

# SAMENA TRENDS

EXCLUSIVELY TO SAMENA TELECOMMUNICATIONS COUNCIL'S MEMBERS

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## Telecom Financing & Strategic Investments

*Exclusive Interview*

**Kamil Gökhan Bozkurt**

Chief Executive Officer

**Türk Telekom**

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# EDITORIAL



This month, being the end of the gregorian calendar year, marks a time of renewal and as such, should yield to re-evaluation of how an individual or a company looks at their performance and how they will adjust for the oncoming year. Budgets are being reviewed and set, programs are being built or killed off, and decisions of great impact are being made or have been made. 2010 was a year of transition. It is my opinion that the year of 2011 will be a time of acceleration and growth, but not in the traditional sense. Consolidation will occur, Investment in networks will increase and reorganization of institutional operations will be the large stories of the year, having been resultants from critical change in the business models of the traditional operators. Change is definitely in the air and it is healthy and yet very challenging for all involved. The pace of change is non linear and is creating critical mass for those that can feel how the social economy has really changed the telecom environment.

Smart phones are a huge instigator of change. This is driving mobile broadband to a frenzied growth pace. The use of the network is now altered forever, from a relatively easy to plan and manage voice foundation to a platform with ever changing data service network demand and the needs of a changing consumer and enterprise market. Network design and the pure elements have also changed forever. Broadband requirements will drive past latent usage of long haul fiber networks to a point of no return, where the development of much greater bandwidth capacity could approach the same similar quotient of Moore's law of computing capacity, at least for the near term.

The M&A environment is definitely enjoying its highest crest of activity in the past two years or more. In a feature submitted by Booz and Company in this same publication, they clearly also see strong positive growth in multiple facets of the industry, but where the growth is, clearly is different from previous years.

Voice services along with fixed line growth has practically stalled, while mobile applications, data services and other wireless service sets offered by smart phones clearly show very strong mid and long term growth trends, which are confirmed by not only Booz, but by most any and all market analysts. The strong continued sales of smart phones only begin to encapsulate the opportunity for change, and perhaps even chaotic change, given that mobile broadband is growing at such a quick clip.

SAMENA and its membership are addressing the change in the industry. Over the past twelve months, the organization has enlisted partnerships with multiple like minded organizations on a global basis, bringing liaison to the SAMENA region on such issues such as the Digital Dividend, Mobile TV interoperability and other very important member interested issues and activities.

The organization is adapting to the market place and the membership clearly is showing very keen interest in content, policy debate and certain technological activities. SAMENA now has multiple very strong work group environments tackling the issues that are most important to the membership. SAMENA is continuously working hard to provide to its membership the collective consensus support it needs and requires. Collaborative efforts with regional bodies in Europe, the USA, in the Pacific Rim and other regions provides the SAMENA membership with the knowledge based elements so critical to its mission, sharing knowledge and developing information sharing that is world class in structure, depth, credibility and value to its membership.

M&A activities will be structured more for synergistic values, inclusive of course with financial dividends, therefore creating added value to the bottom line from both direct and in-direct lines of revenue and cost containment. Added strategic value, as to content holdings, and other non voice based activities are key metrics to be considered in the structure of any new potential agreement. The industry is clearly changing. The stakeholders now include many more players and type of players than previously before. At the end of the day, non voice actors are going to be very much involved, one way or another, or at least have a magnetic effect on the participants of the industry. Financial factors involving much more than voice or basic data will be involved. Indirect lines of potential revenue opportunities are going to be major catalysts for change.

# EDITORIAL

Just today, in the European press, France Telecom, Telecom Italia and other large European carriers went publicly vocal stating that certain very large OTTPs are gaining access to very large revenue channels without paying their fair share for the investments that the operators are having to make in this broadband crazed world that we exist in today. Google, rolling out its latest virtual operating system (cloud based) note book has certainly raised the eyes of many of the traditionalists, and probably have dialed in a very early wake up call to behemoths like Microsoft. I will let others state the statistics, but there certainly is change in the air, but at what cost.

SAMENA has setup a very active Content Committee with three distinct work groups developing knowledge base on a consensus basis which will assist in addressing very specific issues with regard to content. In addition to Europe, a heavily split FCC has issued orders (questions still abound whether the FCC has any real authority over the internet) with regard to protecting the web. This basically referred to as net neutrality lists new constraints to the operators in the US, with how they manage both the fixed and mobile environments they own.

The regional regulators will have a tough challenge ahead, given how they are charged with balancing both the ability of investment (operators and service providers) to earn an appropriate ROI while trying to create an environment that is pro-consumer and developing healthy competition without undue bureaucracy or regulation of free market enterprise. The operators have learned that in 2010, the conditions have changed. Application of adaptive elements to the change will be the order of the day in 2011. Broadband and anything to do with broadband must be always in the scope of the business model. As to basic issues such as the digital dividend, this will be a very strong component of what SAMENA is to work on in 2011 and related issues to the Broadband arena have only begun to surface as industry pivotal instruments of potential impact to the stakeholders in the industry.

It is relatively known that change is opportunity and that the telecom (ICT) environment is now constantly changing. There is opportunity in the air and those that are most aggressive, that are most alert to change, that see the new horizons, that are most participative in the industry forums such as the ITU, SAMENA and other mediums will most surely be the leaders stating operative opinion that should lay the path ahead for the industry.

Thank you all for a fantastic 2010 and we shall all see you on the next annual journey in 2011. Happy Holidays from all of us at SAMENA!!!

Truly Yours,



**Thomas Wilson**  
CEO & Managing Director  
SAMENA Telecommunications Council



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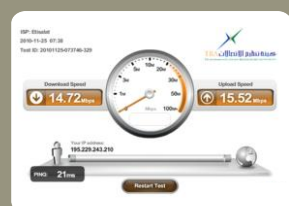
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## EDITORIAL







## TOP REGIONAL & MEMBER NEWS

### **Qtel Acquires Orascom Stake for US\$1.2 Billion**

Qatar Telecom and Princesse Holding are to acquire a 50% stake in Tunisiana, the Tunisian operation of Orascom Telecom. Qtel will formulate the acquisition through its majority-owned Wataniya Telecom, which already controls 50% of Tunisiana. The venture will pay \$1.2 billion for the acquisition. The transaction will allow Orascom Telecom to cut debt ahead of a planned \$6.5 billion merger between its parent company Weather Investments and Russia's VimpelCom. The transaction is expected to be completed in January 2011.

### **Areebaareeba is Pioneering the Professional Social Networking in ME**

Areebaareeba is the latest web based and social networking site for communities in the Middle East and all over the world. Professionals in the Middle East and external can promote their competencies, artwork activities and their

creativities. Areebaareeba is planned to help businesses and professional interact and create new sales channels. It holds many different social tools where people can connect with other Areebaareeba members and also, incorporates several different marketing tools to grow and promote business, services, programs and products.

### **Alcatel-Lucent wins three awards for LTE excellence**

Alcatel-Lucent continues to lead the pack in 4G technology development, winning awards in three different categories at the Long Term Evolution (LTE) North America Awards. Alcatel-Lucent in the categories of Significant Progress for a Commercial Launch of LTE by a Vendor in the North American Region, Best Network/Device Testing Product for LTE for its 9900 Wireless Network Guardian, and Best Green LTE Product Initiative in North American for its LTE RAN, Alternative Energy Program and Bell Labs Green Touch initiative. Alcatel-Lucent was also the only company in the awards competition to be short listed in six out of nine categories.



## PTA, Alcatel-Lucent Present Laptops to Children of SOS Village

Pakistan Telecommunication Authority joined hands with Alcatel Lucent Pakistan to donate laptops to the children of SOS Village as a Corporate Social Responsibility (CSR) gesture. Speaking on the occasion, Chairman PTA Dr Mohammed Yaseen said the government and private sector should work together and ensure that CSR must at all times remain a main concern, especially in Pakistan's perspective where disparities remain high.

## Otesat Maritel to Distribute Inmarsat GSPS IsatPhone

Otesat-Maritel, has signed a distribution agreement with Inmarsat to distribute the new Global Satellite Phone Services (GSPS) IsatPhone. The new satellite phone uses the fourth generation Inmarsat satellites and provides reliable network connectivity with high quality telephony and competitive prices on services and equipment. The new GSPS is designed to work in harsh weather and environmental conditions and provides satellite telephony, voice mail, SMS, e-mail and GPS location data. The new phone service will be available in the first quarter of 2011.

## STC Offers its Customers the Ability to Send MMS with 600 KB Capacity

STC has offered its customers the ability to send MMS up to 600 KB in capacity, with no extra charge and operated in most mobile phones. The capacity offers the ability to send files, pictures, and video contents, as well as large sized texts. It also gives the ability to the customer to send text messages and e-mails to friends and families from anywhere in the world with all flexibility. STC was the first operator in the Kingdom to offer MMS services.

## Batelco Announces "free O-net" Promotion

Batelco has announced a new promotion offering a free O-net device with each new subscription to its BD10 O-net package. Customers can browse the Internet, send and receive SMS and chat using existing instant messaging service, all from the convenience of a laptop or PC, anywhere and anytime. Large volumes of data such as e-mail attachments can also be downloaded fast and conveniently as can music and video files. The free O-net device is also available free of charge with Batelco's BD14, BD20 and BD25 O-net packages.

## Inmarsat Launches New Satellite Mobile in Egypt

Inmarsat launched the first global handheld, IsatPhone Pro, in Egypt, supported by the existing Inmarsat-5 satellite network. The handset will be available in the market at an estimated retail price of \$699, with promotional prices expected to be around \$500 to \$600. IsatPhone Pro provides clear voice quality across the most remote areas on land and at sea. IsatPhone Pro is primarily designed for professional users in the government, media, aid organizations, oil and gas, mining and construction sectors.

## Nokia Siemens Networks Launches New Flexi Base Station Controller

Nokia Siemens Networks has launched a new Flexi BSC that offers up to 80% reduction in energy consumption along with a 40% increase in capacity over existing base station controllers. The new Flexi BSC also provides operators the ability to move to all-IP for communicating among the base station, base station controller and mobile switching center with two new transport features - Packet Abis and A over IP. Flexi BSC is future-proof, providing for the first time in the industry a handling capacity of 4,200 transceivers and over 25,000 Erlangs in a single cabinet.

## Etisalat Afghanistan Signs Agreement with Afghanistan TRA

Etisalat Telecommunications, UAE has signed an agreement with Afghanistan Telecommunications Regulatory Authority (ATRA) to provide telecommunication services in rural and far flung areas of the country. The company subscriber base reached approximately 4 million and its network covers 29 provinces in Afghanistan. Etisalat Afghanistan has successfully won the bidding process of deployment of BTS sites and as a result shall be receiving US\$ 3.4 million subsidy from Telecommunication Development Fund for provision of affordable voice telephony and other data services.





# OPERATOR LEADER'S VISION

**Kamil Gökhan Bozkurt**

Chief Executive Officer

**Türk Telekom**

Mr. Kamil Gökhan Bozkurt is a graduate of Bilkent University, Department of Economics and holds a master's degree from the Department of Economics of Johns Hopkins University, USA. After serving at a number of management positions in various organizations, he has been with Türk Telekom since November, 2006. Prior to joining Türk Telekom, Mr. Bozkurt, served T.C. Ziraat Bankasi in 2003 as Senior Manager responsible for Financial Institutions. He also has held seats as Board Member in Ziraat Bank Moscow CJSC and Ziraat Bank International AG. He joined Halkbank as Executive Vice President responsible for Organization and Human Resources on March, 2004, and in this capacity he was the project leader of the Halkbank-Pamukbank merger. He was appointed as Executive Vice President responsible for Financial Institutions and International Banking in April 2006 and he managed both positions. He was an active participant of Privatization Committee for Halkbank.



## ◆ As Türk Telekom, what are the principal topics in your agenda?

While announcing 2009 as the year of convergence, we in fact announced our long term strategies which we are planning to continue in the future. We will pursue our convergence strategy in line with our predictions for the future. A future is awaiting us where technology will be even more converged, and where the content related to entertainment, education, healthcare and other areas would be offered on the digital platform. While adapting to these changes and by utilizing the convergence platform, Türk Telekom would be offering the services keeping in view the needs in the digital world. We are thoroughly preparing the concrete basis for this with all our investments continued in line with the convergence strategy.

Another important part of our convergence strategy is to offer our services as a leading operator in the region. Acquisition of Invitel International is vital for Turkey to become a bridge for the terrestrial voice and data traffic between Europe and the Middle East. For Türk Telekom, it is a strategic initiative taken towards the European market, and further along, towards the global market. In the near future, with our unique position as a "connection hub", we are going to make our relationship even stronger with data and broadband customers who find it critically important to receive end-to-end reliable services.

Another significant development for Türk Telekom and our country's telecom industry has been made with the JADI LINK project, concerning the installment of an extensive multi-pass fiber optics network between the Middle East, South Asia, and the Far East. With the JADI LINK project, which has been launched with the co-operation of Turkey, Syria, Jordan and Saudi Arabia, Turkey is going to become a communication bridge between Asia and Europe.

*With the JADI LINK project, which has been launched with the co-operation of Turkey, Syria, Jordan and Saudi Arabia, Turkey is going to become a communication bridge between Asia and Europe*

With this project, communication infrastructures of these countries will be able to be used bilaterally over a single line. Thus, a significant alternative to the submarine cables in the Mediterranean and the Red Sea will be offered. This monumental line in a way is going to become a Silk Road for the region.

We are going to continue to increase our regional activities with our technology solutions and our products. We aim to achieve a stronger presence in the global arena in the telecom industry and Türk Telekom Group has already proved itself in this regard. Vitamin, the education software of Sebit, is today seen as a global product. Vitamin has so far been translated into English, Spanish, and Arabic; and has become an international product after having been introduced in three regions. We will continue our innovative strategies, which have helped Türk Telekom to achieve its pioneering position in the industry today. We would like to offer the products and services that we have developed in line with our convergence strategy not only in Turkey and the region, but also in global markets whether it's through our subsidiaries or the joint ventures.

## ◆ What is the significance of these steps taken by Türk Telekom in the international arena for Türk Telekom and the telecom industry?

Shortly after the acquisition of Invitel International, Türk Telekom renamed the company as Pantel. With the acquisition of Invitel International, Türk Telekom becomes a geographical hub connecting the increasing data/broadband traffic in Central & Eastern Europe and Turkey, Middle East, and Asian markets to Western Europe and the US. With the international fiber optics backbone, we are becoming a terrestrial voice and data bridge between Europe and the Far East. Invitel International's 27,000 km-long optic fiber network covering 16 countries offers a significant opportunity for Turkey to become a hub in its geographical region for telecommunications, just like in pipelines.

Invitel International becoming a Türk Telekom subsidiary is also important for the other players in our industry. Companies in the telecom sector will have the opportunity to offer Turkish content and value-added services to a wider region, and to develop new co-operations in closer communication with Western telecom giants. New offices in 40 cities will enhance Türk Telekom's presence in Europe, and this strong position will offer inspiration for new ideas for enabling Türk Telekom and Turkey to achieve leadership.



With the acquisition of Invitel International, the JADI Link agreement combining the international data infrastructure of four countries on a single line offers a historic opportunity for us to become a significant alternative in data communications between the Far East, Middle East, and Europe.

◆ **What are Türk Telekom's plans concerning the JADI Link project, which is among its regional growth targets?**

Recently, we have taken significant steps which make Türk Telekom's global position even stronger. With Invitel International, we have observed one of the most important acquisitions in the history of Turkish telecom. With the JADI LINK project, we have offered a significant alternative for the voice and Internet communications between Far East, South Asia, Middle East, and Europe & America. Even more significantly, we have launched a terrestrial fiber optic cable project. With this project, we are going to shift a significant portion of the said traffic over submarine corridors to Europe over JADI Link and the Türk Telekom backbone.

*With the acquisition of Invitel International, Türk Telekom becomes a geographical hub connecting the increasing data/broadband traffic in Central & Eastern Europe and Turkey, Middle East, and Asian markets to Western Europe and the US*

◆ **What kind of a growth strategy shall Türk Telekom pursue?**

Developments in the communications industry have increased the importance of the concept of "convergence". In the future, convergence products and services will play a greater role in our lives, and we also foresee that online applications will expand parallel to the development in end-user devices. Use of mobile devices such as Smart phones and PDA's are going to increase even more. These devices will be accessible through a large number of different "access networks" in the near future. We are going to establish an Internet infrastructure that meets different customer needs and receiver/transmitter needs compatible with different user's devices; and combining this with a decent quality as well as with the lowest prices possible would be among the basic items on the agenda in the near future.

*We foresee that online applications will expand parallel to the development in end-user devices*

*Use of mobile devices such as Smart-phones and PDA's will increase even more. These devices will be accessible through a large number of different 'access networks' in the near future*

We believe that we displayed our innovative approach with the Ev Avantaj tariffs and the Ev Gibisi Yok concept that we have recently launched. We have offered our customers value-added communication solutions with our tariffs like Ev Avantaj. Within our Ev Gibisi Yok concept, we started to offer home insurance, personal insurance and healthcare services, and offered our customers new and improved solutions. While offering these services, we have cooperated with leading companies outside our own industry. I believe that we have achieved something unique in home and office phones; because when we look at the figures, we see that contrary to the downwards trend worldwide, our traffic has increased between 2009 and 2010.

### What do you do to increase data communications?

Our investments on the expansion of Internet access and to improve the service quality have significantly increased the number of ADSL users from around 1.5 million in 2005 to over 6.5 million today. Turkey has become the second country worldwide with an outstanding ADSL penetration jump from 2005 to 2009.

*Turkey has become the 2nd country worldwide with the outstanding ADSL penetration jump from 2005 to 2009*

Value-added services that we designed keeping in view the customer needs have played a significant role in this growth. The popularity of the 8 Mbps Internet services that we launched in May 2009 shows that we are going towards the right direction. Currently, over 55 percent of ADSL users are using 8 Mbps Internet access.

Increase in the ADSL speed and reduction of prices have played a great role in growing Internet usage. The minimum speed of broadband access in Turkey was 256 Kbps in 2005, which is currently 1 Mbps, the minimum speed has remarkably improved by four times. The maximum speed has reach 100 Mbps with VDSL2 technology

*Our R&D activities have resulted in developing a verity of products that have shown a great success locally as well as internationally*

Under strong leadership, Türk Telekom has contributed to the market growth, and supported the competitive environment. We prepared special campaigns for Internet Service Provider companies, and offered special solutions for the industry's needs.

### ◆ What is being done in line with the objective of becoming a technology center?

We need a strong research and development to be in a position not only to buy, but also to produce and sell. In line with our vision to introduce the Turkish technology around the globe, we provide great importance to our R&D activities.

Our research and development activities are conducted at Türk Telekom as well as at the group's technology companies. Our group companies Argela, Innova, Sebit and Sobee conduct their R&D activities at ITU and ODTU techno-parks. These centers play a major role in the development of Turkish technological space.





Our R&D activities have resulted in developing a verity of products that have shown a great success locally as well as internationally. Sebit's online educational product Vitamin, which is used in three continents; TTNET's Tivibu web TV service, I Can Football game developed by Sobee and which is played 11x11 for the first time in the world.

Furthermore, the European Union's multinational R&D cooperation programs that we joined has improved the R&D segment of the Türk Telekom Group companies and also played an active role in the development of the future technologies.

### ◆ How do you position Türk Telekom in the future?

We position Türk Telekom as the region's leading communications and technology organization. In the next 5 years, we will continue investments and joint ventures to improve our vision of convergence. While developing products and projects making our customers' lives easier, we will continue and enhance our co-operations with not only the Türk Telekom Group companies, but also with the organizations outside our group who support our convergence vision.

In the near future, we will have more creative and innovative business solutions like Wirofon, which has already achieved great success so far not only in Turkey but also in other territories. Thus, we will continue to enable our customers using the most advanced technologies that make their lives easier with the most affordable prices. Not only our products, but our voice/data tariffs and campaigns shall also enable us to enhance our position as a Turkey's leading Telecom Company.





## TELECOMMUNICATIONS IN 2011-BUSINESS UNUSUAL

In 2011, the telecommunications industry will face challenges, threats and opportunities on a scale not previously seen. While some issues have been around for a while, there are several new aspects to them which lead us to believe that 2011 will – in many respects – be a year of business unusual for the GCC region's telecommunications operators.

The trends most likely to reshape the regional telecommunications landscape break down into three broad categories: expansion, new revenue opportunities, and lean operations. To expand, operators will continue to push internationally, but the days of the land-grab are gone. Only those operators with strong and proven capabilities that can be replicated from one market to another will return value to shareholders. As for new revenue streams, in

the past few years new players have muscled their way into traditional telecommunications revenue. Operators now have to respond conclusively and with great energy to demonstrate that they can both discover and protect sources of new revenue using new and innovative capabilities. Finally, operators need to continue efforts to become leaner than they are now: They will need to take an innovative approach to reducing operating costs without sacrificing quality, finding ways to not merely cut costs but reshape their business to operate more efficiently. This time around, they can take advantage of new approaches to network technologies, mitigating the need for traditional, large-scale capital spending.

*“To expand, operators will continue to push internationally, but the days of the land-grab are gone.”*

*“New applications will continue to emerge on innovative, attractive devices, connecting people in new and surprising ways”*

For consumers and businesses, these trends hold substantial promise; services will become available in many more geographies and they will be more affordable and delivered by trusted, reliable brands. New applications will continue to emerge on innovative, attractive devices, connecting people in new and surprising ways. And lastly, the telecommunications network will continue to evolve beyond the traditional role of a phone company, weaving the fabric of a more connected, interactive society.

## Trend #1 – Expansion

For many operators, new markets will remain high priorities for securing growth – providing them with the opportunity to serve customers with more mobility, connectivity, speed, and increasingly more exciting applications. Frontier markets (such as those in Africa and India) are particularly enticing. But expansion in these markets remains complex and challenging. Successful operators will possess refined capabilities and skills and a complete mastery of low-cost operating models; they also will have resilient operations and management as well as advanced training and skill-transfer programs to develop local talent.

Mergers and acquisitions will play a central role in 2011, a marked contrast to 2008 and 2009 when even those operators with the most resilient financial capacities adopted a wait-and-see attitude toward transactions: M&A activity among GCC operators declined from US\$10.6 billion in 2007 to \$6.7 billion in 2008 and just \$0.9 billion in 2009. Although activity is only at \$0.1 billion as of the third quarter of 2010, the \$12 billion potential deal between Zain and Etisalat, as announced in the media, could lead the industry into a strong 2011.

*“Operators in 2011 will shift gears, looking to enter new markets or augment their market share in existing markets, and regional M&A activity will accelerate rapidly”*

Operators in 2011 will shift gears, looking to enter new markets or augment their market share in existing markets, and regional M&A activity will accelerate rapidly. In addition, there is significant potential for consolidation among major group operators—so-called megadeals.

These blockbuster transactions will remain attractive as individual entry points into new markets become scarcer, and operators recognize that large deals can enable them to secure entry into multiple markets through a single transaction, eliminating the complexity of pursuing many deals.

Nonetheless, operators likely will remain selective about which opportunities they pursue, using conservative projections to build cautious expectations, and exploring more innovative forms of financing – such as paper or stock deals, mergers of equals, or cash plus stock.

Another interesting sub-trend that will emerge in 2011 is divestment, as operators scrutinize their portfolios to determine whether to divest, consolidate, invest, hold, or fortify their holdings. Driving this trend is a new sensibility around competitive capabilities, as operators seek to improve their company-wide operations and equip operating companies to execute better in their respective markets—for example, by institutionalizing synergy programs.

## Trend # 2 – New Revenue Streams

The second major trend for 2011 concerns the way operators will respond to falling revenue and the emergence of new competitors. They will seek both to discover and protect revenue sources by using new and innovative capabilities.

Although mobile voice services remain a lucrative business for today's telecom operators, traditional services no longer provide strong growth potential. Data revenues, by contrast, are showing strong growth, from 7 percent of total service revenues in 2007 to 10 percent in 2009. And there is potential for even further development; this 10 percent figure is quite low, as illustrated by the fact that data services contributed 17 percent of total services revenues in Latin America in 2009, 28 percent in North America, and 44 percent in Asia Pacific. Thus, in 2011 operators will renew efforts to drive new revenue streams through fixed and

*“Although mobile voice services remain a lucrative business for today's telecom operators, traditional services no longer provide strong growth potential”*



mobile broadband, and this movement will prove to be the key driver in the next wave of organic industry growth, both in widening access and enabling more content and services.

Despite the exponential gains in Internet and broadband usage in recent years, the growth potential remains significant as consumers demand ubiquitous access and high bandwidth to handle a growing array of services. Of course, increased consumer demand for innovative services is coupled with increasing competition, which will only intensify in 2011. For now, operators will continue to own the relationship with the customers, and those with the right capabilities to maintain and build these relationships will gain incremental returns from them. For instance, operators may follow the lead of AT&T, O2 UK, and Vodafone, which have announced shifts away from unlimited data service toward a tiered pricing structure, in which customers pay more for greater data usage.

However, 2011 will be a pivotal year in the relationship between operator and consumer – a relationship that is threatened by the rise both of Internet companies such as Google, Yahoo, and Skype and social networking sites such as Facebook. As a result, pressures will mount on telecom companies' operating models, spawning the need for them to find ways to offer innovative products and respond to customer demands which continuously are evolving. Operators are certain to sustain investment in innovation and there likely will be interesting developments in partnerships between telecom operators and Internet companies aimed at bringing customers new services. Notions of value chain cooperation, rather than competition, will resurface in 2011 as next-generation broadband networks proliferate.

### Trend #3 – Lean, More Modular Operations

The third key telecommunications trend for 2011 revolves around lean operating models. Pressure to expand and to compete with new services and capabilities will force operators to explore new ways to reduce operating costs without sacrificing quality. This is not a brand new issue for operators. However, this time around, operators will deploy new, more modular approaches to network technologies.

As operators look to reshape their business models, operational efficiency will come into sharper focus, and operators will channel efforts in several areas in line with shifting positions on the value chain. Operators will find new ways to cooperate with partners, transferring the burden of massive investment in fiber from capital expenditures to operating expenditures. Among the concepts likely to be vigorously explored in 2011 are performance-linked vendor compensation plans, partnerships with national governments, and protected franchises under Smart City models.

Operators also will seek to benefit from digitization—a way to increase efficiency. They likely will pursue digitization on their own and also with their suppliers and new partners, forging operating alliances and teams. Although complex and challenging, these partnerships will become a key capability for successful operators in 2011 and beyond.

Lastly, there is a clear need for cost “reshaping,” not simply reduction. This could include new operating models, lean management, sharing, and outsourcing. The most successful operators of 2011 will master these skills, and present them to the market in the form of unique capabilities on which they will base their future development.

### Conclusion

Without doubt, 2011 will be a fascinating year for regional telecommunications operators. In emerging from the recession, GCC operators are standing at a critical juncture – a new era of delivery and opportunity. While there is strong growth potential, not every operator is well positioned to take advantage of that growth. The successful operators of the year will be those able to expand successfully, protect their turf from competitors and carve out new revenue streams, and operate in an effective and lean manner. And they will provide consumers with more mobility, speed, products, and devices.

**Bahjat El-Darwiche**  
Vice President  
Booz&co.





## HARNESSING THE SHIFTING SANDS OF TALENT

With the continued international expansion across the Middle East, Africa & Asia of the region's leading operators the acquisition and more so the retention of high caliber executives in home and local markets is of increasing importance if they are to attain the heights of their stated aims to be leading players on the global stage.

The economic downturn of the past few years has had both positive and negative effects on the region's operators in relation to hiring key individuals. With counterparts in mature markets elsewhere in the world decreasing headcounts and losing aspirational employees to more promising opportunities in growth markets, the Middle East's leading players have been well positioned to benefit from this abundance of hitherto inaccessible or disinterested talent. Within Group and OpCo leadership teams' new international recruits have swelled the ranks.

The bountiful availability of candidates proactively seeking employment has in many cases and in different ways been a double edged sword. Appointments of well qualified professionals have been made in positions and locations that were previously challenging to fill. It has however encouraged and legitimized lazy and reactive recruitment.

Rather than using this time of stagnation and frustration in the world's most established markets to strategically court and entice talent, most have settled for those most readily available on the open market. Importantly, many of those who have taken up positions in emerging markets as a result of such processes have done so out of necessity rather than desire. Rather than having been hired foremost on the basis of capability and suitability they have in fact been employed due to their availability and willingness to take up such roles at this time in the economic cycle.

Expatriate executives throughout emerging markets are historically notable for their transience, a phenomenon that remains true and is unlikely to change dramatically moving forwards. At the point at which international markets have a significant resurgence resulting in attractive opportunities once again materializing in mature markets, many of the aforementioned 'job tourists' will return from whence they came. These continually shifting sands will therefore be hastened due to the compound effect of ongoing transience coupled with the upturn, at which point retention of talent will be paramount to continued growth and success.

Retaining talent must be approached with a long-term view and a focus on company culture rather than purely relying on tangibles such as compensation. While compensation is always a factor in retaining top performers in a competitive market place, particularly in terms of incentives that enable wealth creation over and above base salary, more often than not it is other elements of an executive's professional experience that influence their loyalty to an organization. Interestingly, research suggests that in excess of 80% of individuals that accept counteroffers go on to leave their employer within twelve months irrespective of the improved financial terms.

High achievers tend to be driven by continuous professional development & learning, new challenges, transparency of leadership & communication and an ability to attain authority and autonomy in their leadership responsibilities. In all of these aspects it is the overriding company culture that is imperative and while the vast majority of CEO's would attest that company culture is a top priority, only a small minority actually invest their time and resources and that of their C-suite executives in proactively cultivating and driving company culture.

The scale, breadth, vision and aspirations of the likes of Etisalat, STC, Qtel and Batelco afford them solid foundations on which to offer progressive opportunities to their key executives, thus better retaining such talent. The fact that they are present and competitive in a wide array of countries with a variety of agendas, issues and innovations provides a plethora of strategic and tactical challenges for those within the organization.



Above and beyond this diversity of opportunity it is vital that the seasoned international executives who have been on boarded to innovate, drive change and instill best practices are truly enabled to impact their spheres of influence through autonomous decision making and a collaborative team environment. Furthermore a route to tier one leadership positions within the group must exist in order to keep possession of the most high profile and accomplished leaders.

With people being the cornerstone and most valuable asset of any organization, having been able to acquire high caliber international executives in times of plenty, it is incumbent on the leadership to invest in retaining them. Corporate culture is not something to be left to evolve, it should be carefully cultivated and molded to prevent the sands moving when the winds change.

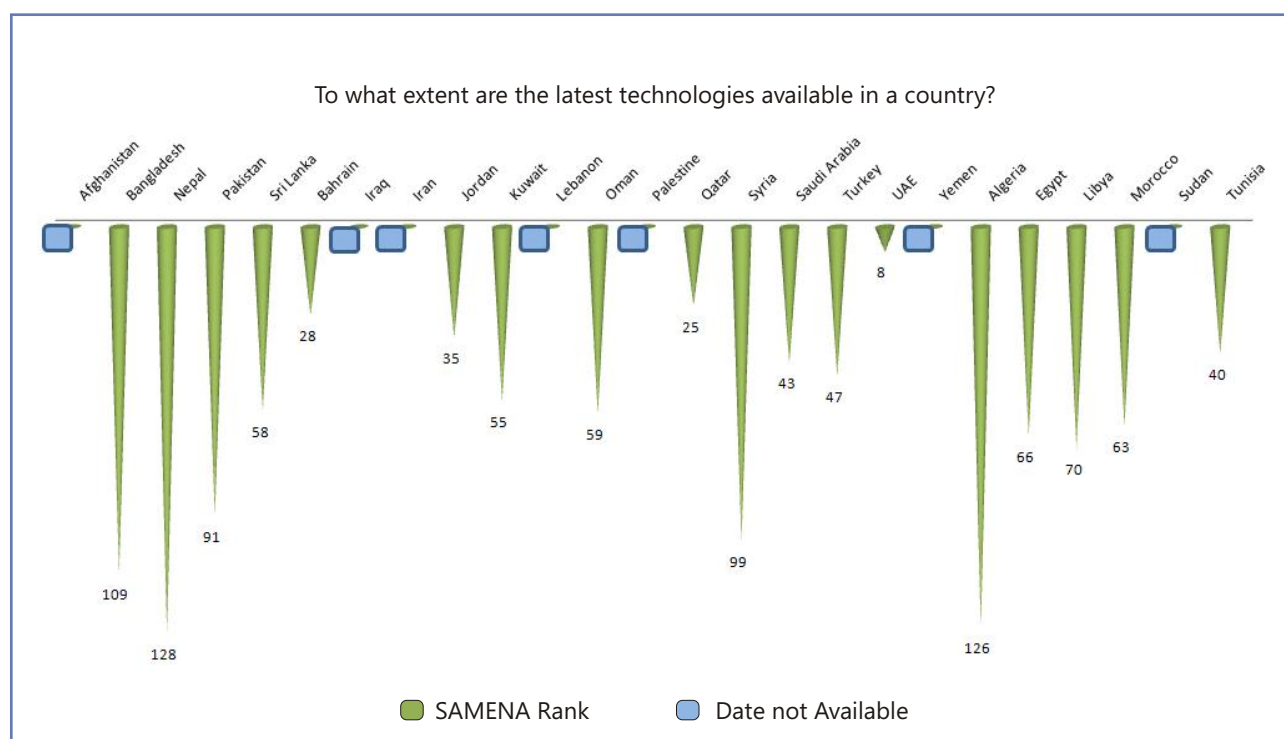
**Richard Guest**  
Principal  
**TRANSEARCH International**





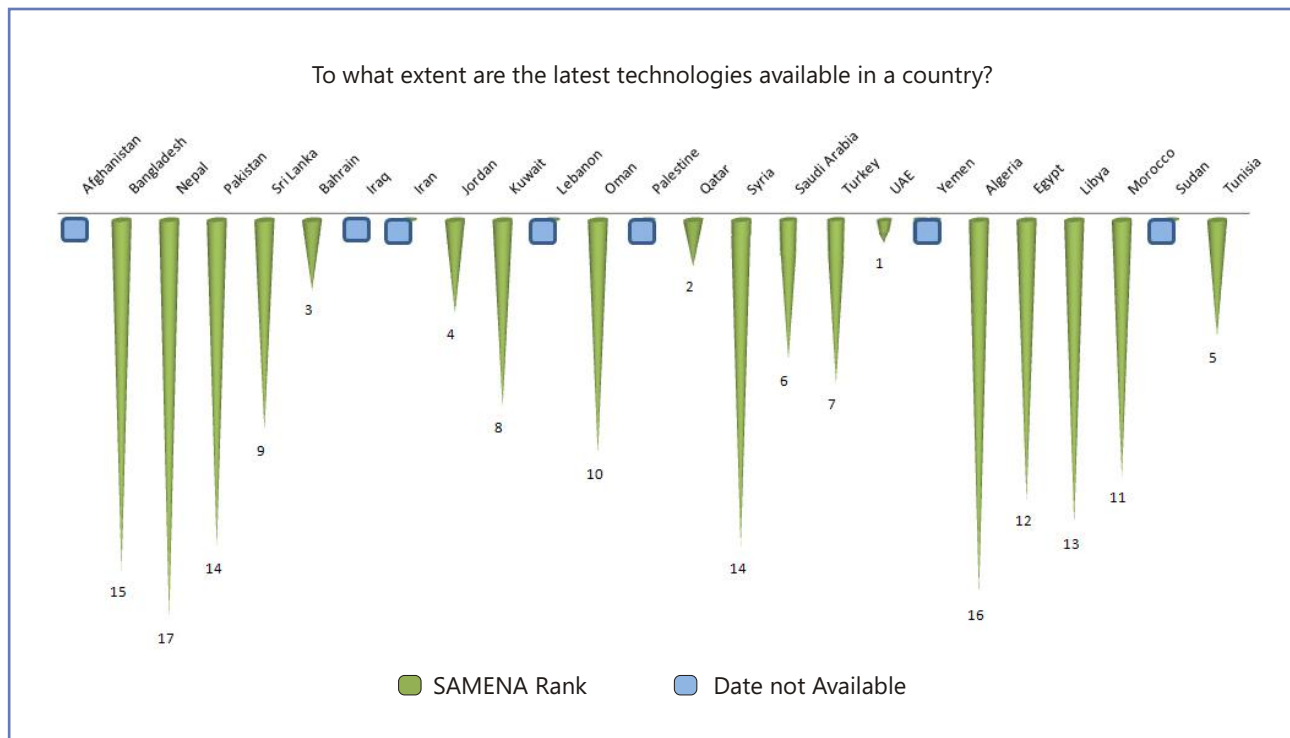


## AVAILABILITY OF LATEST TECHNOLOGIES (GLOBAL RANK OF SAMENA COUNTRIES)



**Data Source:** The Global Information Technology Report 2009-2010 by World Economic Forum & INSEAD  
**Image Source:** SAMENA

## AVAILABILITY OF LATEST TECHNOLOGIES (SAMENA RANKING)



**Data Source: The Global Information Technology Report 2009-2010 by World Economic Forum & INSEAD**

**Image Source: SAMENA**

Research Note: Ranking done by SAMENA based on data from The World Economic Forum. Within the SAMENA region, the UAE appears to be at number 1 in terms of availability of the latest technologies in the country. UAE currently has latest technologies available in addition to the most highly developed and implemented laws relating to ICT. Within the SAMENA region, top 4 countries in terms of availability of latest technologies are from the Middle East. Tunisia is the only country from North Africa to rank among top five regional markets, while there is no country from South Asia to rank among the top 10 countries of the region. Saudi Arabia and Turkey have 6th and 7th position respectively.

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# REGULATORY NEWS

## Chile Approves Emergency Telecoms Legislation

Chile's congress has permitted the country's Telecommunications reconstruction and emergency legislation. Telecommunications regulator Subtel states that the law establishes an advanced early warning system for emergencies and increases requirements on phone operators. It indicates requirements on electric supply to networks, quality of service and the provision, customer indemnities and the provision of timely and precise information to citizens. Operators will have to work at minimizing network congestion during emergencies by tripling SMS capacity and will have to provide free emergency messages in affected areas.

## LTA Inks High Speed Internet Connectivity Agreement

The Liberia Telecommunications Authority has signed a contract with Nigeria-based Environmental Resources Managers Limited (ERML) regarding the drawing up of an Environmental and Social Management Framework (ESMF) and a Resettlement Policy Framework (RPF) for the landing of a high speed internet connection in Liberia. World Bank is providing funding of USD25.6 million for the Africa Coast to Europe (ACE)-Liberia Cable landing project, through the West Africa Regional Communications Infrastructure Programme (WARCIP).





## TRA Wins "Sheikh Khalifa Government Excellence Award"

The Telecommunications Regulatory Authority (TRA) achieved the "Sheikh Khalifa Government Excellence Award" for Customer Service. Sheikh Mohammed bin Rashid Al Maktoum, Vice-President, Prime Minister of the UAE and Ruler of Dubai, honored the awarded entities during the ceremony that was held at the Emirates Palace. "Sheikh Khalifa Government Excellence Award" crowns the efforts and successes TRA has accomplished throughout the year 2010, both on regional and international levels.

## UAE's TRA Introduces Broadband Speed Test

The UAE's Telecommunications Regulatory Authority (TRA) has launched a new function on its website allowing broadband customers to test the speed and performance of the connection supplied by their telecoms provider. TRA website, automatically detects the internet service provider supplying the connection and the connectivity and download speed.

## ATRA Calls for Consultant to Assist with 3G & 4G Spectrum Valuation

The Afghanistan Telecom Regulatory Authority (ATRA) is looking for an international consultant to provide technical assistance with the valuation of frequencies planned for 3G and WiMAX operations. The winning consultant will be expected to deliver an assessment of the Afghani telecoms marketplace in respect of its readiness for the introduction of 3G, and recommend appropriate licensing fees based on the auction of two 3G (2x10MHz in the 2.1GHz band) concessions, as well as the non-competitive award of five licenses.

## Internet Safety to be Taught in UAE Schools

The Telecommunications Regulatory Authority (TRA) and the International Council of E-Commerce Consultants (EC-Council) launched the specifically designed nationwide program with the aim of educating students on the optimal use of the social networking sites and how to avoid suspicious websites. Teachers from respective schools will be trained and provided with learning materials on online security and how to apply the teachings to their classrooms.

## Interactive Intelligence Launches Communications-as-a-Service Offering

Interactive Intelligence has launched a Communications-as-a-Service (CaaS) offering which provides mid-size to large contact centers and enterprises organizations with all the advantages of a hosted solution, while providing the functionality, reliability, security and control of a premise-based solution. A CaaS Portal designed to improve administrative efficiency by providing customers with a centralized Web portal for administration, configuration, and billing.



# A SNAPSHOT OF REGULATORY ACTIVITIES IN SAMENA REGION

The focus of the SAMENA region's regulatory authorities remained the proliferation of broadband in particular and liberalization of sector in general. The Kuwaiti government in a bid to make the country a strong economic hub has started serious deliberations on privatization of telecom sector and appointment of an independent regulator. This move will be a triggering factor for the growth of telecom sector in the region. SAMENA Telecommunication Council welcomes this effort of the Kuwaiti government and extends its full support to government.

The announcement of Bahraini Regulator to introduce number portability and local loop unbundling in the country will enhance the competition in the country.

## Country-wise Regulatory activities

### Afghanistan

During the month the Afghanistan Telecom Regulatory Authority (ATRA) sought an international consultant to provide technical assistance with the valuation of frequencies planned for 3G and WiMAX operations. The winning consultant shall be expected to deliver an assessment of the Afghani telecoms marketplace in respect of its readiness for the introduction of 3G, and recommend appropriate licensing fees based on the auction of two 3G (2x10MHz in the 2.1GHz band) concessions, as well as the non-competitive award of five licenses. The Regulator also awarded contracts to build 67 base stations in under served rural areas using funds from its Telecommunication Development Fund (TDF). The TDF is generated from a 2.5% tax on the mobile network's revenues. This is the third tender for rural base stations funded by the TDF.

## Algeria

For the last several months the Algerian government and Orascom Telecom (OT) remained locked in a bitter dispute. The Algerian government will complete its planned buyout of Orascom Telecom's local subsidiary Djezzy after Orascom settles its debts and pays back taxes. As per Algerian government Orascom Telecom will have to pay US\$230 million in debts as well as US\$190 million in fines for [alleged] illegal money transfers and it do not recognize any partner other than Orascom which whom a deal has been signed. Orascom Telecom Holding Chief Executive urged the Algerian government to resolve the deadlock over a dispute that is threatening the telecom group's planned US\$6.5 billion deal to sell assets to Russia's VimpelCom Ltd. If the dispute isn't resolved soon, Egypt's Orascom plans to turn to arbitration in the second quarter of 2011. The arbitration could drag on for between two to four years, he added. The Algerian government, which has imposed a steep tax bill on Orascom's highly profitable Algerian unit Orascom Telecom Algeria, wants to nationalize the business.

## Bahrain

To further enhance the liberalization in telecom sector the Bahraini Telecom Regulator announced the implementation of number portability within next six months. The regulator also announced the introduction of local loop unbundling and issued an order to incumbent Batelco to allow other licensed operators to use its fixed copper network on fair terms in order to ensure fair competition and equal opportunity for all operators to deliver equivalent services of high quality to customers. The Local Loop Unbundling decision sets the prices and terms and conditions of Batelco's fixed copper network wholesale offering. With the introduction of the local loop unbundling service, TRA hopes to see more competition arising in the provision of fixed services and the introduction of new innovative and affordable fixed services.

## Bangladesh

The Bangladesh Telecom Regulator is in process of formulating guidelines on the licensing and operating of 3G services, whilst the state is in talks with the Chinese government to borrow US\$211 million to develop the capacity of Teletalk to give it a head start in the 3G market ahead of existing private sector rivals and potential new entrants.

## Egypt

According to the latest figures released by the Egyptian Ministry of Telecommunications the mobile subscriber base in the country has reached 63.9 million by September 30, up 19.6% from the same period a year ago. Subscribers for Vodafone Egypt reached 28.8 million for the period, while subscribers for the Egyptian Company for Mobile Services,

or Mobinil, reached 27.9 million and subscribers for the U.A.E- based Emirates Telecommunications Corp Etisalat, reached 7.3 million. According to another research report "Booming Egypt Telecom Market", Egypt has continued to witness rapid up-gradation and development of its telecommunications infrastructure on the back of several reforms and privatization in the last few years. The Egyptian Internet market has seen remarkable developments during the past few years. With the backing of futuristic government programs, the country has become one of the leading Internet markets in Africa, in terms of subscribers, international bandwidth, and services offered. Considering all the telecom trends and developments, Egyptian telecom market will grow at a CAGR of around 8% during 2009 - 2012.

## Iraq

The Iraqi regulator holds a series of meetings with IREX international organization. The two discussed means of providing support to CMC in professional and management development in regard to Iraq's domain name iq. The meeting tackled some professional and administrative problems that hampered the spreading of Iraq's domain name, especially the procedures on the participation of parties demanding this service.

## Jordan

The Jordanian Telecom Regulator launched a website to check the quality of service of broadband provided through ADSL lines. The site provides an easy and effective way to measure the speed of internet according to local and international key performance indicators.

## Kuwait

The Communications Ministry is planning to privatize country's fixed line voice telephony services (currently provided by telecoms regulator of the Ministry of Communications) within the next two years. The Minister reiterated that the only way for Kuwait to achieve its vision of becoming an economic and financial hub is to privatize its state-owned companies. In a separate move designed to limit the MoC's influence on the Kuwaiti telecoms sector, minister said that the government has suspended the issuance of licenses for new internet service providers (ISPs) until a separate telecoms regulator is established in the country. The new body will be charged with granting licenses and setting the relevant standards and conditions. He also said that the Ministry has ambitious plans to develop the country's fiber-optic infrastructure, which will eventually include international submarine links. Lebanon: To streamline internal processes and strengthen transparency of the TRA under the capacity building project, the regulator has received a grant from the International Bank for Reconstruction and Development (IBRD).



## Morocco

According to the quarterly report issued by the telecom regulator the country added 2.6 million net new mobile subscriptions in the third quarter of 2010 to take its total to 30.5 million at the end of September, and boosting the cellular penetration rate to above 96%. The regulator reported that market leader Maroc Telecom's mobile customer base grew by 5.3% to reach 16.7 million at the end of the third quarter, up from 15.9 million three months earlier, whilst Medi Telecom (Meditel) increased its customer base by 2.7% in the same period, from 10.4 million to 10.7 million, and Wana (Inwi) almost doubled its total number of mobile subscribers to 3.1 million from 1.6 million at the start of the quarter. Morocco's number of 3G mobile broadband internet subscribers grew by 14.4% quarter-on-quarter in 3Q10 to 1.16 million (up 105% year-on-year), of which 42.7% had signed up to Wana, 36.3% were with Maroc Telecom and 30.0% belonged to Meditel.

## Nepal

As per data published by the regulator, the country was home to a total of 9.63 million fixed and mobile users as at September 14, 2010, up from 9.34 million the previous month. Of these, 8.30 million were signed up to one of the country's mobile operators, up from 8.03 million, broken down as 7.46 million GSM users (7.21 million previously), and around 840,000 using Nepal Telecom (NT's) CDMA service, Sky Phone. NT also reported a leading share of GSM subscribers with a customer base of 4.03 million, followed by Ncell, the brand name of Spice Nepal, with 3.43 million. The GSM market leader also claimed 4,099 3G subscribers at the end of the period, roughly unchanged from a month before. In the fixed line arena, Nepal counted 840,104 fixed telephony users as at 14 September, up from 838,026 in mid-August, including 597,085 PSTN users and 243,019 WiLL subscribers. Incumbent operator NT counted 587,457 PSTN users and 173,326 WiLL users at that date, ahead of STM Telecom Sanchar (4,841, PSTN), Nepal Satellite Telecom (885, PSTN), Smart (3,902, PSTN) and United Telecom Limited (69,693, WiLL). The NTA also reported a small rise in internet users from 1.76 million to 2.10 million – with the majority connected via GPRS (1.88m) and CDMA 1x (101,464) – as well as 49,406 ADSL connections, 32,500 cable internet lines, 13,000 wireless or fiber connections and 27,137 dial-up accounts.

## Oman

The Telecom Regulator issued a decision by which a regulatory corrective measure was taken against recent violations of a class II mobile resale license and imposed a token of fine of RO 1,000 on Connect Arabia LLC, operating under the brand names of Friendi Mobile, and Hala-foni, and warned against violating its license conditions and the rules and procedures regulating promotional offers in telecommunication services (Decision 113/2009). The violations involved advertising a promotional offer before obtaining approval of TRA. Offering such a service without

approval of the authority is a violation of the license conditions. The TRA also observed that the tariffs advertised were incorrect and misleading for the customers, which is again a violation of the rules and procedures regulating the promotional offers in telecommunication services TRA Decision 113/2008). The TRA's decision to impose a token financial penalty against Connect Arabia comes after adopting less stringent measure of issuing cautionary letters to Friendi Mobile in similar previous violations. The TRA urged all licensees to strictly observe their license terms and procedures and to adhere to the regulatory framework which governs the telecommunications service provision in the Sultanate of Oman.

## Pakistan

The Regulator carried out billing verification of all cellular mobile operators (CMOs) by using computer software based solution meant for such checks through NEMO tool. Currently, mobile operators are offering per-second, 20-second, 30 second and per minute packages. For this purpose, 30-second billing package was selected as majority of the cards were loaded in the SIMs of all CMOs. In order to verify billing system of CMOs, on-net and off-net calls of different durations were made ranging from 28 seconds to 175 seconds. During billing verification exercise, it observed that billing systems of majority of CMOs were accurate and amount was being deducted correctly in accordance with their advertised tariffs. Two of the mobile companies were found overcharging in some instances. It was observed that in most of the cases operators were giving benefit to their subscribers by charging lesser tariffs in comparison to their advertised tariffs.

## Palestine

The Ministry of Communication and Information Technology held a meeting with Internet Service providers and discussed the provisioning of Internet Bit Stream Access.

## Qatar

The Regulator launched a public consultation on its second round of Market Definition and Dominance Designation. This Market Definition and Dominance Designation builds on the first Market Definition and Dominance Designation, which was issued in June 2008, where Qtel was found to have a dominant position on all relevant retail and wholesale markets. The public consultation on Market Definition and Dominance Designation is primarily for Service Providers, and also open to the general public in Qatar.

## Saudi Arabia

The Regulator remained occupied by holding meetings with the Chief Executives of all telecommunication service providers to provide flaw less services to the intending pilgrimage in holy cities of Makkah and Madinah during the current Hajj. The meetings discussed the preparations of the operators and their latest developments to increase the capacity of telecommunication networks. The Governor also directed all the heads of the service providers to mobilize all their energies and efforts to provide excellent service.

## Sri Lanka

Sri Lankan government imposed new taxes on telecommunication removing some of the existing ones, a regulatory license fee equal to 2.0% of revenues and has also imposed a new tax on international calls. The government removed valued added tax from telecoms and made it an exempt industry, further complicating the regime. Exempt industries cannot claim back VAT, but the budget speech said imports of high tech telecom equipment will not be charged VAT. The government has also imposed a 2.0 rupee a minute new tax on outgoing calls. The 20% fee replaces VAT, a nation building levy, a mobile subscriber levy and an economic service charge. The change in taxes is expected to bring 15.5 billion rupees in extra revenues from the sector to finance state spending. The telecom sector has been a key source of state revenues in recent years. However the sector went into the red with a price war and the regulator imposed floor call rates. From July 2011 the minimum call rate of 2.0 rupees a minute will be reduced to 1.50, President said in the budget speech. The President also said that he had asked the Telecommunications Regulatory Commission to regulate the broadband costs in order to increase broadband penetration.

## Syria

Syrians Ministry of Communications and Technology announced that six Arab and foreign companies submitted bids for the country's third mobile license by deadline. The Minister told that the companies in the frame are thought to be: UAE-based Emirates Telecommunications Corporation (Etisalat), Mobily (founded under the name Etihad Etisalat) of Saudi Arabia, Saudi Telecom Company (STC), Qatar Telecom (Qtel), Turkish firm Turkcell, France Telecom (FT) and TAMCO of Iran. The six applicants will now have their tenders evaluated by a committee from the Ministry with the participation of a German advisory company, and two candidates will be chosen to go to the next stage.

## Turkey

Turkey signed the Council of Europe's Convention on Cybercrime, promising a more libertarian Internet regime to avoid criticisms over bans imposed on several international websites. Foreign Minister signed the treaty on behalf of the Turkish government on the sidelines of the ceremony to mark the beginning of Turkey's tenure as the head of the Council of Europe. The signing of the cybercrime convention came nearly 10 days after the country's top security board, the National Security Council (MGK) advised the government to focus on cybercrime in regard to national security. The council's cybercrime convention is the first international treaty to try to respond to computer crime and Internet crimes by harmonizing national laws, improving investigative techniques and increasing cooperation among countries.

## UAE

The Telecom Regulator launched a broadband speed testing facility through its website in order to bring transparency to operator service. The test indicates the service provider, the download and the upload speed. It also performs a ping test to measure the time it takes to get a response from the ISP's test server. The Director General of the TRA said that since its inception, TRA is keen to deal with all the ICT relevant partners in a transparent way and it is our regulatory obligation to ensure that laws and regulations are implemented the right way. The country's two operators, etisalat and du, have been continuously increasing their broadband connectivity, but in some cases the users experience lower speeds than advertised due to lack of technology deployment in all areas the operator covers. Du recently launched the region's fastest broadband speed at 24mbps to meet high bandwidth demand for data downloading, video streaming and online games. The Regulator also succeeded in achieving the "Sheikh Khalifa Government Excellence Award" for Customer Service. Chairman of TRA expressed glorious delight and pride on the occasion, highlighting the fact that this award endeavor flags the trust and credibility the UAE leadership has put in the performance efficiency of the regulatory in addition to honorably meeting the role assigned to it.



## THE RIGHT SERVICE FOR THE RIGHT CUSTOMER

Businesses and governments in the Middle East, like those around the world, increasingly rely on information and communications technology (ICT) to improve experiences for their customers and constituents, enhance productivity, and reduce costs. With these requirements come greater demands: Middle East enterprises today want voice and data solutions, both fixed and mobile, that fit their needs—and they expect telecom operators to deliver them. To do so, operators will need to truly understand the varying needs of their different customers.

All over the world, business and government enterprises are becoming increasingly sophisticated in their purchasing behavior. They often choose a single source for their telecom needs; they are more cost conscious, and they demand more control and improved customer care. Enterprises have realized that the traditional approach of having separate data and telecom networks and running them in parallel is inefficient and costly. According to a 2008 Ovum survey, two-thirds of the CIOs who responded said they recognize the value of end-to-end solution providers to drive down total cost of ownership and network downtime.

*“Global telecom operators must respond, too, to the fact that mobile use has gone mainstream, with 70% of businesses worldwide using some type of mobile application”*

Global telecom operators must respond, too, to the fact that mobile use has gone mainstream, with 70% of businesses worldwide using some type of mobile applications. Broadband is also critical to enterprise users, as they recognize the importance of high-speed connectivity to reduce the cost of doing business (with services such as voice over IP phone service and online payment) and to develop new markets and channels to attract new customers (for instance, by increasing their market reach via the Internet).



Telecom operators in the Middle East are feeling the force of these trends even more strongly than their global counterparts, as businesses in the region strive for growth and government agencies seek to become more connected and efficient. Organizations' potential use of mobile service, in particular, is still relatively untapped in the region when compared to international benchmarks: On average, only 0.4% of mobile subscribers in the region are enterprise users, compared to 4.7% on average in Western Europe. Similarly, there is still considerable room for growth in enterprise broadband. On average, 13.8% of broadband subscribers in the Middle East are enterprise users, compared to 18.3% on average in Western Europe, according to Ovum.

Some factors unique to the region are also driving demand. Government spending on megaprojects is generating the need for customized ICT solutions. The region's real estate boom is also contributing: Developers typically ask for customized services to differentiate themselves through the services they deliver to tenants; they also seek quality of service for their tenants such as service-level agreements, dedicated ICT teams, network operation centers, and 24/7 technical support teams.

Telecom operators are exploring a number of options to meet this growing demand. They are offering integrated bundles that include fixed and mobile voice services and data services in one discounted offer; they are also extending their offerings beyond the typical voice and data connectivity and offering managed services, in which the operator is fully responsible for the delivery and operation of end-to-end service. They are enabling enterprises through mobile solutions: Although e-mail and SMS/ MMS still dominate mobile data use, the adoption of machine-to-machine solutions, such as remote monitoring, and mobile applications are on the rise. The field sales automation application, for example, is expected to grow substantially in the upcoming years. Operators are also increasing their investments in state-of-the-art data centers. These facilities, in addition to their pre-existing relationships with enterprise

customers, high-speed connectivity, and specialized applications, will position operators to capture a share of the US\$15 billion opportunity in cloud computing and software as a service.

Finally, operators are offering ICT solutions to meet the needs of specific sectors, such as the "Connected Hospital," which provides a full solution of connectivity services and tailored applications to hospitals and healthcare providers. Similar ICT solutions are continuously being designed and developed to address the needs of other key economic sectors, including government, education, defense, and logistics.

Offering these services is a step in the right direction, but operators will need to continue their efforts in order to fully capture the opportunity offered by enterprise ICT. First, they need to thoroughly understand their customers' needs and segment their customers accordingly: For instance, small and medium-sized enterprises are likely to prefer bundled services, whereas large enterprises (including key local players in various economic sectors as well as multinational corporations operating in the region), are more likely to opt for integrated, customized ICT solutions. Second, operators need to develop their products and services based on this deep understanding, taking into account different enterprise segments' needs in terms of connectivity, mobile use, and sales approaches. Third, operators must create after-sales service and support to meet enterprises' increased expectations through higher service availability, 24/7 help desks with knowledgeable technical support, proactive maintenance, short resolution times, and service-level agreements for increased commitment. Doing so will not only lead to operators' own success but support the critical growth and development of the region's businesses and governments.

**Hadi Raad**  
Principal  
Booz & Co.

**Jad Hajj**  
Senior Associate  
Booz & Co.

*Although e-mail and SMS/ MMS still dominate mobile data use, the adoption of machine-to-machine solutions, such as remote monitoring and mobile applications are on the rise*





# Top Technology Updates

## LTE-Advanced Gets Official 4G Certification, Joins WiMAX 2

LTE-Advanced has been officially recognized as a 4G wireless standard. The upgraded LTE now joins WiMAX 2 as an IMT-Advanced technology. In order to qualify for official 4G status, wireless technologies need to achieve peak rates of 1Gbps in hotspots and 100Mbps while mobile, have to be fully IP-based and have the ability to switch between networks that include 4G, 3G and Wi-Fi.

## T-Mobile Launches 4G Wireless Phone Network

T-Mobile is adding eight metropolitan areas including metro Detroit to its next-generation 4G network. T-Mobile now has 4G coverage in more than 80 metropolitan markets in the U.S. T-Mobile offers two smartphones that are fully compatible with the faster 4G speeds: the T-Mobile G2 and T-Mobile myTouch 4G. All current T-Mobile handsets will be backward compatible on the new network.

## NFC mobile payments trial in Singapore

Singapore mobile network operator, Starhub is starting a NFC based mobile payments trial in collaboration with DBS Bank. The trial jointly conducted by DBS Bank, EZ-Link, Gemalto, MasterCard and Starhub will last for eight months. The trial involves adding an N-Flex solution enabling to turn typical handsets into NFC-enabled mobile phone. With this service, the NFC trial user will be able to make payments with their mobile handsets at all merchant outlets that accept the MasterCard PayPass or the ez-link card. The N-Flex solution functions on SIM cards helping to accelerate the ubiquity of handsets supporting NFC. The solution is also the first-of-its-kind conforming to the Single Wire Protocol (SWP) as endorsed by the GSM Association.

## SIRIM Offers WiMAX Testing Laboratory

SIRIM QAS International Sdn Bhd is now offering Worldwide Interoperability for Microwave Access (WiMAX) testing services. WiMAX testing laboratory, located at the Technology Park in Bukit Jalil here, is the only independent WiMAX testing laboratory in the Southeast Asian region. The laboratory is able to perform measurements for all WiMAX profile (2.3GHz, 2.5GHz and 3.5GHz). The laboratory will also be able to support both national and international WiMAX network operators, research and development (R&D) centers and manufacturers, by providing testing services on products to be used in the WiMAX network.

## Asia Pacific LTE Connections to Surpass 120 Million by 2015

LTE connections in Asia Pacific will exceed 120mn by 2015, this aggressive growth will be spearheaded by China with the country expected to account for nearly half (57.9mn) of the total number of LTE connections in Asia Pacific during this period. Behind China, the three largest LTE markets in the Asia Pacific region in 2015 will be: Japan, with 26.5mn connections; Indonesia with 13.1mn connections; and South Korea with 9.8mn connections. Major Asian countries are currently driving HSPA and LTE Mobile Broadband uptake to boost productivity, enhance GDP and build more efficient, information-based economies.

## China Mobile's 3G Network to Cover All Chinese Counties

The number of China's TD base stations is expected to reach 220,000 by the end of 2010, and the networks will cover all the counties in China. China had constructed 545,000 3G base stations, including 115,000 TD base stations, and the number of 3G service subscribers in China reached 34.99 million. China's 3G networks support three wireless access standards. The standards are CDMA2000 operated by China Telecom, WCDMA run by China Unicom and China's self-developed 3G standard TD-SCDMA.

## Philippines' Globe Telecom Ready to Launch 4G

Globe Telecom plans to launch in the next few years the "real 4G" technology in the Philippines, promising to offer wireless broadband Internet connection speeds never seen before in the country. The company said new technology is in line with its strategy of growing its broadband business amid the saturation of the market for traditional call and text services. Globe said the LTE will not only make existing mobile phone applications run faster but also pave the way for new functions that were previously available only for devices with fixed-wire connections







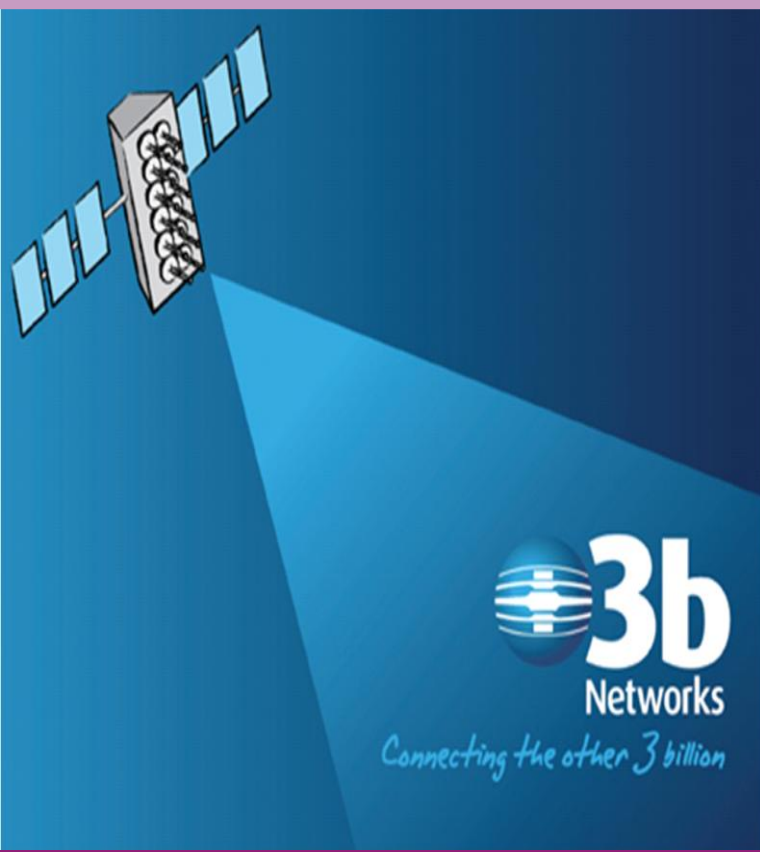
# SATELLITE NEWS

## Yahsat to launch Ka-band satellites in 2011

Al Yah Satellite Communications Company (Yahsat) plans to launch the first Ka-band satellite in the Middle East region in 2011. It plans to launch two Ka-band satellites in 2011 - one in Q1 and the other in Q4. This will allow Yahsat to deliver its Yahsecure and Yahclick services to both public and private customers across 26 countries. The satellite will carry 14 C-band transponders, eight with 36 megahertz of power and six with 54 megahertz. The C-band will be aimed at market in Africa, Middle East and Central Asia. The satellite will also carry 25 Ku-band transponders, enough to broadcast 150 standard-definition digital television channels or 50 high-definition channels.

## Otesat to distribute Inmarsat's GPS satellite system

Otesat-Maritel has signed a distribution agreement with Inmarsat. Otesat will distribute the satellite system called Global Satellite Phone Services (GPS) IsatPhone, a satellite handheld by Inmarsat with global coverage. The satellite phone uses the fourth generation Inmarsat satellites and provides network connectivity with high quality telephony. With the size and the shape of a GSM telephone, it is practical and designed to work in all conditions. The IsatPhone addresses a range of professionals and individuals on land and at sea.



## O3b Networks Raise US\$1.2 Billion, to Finance Satellite Network

Satellite based internet provider, O3b Networks says that it has secured the final funding round before its service launch. The company has raised a total of US\$ 1.2 billion from a group of investors and banks. This will see the company through to the launch of its first satellites which will provide internet connectivity between developing markets and the global internet infrastructure. John W. Dick Chairman of O3b Networks Limited said: "We are pleased to have the new shareholders supporting this important mission. The amount of new funding and the quality of the investors reflects O3b Networks' ability to balance important social goals while maintaining the required private sector returns."

## Eutelsat's KA-SAT on Track for Launch

Eutelsat is ready to launch KA-SAT Satellite. KA-SAT built for Eutelsat by Astrium will be the cornerstone of a new European infrastructure which includes the major gateways located in Europe and connected to the internet by fiber backbone ring. With its total capacity of more than 70 Gbps ranking it as the world's most powerful Spacecraft, Europe's first High-Throughput Satellite (HTS) will usher in a new era of competitively-priced satellite-delivered services. The KA-SAT programme represents a versatile platform for data communications, local and regional broadcasting, IPTV and emerging video applications needing ultra high-bit rates such as HD digital cinema.

## India to Launch New Communication Satellite Next Month

Indian Space Organization said that India would launch a new communication satellite to augment capacity and services in the field. The top space scientists would meet to conduct a mission-readiness review and give the final go-ahead for the launch of the satellite. The satellite, GSAT-5 Prime, would be launched by geosynchronous Satellite Launch Vehicle (GSLV-F06). An exclusive C-band spacecraft, GSAT-5P carries 24 normal C-band and 12 Extended C-band transponders to augment communication services in areas like television broadcasting and telecom.







### **Ofcom Faces Opposition from Operators to Reduce MTR**

Ofcom faces opposition from mobile operators in the struggle to reduce termination rates due to the negative impact on revenues. The mobile termination rate (MTR) is the amount charged by one operator to another for terminating a call on their network. The rates for mobile are currently higher than fixed line charges and vary across different operators. European Commission wants standardization across the continent and is putting pressure on regulators such as Ofcom to intervene.

### **Kyivstar-Beeline National Roaming and Inter-Network Tariffs launched**

Kyivstar launched a national roaming service for subscribers of sister mobile operator Beeline Ukraine alongside new competitive rates for calls between subscribers of both networks. New monthly packages for consumers and business users have been introduced, inclusive of 250 minutes or 350 minutes, respectively, of calls to either network. The new roaming facility means that Beeline subscribers will be automatically transferred to Kyivstar's network if the Beeline signal is weak or non-present, with no changes to fees.

### **ID-WiBB Launches WiMAX & WiFi Roaming Facility in Indonesia**

ID-WiBB has launched an Indonesian broadband roaming facility to serve the many wireless broadband service providers throughout the region. This will enable roaming between WiMAX and WiFi and possibly future LTE operators, creating a unified 4G wireless network across the nation. Three operators awarded WiMAX derived Wireless Broadband licenses in Indonesia have signed up to become roaming partners.

### **Visafone Launches International Roaming in 200 Countries**

Visafone Communications has launched its international roaming services in over 200 countries and more than 400 networks worldwide. With this development, the company has become first CDMA Network in Africa to launch International roaming services to all telecommunication networks.

The company is also offering their customer a 128k dual mode open market handset (OMH) SIM card (Visafone+GSM) that works with its network.



# What SAMENA is doing right now?

## Dear members,

This letter is designed to update you about SAMENA's activities and programs, as well as some ongoing initiatives, which we are working on and which require your participation to help us bring more value to you. Based on inquiries by both members and prospects, we have tried to compile and present to you all pertinent information about our engagements at present as well as for the year end 2010.

## SAMENA MEMBERS' MEETINGS

For the year 2011, the following members' meetings, conferences and "Executive Briefing days" have been planned:

### 1. Broadband Summit 2011

4th week of February  
Country: Muscat, Oman  
Hotel: Shangri LA

### 2. Beyond Connectivity 2011

4th week of April  
Country: Beirut, Lebanon  
Hotel: to be advised

### 3. Mobile Broadband Summit 2011

4th week of May  
Country: Islamabad, Pakistan  
Hotel: Serena

### 4. Convergence to Doha 2011

3rd week of October  
Country: Qatar  
Hotel: to be advised

### A. Additional Meetings

1. CMO's Executive Briefing Day, dates to be announced Led by Peppers & Rogers
2. Quarter Workshops of Content  
Every quarter and led by the SAMENA Content Committee
3. Regulatory Summit in Riyadh - KSA  
Organized by the SAMENA Regulatory Committee

## COMMITTEES & WORKGROUP INFORMATION UPDATE

### SIRG Committee

SIRG had a meeting in Casablanca on October 27th with 9 companies

The IRR survey has been finalized and the related results have been prepared by SAMENA and submitted to the members during Casa meeting. Based on the IRR results the "One Roaming Rate" (ORR) initiative is born. It has been updated by the members for the Board review and comments.

A draft position paper about the Roaming rates regulation is ready to be submitted to the Board. Due to the board tight schedule, the Board will review SIRG activities above during the next board meeting in February 2011.

Meanwhile SIRG will be reviewing and updating the ORR project.

Next issue for SIRG is Global Roaming Quality (GRQ).

### Regulatory Committee

Regulatory committee meeting took place in Casablanca on October 27th.

The results assessment have been prepared by SAMENA and updated by the members during the meeting.

Topics with top priority have been chosen and decided by the members during the meeting. SAMENA and Members have started working on developing the mentioned topics from regulatory perspective.

A specific Working Group has been created within the regulatory committee. The WG is composed from members contributing in the committee activities regularly.

### Technology Committee

A Position Paper on UMTS900 is being drafted and will be provided to the Regulatory Committee once approved by Committee.

#### Committee items under discussion are

HSPA Deployment / LTE Offloading and Backward Compatibility

Arabization of Handsets and Handset Firmware

Future of e.Services (e.Health/e.Gov/etc) and associated Implementation Standards

IPTV Piracy and Copyright/Intellectual Property Issues

### Satellite Committee

Currently Satellite Committee is being reorganized due to members moving jobs and no longer affiliated with Committee.

### Content Committee

#### 1. OTTP – Challenges & Opportunities

Over-the-top-players (OTTP) like Skype, YouTube, Facebook and other companies exponentially increase traffic and associated telco network costs without compensating telcos. Discussion within the committee to approach OTTP's and discuss with them the business modeling.

#### 2. Monetization

Telecommunications companies have to find new ways to monetize content and embrace new business models. One of the biggest income source for content companies is advertising, yet telcos in the SAMENA region have not tapped into that area.

Look at the mobile advertising as a source of income.

#### 3. Digital Content Ecosystem

Telcos and content companies face two key challenges in SAMENA: (1) a lack of quality content and content-related services and (2) suitable monetization method. Telcos and content companies should team up to address those challenges together.



## REGIONAL COLLABORATION AND REACH

SAMENA's interaction with key regional players is building up. We are actively working with a number of operators as well as regulatory bodies, such as TRA-Bahrain and TRA-Lebanon, as well standards organizations such as the ITU.

To help reorganize and reprioritize SAMENA's agenda, our team is also working in enhancing our online presence. The results of these efforts will surface in the nearest future.

SAMENA is actively working to develop relationship with the AREGNET for the benefits of the operators. Request of membership for SAMENA to become an observer has been sent to M'hamed Toufik Bessaï, permanent secretary of the organization in Algiers.

### External Affairs

SAMENA & ETNO coordination for a large summit in Summer 2011

MoU with AICTO under process

MoU with FTTH Council under process

SAMENA participation in "Leaders in ICT" event in Beirut

SAMENA next participation in FTTH MEA event by end of November 2010

## RESEARCH AND REGIONAL INDUSTRY UPDATES

SAMENA Council has several research activities in progress. The major ones include:

1. SAMENA TRENDS: new SAMENA monthly magazine was issued in August highlighting Technology, Market Trends, Regulatory issues, roaming issues and also providing interview of leaders of the industry. The magazine will carry information about regional developments, key performance indicators and other research information. However, what distinguishes our new magazine from our current newsletter is its ability to provide a stronger marketing and visibility platform to our members and other regional players. The new e-magazine will later be developed in print form and will be circulated regionally.
2. The SAMENA research team has defined five KPIs of its own, unique to SAMENA Council' purposes. These KPI's include: STDI: SAMENA Telecom Development Indicator, SPI: SAMENA Progress Indicator, STPI: SAMENA Technology Progression Indicator, SOPI: SAMENA Operator Progression Indicator, SRPI: SAMENA Regulatory Performance Indicator. These KPIs will serve SAMENA'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.
3. SAMENA's research team is preparing a comparative study of SAMENA and its competition in the region and beyond. In so doing, our goal is to highlight SAMENA's key membership benefit areas and to show what value SAMENA is offering as compared to other similar organizations/councils around the world. This comparative study will help SAMENA to improve on to its currently available member deliverables and to further enhance its collaborative and information-driven agenda.
4. SAMENA's research team is currently working on a research paper on the subject of Content. The purpose of this paper would be to see development and issues in the areas of content from both regional and global perspectives.
5. The SAMENA research team is now keeping a monthly check on industry's hottest issues, in line with its six main areas of focus (Broadband, Optical Networks & Applications, Mobile TV, Content, International Roaming, Regulatory Issues). The monthly monitoring of issues would help the SAMENA team prioritize its conferences/workshops' agenda more aligned with the operator's needs.
6. SAMENA is updating its SIRG section with FAQs on international roaming (IR) and related topics. This would help to bring more focused information on IR at one place. Please note that SAMENA's daily news archive already keeps a daily account of roaming related updates from around the region and the globe.
7. Our daily 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.
8. SAMENA's team is regularly sharing its fortnightly regulatory findings in its newsletter. Please write to our regulatory representative, Mr. Javaid Malik, at [jmalik@samencouncil.org](mailto:jmalik@samencouncil.org), and be on our regulatory newsletter's recipient list.
9. Our team is updating of the Research Library section over the SAMENA website, where research information and other inputs from members are archived and maintained.
10. SAMENA Website updates, including 25 countries reports, and other sections such as industry perspective etc
11. Hot Topics List- updated on monthly basis
12. KPIs document-made for SAMENA Awards evaluation process. This includes detailed KPIs of the selected, nominated and shortlisted, regulators, vendors, operators, and executives.



## MEMBERSHIP UPDATE

SAMENA is growing on a monthly basis and is welcoming among its community the following members who have joined the council during the past few weeks:

Qatar Telecommunication - Qtel International  
Bravo (Kingdom of Saudi Arabia)  
Accenture  
SSD

**Total SAMENA current members are 82 organizations.**

## SAMENA CAREERS WEB PORTAL

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

Both SAMENA members and non-members, at varying levels of accessibility and cost, can post job openings. Only members can post completely free of cost. 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.

The SAMENA Careers Portal is the South Asia -Middle East - North Africa region's first job placement and recruitment platform that caters to the needs of Employers and Job

Seekers, specifically in the fields of Telecommunications and Information Communication Technologies (ICT). Designed to meet the needs of the tri-regional marketplace, the SAMENA Careers Portal aims to serve as a source of ready access to top talent in the SAMENA region and beyond.

Experience a new, regionally targeted careers portal and allow new opportunities to knock at your doorsteps!

Please visit <http://www.samenacouncil.org/careers/>

SAMENA's team hopes that this update proves to be of value to you and which you may refer to from time to time to work with us in the near future.

We are committed to taking the "SAMENA idea" forward in both scale and substance, and truly feel encouraged by the prospects of having you-a valued member and resource-work with us, to augment our ongoing efforts and to continually surpass the depth of our delivery.

Please write to us at "info@samenacouncil.org" if you have any questions or research needs or if you would like to know how to contribute. Please also get your contact information updated in our contacts database, so we may expedite timely communication with you on our activities. It is with your support and insightful contributions that we all, collectively, may gain the level of business success we all are striving for.

Thank you



**Bocar A. BA**

President

SAMENA Telecommunications Council

Welcome to  
**SAMENA**  
careers ▶

**Find Employment Opportunities by  
Job Classification, Job Type & Location  
in South Asia, The Middle East & North Africa**

# Subscribe!

Welcome to SAMENA monthly newsletter. This newsletter incorporates news, analysis, data and research on Telecommunications and ICT industries in South Asia, the Middle East and North Africa.



*Coming Soon....*

*Operators' strategies/advancements in convergent world*

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Nationality: \_\_\_\_\_  
Company name: \_\_\_\_\_  
Industry name: \_\_\_\_\_  
Position held: \_\_\_\_\_  
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