

## 1. AT A GLANCE

SAMENA Telecommunications Council is South Asia – Middle East – North Africa (SAMENA) region’s sole industry association, driven primarily to represent telecommunications operators and service providers. It is a not-for-profit operator interest group; a regional collaborative body; and a policy support organization that provides collaborative means and a regionally-recognized platform for knowledge-sharing, and for discussing pressing business, technology and regulatory issues. While SAMENA Council does organize annual conferences and other executive industry events throughout the region to convene its members and industry stakeholders, its primary function is to be a regional agenda driver within the ICT industry and to promote policies that are supportive of telecoms operators. SAMENA Council’s 95-plus member community includes telecom operators, manufacturers, government bodies, leading global management consultancy organizations, and other ICT stakeholders from around the region. SAMENA Council represents over 40 telecommunications operators in 25 markets, representing an aggregate subscriber base of 700 million mobile users, 79 million fixed-line users, and 22 million broadband users.

## 2. VISION

Provide a Unified Voice and a collaboration forum for Operators and Service Providers in the SAMENA region.

## 3. MISSION

Promote the development and adoption of policies, regulations, standards, business models, and collaboration initiatives that enable growth and improve efficiency in the telecommunications industry of the SAMENA region, incentivize investment and development, and broaden value-creation opportunities.

### Organizational Objectives

- To promote the development and adoption of national and sector-specific **digitization policies** that create new growth opportunities for telecom operators and ICT industry stakeholders while accelerating socio-economic development in the region.
- To promote the **progress of telecom sector governance and regulation** in the region to support the evolving scope, dynamics, and needs of the telecommunications industry, and enable its growth and sustainability
- To facilitate the creation of an environment conducive to incentivizing operators’ investment in the **next-generation broadband infrastructure**, including enabling policies, regulation, standards, and business models.
- To promote **cooperation** between telecom operators and other industry stakeholders to enhance industry efficiency and enhance value creation.

## 4. BOARD OF DIRECTORS

SAMENA Council Board of Directors comprises elected as well as appointed corporate heads of telecommunications companies that include, but are not exclusive to, cellular and landline. The Board has the authority to interpret and make amendments to SAMENA Telecommunications Council Charter of Bylaws. Each member of the Board has the responsibility to best represent and serve the needs of SAMENA Council's members.

**Sheikh Mohamed Isa Al Khalifa**

Chairman & Member of Executive Committee  
Chief Executive Officer, Batelco Group

**Mr. Walid Irshaid**

Vice Chairman & Member of Executive Committee  
Chief Executive Officer & President, Pakistan Telecommunication Company Ltd.

**Eng. Saud Al Daweesh**

Director  
Chief Executive Officer, Saudi Telecommunication Company (STC) Group

**Mrs. Nayla Khawam**

Director  
Chief Executive Officer, Orange, Jordan Telecom Group

**Dr. Amer Awadh Al Rawas**

Director  
Chief Executive Officer, Oman Telecommunication

**Mr. Jamal Al Jarwan**

Director  
Chief International Investments Officer, Etisalat

**Dr. Nasser Marafih**

Director  
Chief Executive Officer, Qtel Group

**Mr. Hakam Kanafani**

Director  
Chief Executive Officer, Turk Telekom Group

# PROFILE



**Mr. Mohammed A. Al Ageel**  
Director  
Chief Executive Officer, Bravo

**Mr. Salman Bin Abdul Aziz Al Badran**  
Director  
Chief Executive Officer, VIVA Telecom – Kuwait

**Mr. Thomas W. Wilson**  
Director & Member of Executive Committee  
CEO & Executive Managing Director of SAMENA Council

## 5. MEMBERS



SAMENA Council has initiated a campaign to reach out to members to engage their active role in its ongoing activities.

Why become a SAMENA Council Member?

- Join the top leadership of the SAMENA region’s telecom industry
- Benefit from the opportunity to take leadership roles in any of SAMENA Council’s committees and working groups
- Gain an opportunity to be part of SAMENA Council’s Policy Board; an executive and select group of senior officials from SAMENA Council’s operator members
- Benefit from ad-hoc and planned market research and business intelligence support
- Contribute to and benefit from SAMENA Council’s regional policy assessment studies
- Contribute to and benefit from SAMENA Council’s Webinars program and industry educational support
- Benefit from SAMENA Council’s ICT Career Portal
- Benefit from SAMENA Council’s extensive media and public relations program and international reach
- Contribute to the regional unification of voice and gain strength from SAMENA Council’s advocacy and policy-support mechanism
- Become a driver of an initiative and gain access to SAMENA Council’s full support—technically, operationally, and strategically

## 6. CAREERS PORTAL

The SAMENA Council Careers Portal is now active and running, with both employers and employees accessing the portal to explore business and career prospects!

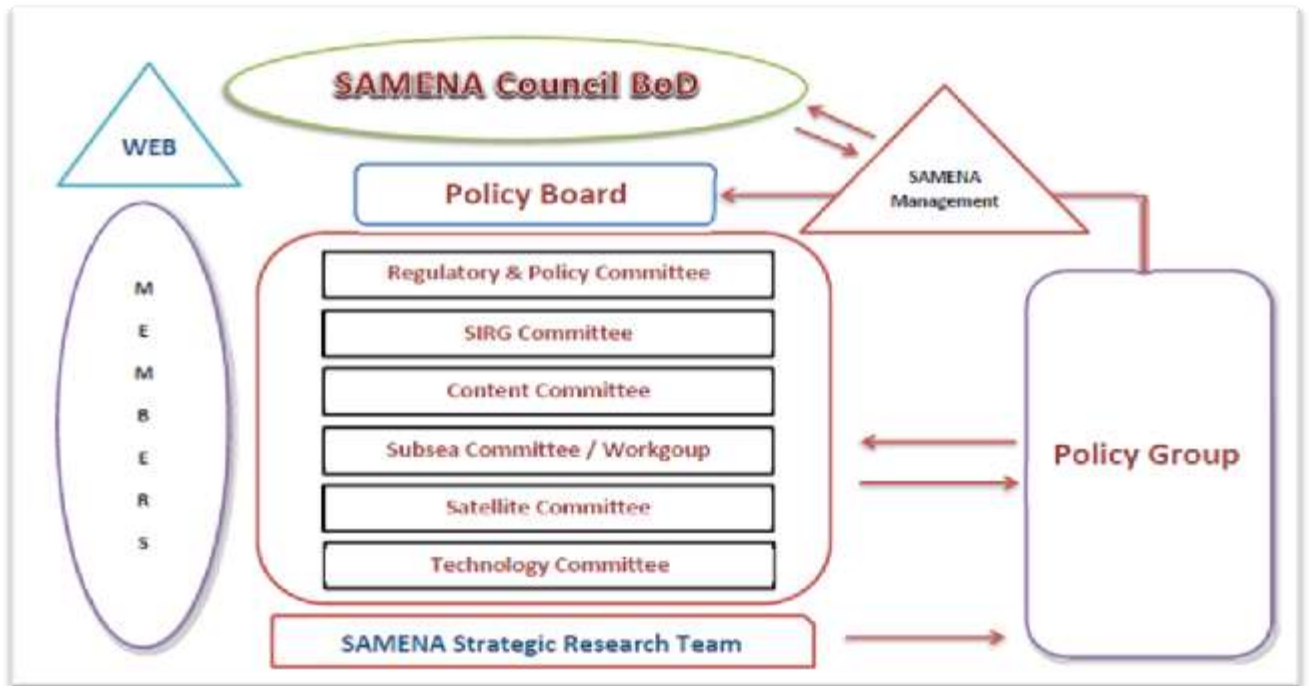
Already, many companies have posted job vacancies or have invited expressions of interest from prospective hires. In essence, the SAMENA

Council Careers Portal allows Employers to post employment opportunities and Job Seekers to create account and submit their qualifications and areas of speciality for targeted job placement.



Both SAMENA COUNCIL members and non-members, at varying levels of accessibility and cost, can post job openings. All prospective employers have options of posting both “regular” as well as “premium” job offers. The latter postings remain active for a specific time period only. Similarly, employment seekers have a standard set of options available to them for posting their CVs and to apply for job offerings from within and outside of the SAMENA region.

## 7. OUTPUT LIFECYCLE



### A. SIRG Committee

SIRG effectively addresses critical issues and challenges facing operators with respect to international roaming. The purpose of the SIRG is to demonstrate leadership and develop consensus among telecom operators in the SAMENA region to develop and shape appropriate initiatives with respect to international roaming. As part of the broader SAMENA Council, the initiative further aims to promote best practices and support growth and innovation in the telecommunication.

## **B. Regulatory & Policy Committee**

Regulatory & Policy Committee is playing a leadership role in developing and shaping the emerging regulatory environment for the communications industry in the SAMENA region. The agenda of the regulatory and policy committee is currently tackling issues such as Broadband Spectrum Harmonization and Efficiency - Technology & Services Agnostic, Infrastructure Sharing, ICT Policy, and Public Private Partnership.

## **C. Content Committee**

- OTTP – Challenges & Opportunities
- Monetization
- Digital Content Ecosystem

## **D. Technology Committee**

- HSPA Deployment / LTE Offloading and Backward Compatibility
- Arabization of Handsets and Handset Firmware
- Future of e-Services (e-Health/e-Gov) and associated Implementation Standards
- IPTV Piracy and Copyright/Intellectual Property Issues

## **E. Satellite Committee**

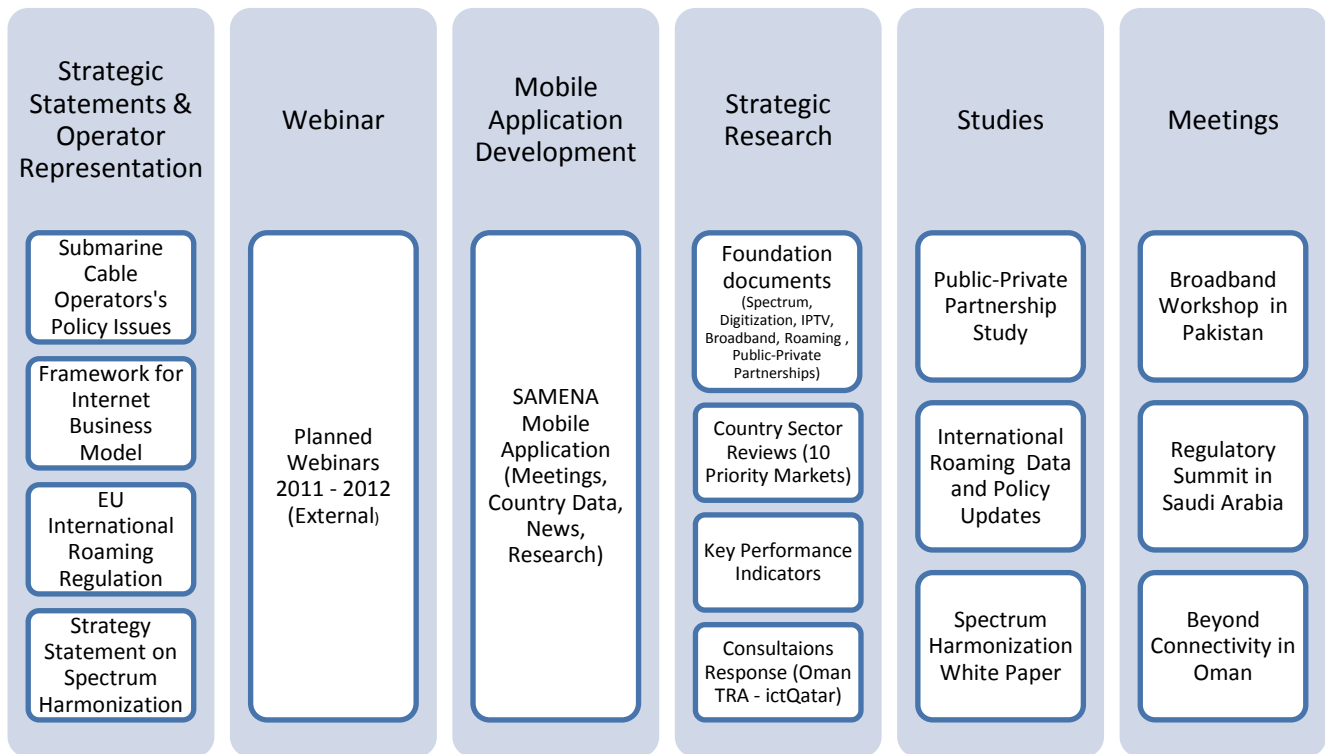
Satellite Committee is taking a leadership role in developing and shaping the emerging technologies for the satellite communications industry in the SAMENA region in the interests of its membership. The Committee seeks to represent the best interests of its membership and its actions shall always promote the growth of the satellite communications industry and SAMENA Council's membership.

## **F. Subsea Working Group**

The SSWG is a forum of support for SAMENA Council's membership on educational and leadership matters concerning subsea cable industry's inter-regional connectivity as well as domestic and international infrastructure convergence. Given that the subsea industry has traditionally been operating in perceived isolation from other sectors of the telecommunications industry and has been utilized primarily to provide intra-regional and international connectivity, the SSWG adopts leadership roles in raising awareness about the subsea industry's roles and in educating the SAMENA Council members on technology, business, marine cable system trends, regulatory/permitting matters and system integration challenges.

## 8. CURRENT AREA OF FOCUS

### A. Sustainable Internet Model Development (Content Revenue-Sharing & Collaboration Model)



Operators and over-the-top-providers are now at a point where it is crucial to work toward developing new business models that guarantee sustainability, cooperation, and revenue growth for both groups. The globally available mobile applications are now hogging away bandwidth, facilitated greatly by over-the-top content providers (OTTPs). Without significant investments in enhancing bandwidth capacity and revamping existing business models, the data traffic influxes would drastically impeded networks' overall performance, ultimately, impacting both the OTTPs and the operators. According to A.T. Kearney, industry stakeholders, in order to maintain the success of the Internet and associated services within this region, must come together and form a solid plan of action. Investments in efficient networks cannot take place without addressing the current issue of pricing and inefficient use of the already existing network resources.

## **B. Spectrum Harmonization & Efficiencies (1800 MHz, 2100 MHz, 2300 MHz, 2600 MHz)**

Spectrum harmonization and digital dividend (mentioned next) are two of the most important issues currently being discussed globally. Spectrum harmonization is of immense importance within the context of LTE, which is a strong and robust technology but will not work out well if efforts to harmonize and effectively manage spectrum are not exerted promptly and properly. Infrastructure vendors, generally speaking, support the idea of spectrum harmonization and efficiencies, in order to reach a critical mass market for their equipment more consistently and easily.

It is time that regional regulatory bodies communicate more closely to discuss the issue of spectrum harmonization. SAMENA Council, in collaboration with its partners, can build a collaborative spectrum harmonization program, to reach out to key stakeholders and to invite their prompt attention to discussing this important issue. The region will see LTE commercially launched over the next 12-18 months. However, it is important that spectrum related challenges are openly discussed now than later. For the most part, and contrary to the clichéd belief, sufficient spectrum exists; it just needs to be planned, harmonized, and managed better.

## **C. Digital Dividend (700 MHz, 800 MHz, 900 MHz)**

Digital switchover is the process in which analog television broadcasting will be replaced by digital television broadcasting, making it technically possible to transmit much more information into a radio signal than in the case of analogue technology. Now, multimedia content is driving the need for more spectrums. This is evident from the fact that for broadband services below the 1 GHz range, there is a recurring shortage of required spectrum. Digital dividend spectrum has the inherent potential to penetrate buildings easily, and to cover wide area allowing effective indoor use. The digital dividend will provide opportunity to free up a significant amount of valuable spectrum for 4G networks. Similarly, it could contribute to the SAMENA region's economic activity. The ongoing convergence hold digital dividend spectrum as suitable for the deployment of mobile multimedia services and mobile broadband.

## **D. International Roaming Rates Regulations**

International roaming is a complex and a very special type of service, which requires tremendous investments from operators. It is inherently different from virtually all other types of telecom services. Traditionally, the price of roaming service has been high, which is why, despite its desirability and usefulness, there have always been issues with it, especially with regard to its pricing.

While government regulatory bodies have the authority and the responsibility to create and sustain healthy market competition, and to ensure that reliable and fairly-priced telecoms services are made available to the customers, it is important to realize that all commercial decisions concerning international roaming, or other services, have a major impact on the profitability and survival of telecom operators. An Informa Telecoms & Media survey on global mobile roaming shows that by 2013, as upheld by the majority of telecoms stakeholders and opinion-makers, international roaming contribution to an operator's total revenues would be nearly 15%. The big players in the regional telecom can play a direct and voluntary role in helping create a win-win roaming rates model for

SAMENA region, without unnecessary involvement of the telecom regulatory bodies. To help create such models, SAMEN's SIRG Group has been actively organizing its activities.

## **E. Infrastructure Sharing**

The issue of infrastructure-sharing is being discussed in Brazil, Russia, India and China under the banner of "efficiencies," which include harmonization and reduction in network operational and handset costs. Infrastructure sharing will increasingly be used by operators to reduce capital expenditure (CAPEX) and operating expenditure (OPEX) on backhauls. These trends will create growth opportunities within the BRIC countries as well as in the SAMENA regional markets, wherever infrastructure-sharing has been done or has been planned.

## **F. M-Health**

The integration of mobile phone technology with the medical facilities has enormous potential to promote healthy lifestyles, improve decision-making by health professionals. This convergence will improve the quality of healthcare by improving access to health information among the masses. According to Arthur D. Little, advances in mobile technology have the potential to transform the way healthcare is delivered in both emerging and developed markets, with revenue potential reaching ten billion dollars within five years. Mobile Health services are considered to have the potential to provide considerable health opportunities and new growth opportunities for mobile operators. There are other challenges to be faced as well.

The delivery of health information by SMS and MMS or medical help line that connects mobile phone callers to a healthcare call center can be used to raise awareness and to educate the population. Furthermore, healthcare providers can use Mobile Health services to provide remote diagnosis support to field staff and also to suggest treatments. As a regional example, the Mobile Health Company (MHC), based in Saudi Arabia, is working with several MNOs in the region to provide comprehensive health education by SMS and MMS.

## **G. Broadband Fiber Investments**

In 2009-10, emphasis on broadband began to be placed as many companies made investments into different technologies, to enable broadband proliferation. In markets such as the USA, where full-fledged broadband proliferation programs and monetary support have been put into place (for example, under the label "Broadband Stimulus Package"), the penetration rates are rising exponentially, with speculations of near-to-be-achieved 100% broadband penetration enduring. Within the SAMENA region, at large, the focus toward broadband has been no different; both companies and governments are showing increasing tendency to invest in broadband. However, with the region having less than 4% broadband penetration, despite the existence of most advanced technology footprints, a strong need for enabling policies and policy support exists.

## **H. SAMENA Council Technology & Educational Webinars Program**

SAMENA Council is developing a series of educational Webinars Program; an initiative that aims to promote advocacy and promotion of positive policy change through industry awareness and education. Several of SAMENA Council's members and partners as well as industry stakeholders have shown support for this idea, which will now be executed.

## 9. RECENT SUBMITTALS

### A. SAMENA Council's participation in and support of the ITU-AICTO workshop on IPTV

SAMENA Council addressed the issue of content proliferation and shared thoughts on the regional IPTV scene, while highlighting key policy issues and drawing parallels with SAMENA Council's own policy-support focus for the year 2011-2013.

### B. SAMENA Council's submittal on EU International Roaming Regulation

SAMENA Council's position on international roaming activities around the EU and SAMENA region to which members, provided feedback and inputs—included the recommendation that the placement of abrupt and strict price caps on roaming services should be reduced in volume and period of application. Furthermore, operators should be presented with incentives to ensure their future investments and ROI plans do not get compromised.

### C. SAMENA Council's communication with TRA-Oman on Spectrum Harmonization and Technology & Service Agnostic Licensing

In its consultative communication with TRA-Oman, SAMENA Council expressed that service and technology-agnostic spectrum should be the basis for developing a modern frequency spectrum policy framework in Oman. As a nation already trialing LTE, it may be best to adopt technology and service neutral and spectrum harmonization policies at this nascent stage in 4G infrastructure development in Oman.

### D. SAMENA Council's projection of the Subsea Cable Industry's issues

SAMENA Council successfully lobbied the cable industry's issues in one of its publications, and invited interest of policy-makers around the region. In recognition of this effort, the International Cable Protection Committee has shown willingness to work with SAMENA Council. Formal plan of action for engaging in mutual lobbying efforts is expected to take place in 4Q-2011.

### E. SAMENA Council's submittal on "Network Policing"

In response to Virgin Megastore ME's claims that telecom operators are causing revenue losses to the music industry, SAMENA Council has submitted a 10-point strategic response. The goal of this response was to represent operators and to give a unified voice to their perspective. The SAMENA Council perspective supported the idea of protecting copyrights materials and to help the music industry developed better strategies to protect illegal music downloading. However, SAMENA Council expressed it clearly that operators expend heavy capital to provide bandwidth to support data traffic that they do not necessarily cause themselves. SAMENA Council's position focused on bringing all ICT and music stakeholders together and devise new models to protect intellectual property and to assure revenue-sharing.

## 10. STRATEGIC RESEARCH UPDATES

### A. Public-Private Partnership Study

The study aims to understand different PPP models in use within the region and the world. The aim of the study is to find out which models have a higher success rate in proliferating ICT service within a given market.

### B. Spectrum Harmonization Whitepaper

As part of SAMENA Council's spectrum planning and harmonization initiative, especially with regard to LTE, SAMENA Council's research team has drafted a white paper. The white paper aims to present the rationale for engaging in spectrum harmonization efforts in the region. This effort is in direct support to SAMENA COUNCIL's initiating of a dialogue with regional regulatory bodies, including TRA-Oman.

### C. Foundation Documents

SAMENA Council is developing a series of foundation documents (presentations, supporting documents, and position statements) on subject matter that focuses on broadband, spectrum, digitization, revenue-stream for fixed-line operators, cross-industry and cross-stakeholder co-operation.

### D. Country Sector Reviews

SAMENA Council's strategic research team, SSR, is developing country telecom sector reviews on top-ten priority markets, including the UAE, Pakistan, Qatar, Bahrain, Saudi Arabia, Egypt, among others.

### E. Policy & Regulation Insider

This is one of SAMENA Council's two monthly publications. This e-magazine carries information on regulatory developments from around and beyond the SAMENA region. Active regulatory consultations as well as viewpoints, in line with SAMENA Council's monthly theme, are also presented in the Policy & Regulation Insider.

### F. SAMENA Council TRENDS

What distinguishes SAMENA Council TRENDS from our other newsletters and e-magazine, is its ability to provide a stronger marketing and visibility platform to our members and other regional players.

### G. SAMENA Council strategic research team has defined five **KPIs** of its own, which are unique to SAMENA Council' purposes. These KPIs include: STDI: SAMENA Council Telecom Development Indicator, SPI: SAMENA Council Progress Indicator, STPI: SAMENA Council Technology Progression Indicator, SOPI: SAMENA Council Operator Progression Indicator, SRPI: SAMENA Council Regulatory Performance Indicator. These KPIs will serve SAMENA Council's need to track operator, regional, technology, regulatory progress in the region using its own in-house performance measures. The team is currently formulating and calibrating these KPIs.

## H. SAMENA Council Daily News

Briefing newsletter now carries a much more elaborative set of news, especially on 3G & 4G networks, international roaming developments around the world, Mobile TV & IPTV and Mobile Content. If you are not in receipt of this newsletter due to any technical reason, please write to us and we will arrange for you to receive it separately.

I. Our team is updating the **Research Library** section over the SAMENA Council website, where research information and other inputs from members are archived and maintained.

J. **Hot Topics List**- An updated list of industry issues that is circulated internally (as well as to members on a need-to-know basis).

K. SAMENA Council is also creating a new section, titled **SAMENA Represents**, on the main page of the SAMENA Council Web portal. This section will provide quintessential information about the region, regional subscribers, and other key KPIs of the activities of the regional ICT industry.

L. **Awards KPIs** document- made for SAMENA Council Awards evaluation process. This includes detailed KPIs of the selected, nominated and shortlisted, regulators, vendors, operators, and executives. For the current year, our team has collected its awards data and is currently contacting members and nominees individually to solicit data, which will be presented to the Awards Evaluation Committee.

## 11. ADVOCACY / CONSENSUS BUILDING

Your SAMENA Council has been active on the following fronts, with regard to its policy and lobbying efforts.

1. Net Neutrality
2. International Roaming Regulations
3. Spectrum Harmonization and Efficiencies – Digital Dividend (strategy statement, presentation and letters to telecom regulatory bodies in the region)
4. Telecom Network Policing and Protection of Music Content
5. ICT Sector Review
6. IPTV Standardization and Related Policy Issues
7. Public-Private Partnership (SAMENA Council submittal expected shortly)
8. Spectrum Allocation and Fees (SAMENA Council submittal expected shortly)
9. Internet Sustainability and Content Revenue-Sharing (SAMENA Council – ETNO cooperation program)

## 12. COLLABORATION AND EXTERNAL AFFAIRS

SAMENA Council's strategic exchange and relations-building program focuses on areas of interest to its members and to all the stakeholders of the ICT industry within and outside of the South Asia – Middle East – North Africa region. Immediate areas of interest to SAMENA Council's with other like-minded industry associations from around the world are in congruence with SAMENA Council's strategic objectives for 2011-2013. These objectives revolve around the promotion of digitization and broadband investment-friendly policies, regulations and governance in line with market evolution, and enhancing cooperation among industry stakeholders.

As an operators' industry association, similar to ETNO in the European Union region, US Telecom in the US, for instance, SAMENA Council serves as a source of information, guidance, policy support, and consultation for the ICT industry of South Asia, the Middle East, and North Africa.

SAMENA Council has already conducted a CEO-level event with ETNO to generate dialogue on the need to develop sustainability models for the Internet and to encourage cooperation among OTTPs and telecom operators. Earliest this month, SAMENA Council collaborated with AICTO and ITU to work on IPTV interoperability models and the need to issue pertinent policy issues. Communication with FTTH Council Europe is active and information exchange has already taken place. Soon, in collaboration with FTTH Council, SAMENA Council will issue a submittal on FTTH regulations and ways to incentivize fiber investments. Information exchange with US Telecom is soon expected to lead into the issuance of collaborative statements that defend broadband network operators while creating an industry-wide dialogue on intellectual property protection of digital content owners.

Additionally, SAMENA Council is now enjoying an active working relationship with a number of operators as well as regulatory bodies. SAMENA Council is actively working to develop relationship with the AREGNET for the benefits of the operators. A request for membership to become an observer has been sent to the permanent secretary of the organization.

As a part of its external relation-building program, SAMENA Council's goal is to work in the best interests of the telecoms service providers, establish reference facts.