

Aligning visions to meet the Demands of the Digital World



TELECOM LEADERS' SUMMIT 2017



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Building great co-operation works in the interest of all. For digital development, which demands an unprecedented level of stakeholder co-operation and understanding of stakeholder priorities, stakeholder alignment is critical.

Devoid of alignment of visions, industry dialogues and efforts would be futile. True progress, time savings and operational efficiencies, fulfillment of national as well as international obligations, and the assurance of a viable and sustainable future for both business and socio-economic well-being now rest on the adoption of a collective mindset for setting and addressing digital development priorities.

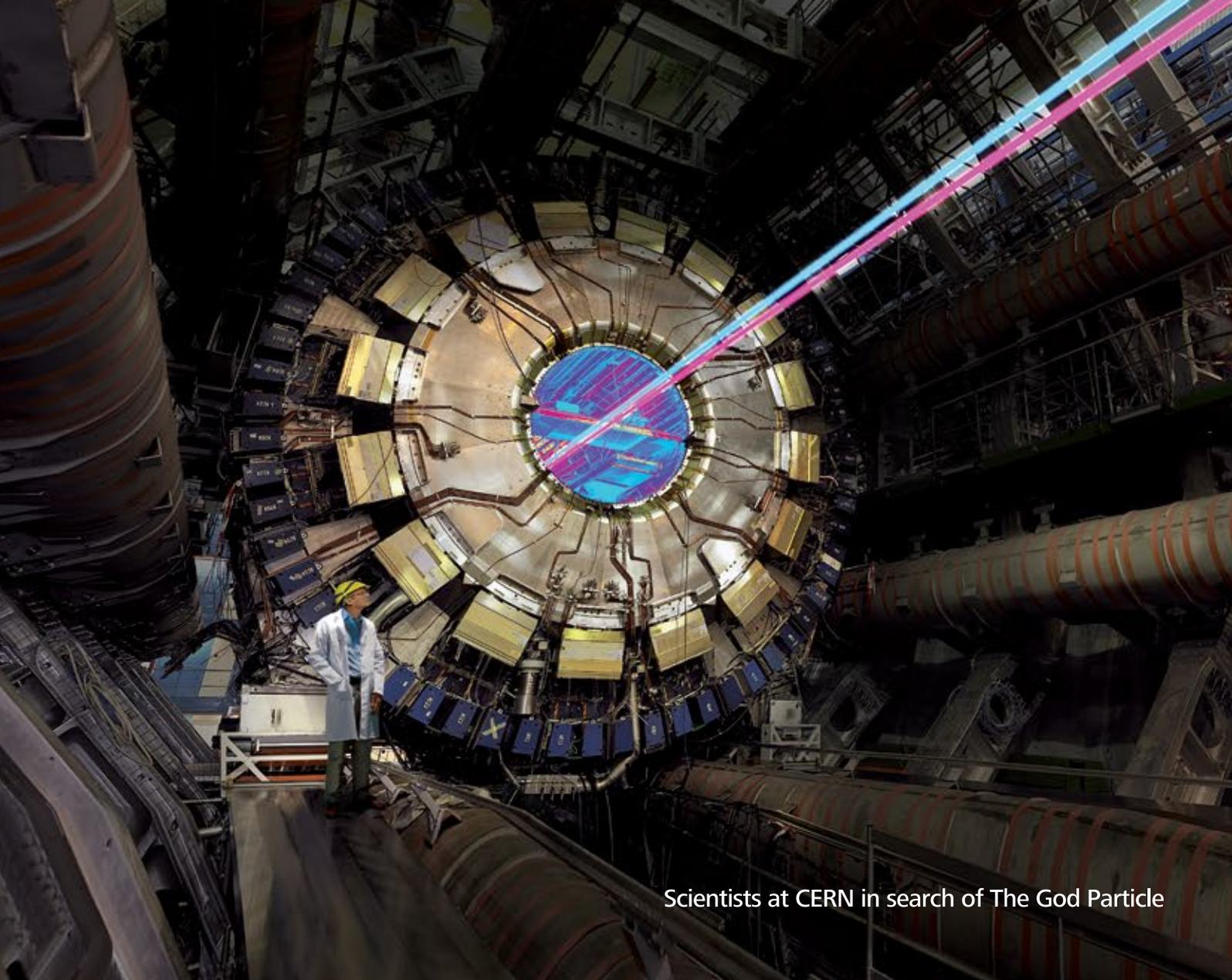
As expected, the need to digitally transform through political will and action and the need to incentivize investment remain top industry priorities. There also

exists a dire need for defining and pin-pointing what the real requirements in this region are, and what region-specific approaches can be adopted through stakeholder co-operation, consensus and common positions on issues, and willingness to achieve much larger, far-reaching digital development goals.

No national digital, or socio-economic, challenges could be overcome without inducing and sustaining mutual benefit for all the stakeholders involved, and guaranteeing their inclusion and understanding varying perspectives.

The digital communication industry, collectively, needs to drive a transformational reset and to define a regulatory paradigm through collaboration among policymakers, regulators, and operators; for which common operator visions and positions are necessary for communication with regulators.

The Leaders' Summit is one of the key instruments used by SAMENA Council to demonstrate its focus on the needs of the private sector, in general, and of telecom operators, in particular, and a means that is serving the industry well in terms of cooperation-building, perspective sharing, and advocating on matters that are important to the well-being and sustainability of the digital ecosystem.



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'Shape the Cloud, Win the Future'

For the fourth consecutive year, Huawei took part in the SAMENA Telecommunications Council Telecom Leaders' Summit, held on 30 April.

Huawei's participation came as part of the company's new strategy 'Shape the Cloud, Win the Future', which seeks to fully streamline infrastructure networks in four areas – equipment, network, services, and operations. Existing networks do not currently meet high capacity, low latency, and massive connection requirements. Building a user-centric mobile network and accelerating service provision is critical.

As such, the strategy aims to create systematic strengths in pooled hardware resources, fully distributed software architecture, and full automation.

During the event, Huawei focused on three activities:

1. Global Connectivity Index (GCI)

On 30 April, Huawei launched the fourth edition of its Global Connectivity Index (GCI) in the Middle East region, a whitepaper that measures how 50 countries are progressing in their digital transformation based on 40 unique indicators that cover five technology enablers: broadband, data centers, cloud, big data and Internet of Things. Investing in these five key technologies enables countries to digitize their economies. Through centralized planning, potential connectivity can be fully leveraged and ICT capabilities can support the positive growth of national economies.

2. Cloud Business Forum

During the sub-forum, Huawei discussed how cloud industry participants can collaborate and learn from one another to build a win-win environment and a better industry atmosphere for all.

To help operators lead in the digital age, Huawei is delivering All Cloud solutions, enabling them to transition to a dynamic, on-demand approach that will allow them to rapidly expand and better meet customer demands. This crucial aspect of cloud

services, and the importance it will play in the coming decade, cannot be underestimated. We forecast that by the year 2025 every company in every industry will employ cloud technology and cloud models, with more than 85% of enterprise applications being deployed on the cloud. There will be 100 billion connections globally, and the penetration rate of industrial intelligence will exceed 20%.

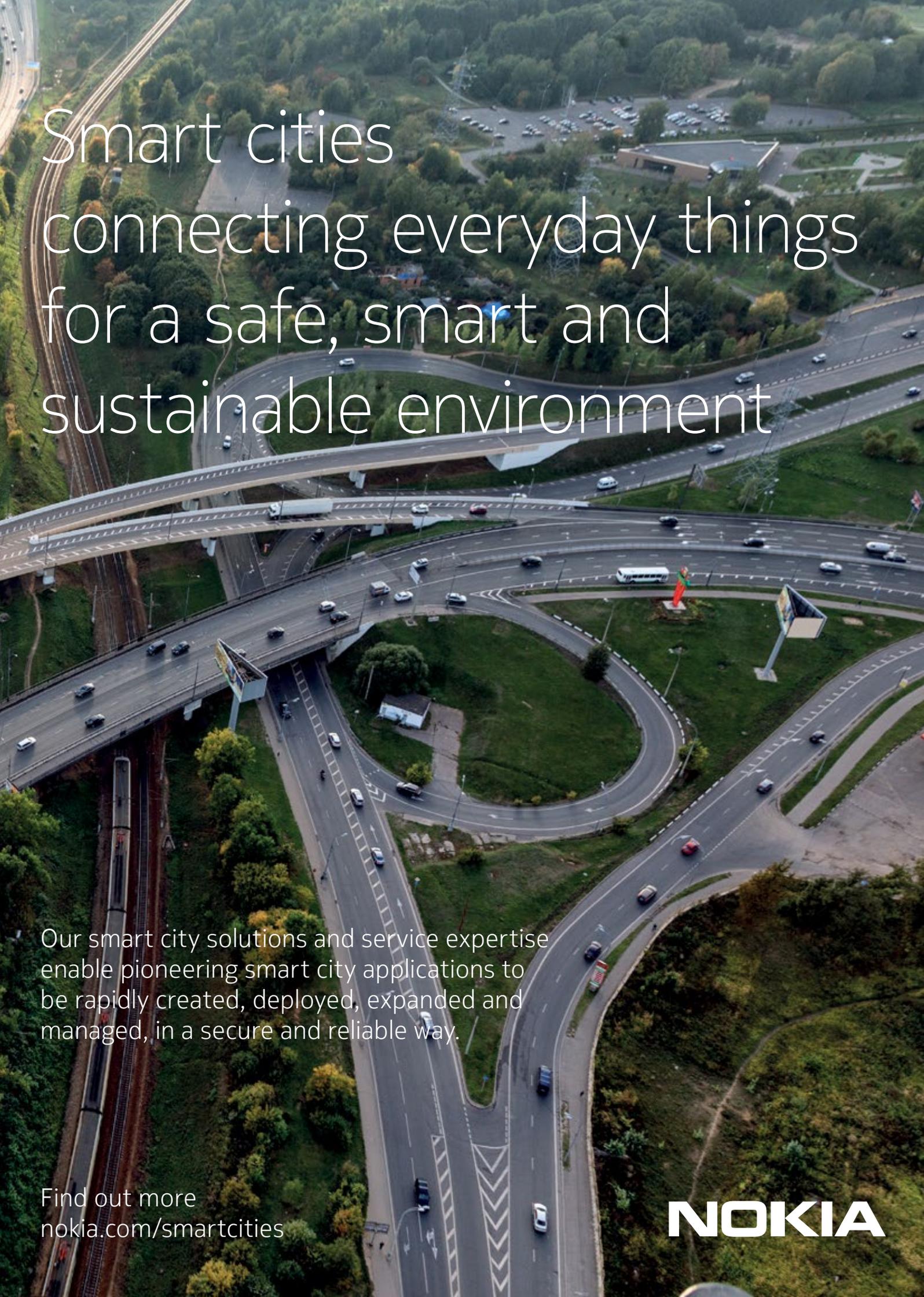
3. Ultra-Broadband (UBB) Summit

The UBB Summit highlighted growth opportunities for telcos in the video sphere brought about by the implementation of ultra-broadband networks, and allowed Huawei to highlight how it will enable telco's video business in many ways.

Ultra-broadband speeds are inextricably linked to user experience, particularly in the burgeoning area of video. In turn, user experience improvement continues to drive increases in operator broadband revenue and profits. Here we see advances in HD/4K and CloudOptix, which enables high-speed data traffic over long distances with low latency.

As part of its participation in the event, Huawei displayed its latest technologies in three different zones: Network Cloudification, which showcased Data Center, SDN/NFV, 5G, WTTx and Ultra Broadband network; Business Cloudification, including industry cloud, IoT and video; and Operation Cloudification, which featured big data, CEM (SOC), and data transformation.

To support digital transformation and Huawei's vision is to build a Better-Connected World, the company remains customer-centric, focused on ICT infrastructure and provide innovative cloud technology. Through this process, we will strive to become a preferred partner that enables digital and cloud transformation, while actively contributing to the cloud ecosystem through openness, collaboration, and shared success.



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SALT MEETING

All bi-lateral meetings held during the Leaders' Summit followed the Chatham House Rule. In compliance with the Rule, the following information is being selectively outlined below, without disclosing the identities of the speakers:

This meeting among telecom operators, regulators, and technology providers (as observers) commenced with a brief background on the objectives and rationale for the SALT meeting - which was to bring stakeholders together, and how operators and regulators need to be aligned on priorities and common positions.

During the meeting, a strong positive message was sent by one of the regulators by attributing their own success to the success of the operators. From the operators' side, it was reiterated that operators too have all the intentions to assist regulatory authorities and to precisely identify what is needed, so that specific issues can be handled and progress could be reported on them in subsequent meetings of SALT. It was discussed that there is a need

to adapt quickly and that operators have to practice consistency in matters of revenue generation, spectrum, and network evolution; deemed to be key working points for starting a collaborative engagement with regulators. Digital services, data regulation, spectrum, and industry fees were mentioned as the priorities that the industry needs to address.

The meeting discussion heavily focused on the need to (1) innovate, (2) to think and work together on the key market offering (data), and (3) that operator will put together coherent narratives, policy papers and common positions and views to help the regulator to devise effective regulatory frameworks.



“Leader Summit organized by SAMENA Council is an excellent opportunity for the sector members to meet and discuss the common issues affecting/ influencing the ICT sector with a view to positively impact the sector”

H.E. Dr. Hamed Salim Al-Rawahi
Executive President, TRA, Oman



“The summit was very fruitful and it felt so good of taking inputs from the top regional ICT experts/leaders who shared values towards digitalization in addition to the great knowledge participated by top ICT & Digital companies through exhibition.

I wish that through diversified idea and time-to-time changes, we can achieve more success in the future and revitalize potential business in this modern age”

Dr. Khaled Biyari
Group CEO, STC, KSA



OPERATOR & INTERNET APPLICATION DEVELOPER MEETING

Industry stakeholders were presented the Facebook Inclusive Internet Index. Facebook provided the Index's background, the key objectives, data collection methodology by EIU (Economist Intelligence Unit), number of countries included in the analysis (highlighting that this is the "zero or beta version") and that several additions and changes will be made for the 2018 version, number of metrics considered, highlighting the 4 key Internet inclusion factors, key findings per region along with a detailed breakdown to show those countries included from the MENA region. MENA stands 5th in terms of overall ranking based on 75 countries of data collected. An in-depth analysis for 6 MENA countries and for Turkey and Pakistan was shown. Each country included in the Index within MENA region was ranked, highlighting each

countries' respective strengths, weaknesses and the areas of improvement. The ranking comprises number of key indicators including coverage by technology (2G, 3G and 4G), latency, upload and download speed, local content development, accessibility of internet by women, and Internet and mobile penetration rates.

Facebook also presented and compared the key characteristics that the old telecom model and the new digital ecosystem are based on and highlighted the need for change to further and advance transformation and value creation. Policies and co-operation approaches than can help develop an inclusive Internet and incentivize investment should be pursued, and that factors that influence investment should be clearly understood.



"This Summit provided useful insights into the current and future state of the sector. Apart from the excellent networking opportunities, it was very beneficial to share and discuss ideas on emerging issues with regulators, suppliers and policy makers all in one event that was extremely well organized by SAMENA."

Reem AlBuainain

Chief of International Telecommunications Affairs, Ministry of Transportation and Telecommunications, Bahrain



"A brilliant gathering of industry leaders. Thanks for the great organization."

Mr. Paul Doany

CEO and Board Member, Turk Telekom Group



TERRESTRIAL & SATELLITE OPERATOR MEETING

This meeting was held to explore the possibility of developing terrestrial and satellite co-operation, at a strategic level. It was felt that 5G offered new opportunities for joint satellite and terrestrial integrated solutions that would be of benefit to both parties. It was recognised that spectrum is an important issue and that it was vital to the services of both terrestrial and satellite offer. As the industry is aware, the importance of spectrum as a scarce resource to both industries has led to tensions in the past, for example during WRC-15. It was thus felt that both parties have an interest in trying to avoid or minimise such tensions surrounding spectrum. It was recognised that if both satellite and terrestrial could present a common or unified position to regulators regarding issues such as spectrum that would be beneficial to all.

It was recognised that if we adopt a “top down approach “ i.e. strategic approach it would be easier to resolve potential conflicts. A strategic approach would be one that looks at the high level commercial opportunities that could be had from joint terrestrial and satellite services, such as IoT, M2M, rural coverage, etc. Thus it was agreed that a vision paper looking at the positive aspects of joint satellite and terrestrial business opportunities should be developed to help foster closer cooperation between the two parties. It was agreed that the satellite side should first develop this paper, for mobile operators to comment on. It was also agreed that a smaller group of stakeholders should work offline to develop specific milestones for the issues raised.



“The SAMENA Leaders’ Summit 2017 shows once again SAMENA’s convening power. The event was very well attended by regulators, telecom operators, satellite operators, equipment manufacturers, and others who are part of this dynamic industry.”

Dr. Kamal Shehadi

Chief Legal and Regulatory Officer, Etisalat International, UAE



“We firmly believe in the power of collaboration with industry peers, not only to overcome challenges that the satellite community is facing but also to work together to pursue innovation and development in this field. SAMENA Council’s Telecom Leaders’ Summit is a good platform for us to engage in knowledge exchange and stimulating discussions. Yahsat is at the cutting edge of the UAE’s space ambitions and we look forward to continue working with industry partners to enhance satellite communications and facilitate socio-economic growth across different regions.”

Mr. Masood M. Sharif Mahmood

CEO, Yahsat





H.H. Sheikh Nahyan bin Mubarak Al Nahyan

Cabinet Member and Minister of Culture and Knowledge Development
United Arab Emirates



UNITED ARAB EMIRATES
MINISTRY OF CULTURE &
KNOWLEDGE DEVELOPMENT

The UAE is a country that shares the interests and aspirations of the SAMENA Telecommunications Council.

The Council has declared that it is in pursuit of broadband investment-friendly policies, futuristic regulations and good governance, analyzing and encouraging the adoption of digital services, and promoting the need to collaborate and work together, to mutually address issues that drive business strategies and investment decisions for ensuring a sustainable future.

The agenda of the Leaders' Summit 2017 verifies that the pursuit of such worthy goals continues to be your aim. It must be the case that your underlying and uniting passion is the creation of a wholly digital world with all human beings digitally connected and empowered – a digital world that is secure, capable of meeting present and future needs, committed to satisfying international standards, and ready to promote community engagement and support. I am confident that most of the global population welcomes your efforts.

Today, we all welcome, with confidence and resolve, a totally connected world. Endeavors that have long recognized and depended on the swift exchange of information, that is, research, business and investments, re-engineering and transformation of most human activities, and keeping pace with global developments and innovations gain efficiency and power with every new person added to the internet.

We in the United Arab Emirates share that view with all of you. In our forty-five years as a nation we have purposefully become a member of the global society and have moved perhaps most zealously to develop our technological capacity. Under the wise leadership of the President, Sheikh Khalifa bin Zayed Al Nahayan, our country continues to value technological competence, especially as it supports education, business and finance, a sustainable environment, and an innovative, productive, and prosperous society. Reinforced by the leadership of the Vice President, His Highness Sheikh Mohammed bin Rashid Al-Maktoum, and His Highness Sheikh Mohammed bin Zayed al Nahayan, Crown Prince of Abu Dhabi and Deputy Supreme Commander of the Armed

Forces, His Highness Sheikh Khalifa presides over a country deeply enmeshed in technological networks, a country taking full advantage of the possibilities of all digital developments. Dedicated to building and sustaining a knowledge society, we fully understand that we must enhance our national capacity to meet the demands of the digital world.

All of you are familiar with the fifteen declarations regarding the internet endorsed last year by the Human Rights Council of the United Nations, which:

- Recognizes the global and open nature of the Internet as a driving force in accelerating progress towards development in its various forms....
- Calls upon all states to promote and facilitate international co-operation aimed at the development of media and information and communication facilities and technologies in all countries.
- Affirms that quality education plays a decisive role in development, and therefore calls upon all States to promote digital literacy and to facilitate access to information on the Internet, which can be an important tool in facilitating the promotion of the right to education.
- The UN in effect supports the actions of the SAMENA Telecommunications Council. The UN is not alone in bolstering your goals.

Some of you may recall my mentioning last year the Global Connect Initiative organized by the United States Department of State. Stemming from the conviction voiced by the Secretary of State that "the internet is essential to economic prosperity in the twenty-first century," an Alliance for Affordable Internet was established. It is an international alliance in which the SAMENA Telecommunications Council might well be quite comfortable. In its recently issued status report, the Alliance asserts that the current rate of progress in bringing disconnected people on line will not achieve the Sustainable Development Goal set by the United Nations, that is, affordable, internet access for everyone by 2020. The Alliance points out that without urgent policy action, we will miss that target by over twenty years.

We are all, quite naturally, most focused on policies, practices, and progress within our own national borders. But in our MENA region, telecommunications leaders know that our concerns must extend as well beyond our borders. We cooperate with others in our best interests. That is the view of His Highness the President, Sheikh Khalifa bin Zayed Al-Nahayan: "We are guided in our international relations by the principles of co-operation and openness towards others."

That measured, non-threatening international stance implicitly aligns with the position of the World Bank in its report titled "Digital Dividends." The report deals

with virtually all matters pertinent to the SAMENA Telecommunications Council. The authors held consultations in some of the countries in our region, including the UAE. The report notes the fundamental need to increase internet access, but looks beyond the challenge of connectivity. It identifies three significant risks that groups like [SAMENA Council] must work to mitigate to ensure a productive future. It states that:

1. Vested business interests, regulatory uncertainty, and limited contestation across digital platforms could lead to harmful concentration in many sectors.
2. Quickly expanding automation, even of mid-level office jobs, could contribute to a hollowing out of labor markets and to rising inequality.
3. The risk that states and corporations could use digital technologies to control citizens, not to empower them.

The World Bank advocates a three-pronged approach to addressing those problems. It says that digital investments need support in these matters:

4. Regulations, so that firms can leverage the internet to compete and innovate.
5. Skills, so that people can take full advantage of digital opportunities.
6. Institutions, so that governments respond to citizens' needs and demands.

The Bank adds that digital technologies can, in turn, augment and strengthen efforts in regard to regulations, skills, and institutions and therefore accelerate the pace of development. That development is critical to the well-being of every country represented at this Summit.

You, leaders, are a prominent element of the global forces that hold the future of civilization in your hands. We are in the midst of a transformation even greater than that of the industrial revolution. Not only does everyone need to use the internet. Influential leaders—and you exert gigantic influence—must deal humanely and effectively with the effects of everyone using the internet and must think in the broadest possible terms about the role of technology infrastructures in our societies. Just a few days ago Jack Ma of Alibaba echoed the World Bank's concern about the labor market when he declared that in the next thirty years the world will see much more pain than happiness as a result of job disruptions caused by the internet. In other words, you are helping to move us all into what is fated to be a confusing, conflicted, and uncertain future. **Your foresight and wisdom are needed to help make that transition more inclusive and less disruptive for everyone.** I am grateful that you are taking your responsibilities seriously as evidenced by this forward-thinking Leaders' Summit.

Thank you for your concern about the sustainable future of civilization.



ERICSSON

IT'S A BIG SMALL WORLD

Away from home you're not alone. It's about making two people on two different continents feel like they are in the same room. And that begins with the people who connect almost half the population on this planet of ours.



We have showcased Ericsson's commitment to the Global Sustainable Development Goals, set to achieve three extraordinary things in the next 15 years:

- End extreme poverty
- Fight inequality and injustice
- Halt climate change

We have adopted the SDGs as the framework for measuring our impact on society. By embedding Sustainability and CR into our business, we have a strong platform for continued progress and positive impact.

The role of the private sector to advance sustainable development is increasingly evident. As a member of the Business & Sustainable Development Commission we work to highlight the role of the private sector in achieving the SDGs. In the report "Better Business, Better World" new research from the Commission shows pursuing 60 sustainable and inclusive market "hotspots" in just four key areas (energy; cities; food and agriculture; health and wellbeing) could create at least USD \$12 trillion in business value by 2030 – equivalent to 10% of forecast GDP – and generate up to 380 million jobs, mostly in developing countries.

Achieving the SDGs will require leveraging existing and widely deployed technologies, such as broadband, but also new innovative services and the improved reach of technological solutions. This was underscored in our 2016 report, "ICT & SDGs: How Information and Communications Technology Can Accelerate Action on the Sustainable Development Goals," published in collaboration with the Earth Institute at Columbia University, GSMA and ITU. As the fastest and most global technology uptake in history, mobile broadband has the potential to positively impact all of the 17 SDGs.

With Partnership for the Goals (SDG 17) at the heart of the Sustainable Development Goals, we take a proactive leadership role in a number of high-level fora and collaborate with a wide range of stakeholders to scale the impact of our advocacy efforts.

Read examples of how Ericsson technology, advocacy, innovation and expertise are helping to achieve each one of the Sustainable Development Goals: <https://www.ericsson.com/en/about-us/sustainability-and-corporate-responsibility/sustainable-development-goals>





Dr. Khaled Biyari
Group CEO
Saudi Telecom Company



We are continuing to witness, catalyze, and experience trans-formation within the industry, in telecoms technology, in socio-economic landscapes, and as human society.

To a significant extent, what we will achieve tomorrow as digital communications service providers will be determined by our own digital transformation, our ability to achieve agility in our decision-making, flexibility in our business expectations, capability to promptly react, preparedness in meeting cost efficiency requirements, and determining our next growth streams. All this will require embracing Digital across the entirety of our businesses.

For us to open new possibilities in the world of digital communications for ourselves, for our valued customers, and for the government-sector stakeholders -- whose closeness, willingness, and collaboration with us is required more than ever before to meet common goals -- we need to understand ourselves and facilitate other stakeholders' understanding of the depth of real challenge and issues, and adopt technologies, seek best practices, and continually gain insights from experiences that others have created for us.

As the enablers of the digital economy, telecom operators have made among the most foundational contributions toward the society's ability to create and experience new possibilities. Telecom operators need to continue doing that, and they have two choices in being able to do so: One, to evolve and become truly digital companies, with full preparedness to capture the true value of digital; or, two, walk the utility path.

Growth and value centers across the world's digital economies will be created on transformations in the wake of technology disruptions. The digital communications industry needs to equip itself to drive such growth and value creation and remain at the heart of such transformative trends.

Our visions of the future during these digitization-driven times necessitate our alignment with realities, priorities, and visions of others. This is a key determinant of progress in digital development.



Mr. Charles Yang

President
Huawei Middle East



Building the Digital Ecosystem Shape the Cloud, Win the Future

As new technologies emerge to drive a high-quality user experience, the ICT and telecoms industries are at a crucial stage of digital transformation.

Reflecting our ambition to support knowledge-based economies and drive the development of the telecoms industry, Huawei is, for the fourth consecutive year, participating at the SAMENA Telecommunications Council Telecom Leaders' Summit that was held on 30 April. The event has become the seminal conference for private and government sector leaders and influencers in the telecommunications industry across South Asia, the Middle East, North Africa, Asia, Europe and beyond.

As a company, we have long advocated the cooperation of a Win-Win Ecosystem to take the digital transformation forward. We have a vision of Building A Better Connected World. We believe our ROADS strategy (Real-time, On-demand, All-online, DIY (do-it-yourself), and Social) addresses the digital transformation future requirements and the new growth objective of operators and other sectors and industries. This is simply because we have built the ROADS strategy on four key pillars; Maximizing Network Value, All-Cloud Network, Cloud-Enabled Digital Operations, and Cloud-Powered Digital Services.

At the SAMENA Telecommunications Council Telecom Leaders' Summit Huawei sets three activities, first is a conference to discuss the Huawei Global Connectivity Index (GCI), The index serves as an

indicator of which countries are best poised for development and growth, and an ICT planning reference for policymakers looking to embrace the digital economy. Second is the 'Cloud Business Forum' to discuss how cloud industry participants can collaborate and learn from one another to build a win-win world and a better industry environment for all. Third is the 'Ultra-Broadband Summit', which will highlight growth opportunities for telcos in the video sphere that are brought on by the implementation of ultra-broadband networks, and how Huawei will Enable Telco's video business in many ways.

To help operators lead in the digital age, Huawei is delivering All Cloud solutions, enabling them to transform to a dynamic and on-demand approach that will allow them to rapidly expand and meet customer demands. The crucial aspect of the cloud, and the importance it will play in the coming decade, cannot be underestimated. We forecast that, by the year 2025, every industry and company will employ cloud technology and cloud models, and more than 85% of enterprise applications will be deployed on the cloud. There will be 100 billion connections globally, and the penetration rate of industrial intelligence will exceed 20%.

At the core of 'Shape the Cloud, Win the Future' is the full reconstruction of infrastructure networks in four respects – equipment, network, services, and operations. The strategy aims to create systematic strengths in pooled hardware resources, fully distributed software architecture, and full automation. Huawei has established more than 10 open labs worldwide for joint innovation and rapid commercial deployment of services.

To support digital transformation and Huawei's vision is to build a Better-Connected World, we will continue to stay customer-centric, focus on ICT infrastructure, and provide innovative cloud technology. Through this process, we will strive to become a preferred partner that enables digital and cloud transformation, while actively contributing to the cloud ecosystem through openness, collaboration, and shared success.

Telecom Leaders' Summit 2017

Digital Communications Industry and the Demands of the Digital World



collaboration imperatives for shaping the future of the digital marketplace.

The South Asia, Middle East and North Africa (SAMENA) region's most prestigious annual ICT leadership event, the SAMENA Telecommunications Council's Leaders' Summit, held in partnership with Huawei Middle East, sponsored by Nokia, Ericsson, du and Etisalat, and with the patronage of Telecommunication Regulatory Authority (TRA) of the UAE, took the dialogue on industry imperatives to the next level and reminded the industry to set new aspirations and counter challenges, in order to realize the required changes within the industry.

The Summit, honored by the presence and keynote address of the UAE's Minister of Culture and Knowledge Development, HH Sheikh Nahyan bin Mubarak Al Nahyan, SAMENA Council's Guest of Honor in the Leaders' Summit, emphasized to industry stakeholders of the digital communications industry that connectivity for everyone is a basic human right and it is exponentially transforming from being physical to virtual. It was reiterated that digital is the new way of life, and thus the industry must work tirelessly, driven by innovation and co-operation, to capture its true value, develop new pricings systems and do everything in its collective power to connect everyone to the Internet; with the aim of eliminating digital divides, which still persist and may still be growing, despite high rate of adoption of connectivity services and investment by telecom operators. The industry must also work collaboratively to go beyond connecting people to promoting the usefulness and the relevance of digital communications in the evolving human society.

To enable effective digital transformation and accelerate digitization, the digital communications industry requires a makeover, including a revamp of current regulatory regimes; operator business models; and multi-stakeholder approaches that should be sector-agnostic and collaborative. Understanding challenges of the digital economy and the stakeholders' need for aligning visions to meet the demands of the digital world are new





Core discussions of the Summit focused on the use of new digital communication technologies, such as cloud-based communications and network virtualization, to transform the operating model, environment, infrastructure, commercial approaches within the industry, policy and regulatory frameworks, and cooperation-building among technology providers, telecom operators, and government bodies to realize accelerated pace of digitization. With the purpose of aligning the industry stakeholders on the creation and provision of digital services, the discussions also invited attention on reducing costs, increasing flexibility to deliver new digital services through cloud for a better customer experience, meeting policy efficacy and regulatory efficiency requirements for facilitating fair and healthy business practices, and creating open digital platforms.

Some of the key messages from the panel discussions included following:

- The industry must transform to share in the value of the new digital world through collaboration in building and sharing infrastructure; diversifying into content

and other sectors, including healthcare and education; embracing IoT to stimulate increased network use and moving into analytics; and applying new business models, including the advertising model.

- Operators need to take a critical look at their internal operations and structures and re-evaluate their position in the ecosystem.
- Refreshed thinking of subscription model is needed; but unlimited data packages do not make business sense.
- Regulators and governments must be more technically proficient and should enable growth in network use.
- There should be general data protection regimes or laws, as they incentivize operators. Such laws, however, should not be sector-specific. Broader, general data protection is most desirable.
- Regulations should be ex-post, not ex-ante. Sector-specific regulation is not desired.

Industry stakeholders attending the Leaders' Summit also took part in exclusive bi-lateral stakeholder meetings, organized by SAMENA Council on a "by-invitation-only" basis.

The SAMENA Council's Leaders' Roundtable (SALT) meeting focused on the current state of the digital ecosystem and how it requires open and flexible and technology neutral governance models that should facilitate innovation, competition and local and regional value-creation through investment, while protecting consumers. While the meeting was held under the Chatham House Rule, the underlying objective of the discussion was to drive a transformational reset and to define a regulatory paradigm through collaboration among policymakers, regulators, and operators; for which common operator visions and positions are necessary for communication with regulators. Similarly, the bilateral meeting held between telecom operators and Internet applications and content providers focused on the





need for developing symbiotic relationships, given that there are opportunities and goals, which are common to both, and challenges that both view differently, with varying perspectives. A new Inclusive Internet Index was presented by Facebook, with publically accessible data. The index promises new possibilities in stakeholder co-operation by using new findings and insights on where Internet is and is not being accessed and the factors contributing to this lack of access and adoption. Held also was a bi-lateral meeting among terrestrial and satellite operators, with the purpose of bringing together both industries to develop a minimum common agenda, move forward together, and to explore new opportunities that exist for both.

Moderators and speakers of the Summit and its bi-lateral meetings included Mr. Phillipe Defraigne - Director - Cullen International, Mr. Bahjat El Darwiche - Partner, Strategy &, Dr. Andrew Arowojolu - Group Regulatory Division Zain Group, Sh. Nasser Bin Mohamed Al Khalifa - Deputy General Director - TRA Bahrain, Dr. Kamal Shehadi - Chief Legal & Regulatory Officer - Etisalat International, Mr. Karan Ponnudurai - Chief Digital Officer - Batelco Group, Dr. Ismail Shah - Chairman - PTA Pakistan, Mr. Eric Loeb - Senior Vice President - AT&T, Mr. Noel Kirkaldy - Business Development, Public Sector, Advanced Mobile Network Solutions - Nokia, Mr. Jawad Abbassi - Head of

MENA GSMA, Mr. Chua Ghim Sim - VP IT America Branch Huawei, Dr. Mohammed Altamimi - Director of Service Providers Affairs Competition & Legal Dep - CITC, Mr. Indranil Das - Vice President, Head of IT& Cloud, Region Middle East - Ericsson, and from SAMENA Council Ms. Imme Philbeck, Dr. Mustafa Aykut, Mr. Roberto Ercole, and Mr. Izhar Ahmad, who provided initial roadmap of the discussions.

An annual collaborative and communication-centric industry-wide experience, Telecom Leaders' Summit is created by SAMENA Telecommunications Council for the leaders of the public and private sectors of South Asia, the Middle East, North Africa, Asia, Europe and beyond.



TELECOM LEADERS' SUMMIT 2017

30th April 2017

Atlantis, The Palm - Dubai, UAE



ALIGNING VISIONS TO MEET THE DEMANDS OF THE DIGITAL WORLD



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مسابقة المهارات العالمية أبوظبي 2017



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The 44th WorldSkills Competition comes to Abu Dhabi this October

Held under the patronage of H.H. Sheikh Mohamed bin Zayed Al Nahyan, Crown Prince of Abu Dhabi and Deputy Supreme Commander of the UAE Armed Forces, WorldSkills Abu Dhabi 2017 represents a number of firsts. It is the first time the Competition will be held in the Middle East and North Africa (MENA) region, the first time in an Arabic speaking country, and it will have a record number of competitors.

WorldSkills is the global hub for skills excellence and development. From October 15-18, 2017 over 1,300 young people in teams representing the 77 Member countries and regions of WorldSkills International will compete for the gold, silver and bronze medals that will mark them as Champions in their chosen field of excellence.

WorldSkills Abu Dhabi 2017 hopes that young people will be inspired to choose vocational skills as a career opportunity.

In addition to being the greatest skills competition, WorldSkills is a unique opportunity for all the countries and regions that participate to benchmark their vocational education and training systems. The 20 largest economies in the world are Members of WorldSkills, which includes the five most populous nations.

The skill competitions at WorldSkills Abu Dhabi 2017 presented by Samsung are a celebration of excellence and a unique opportunity to share knowledge. Young people from around the world will gather in Abu Dhabi

to compete in 51 different skill categories ranging from aircraft engineering and mobile robotics, to cooking, floristry, and 3D digital design.

This October will mark the 44th edition of skills world championships. The first was held in Madrid in 1950 and since then it has grown to become a major international event, held every two years in a different host city.

Around 100,000 visitors—with an emphasis on young Emiratis—are expected to visit the competition, and also learn and try many of the skills themselves in hands-on activities.

The competition underlines the UAE Government's commitment to vocational education and training, and to build a diversified post-oil economy in line with UAE Vision 2021 and the Abu Dhabi Plan.

The Abu Dhabi Centre for Technical and Vocational Education and Training (ACTVET) is the host of WorldSkills Abu Dhabi 2017 presented by Samsung and the parent organisation of EmiratesSkills. The event will be a landmark for the United Arab Emirates and will boost awareness of training and educational opportunities for young UAE nationals in the vocational sector.

ACTVET's ultimate goal is increasing the number of skilled Emirati youths in rewarding career paths and foster lifelong learning and personal development.



Enabling the digital economy through digital services and advanced digital technologies - LEO satellites to change the world

In his presentation, Mr. Ted Matsumoto (Softbank Corp.) discussed the role of OneWeb Solutions, a Softbank-owned subsidiary, in expanding satellite coverage and connecting the unconnected by 2021-2022.

- OneWeb Solution will be the provider of a Low Earth Orbit Satellite system, which will cover the entire planet and will play an instrumental role in countering digital divide. OneWeb solution also aims to address the current problems of the service operators such as High speed backhaul requirements, Optical fiber availability, O&M cost of terrestrial radio system and GEO Satellite requirement to have big dish for 2-way communication.
- Nearly US\$500 million have been pledged for this purpose by leading contributors, including Qualcomm (17.27%); Airbus Group (11.43%); Virgin Group (9.94%); Bharti Airtel Group (6.92%); Hughes - EchoStar (3.46%); Coca-Cola Company (1.73%); Grupo SALINAS (1.73%); Intelsat (1.73%).
- OneWeb aims to deploy 882 satellites in various stages to provide the required coverage, also catering to mobile and fixed-line markets through direct and indirect channels. The satellite system will also positively impact the state of business for Aeronautical and Maritime, Land Vehicles, Mobile Operators BTS Backhaul, Government and Public Sector, and fixed service providers to consumers and businesses.
- OneWeb anticipates playing a collaborative role in bringing digital services and robust connectivity to its intended users in co-operation with terrestrial operators in all the countries.



Recognizing the Leaders' Summit as an important platform for the digital communications industry during his speech, HE Hamad Obaid Al Mansoori, TRA-UAE's Director General stated that: "We are on the threshold of a big transformation. The Internet of Humans is evolving into the Internet of Things. The world is witnessing an explosive boom in artificial intelligence and connectivity of devices and objects. By 2020, billions of interconnected robots, devices and data sources will make humanity enter an era of unprecedented features and relations. One of the funny predictions of Gartner is that by 2020/, the average person will have more conversations with robots than with their spouses. Therefore, numbers of such flowing data exchanged among devices will be astronomical and unprecedented. Words like 'Zettabyte' will be a widely used term then."

TRA DG also participated in two of the aforementioned bi-lateral stakeholder meetings, set up by SAMENA Council as a part of its continuous co-operation and coordination-building efforts among industry stakeholders from within and beyond the SAMENA region.

H.E. Hamad Obaid Al Mansoori
Director General, TRA, UAE



The SAMENA Telecommunication Council plays a vital role in advancing the industry in the region. By bringing together various stakeholders, including decision- and policy makers, thought-leaders and industry experts from both the public and private sector, the Council helps define a roadmap for sector growth and address challenges facing the ICT industry, in addition to highlighting development opportunities.

As a leading ICT solutions provider and a key player in advancing the industry, both regionally and globally, Huawei is proud to be an active member in the SAMENA Council, as well as being a strategic partner for the Council and the industry's most successful events, the SAMENA Telecom Leaders' Summit. This allows us to openly interact with more industry players to build a sustainable ICT ecosystem and forge ahead with region's digital transformation agenda, in addition to playing a more active role in shaping the future of the ICT sector in one of the world's most populated areas.

We look forward to further strengthening our relationship with the SAMENA Telecommunications Council and its members, to drive forward ICT development in the region and build a better connect world.

Mr. Charles Yang
President, Huawei Middle East



Policies for an Inclusive Internet

Inclusive Internet Index: Focus on Middle East & North Africa (MENA)

In his presentation, Dr. Robert Pepper (Facebook) presented an analysis on the state of inclusiveness of the Internet.



- Facebook has developed a new index, which provides insights into how the Internet is being accessed, and which can help identify areas and imperatives for operators and internet application providers to collaborate, especially from the perspectives of Availability, Affordability, Readiness, Relevance. Several additions and changes will be made for the 2018 version and the number of metrics considered.
- There is a dire need for change to further and advance transformation and value-creation. Also needed are new frameworks that support innovation, investment, competition and new business models, which should help realign economics with incentives, complexity, and competition. This means, on the Supply side required are policies (not just regulation) that lower costs, speed deployment—e.g., more spectrum/reduce cost/flexibility. On the Demand side, desired are policies that foster relevance and readiness; e.g., local/relevant content/language, e-Gov services.
- Industry stakeholders should really be focused on developing symbiotic relationships, telecom infrastructure, partnering on infrastructure projects to lower costs, and finding common ground for mutually beneficial business models.





"A great conference with highest level of key stakeholders in attendance. I really liked the key notes and the panel discussions. It also provided an excellent opportunity for networking."

H.E. Dr. S. Ismail Shah, PhD
Chairman, PTA, Pakistan



Pakistan Telecommunication Authority





du showcases Media Cloud Services at the event

UAE-based telecommunications service provider had a successful presence at the SAMENA Telecom Leaders' Summit, held on 30 April this year as a Sponsor. "The telecom sector regionally is undergoing massive changes in general, Digitalisation particularly holds an important key to the continued success of this vital sector. We are proud to collaborate with SAMENA Council to find engaging new ways to bolster public-private co-operation and new, refreshing ways to work together and making this digital transformation possible," said CEO of du, Osman Sultan. "As an active member of SAMENA, du will share its experiences on digital implementation, particularly from the cloud communications perspective", he added.

During the event, du showcased media cloud portfolio of solutions – an important ingredient to drive digital transformation of the media industry. These Cloud-based solutions enable broadcasters, content producers and content providers to benefit from the flexibility of the Cloud. du's new and existing customers can use Media Cloud to rapidly develop and deploy broadcast and

content services across the Middle East. du was the first telecommunications provider in the region to launch end-to-end Media Cloud Services. du's Media Cloud based solution improves performance while simplifying media management for TV stations and other media producers and broadcasters. The solution enables the Media Industry to experience the video production and broadcast environment to which they've become accustomed, with increased flexibility, ease of use and accessibility.

du Media Cloud translates into carefully designed suites, to address media houses specific needs and objectives. Businesses that opt for the service from du will benefit from convenient monthly payment structure and round the clock local support governed by strict service level agreements (SLAs).

Media Cloud Services is delivered through the du Media Cloud platform hosted in the United Arab Emirates (UAE) and can leverage customers' existing Infrastructure in line with requirements and internal policies.



TESTIMONIALS



"The SAMENA Leaders Summit 2017 is a vital gathering to foster close working collaboration with telecom leaders in the region, through transparent communications and open dialogue, in order to formulate creative solutions that address the specific telecom needs of customers."

Eng. Salman Bin Abdul Aziz Al Badran
CEO, VIVA Telecom, Kuwait



"The ongoing work of SAMENA to shape the digital world of tomorrow remains vital, and Ooredoo Group is honored to contribute to its progress through important events such as the Telecom Leaders Summit 2017. The region is indeed on the threshold of a big digital transformation, one best supported by the alignment of visions, which is why SAMENA's mission and purpose is so critical to Ooredoo's own success. As the region's data experience leader, we eagerly welcome the zettabyte era, and we look forward to working more closely with our industry partners to make it a positive reality for all to enjoy!"

Sheikh Saud bin Nasser Al Thani
Group CEO, Ooredoo, Qatar



"I was delighted to attend the Telecom Leaders' Summit 2017, which is the culmination of the advocacy and lobbying efforts that SAMENA Council continually exerts on behalf of its members. The Leaders' Summit hosts both global and regional top leadership and provides the opportunity for open and transparent dialogue year after year, presenting diverse topics that cover crucial areas. I look forward to attending next year's summit and learning about the latest industry trends, as well as the related issues that face the telecom industry in the MENA region."

Jerome Henique
CEO, Orange Telecom, Jordan





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As the UAE roars ahead to maintain its position as a global leader in telecommunication infrastructure, Etisalat, the telecommunication leader in the Middle East is strategically transforming itself into the leading integrated digital services provider to meet the dynamically changing needs of UAE, and beyond.

In support of the UAE's goal to create smarter cities, Etisalat UAE has brought smarter services into every aspect of its offering - for individuals as well as small, medium and large businesses and enterprises.

To enhance the customer experience, Etisalat has gone a step further by setting up experience zones with key partners at strategic locations where consumers as well as business customers can get first-hand experience of Etisalat products & services. These zones are unique and an innovation in the UAE.

But Etisalat does not stop at consumer's experience being offered at our premises, as part of its objective to connect with customers on a multitude of platforms, and bring this experience of the digital future to the consumers and customers, Etisalat launched "Etisalat Hummer".

The Etisalat Hummer is one of the various ways of getting closer to our valuable customers. It's equipped with full work station items that helps the agent to provide services similar to any point of sale.

The equipment installed in Etisalat Hummer are working over high end 4G LTE connectivity and are linked to the Etisalat's centralized database system remotely.

Customers can apply for new services, Devices, replacement, bill payments and a lot of other services.

Etisalat Hummer is usually used to support the events among UAE, where Etisalat is participating. Because of its wireless connectivity, it can be relocated easily to any place. Aside from its attractive branding & the provided services, customer are given some cool giveaways when they interact with the customer touch-point.

This consolidates Etisalat's position as the digital partner who is always there, whenever and wherever our consumers and customers need us, helping us to foster a great experience with them at their convenience and need.



TESTIMONIALS



"The Leader's Summit brought together ICT decision makers from the government and private sector, to share ideas, experience and best practices which will help in achieving our common goals for a better digital future."

H.E. Dr. Abdulaziz Salem Al Ruwais
CITC, Governor, KSA



"Thank you for the great arrangements and greetings to Bocar for his leadership and vision in organizing Leaders' Summit 2017."

Mr. Amr A. Eid
CEO, Gulf Bridge International



"SAMENA Council Telecom Leaders' Summit 2017 was a great gathering for industry stakeholders and visionaries in the region as it allowed for quality engagements and thought sharing. Nokia believes in the importance of industry and cross sector collaboration. We are proud to be a key sponsor of the Summit."

Mr. Bernard Najm
Vice President - Middle East, Nokia



TESTIMONIALS



"The SAMENA Telecom Leaders' Summit 2017 has been outstanding and exceeded all expectations this year. The quality of debates, and open discussions about key industry policy and regulatory matters has been among the highlights of the summit. It is through platforms such as SAMENA Council that industry stakeholders can come together and nurture collaboration and work together towards a viable and sustainable ecosystem of innovation."

Mr. Brahim GHRIBI
Head of Government Relations MEA, Nokia



"The 2017 SAMENA Leaders' Summit held at the Atlantis Hotel was a great success, well attended by the industry's most senior leaders. SAMENA Council has once again proven itself as the most vital vehicle for the industry to discuss and find industry wide solutions to shared concerns and challenges. Very well done indeed Bocar and team."

Mr. Erik Almqvist
Managing Director and Head of the Middle East, Goetzpartners



"The SAMENA Council's Telecom Leaders Summit 2017 created an excellent forum for active discussion on experiences, best practices, and objectives. The combination of leaders from so many countries, industries and stakeholder groups ensured an exchange of diverse views. I applaud SAMENA Council for its effort, and am optimistic the Summit will bring parties closer to their objectives."

Mr. Eric Loeb
Senior Vice President, AT&T



TESTIMONIALS



"The SAMENA Leader's Summit was created to act as a platform for dialogue among all the stakeholders of our Telecom Industry in the SAMENA region. It was a very important and useful event to discuss changes in our industry and to lead the change process for the telecom industry especially in the digital space. We wish SAMENA Council a very successful journey ahead and we are looking forward to witnessing more success and eventful activities."

Mr. Hamoud Al Rumayan
CEO, Intigral



"Ericsson's participation in the SAMENA Leaders' Summit this year offered us a great opportunity to engage with thought leaders and key ICT players in the region. I would like to thank SAMENA Telecommunications Council for providing this opportunity that truly supports the technological evolution and paves the way forward to the new frontier of 5G, IoT and Cloud. We look forward to participating again next year."

Mr. Indranil Das
VP - Head of IT & Cloud MEA, Ericsson

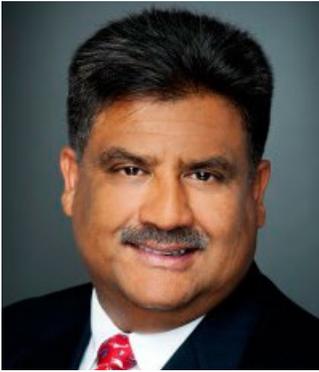


"The SAMENA Council Telecom Leaders' Summit 2017 held in Dubai offered a strong platform to share perspectives on the regional ICT landscape. I found it to be a highly valuable experience as both a speaker and attendee, and look forward to participating in future events."

Mr. Jawad Abbassi
Head Of MENA - Government & Regulatory Affairs, GSMA



TESTIMONIALS



“Excellent event that brought together a strong and unique mix of heavyweight VAS operators with regulatory and government officials. Refreshingly well-planned and executed, SAMENA Council Telecom Leaders’ Summit is a must for any telecoms business looking to expand their relationships.”

Mr. Karim Khoja
CEO, Roshan



“Our industry may face a plethora of challenges but Summits like these truly play a large part in brainstorming ideas in order to overcome and prevent challenges from occurring again. Moreover, the Summit also starts a dialogue on how we can improve our impact in the region and around the globe. The SAMENA Leaders’ Summit was highly educational and well-structured. I am grateful for the opportunity to attend this event and meet like-minded people in the field in order to share and expand my knowledge of the industry. I would like to extend my gratitude to the organizers, the SAMENA Telecommunications Council, and congratulate them on another successful Summit.”

Dr. Khalid Omar Al Midfa
Chairman, Sharjah Media City



“The Gulf is not only of global importance because of its huge fossil energy reserves but also because of its strategic position between the rising economic powerhouses China and India, on the one hand, and, on the other, Europe and Africa. SAMENA Telecommunications Council’s Leaders’ Summit, held on 30 April in Dubai illustrates the Gulf’s key strategic location between the three continents. The SAMENA Council’s Leaders’ Summit brings together Chairmen and Chief Executives of leading communications service providers, Heads of regulatory authorities, Ministers, Influencers, and Professionals that are driving digital development both regionally and internationally. Participating in the annual SAMENA Telecommunications Council’s Leaders’ Summit is therefore not only a must to remain up to date of the telecom market evolutions in the Gulf states but also of the global trends.”

Mr. Luigi Gambardella
President, ChinaEU



TESTIMONIALS



"SAMENA Council's team is really a reflection of a harmonized work. The outstanding organization of the Telecom Leaders' Summit 2017 was the result of that work. The event was so productive. I have experienced the impact of SAMENA Council at any event that I attend. SAMENA Council is really a very successful platform for the telecom industry in the region."

Mr. Magdi Makki El MARDI

International Relations Director, SUDATEL Telecom Group



"SAMENA Council continues to play a vital role for the ICT sector in the region by bringing the leaders from both regulators and operators together. I really appreciate the theme of this 2017 summit, where digitization is the corner stone of any future static plan in this sector. I have been enchanted by the overall ambiance and the quality of people I met . My thanks to the SAMENA Council, very well done indeed in arranging this exceptional summit."

Dr. Mohammed Altamimi

Director of Service Providers Affairs Competition and Legal Department, CITC, KSA



"The SAMENA Council's Leaders' Summit is one of the unique global occasions in the year, where one can meet the Top Telecom Leaders of the region and get detailed insights on latest trends and information in technology and policy development. It is a must-attend event for every Telecoms leader interested in the MENA region."

Mr. Markus Fritz

EVP Commercial Development & Strategic Partnerships, Eutelsat



TESTIMONIALS



"The SAMENA Leaders Summit remains not only an excellent opportunity for industry leaders, policy makers and regulators from the region and over the globe to share best practices and discuss all the ongoing changes in ICT sector but also provides an exclusive platform for leading operators and service providers to establish new business contacts. The ability of SAMENA representatives to gather such a significant number of ICT dignitaries in one place clearly emphasizes the value of the dialogue that the organization brings to the participants. Therefore, I would also like to thank the organizers for their efforts to arrange the process in such a great way. This truly was a fruitful experience. Thank you!"

H.E. Nikolay Nikiforov

Minister, Ministry of Telecom and Mass Communications of the Russian Federation, Russia



"Efforts to align visions to meet the demands of the digital world were evident in every aspect of the SAMENA Telecom Leaders' Summit 2017, which I feel privileged to have attended. The gathering of so many distinguished leaders, experts and industry CEOs was an amazing opportunity to share and gain insights on development and success in telecommunications and digital industries."

Mr. Roman Taranov

CEO, RGK Mobiles



"It was an honor and pleasure to join so many industry leaders at the SAMENA Telecom Leaders' Summit 2017 in Dubai. The event was professionally organized by SAMENA Council CEO Bocar BA and his team. The speakers and panelists enlightened us about the central role of the telecommunications and ICT industry in providing the backbone for the innovation. Digital connectivity was described as a basic human right. Simply stated, digital is the new way of life and the telecom and ICT industry needs to position itself to make our individual and collective digital experience pleasant, cost effective and enriching."

Mr. Ronald K Noble

Founder, RKN Global





"It was a real pleasure for me to participate in the SAMENA Council Leader's Summit 2017 in Dubai. As it was in the past years, this year's Summit was again a very well organized event and has addressed issues of major concern to ICT sector. The Summit served as a platform for exchange of ideas and experiences as well as for discussing current trends in the sector between the leaders attending to the event. No doubt, the region's leaders have very much benefited from the high level and very qualitative interactions that the Summit had offered."

Selamettin ERMIS

Head of International Relations Department, ICTA, Turkey



"It was a great opportunity offered to me through SAMENA to attend the Telecom Leaders' Summit 2017 organized by SAMENA on 30th April in Dubai. The event was professionally organized and executed. It gathered the right people shaping the regional ICT industry including policy makers, regulators and operators. I found the event is conducive for learning, knowledge transfer, and developing strategic alliances through various contents presented along the day (workshops, discussion forums, and aside meetings). The event also provided a valuable opportunity to connect and meet with the right people in order to discuss issues of common interest. I strongly believe that the objectives planned for this event were successfully achieved".

Dr. Saoud Humaid AL Shoaili

DG Communications & Postal Services, Ministry of Transport & Communications, Oman



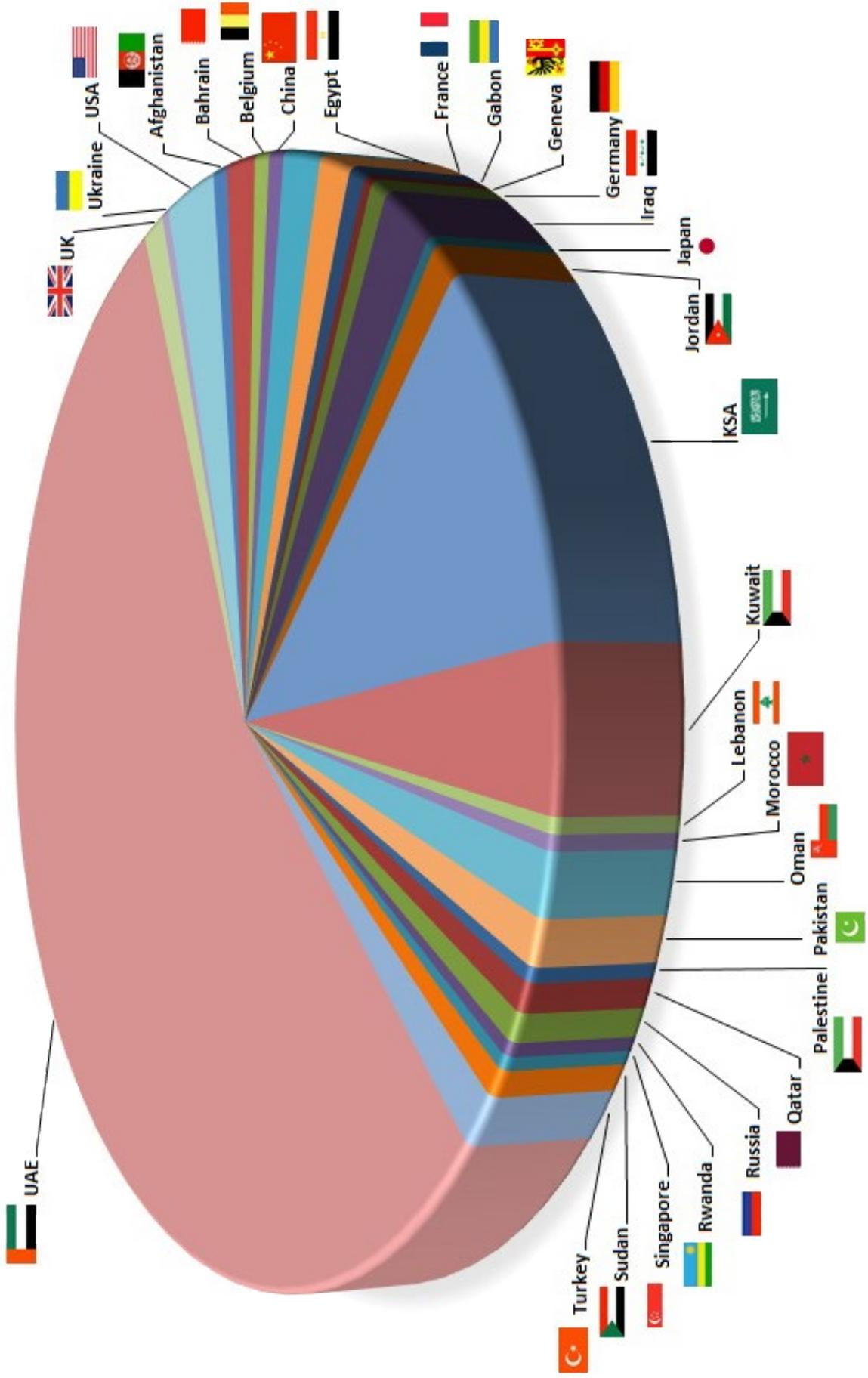
"I am glad I attended SAMENA Council Leaders' Summit 2017 in Dubai. Appreciated the time and effort put forth by the Organization. Attending SAMENA Council's meetings is a great enlightening experience and an excellent overview of Telecom World as well as a good opportunity meet distinguished members of our community. Wish you success to continue such projects in the future."

Mr. Ümit ATALAY

Co-CEO, Innova



SAMENA Council Telecom Leaders' Summit 2017 Attendees



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