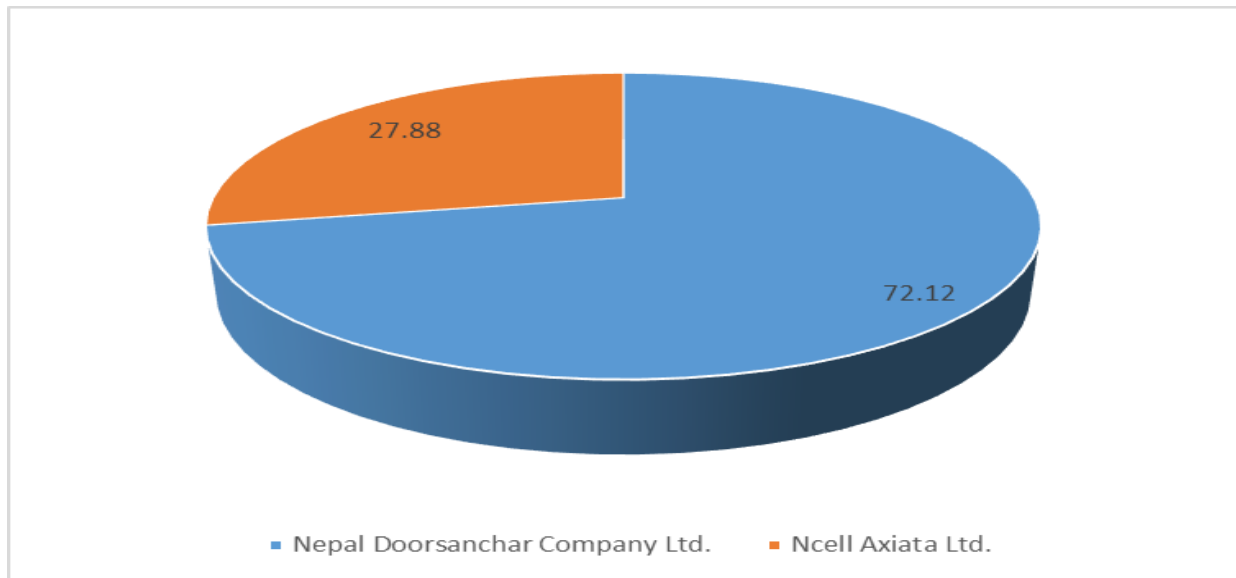
2.2 Market Proportion of Data Service (Technology-wise)

| Broadband Services | Number of Subscription | Market Proportion (%) |
|--------------------------------|------------------------|-----------------------|
| Fixed Broadband (Wired) | 2712508 | 8.13 |
| Fixed Broadband (Wireless) | 6183 | 0.02 |
| Mobile Broadband | 30641126 | 91.85 |
| Total Broadband Service | 33359817 | 100.00 |



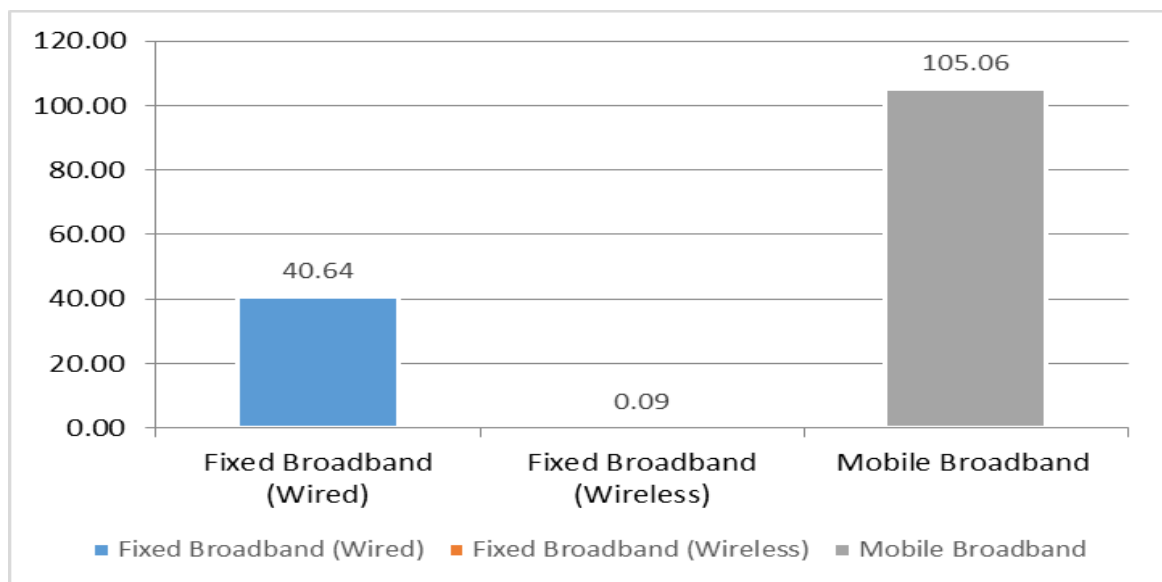
2.3 Market Proportion of Mobile Broadband Service (Based on Sim Subscription)

| Operator | Number of Subscription | Market Proportion (%) |
|--------------------------------|------------------------|-----------------------|
| Nepal Doorsanchar Company Ltd. | 22098348 | 72.12 |
| Ncell Axiata Ltd. | 8,542,778 | 27.88 |
| Total | 30641126 | 100.00 |



2.4 Population Penetration of Broadband Service (Based on Subscription)

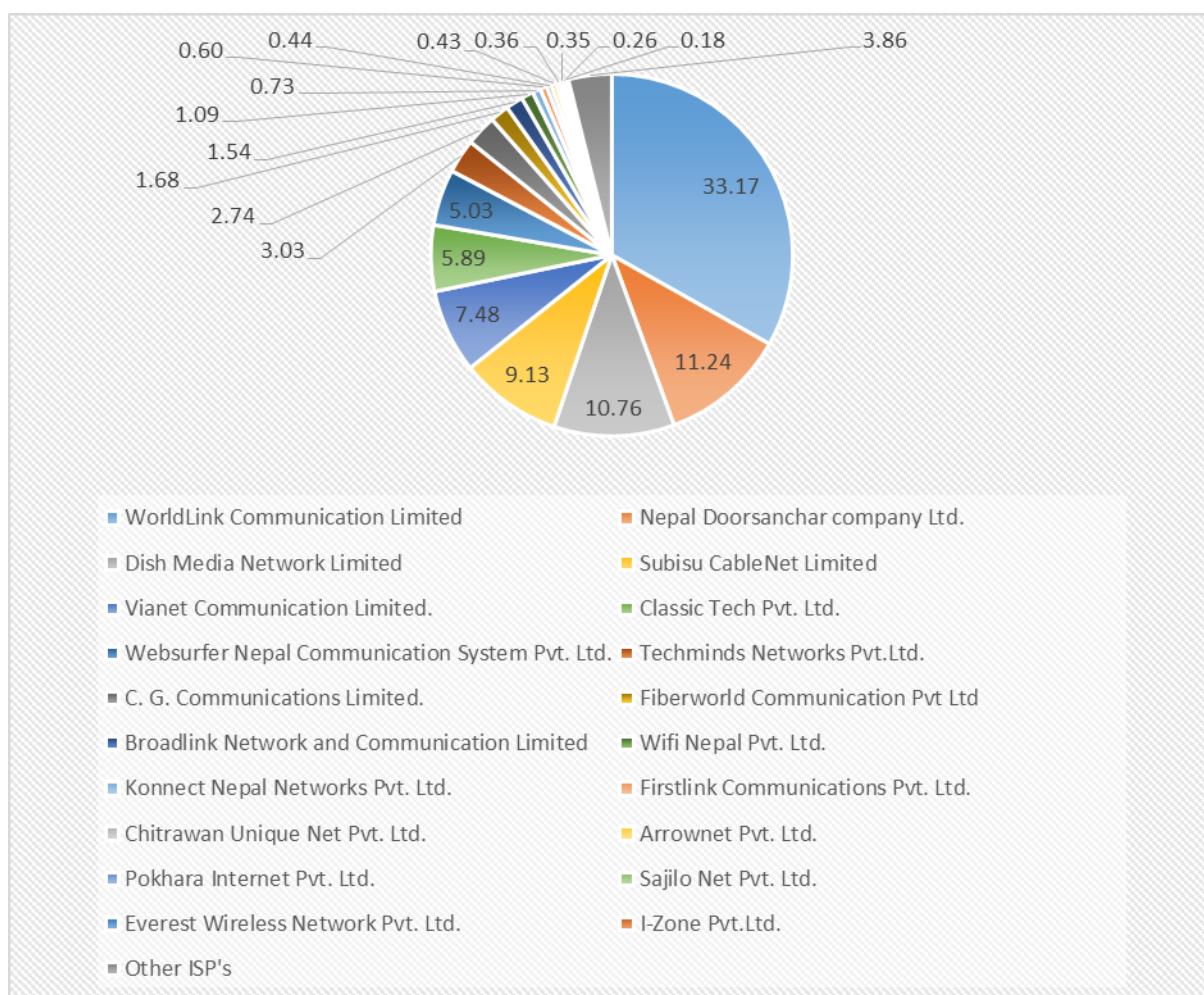
| Broadband Services | Number of Subscription | No.of Population | Population Penetration(%) |
|----------------------------|------------------------|------------------|---------------------------|
| Fixed Broadband (Wired) | 2712508 | 11853660 | 40.64 |
| Fixed Broadband (Wireless) | 6183 | 27020 | 0.09 |
| Mobile Broadband | 30641126 | 30641126 | 105.06 |
| | 33359817 | 42521806 | 145.80 |



2.5 List of Top Twenty Internet Service Providers (Based on Number of subscriber-Fixed Broadband)

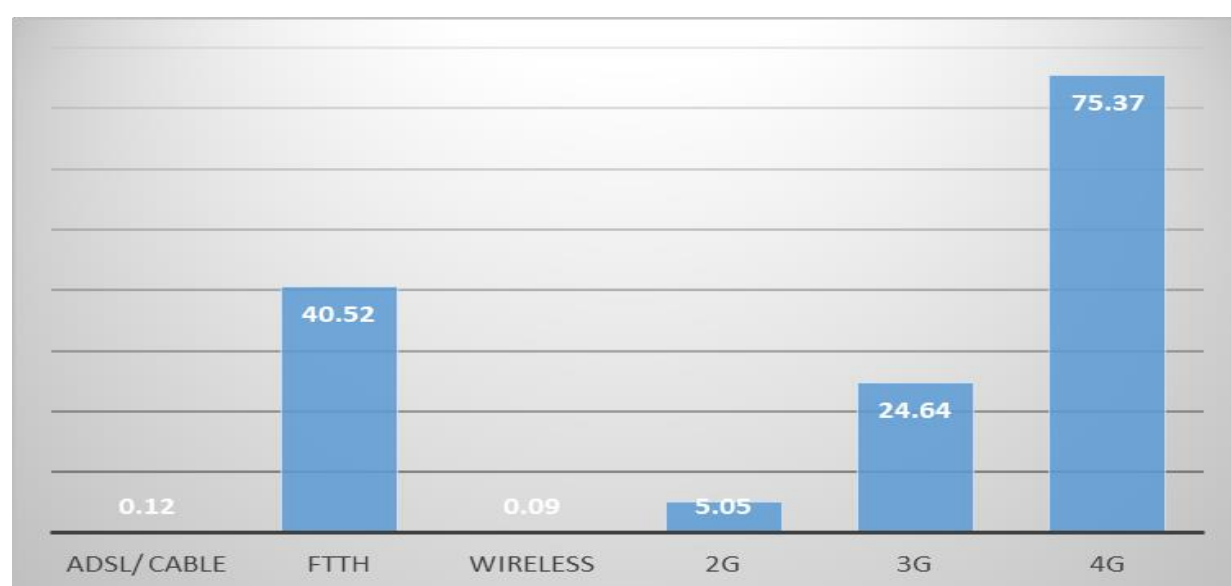
| S.no. | Operator | Fiber | ADSL/ Cable | Wireless | Total | Market Share (in %) |
|--------------|--|---------|----------------|----------|---------|------------------------|
| 1 | WorldLink Communication Limited | 901182 | 531 | 15 | 901728 | 33.17 |
| 2 | Nepal Doorsanchar company Ltd. | 298260 | 7453 | 0 | 305713 | 11.24 |
| 3 | Dish Media Network Limited | 292586 | 0 | 0 | 292586 | 10.76 |
| 4 | Subisu CableNet Limited | 248084 | 0 | 0 | 248084 | 9.13 |
| 5 | Vianet Communication Limited. | 203379 | 0 | 0 | 203379 | 7.48 |
| 6 | Classic Tech Pvt. Ltd. | 159505 | 0 | 703 | 160208 | 5.89 |
| 7 | Websurfer Nepal Communication System Pvt. Ltd. | 134958 | 0 | 1917 | 136875 | 5.03 |
| 8 | Techminds Networks Pvt.Ltd. | 82225 | 0 | 275 | 82500 | 3.03 |
| 9 | C. G. Communications Limited. | 74513 | 0 | 0 | 74513 | 2.74 |
| 10 | Fiberworld Communication Pvt Ltd | 45800 | 0 | 0 | 45800 | 1.68 |
| 11 | Broadlink Network and Communication Limited | 41780 | 0 | 154 | 41934 | 1.54 |
| 12 | Wifi Nepal Pvt. Ltd. | 29527 | 0 | 0 | 29527 | 1.09 |
| 13 | Konnect Nepal Networks Pvt. Ltd. | 19711 | 0 | 0 | 19711 | 0.73 |
| 14 | Firstlink Communications Pvt. Ltd. | 16180 | 0 | 0 | 16180 | 0.60 |
| 15 | Chitrawan Unique Net Pvt. Ltd. | 12089 | 0 | 0 | 12089 | 0.44 |
| 16 | Arrownet Pvt. Ltd. | 11679 | 0 | 0 | 11679 | 0.43 |
| 17 | Pokhara Internet Pvt. Ltd. | 9508 | 0 | 187 | 9695 | 0.36 |
| 18 | Sajilo Net Pvt. Ltd. | 9505 | 0 | 0 | 9505 | 0.35 |
| 19 | Everest Wireless Network Pvt. Ltd. | 5683 | 0 | 1320 | 7003 | 0.26 |
| 20 | I-Zone Pvt.Ltd. | 4970 | 0 | 0 | 4970 | 0.18 |
| 21 | Other ISP's | 103400 | 0 | 1612 | 105012 | 3.86 |
| Total | | 2704524 | 7984 | 6183 | 2718691 | 100.00 |

2.6 Market proportion of Fixed Broadband service (Operator-wise)



2.7 Technology used in Broadband Service

| Technology | Number of user | Population Penetration Proportion (%) |
|-------------|-----------------|---------------------------------------|
| ADSL/ Cable | 34890 | 0.12 |
| FTTH | 11818770 | 40.52 |
| Wireless | 27020 | 0.09 |
| 2G | 1471995 | 5.05 |
| 3G | 7187108 | 24.64 |
| 4G | 21982023 | 75.37 |
| Total | 42521806 | 145.80 |



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