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Customer behaviors and latest trends in Mobile market

Exclusive Interview

H. E. Mohammed Omran
Chairman of Etisalat

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EDITORIAL

IN TODAY'S BROADBAND WORLD, IS FACSIMILE BUSINESS SPEED?

I am writing this month with a semblance of wishful prescience for it seems there are far more issues of great importance that what meets the eye. Given the recent ninety days of hyper media activity regarding the Blackberry expose on encryption methods within their facility based network, one must be careful not to overlook the ongoing tidal rush of policy and other activities hitting every operator in our ever changing region of telecoms.

As of latest tally, it appears that five countries, at least by my own limited recollection in this region, inclusive of Lebanon, UAE, Saudi Arabia, Kuwait and Turkey that have gone public regarding the Blackberry issue. Others also are fully engaged with RIM, yet are maintaining confidentiality. I would think RIM (Research In Motion) may be re-addressing their current and future Business Model, given that it is highly likely additional remote servers may be somehow added to CAPEX expenditures. However at the same time, other issues of equal or greater importance (depending upon the audience of course), are in the dialogue or even action mode. It is actually somewhat breathtaking, when one takes in all the issues being addressed currently, by both operators and regulators.

Issues such as Benchmarking of Telecom prices, by the TRA of Bahrain, subscribed by the AREGNET are going to be very helpful in seeing how the operators matchup market to market. What may be interesting, is that if you look at VOIP, some markets totally will not accept it in any form, while others look at it as yes, a destructive technology, but also a creature of progress and stabilization of market demand. In one market, the police are arresting five supposed "recalcitrant" persons selling VOIP out of their home while another market is looking at issuing 3000 more VOIP licenses. The continuity is very thin, even in our part of the world. Therefore, the importance of localization of the issues, the impact and requirements of the markets themselves is highly important when anyone wishes to address them. What is good in Europe is not necessarily good for SAMENA's regional markets. Other issues being addressed also includes cyber security, Falcon Cable connectivity, SIM purchase verification, infrastructure sharing, 3G and 4G network licensing and many others.

This issue of "SAMENA Trends" focuses heavy on customer behaviors and latest trends in mobile markets and as such, the contributions by authors are extraordinary. The purpose

of "Trends" is to provide the best knowledge based source of information possible and to address the "prescience" of the market as best as possible. Therefore it is incumbent of the industry to hear and listen to as many trumpets of theory and thought as possible, and "Trends" is one. The quality of the input is essential matching the needs of the industry professional having to make decisions based on information he or she needs to base such decisions.

Yet, with all of the Broadband applications pounding your iPhoneian, Androidian and Symbian hearts, as well as all other smart phones, you would think customer service would reach some similar level of technology based service provisioning. However, a certain carrier when asked about a specific dispute on carrier billing for internet services recently, emailed back their response to the same party, that in order for their billing dispute to be reviewed, facsimile was the ONLY method of transmittal of the dispute complaint letter, even though the letter was emailed and the response was emailed. Is this an oxymoron of the times we live in or not. I gotta get a cup of coffee (or tea) on this one.

Truly Yours,



Thomas Wilson
CEO & Managing Director
SAMENA Telecommunications Council



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VOIP NETWORK TIMING

VOIP Networks are currently undergoing a tremendous adaptation phase around the world! In the not too distant past IP was considered a best-effort technology which was confined to the amateur technologist. Voice transmission, once considered an application never to embark upon the IP bandwagon because of its susceptibility to delays, now enjoys widespread adoption in the form of Voice over IP (VoIP), from the savvy home user to the cost-conscious business professional.

With VoIP technology, businesses now have a cost effective, feature-rich alternative to traditional business phone systems, a powerful business feature set, plus local and long distance calling for a fraction of the cost of both the low-feature multi-line phones and the feature-rich PBX.

In building a seamless VoIP network, careful engineering design and consideration must be taken to ensure the transmission of your voice traffic reaches its desired destination intact. Of paramount importance is highly accurate timing and synchronization which plays a hand in billing, trouble shooting, voice quality and traffic reporting.

- ◆ **Billing** Call Detail Records (CDRs) are essential pieces of billing for voice calls; they provide the call origination/destination numbers, start and stop time, as well as duration for each hop on the network, and across multiple carriers' networks. Without accurate, traceable time, it is impossible to reconcile CDR and other billing information, which can have significant financial implications.
- ◆ **Trouble-shooting** Establishing cause vs. effect without highly accurate timing is troublesome. An event at one location may cause an outage elsewhere, but with

inaccurate time, it may be impossible to determine which event was the cause, which can have implications in terms of Service Level Agreement (SLA) compliance, regulatory compliance, and forensic applications to conduct diagnosis and recovery.

“ With VoIP technology, businesses now have a cost effective, feature-rich alternative to traditional business phone systems. ”

- ◆ **Voice quality** Perceived voice quality is highly susceptible to latency and jitter as well as bit loss. As VoIP is a real-time application, bits (i.e. packets) are not retransmitted and are delivered sequentially, however, are reliant upon accurate time stamps to ensure accurate order (see figure 1). In addition, measurement of latency a true Quality of Service (QoS) metric requires highly accurate, synchronized clocks at each end. In the absence of good QoS metrics, network operators are forced to over-provision their networks to increase the probability not guarantee of high quality voice.
- ◆ **Traffic Reporting and Engineering** All carriers report on Busy Hour Call Attempts (BHCA), average load, and total minutes. Accurate timing is assumed, and must be ensured.

Traditional Telephony Timing and Synchronization

In the circuit-switched network the PSTN we're all familiar with, frequency synchronization is required to ensure proper alignment of bits within a T1 frame (and higher speed circuits such as SONET). Loss of alignment can cause data errors, as well as dropped calls. In the traditional telephone network, timing and synchronization are distributed on the same TDM network as the data itself.

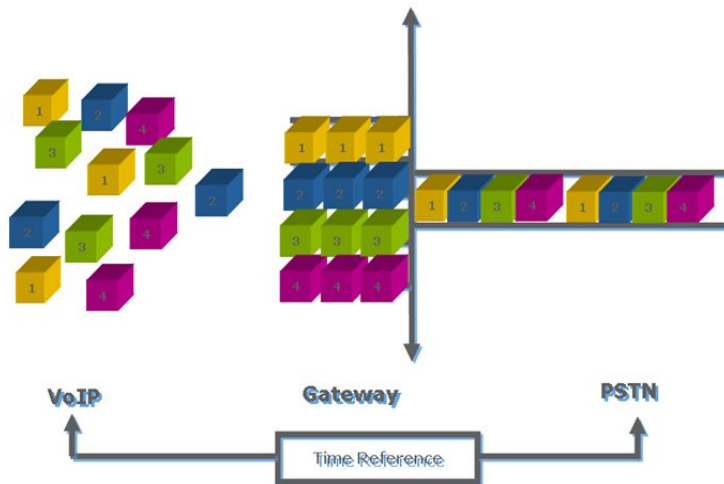


Figure 1. Precise time is required for reordering of VoIP packets for delivery to the PSTN.

TDM networks are synchronous—that is, all elements are synchronized with each other, thus time and frequency distribution are inherent in the structure of the network. In each node of the network, synchronization is distributed from a synchronization system to all of the network elements, and throughout the network, node to node with TDM frame alignment of PDH or SONET/SDH. In addition to transport and switching equipment, synchronization is also needed by service endpoints such as PBXs (Private Branch Exchanges) and IADs (Integrated Access Devices). These endpoints require a highly accurate timing source to ensure the alignment of the originating and terminating service endpoints for proper service operation. Typically each central office will have a Primary Reference Clock (PRC) synched with the GPS system to regenerate timing and ensure that the electronics maintain accurate synchronization.

To ensure accuracy of time anywhere in the IP cloud, the concept of a timing network must be introduced.

The Challenge: Distribution of Time Over an IP Infrastructure

IP, rather than being a synchronous system is asynchronous; not every bit or packet arrives at an end point precisely on time. In fact, they may not even arrive in the same order they were transmitted. Therefore, the challenge for operators of VoIP networks is how to provide accurate timing at all points in their networks. In the case of Cisco and many other equipment providers, there are several options for providing synchronized timing. The Network Time Protocol (NTP) and Windows Time Service (W32Time) are the two most common time distribution methods in use for IP telephony. However, Cisco recommends the use of a highly accurate NTP based solution for their product set¹ because it ensures a more accurate time across the network. W32Time can satisfy the loose timing requirements of the Kerberos authentication protocol (see http://www.windowsnetworking.com/articles_tutorials/Configuring-Windows-Time-Service.html) and provides that “clocks of all Windows machines in a forest will agree within 20 seconds of one another”², it does not meet the much more stringent requirements of a VoIP network.

The challenge for operators of VoIP networks is how to provide accurate timing at all points in their networks.

To ensure accuracy of time anywhere in the IP cloud, the concept of a timing network must be introduced. NTP allows for distribution of time over IP, but does not address holdover when the IP network is lost, nor does it provide for the ultra-accurate timing required for the frequency recovery that is used to ensure bit boundaries are maintained on TDM networks. In addition, the traceability of the timing source must be guaranteed, simply pointing at a public NTP source is not sufficient to ensure the traceability required for many legal requirements. What is required is a system that ensures timing is traceable to a Stratum 0 (such as GPS) source, timing loops in the network are avoided, and that multiple NTP peers are used for backup timing in the case of loss of GPS signal. Today, only one such architecture exists.

The Solution

Even without malicious intent, businesses can be exposed to severe problems resulting from inaccurate clock and timing distribution. These problems include network outages resulting in loss of business, disruptions to workflow or erroneous recordkeeping.

Inaccurate clocks and timestamps adversely impact a businesses ability to detect and identify frauds as well as malfunctions. As a result, not only does it increase the time taken to detect such business impacting events, but once detected, the time taken to correlate the events to accurately identify the entity responsible for the original event is also increased.

One must have a line of timing and synchronization products that can enable businesses to ensure ultra-accurate timing, carrier class robustness and legally traceable Stratum time for all types of networks, including Voice over IP requirements. The NTP servers should exceed the requirements for existing billing applications, and even the nascent IEEE 1588 Precise Timing Protocol's (PTP) more stringent requirement for HW based time stamping. The VOIP solution must ensure continued survivability in the case of traffic based Denial of Service (DoS) attacks, loss of GPS connectivity, and SLA enforcement.

Best Practices

Best practices demand that organizations and businesses deploy a highly secure, highly reliable and highly accurate timing network. In order to make an educated decision, the following factors should be taken into careful consideration:

- ◆ List of regulatory and industrial compliances that demand timing accuracy
- ◆ Contractual obligations which are dependent on timing accuracy
- ◆ An executive team member responsible for ensuring the organization is maintaining secured, redundant, robust, accurate timing and clock systems
- ◆ Possible exposure to business liabilities in case of misconfigured timing in the system
- ◆ Schedule for periodic review of all the items identified in this checklist.
- ◆ Develop a time distribution architecture that identifies a primary NTP server that is in turn locked to a Stratum 0 clock source (i.e. GPS) and consider a NTP-based holdover methodology
- ◆ Establish the correct NTP polling interval it is recommended to use the minimum allowable polling interval of 64 seconds for greatest accuracy
- ◆ Deploy appropriate QoS for both timing distribution and VoIP, as well as other real-time based services, such as IPTV

There are not that many reliable products on the market today that will deliver what is needed in a reliable timing source. One exemplary provider is Brilliant Telecommunications, whose NTP servers provide an ideal solution for building highly accurate and reliable timing networks.

Benefits that all carriers should insure come with their timing source include a highly accurate NTP server that is referenced to GPS, a distributed clock through a private timing network, and an intuitive timing management interface that provides tools for diagnosis, monitoring, alarms, etc.

Best practices demand that organizations and businesses deploy a highly secure, highly reliable and highly accurate timing network.

Characteristics of a Proper NTP Server Product Line

Carrier-class Time And Frequency Equipment

- ◆ Accuracy (sub 50 ns vs. Ms)
- ◆ Zero footprint in Colo or data center
- ◆ Bi-directional timing (packet to TDM; TDM to packet)
- ◆ Fully redundant and modular
- ◆ Meets tough industrial environmental specs
- ◆ NTP-based Stratum 2 holdover (50ps)
- ◆ Fully hardened, outdoor, redundant NTP servers
- ◆ Ultra-high precision hardware timestamps and location based on GPS
- ◆ Compact and highly integrated NTP server
- ◆ Scalable processing for GPS location-based services
- ◆ Enables triple-play QoS for real-time VoIP, streaming IPTV and data
- ◆ Spans the entire space from base station to enterprise

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Jeff T. Seal, COO - Terlight



TOP TECHNOLOGY UPDATES

Sprint's 4G Predicament

This 4G network is made possible by the partnership between Sprint and Clearwire. Currently, Sprint has the majority ownership in Clearwire. Sprint currently has the lead in the 4G race with the country's only 4G network though AT&T and Verizon Wireless are working hard to launch their own 4G networks. Both AT&T and Verizon Wireless have committed to the LTE (Long Term Evolution) standard. Although Clearwire currently uses the WiMAX standard, there's still a possibility it could switch to the LTE standard in the future. Clearwire currently offers 4G service in 49 cities.

"3G/4G/LTE Wireless Baseband Processors From Mindspeed"

Mindspeed Technologies has presented an architectural overview of the Transcede family of 3G/4G/Long-term evolution (LTE) wireless baseband processors entitled, "Transcede: Solving 4G Challenges for Pico, Micro and Macrocell Platforms. 3G and 4G network operators are looking to migrate to a more flexible cellular landscape, which can accommodate compact base stations, such as microcells, picocells and metro femtocells. Mindspeed has designed the Transcede family of baseband processors to enable tomorrow's network architects to deploy powerful 4G Macrocells and 'small cells,' which are built on a common framework.



"3G Smart-Phone Market Has Huge Potential"

According to a survey, in 2009 5.28 million 3G mobile phones were sold in China. Samsung, with Nokia and CoolPAD being the top three brands, take up a market share of nearly 60 percent altogether. Among homegrown players, CoolPAD was the clear leader, holding 10 percent market share.

Market competition is inevitable, and mobile phones' homogeneous trend is an indisputable fact. To seek diversified development, a mobile phone vendor needs to give full play to its technological features and meet personalized customer demand.





VoIP Hardware Industry Continues To Grow

The global VoIP hardware industry has continued to grow. Infonetics Research has revealed that increased demand for session border controllers (SBCs) has contributed to the steady development of the VoIP equipment market during the second quarter of 2010. SBCs are used in some IP telephony solutions networks to help control and boost the signal strength, while they can also improve call security. Overall, market revenue increased to \$564.7 million (£366.2 million) in the second three months of the year, a rise of 5.3 per cent compared to the previous quarter.

New Wireless VoIP Hardware Released

A US firm has released a new VoIP solutions headset which could improve the sound quality of calls. The new H760 wireless headset allows users to continue their VoIP conversation in a crowded area, while corporate customers can use the technology in a busy call centre. Furthermore, the hardware includes a built-in equalizer that enhances the sound quality of IP telephony solutions. Brian Yalung, claimed the new headset is more flexible than many of its rivals due to its wireless capability.

The H760 also includes a quick-access audio control to allow customers to easily adjust the sound of calls.

Blackberry Users Can Now Make VoIP Calls Over WiFi

Blackberry users can now make calls over WiFi using Tringme's newly launched application. TringMe has launched a 'true' VoIP application for blackberry enabling BB users to make VoIP calls over WiFi (doesn't require your cellular minutes to make VoIP calls). In case you do not have WiFi, TringMe gives you local access numbers and callback options available to place your calls. The application also allows to make conference call using WiFi service.

Internet Is Coming To Cars According To IMS Research

As Internet became more common in homes and offices, it was widely expected that soon it would also be common in light vehicles. A recent report from IMS Research claims that this is about to change. 'The World Market for OE In-vehicle Telematics' forecasts that globally, the number of new vehicles with Internet access will grow from 1.1 million in 2009 to 6.0 million in 2017 (about 6% of new vehicles).

The report forecasts that sales of in-vehicle apps will grow rapidly to over \$4 billion in 2017. Third-generation (3G) technology has changed this, and is now widely available in most developed countries (Japan, with early wide availability of 3G, had the most vehicles with Internet access in 2009). Deployment of next-generation (4G) technology not only will make in-vehicle Internet access faster but will also support new services that were not previously feasible.





OPERATOR LEADER'S VISION

H. E. Mohammed Omran
Chairman of Etisalat

Mohammed Omran leads Etisalat, which is now one of the largest telecommunications companies in the world with a market value of approximately \$25 billion.

Mr. Omran has worked for Etisalat over three decades and served in many different positions until he became the Chairman of Etisalat in 2005. From his current position he

has overseen many of the company's major achievements and today is considered one of the key decision makers in the telecommunications sector in the region. In 2010, Arabian Business named Omran in its Power 100 list of the 'Most Influential Arabs in the Arab World' and he is the only representative from the regional telecom sector to maintain their presence in the list in 2010.

Omran joined Etisalat in 1977, one year after of its inception. In 1982 he was promoted to Area Manager in Ras Al Khaimah, and then appointed as Deputy General Manager of Etisalat in 1984. He held several managerial positions after this until he became the CEO of Etisalat in 2004.

He led Etisalat into new markets through a set of expansions and global investments in Asia and Africa. Because of this, Etisalat is now rated among the list of largest international telecommunication operators. Many of Etisalat's international expansions became models for hard work and success - most notably the Saudi and Egyptian markets.

“We are not afraid to adopt new technology-we like to adopt it. And the market likes it and the customer likes it.”

Operator Leader's Vision

1. Tell us about your leadership and visionary roles as a chairman of Etisalat, and What does a leader need today, to be able to maintain an edge?

Since the beginning Etisalat has been keen to adopt new technologies and to adopt them fast- sometimes much faster than the rest of the world.

The first mobile network in the UAE was totally new in 1982. At that time, I was involved in the initial forecasting in which we anticipated that gaining 5,000 customers would take three to five years. We met that goal in one year, even though the cost was very high and the mobile was not very portable-it was only used inside cars.

When GSM was introduced, there was a special group for European countries that were looking to set up a mobile system for the European Union. There were 17 operators in Europe who were members. We heard about it and we wanted to join. They said, “but you are not European.”

We said, yes, but we like this technology and we want to market it in the GCC because we, also, have a small number of countries and we'd like to have one network that works for all. That was back in 1986-87.

At the time that we submitted our memorandum of understanding to the GSM Association, an Australian operator also expressed interest in becoming a member. So they became number 18 and we became number 19. We installed our network in 1993. So you see, this was and still is the way we are in Etisalat:

We are not afraid to adopt new technology-we like to adopt it. And the market likes it and the customer likes it. We have people from all over the world coming into the UAE, so we had to offer the best technology at a fair price.

The same thing happened when the Internet came. In the beginning of the 1990s we sat together and tried to visualize where growth was going to come from. We determined it would be in mobile and in Internet and started thinking about how we could become a leader in those areas.

At that time, most of the Internet access wasn't necessarily straight into the region and most operators who offered Internet access were not telecom companies. But we said, we-not someone else-will offer Internet access because we can.

In the beginning you needed to connect with the United States because the databases were in the US. If you look at the globe, the US is on one side and we are on the other side. So we linked with the US through the East via Japan and the West via Europe, which gave us advantages in the case of a cable cut and ensured that we had backup connectivity.

Then we developed EMIX, the Emirates Internet Exchange, through which we offered bulk Internet bandwidth connectivity to countries around us. Some of those countries have developed their own networks, but at that time and still today, EMIX is the main network.



2. What are your current business activities in the market?

Etisalat operates in 18 countries across Asia, the Middle East and Africa, servicing over 107m customers out of a total population of approximately 2bn people.

We are a comprehensive telecommunications provider offering a one-stop shop for mobile and fixed-line voice and data services and cable TV to individuals, enterprises and international telecommunications companies, ISPs, content providers and mobile operators.

We offer a variety of hi-tech complimentary services to the telecommunications industry including managerial and technical training, SIM card manufacturing, payment solutions, clearing house services, peering, voice and data transit, and submarine, satellite and land cable services.

Etisalat is also the major hub in the region, for internet, voice, mobile broadband, broadcast, roaming and corporate data services, with an extensive regional and intercontinental network. It is the largest carrier of international voice traffic in the Middle East and Africa and the 12th largest voice carrier in the world. Etisalat is the largest comprehensive provider of carrier and wholesale services in the region with Points of Presence (PoP) in New York, London, Amsterdam, Frankfurt, Paris and Singapore providing a truly global reach.

3. Why has keeping a customer become a real challenge for companies-operators and vendors alike?

While competing for market share, telecoms operators need to meet high customer expectations and comply with ever-changing regulations.

Meanwhile, technology's next-generation infrastructure changes the nature and delivery of services. Operators must offer increasingly innovative and high-value services.

Traditional revenue streams are under increasing threat from competition and market saturation.

Owning or buying infrastructure, creating value through managed services, winning the race for talent and creating more agile customer-centric organisations are key challenges for leaders across the telecom sector.

In general Increasing competition brings with it many challenges and one of those is in maintaining your customer base. Certainly when a new entrant comes

Etisalat is also the major hub in the region, for internet, voice, mobile broadband, broadcast, roaming and corporate data services, with an extensive regional and intercontinental network.

to the market, your market share will automatically be impacted as they offer lower introductory prices to attract those easiest to shift. This segment of customers, which is a large segment, is not easy to maintain by any operator except by promotion of new packages and low prices. This makes promotional campaigns even more effective at this time than before and places challenges on maintaining loyalty of even your most stalwart customers.

4. What are the present market conditions that operators are training themselves to grow accustomed to?

Once again, competing for market share, delivering innovative solutions, and keeping pace with technology, the telecommunications sectors are developing at a relentless pace. As global markets evolve, converge and grow, there is no escape for operators to be constantly updated with capabilities and talents in order to keep pace.

This talent could be a new breed of sales and technical people providing customers with innovative, high value propositions, or a pool of experts who can keep pace with technological advances and then apply these advances apply to business needs. Whatever the function, recognising, engaging, developing and valuing thought-leaders as well as people-leaders continues to be a challenge for many in the sector.

Most customers today are looking for ways to cut their expenditure. Therefore sales and marketing teams of the operators need to readjust their thinking to be closer to their customers. There is no-longer a call to launch ever new services, but rather to help customers on how telecom services save money and grow their business. Despite the fact that telecoms is part of the essential bag of goods customers continue to spend on in this time, Operators still need to ensure our portfolio is relevant to the conditions of today's market and to be competitive. I am sure that this mindset change is essential at this period.

5. What is your assessment about IPTV content industry in UAE?

Many years ago we have foreseen the need to establish a cable TV system. Our system was the only one in the whole Arab region with real cable TV to the home. We used hybrid fiber coaxial, but now the FTTH network that we have implemented has opened a lot of potential for the home and for business and paves the road for the media industry to develop more high definition content. Abu Dhabi is now the first capital in the world to be fibre already. We have people who are willing to pay for good quality and good content.

6. How do you think Etisalat can get maximum profit out this (IPTV) market / opportunity?

We are already competing with satellite operators and buying from them as well. We offer Showtime, ART and Orbit to our customers, but we are also developing our own channels and we are buying some other channels because we are not in the media business. We need to be more active in the whole communications value chain, and that, mobile content, is one of the areas that is very important for future growth.

7. What are the most important Value Added Services (VAS) that you depend on for maximizing revenue generation and what are the trends in Middle East?

Etisalat's was successful in diversifying its sources of revenue by improving and upgrading our network and infrastructure with advanced technologies which enabled the introduction of new products and services such as higher speed broadband packages, improved value added services and introducing the most advanced mobile data packages like the iPhone, and Blackberry. Our mobile internet users are more than a million customers. Adding that Etisalat has been able to achieve increase in internet revenues by AED 599m (9% of total revenue) while the data revenues increased by Dh 486m (12% of total revenues) by the end of 2009.

8. What do you think will be the impact of blackberry ban on Etisalat?

Although there will be some impact, we expect that this will be minimized. We will maintain our revenues since the attractive alternative packages and services that we are offering our valued customers will be comparative or even better in terms of value and price.

9. How would you assess the future of LTE technology in the region?

The Region is now gradually evolving and advancing from standard 3G towards the fourth generation technologies, Etisalat announced its first trial of LTE in October 2009, and we have progressed well since then. We also have now started the pre-commercial testing using a control group of customers.

We have also formed some strategic engagements with all of the major vendors in this field and continue to test to ensure we install the very best infrastructure.

10. Which regulatory decision has had the greatest impact on your overall strategy?

In 2004, the telecom market in the UAE opened to competition. The Telecom Regulatory Authority was set up at that time and changes were made in some of Etisalat roles. We made the necessary changes in our internal structure, which helped our business grow with the present market changes. We will continue to achieve growth by refocusing our business and developing better relationships with our customers.

11. What have been your most distinguished achievements between 2005 and 2010?

With devotion and determination for over three decades Etisalat transformed itself from a local operator into international player operating in 18 countries following a selective expansion strategy and deploying international best practice. The number of Etisalat's customers increased from only 4 million in 2004 to 107 million customers across 18 markets in Asia, Africa and the Middle East today. This means that the number has increased 2,500% in just five years. Etisalat was also keen to continually upgrade its networks making Abu Dhabi the first capital in the world to be fully connected with the advanced fibre to the home network. Etisalat has also received the Best Operator in the Middle East Award five times in the past three years.

In addition to this, revenues increased at a compound annual growth rate of 24% between 2005 and 2009 to reach AED 30.8 billion. Net profits increased by 20% in the same period. And the total profit distributed by Etisalat in the last five years is equal to the total amount of profit distributed during the previous 24 years. The amount of bonus shares the company distributed in the last five years is also approximately the same amount of bonus shares it has distributed since its inception.

All of these achievements accomplished by Etisalat would not have been possible without an experienced team possessing the ability to implement general strategy and policies applied by the management. This has reflected positively on our international expansion so that we are now able to extend our services to more than 2 billion people.

12. In your view, which trend will take over 2011?

I think that the trend of Social Networks will spread further in the workplace. As the lines between professional and personal communications become increasingly blurred, the industry will need to incorporate enterprise social networking into their overall unified communications and strategy. Enterprise-grade versions of Facebook, Twitter and Wikis in the workplace will begin to be as common as e-mail and will change the way business is conducted. As a result, the decision-making process will be accelerated.

*H. E. Mohammed Omran
Chairman of Etisalat*



Etisalat's vision and positioning is clearly a demonstration that the Middle East has a potential and reservoir of talents that can put on orbit leading operators that could be among the 10 players in the world and in a very short period of time. Samena greatly benefits from Etisalat's role as an innovative player in the region, constantly investing to have a reliable network through which key and unique applications are provided.

We can state that Etisalat is an "integrated operator" where the Business Units have been consolidated:

Data/Mobile/Fixe/TV with a Customer centric approach meeting each community and demand. Furthermore, Etisalat is relying on human values having the right skilled technical and commercial employees thanks to its Etisalat academy.

With the global challenges that operators are facing now, Etisalat is in perpetual move as to the innovation and questioning themselves to meet the demand of the market as the competition is fierce but healthy.

In term of orientation and it's not surprising that Etisalat is banking on a massive development of the community Social Networking which is just in line with the image of the UAE.

The major market development arising is the penetration of the Over the top providers where Etisalat has foreseen the potential growth and has been developing TV related services which is a fast growing platform.

It is a privilege for SAMENA Telecommunications Council to benefit from the support and expertise of Operators such as Etisalat for the development of the Telecommunications in the region.

Bocar A. BA, President - SAMENA



SATELLITE NEWS

Production Of First National Telecommunications Satellite Of Azerbaijan Starts In USA

Orbital Sciences Corporation has started manufacturing of the first national telecommunications satellite of Azerbaijan. Azerbaijani Minister of Communications and Information Technologies Ali Abbasov says, work for production of Azerspace has already been started by Orbital Science Corporation in USA. Azerspace is designed for providing different services such as digital television and radio broadcasting, access to the Internet network, data transmission, creations of multiservice networks VSAT, as well as government call among others.

"Presently, our main aim is prepare local personnel and establish international cooperation in space industry sphere," A. Abbasov said. "Work for the project is carried out in compliance with established program. It is planned to build an earth-based station, marketing actions and so on at a following stage," A. Abbasov said.

A contract has already been signed with Malaysian satellite operator MEASAT for lease of an orbital position, where the satellite will be placed. It is expected that satellite Azerspace will be launched in July to August, 2012, after which it is planned that the project will be implemented on launching of the next and in the future several satellites.

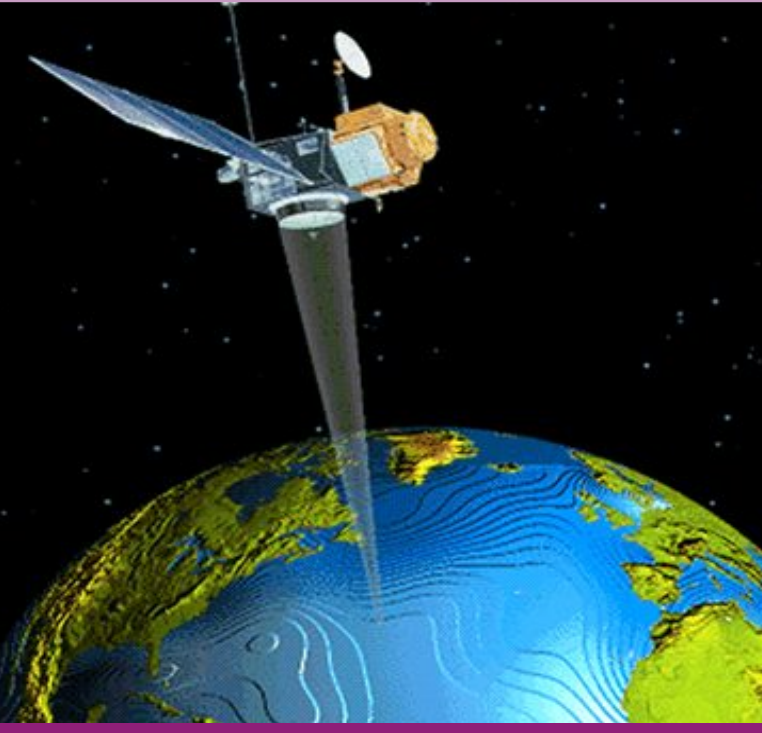
Africa Initiated A New Communications Satellite

European rocket Ariane 5, which has orbited the telecommunications satellite Rascom. Covering mainly sub-Saharan Africa, the satellite, whose construction was entrusted in 1999 to Alcatel-Alenia (now Thales-Alenia), will connect African villages to the Internet without having to install expensive networks. Twenty-eight African countries have already committed to rent its services.

The New Partnership for Africa's Development (NEPAD) has identified and listed the project of pan-African satellite system SAR - COM-QAF as an infrastructure priority basis to facilitate the development of new information technologies and communication.

RQ1R has three objectives of providing telecommunications services to African operators and bridge the digital divide by connecting to broadband the great cities of the continent, but also by bringing the phone in remote areas through low cost terminals.

One hundred and thirty thousand remote villages could be served by Visat: 15,000 antennas have already been commissioned for this purpose and would be ready to be installed. Other clients served, televisions, who, with the transition to high definition, become very large consumers of satellite links.



Inmarsat To Launch Global Satellite Network In Ka Band

Inmarsat has announced an agreement with Boeing to purchase three satellites that the company will operate in the Ka band in order to provide mobile broadband data services to the government, energy and maritime sectors. With this, Inmarsat will be the first to market with Ka-band mobile broadband services targeted to the government and enterprise sectors. While Ka-band service providers already exist, they typically provide fixed services to the home market.

The company will invest \$1.2 billion over the next five years to purchase and launch the satellites, deploy ground-based infrastructure, and develop products. The company said that it expects to realize annual Ka-band service revenues of \$500 million five years after the network becomes operational.

Terminal form factors will be small, about 24 inches wide. "It's a very manageable size for ship use and for oil-drilling platforms. Terminals that will be used for airborne reconnaissance and by troops on the move will be about 8 inches, "about the size of an iPad. Operations are expected to begin by 2014 and the prices are expected to be less than the prices that Ku-band service providers currently are offering.

Federal Broadband Grants Go to 4 U.S. Satellite Firms

Four satellite-broadband providers have been awarded a combined \$100 million in U.S government grants to provide links to rural areas of the United States under the government's broadband stimulus program. Three of the four companies were awarded grants to provide two-way

satellite broadband to specific regions. The fourth, Hughes Network Systems of Germantown, Md., was given more than half the grant total, \$58.8 million. Carlsbad, Calif received \$19.5 million in grants to extend the service in the West and Midwest. EchoStar XI Operating LLC received about \$14.2 million to provide satellite broadband in the East and Midwest. Spacenet of McLean, Va., received \$7.5 million for satellite broadband projects in Alaska and Hawaii.

KVH Mini-VSAT Broadband Coverage for Internet and Voice Soon to Include Brazil

KVH Industries announced that it has signed an agreement with Star One to support mini-VSAT Broadband(SM) coverage for Brazil and its offshore waters. The mini-VSAT Broadband network was designed from the ground up to be the first next-generation maritime satellite communications solution. Offering service and performance superior to traditional maritime VSAT services through a global spread spectrum satellite network, it also includes the commercial-grade KVH TracPhone V7, the first FCC-approved 24-inch (60 cm) VSAT antenna.

SES ASTRA Expands Satellite Broadband Service ASTRA2Connect to Ukraine, Belarus and Moldova

SES ASTRA announced that it has added another distribution partner to market its satellite broadband service ASTRA2Connect in Ukraine, Belarus and Moldova. With Novacom, ASTRA2Connect now counts 23 distribution partners in 21 countries across Europe. ASTRA2Connect is an interactive broadband internet access that is offered via distribution partners to end customers and businesses in Europe, the Middle East and Africa. ASTRA2Connect has more than 65,000 users in Europe, thereby representing the largest satellite-based broadband network on the continent.

SIS LIVE Upgrades SNG Network to iDirect's Evolution Platform

VT iDirect is an in satellite-based IP communications technology announced that SIS LIVE, Europe's broadcast and uplink supplier, is upgrading its satellite news gathering network to iDirect's Evolution platform. The upgrade allows SIS LIVE to more efficiently allocate and segment bandwidth for its U.K. broadcast customers who use the network to transmit live video and audio feeds from vehicles in the field. SIS LIVE's network provides major U.K. news agencies with broadband access via satellite connectivity to help them meet the growing demand for live news coverage.



THE BLACKBERRY FEARS...

The Canada based Research in Motion (RIM) BlackBerry Smartphone Manufacturers, that allows users to send and receive data like e-mail through servers located overseas, is involved in matching disputes with at least four countries in UAE, Saudi Arabia, India and recently Indonesia, over apprehensions that its device's powerful encryption technology (government-level 256-bit encryption) could be used as a tool for terrorism or criminal activity. Being restricted from accessing RIM servers and accordingly the possibility of monitoring the citizens data transmitted through BlackBerry service, the governments think that the device's strong encryption is considered a threat to national security.

The point of view over whether several rising nations can successfully hack BlackBerry service gives an unusual sight of the vague world of state electronic scrutiny already changing politics, espionage and business.

Governments argue about the double standard on the part of RIM BlackBerry servers are located in the United States, Britain and Canada and it is very hard to believe that intelligence agencies in those countries have access to them. Maybe for that reason France has banned its officials from using the devices. But most analysts say Western efforts have focused mainly on trying to use electronic intercepts to track a small number of militants, organized criminals and others including child pornographers.

Governments in the U.S. and Europe have largely made their harmony with encryption technology, but officials in Asia and the Middle East have demanded that RIM modify its practices to allow them access the BlackBerry e-mails and BlackBerry Instant messaging data.

In a recent interview by the U.N. Telecommunications Chief, he urged the BlackBerry's Canadian manufacturer to give law enforcement agencies around the world access to its customer data, as the governments have legitimate security concerns that should not be ignored.

Hamadoun Toure, Secretary General of the International Telecommunication Union, said that officials fighting terrorism have the right to demand access to users' information from the maker of the BlackBerry and these are genuine requests and there is a need for cooperation between governments and the private sector on security issues.

The concern has brought human rights groups into the fray. The New York-based Human Rights Watch says governments around the world are trying to get their hands on personal information for a "variety of reasons," and there have to be safeguards in place to ensure that they don't use this data for "nefarious purposes".

And at the U.S. State Department, spokesman Philip Crowley has already linked the actions against BlackBerry to the question of freedom of information.



"It's about what we think is an important element of democracy, human rights, and freedom of information, and the flow of information in the 21st century," Crowley said on August 2 in expressing disappointment at the UAE decision. "It is our view that you should be opening up societies to these new technologies that have the opportunity to empower people rather than looking to see how you can restrict specific technologies out of a security concern, which is understandable, but we think this is not necessarily the best way to accomplish that," Crowley added.

Due to concerns shown by the different governments that have been addressed in other parts of the world, this issue should definitely be tackled in order to remove the apprehensions of all concerned governments.

Till date, no solutions have been agreed on between RIM and the concerned countries in order to satisfy both requirements. Discussions are still ongoing until a feasible technical solution is found and implemented.

Meanwhile the BlackBerry service is still active within the mentioned countries until further notice.

BlackBerry in the UAE

The issue jumps to eminence when the United Arab Emirates announced on August 1 that it would ban BlackBerry's e-mail, messaging, and web services from October. Authorities say the problem is that BlackBerry data is automatically shipped to computers abroad, making it difficult for them to monitor illegal activities at home. The ban will affect even visitors to the UAE, depriving them their accustomed services.

The UAE, where BlackBerry maker RIM has 500,000 users, has said it would suspend BlackBerry Messenger, email and

Web browser services from October 11 until the government could get access to encrypted messages. BlackBerry's Messenger application has spread rapidly in the Gulf where it is a popular business and social networking tool. But because the data is encrypted and sent to offshore servers, it cannot be tracked locally.

This has raised fears in Gulf States, especially in the UAE and Saudi Arabia, that a lack of access could fetter their ability to hunt out potential spies, assassins or Islamic militants, analysts say.

The U.S. and Canadian governments have started talks with authorities in countries including the United Arab Emirates to try and head off possible bans on the use of BlackBerry.

Canadian Trade Minister Peter Van Loan told his country's officials are working with RIM and foreign governments to find a solution to disputes over the device.

As mentioned during a press conference by the U.S. Secretary of State, both U.S. and UAE governments are discussing a proposed ban. "There is a legitimate security concern," Secretary Clinton said, "but there's also a legitimate right of free use and access."

"It is regrettable that after several years of discussions, BlackBerry is still not compliant with UAE regulatory requirements even as it complies with similar policies in other countries." The UAE has said that the upcoming ban on BlackBerry services would remain in effect until RIM becomes fully compliant with UAE regulatory requirements.

It is understood that in order to avert the possible ban, RIM is in negotiation with the Regulator and offered some sort of remedy which it had offered to other concerned countries.

BlackBerry in KSA

According to a Saudi official, Saudi Arabia and RIM have reached a deal on accessing users' data that will avert a ban on the service. The agreement involves placing a BlackBerry server inside Saudi Arabia to allow the government to monitor messages and allay official fears the service could be used for criminal purposes. The deal could have wide-ranging implications for several other countries, including India and the United Arab Emirates, which have expressed similar concerns over how RIM handles data. The Saudi official said tests were under way to determine how to install a BlackBerry server inside the country. The reported agreement raised questions about how it would affect Saudi access to messages sent over BlackBerry. RIM says its technology does not allow it or any third party to read encrypted emails sent by corporate BlackBerry users. The estimated user base is around 750,000 in the kingdom. The consumer version has a lower level of security. The kingdom is one of a number of countries expressing concern that the device is a security threat because encrypted information sent on the phones is routed through overseas computers

making it impossible for local governments to monitor. Analysts say RIM's expansion into fast-growing emerging markets is threatening to set off a wave of regulatory challenges, as its commitment to keep corporate emails secure rubs up against the desires of local law enforcement. The Communications and Information Technology Commission announced the imminent ban saying the BlackBerry service "in its present state does not meet regulatory requirements", according to the state news agency SPA. Saudi security officials fear the service could be used by militant groups. The kingdom has been waging a crackdown for years against extremists linked to al-Qaida.

BlackBerry in India

India withdrew threat to ban BlackBerry services for at least two more months after RIM agreed to give security officials "lawful access" to encrypted data. The Home Ministry, which wants real time access to encrypted corporate e-mails and instant messaging, said in a statement it would review RIM's security proposals over the next 60 days after the Department of Telecommunications studies the feasibility of routing BlackBerry services through a server in India. It remains unclear precisely what concessions RIM agreed to in order to avert the ban. About 1 million BlackBerry users would have been affected in India. RIM has made certain proposals for lawful access by law enforcement agencies and these would be operational immediately. The feasibility of the solutions offered would be assessed thereafter, the ministry said. Home Secretary met officials from the Department of Telecommunications, the Intelligence Bureau and the National Technical Research Organization a cyber intelligence organization to discuss BlackBerry security issues, Home Ministry spokesman said. RIM has been reluctant to agree to its demands for real-time access to encrypted corporate e-mail, saying previously it is technically impossible to provide. RIM has also said it is a "misperception" to think server location has any bearing on a government's ability to access encrypted information.

BlackBerry in Indonesia

RIM faces growing scrutiny over its BlackBerry e-mail and messaging services from Indonesia, the world's fourth most-populous nation, became the latest country to express concern about BlackBerry services. The Indonesian government doesn't plan to limit BlackBerry services in the country, the Ministry of Communication and Information Technology said.

"So far, there is absolutely no plan to implement a similar ban policy pursued by the United Arab Emirates as we don't see an urgent or strong reason to impose it," the Ministry said in a statement on its website. The statement counters earlier comments by Heru Sutadi, a member of Indonesian Telecommunications Regulatory Body, an independent regulator, who said the country may ban BlackBerry services over security concerns unless the company sets up a server in the country.

RIM's Statement

RIM is becoming a victim of its own success and in a series of countries in Asia and the Middle East; the company's Smartphone faces crippling security regulations, as these countries are demanding access to users' encrypted corporate e-mails and instant messages. The stated concern of the countries is that terrorist and militant groups could use BlackBerry's security features to communicate discreetly.

But David Yach, the company's Chief Technology Officer, says he's not worried about controversy; he's just gratified by how well the security in the BlackBerry system is operating, because it's what the company's customers worldwide are relying on.

On Aug. 2, in one of RIM's rare statements to the public on this issue, the company sent out what they called an "update" to "valued BlackBerry customer(s)." The statement was issued to reassure customers that their information remained safe.

"The BlackBerry architecture was specifically designed to provide corporate customers with the ability to transmit information wirelessly while also providing them with the necessary confidence that no one, including RIM, could access their data," the statement read. "RIM assures customers that it will not compromise the integrity and security of the BlackBerry Enterprise Solution."

*Mr. Javaid Akhtar Malik
Director Regulatory & Consultancy - SAMENA*





LET'S SAVE THE PLANET !

Nations and Governments, Regulators and Authorities, Operators and Vendors, Profit and non-profit Organizations, representing the standards and the big players of the ICT industry, are all calling for a safe Environment, green technologies and solutions to save the planet from the global warming coming closer year after year.

The "Better City Better Life with ICTs" theme has been adopted by the ITU Council in 2009 to mark the World Telecommunication and Information Society Day in 2010 which is dedicated to promoting "Better Cities, Better Life" and which will showcase a number of initiatives aimed at achieving greener, safer, healthier, prosperous, inclusive and well-managed cities where over half the world's population resides.

The United Nations Environment Programme has Commemorated on 5 June since 1972 the World Environment Day (WED) aimed to be one of the principal vehicles through which the UN stimulates worldwide awareness of the environment and encourages political attention and action.

ICTs will contribute to a better future with innovative ways of managing our cities smart buildings, intelligent traffic management, new efficiencies in energy consumption and waste management, and not least exchanging information and knowledge and communicating on the move in an increasingly converged information society.

SAMENA Council encourages such initiative and call for action to make this happen through its awareness and communication tools, and it is very proud to announce the following initiative of one of its full member Umniah in Jordan.

SAMENA Team



Embodying its corporate identity that belongs to the environment and as part of its interests towards preserving natural resources and the Kingdom's environment for future generations, Umniah announced the launch of its environmental initiative entitled the 'Umniah Green' Initiative.

The launch of this initiative, which is still in its early stages, coincides with the World Environment Day and stems from Umniah's strong belief in the importance of protecting the environment through a prudent consumption of the country's resources and a decrease in the negative impact of some practices that harm the environment. The initiative reflects Umniah's interest towards enforcing the concept of sustainability in light of environmental challenges that are being faced by Jordan, the region and the world.

As part of this initiative, Umniah will be focusing on four main environmental fronts reducing water, energy, paper and plastic consumption. Towards this end, and as part of the actions that were taken in relation to reducing in water consumption, Umniah adopted a number of practices including a reduction in the pressure of water pipes accords the company's buildings and main offices in order to save water. The company also launched an awareness campaign with tips and practices related to water conservation. During the latter stages of this initiative, Umniah will also be installing water saving devices in all of its water outlets.

As part of it efforts associated to reducing energy consumption, Umniah is renowned for its environmentally friendly practices primarily related to of the use of green and renewable energy resources and the reduction of CO2 emissions. The company has harnessed solar energy to replace diesel in the generation of electricity required to operate 20 of its cellular stations in different areas around the Kingdom. This step resulted in savings at an average of 360 thousand liters of fuel annually and protected the areas surrounding the sites from CO2 emissions.

The engineering department at Umniah is also currently working on the installation of wind powered electricity generators at cellular station cites and developing a direct cooling system in these stations to reduce energy consumption and CO2 emissions. Within this context, Umniah is also currently using energy saving light bulbs in all of its main building offices. The bulbs are known for their long levity and reduced levels of energy consumption.

Pertaining to its measures that guarantee a reduction in paper consumption, Umniah launched an awareness campaign for all of its employees that included the

placement of paper recycling bins in all of its departments and selling points to gather paper for recycling in cooperation with the Jordan Environment Society.

Umniah's first step to promote the efficient consumption of plastic included the replacement of plastic prepaid recharging cards with paper cards. The company also placed plastic recycling bins in collaboration with the Jordanian Environment Society in all of its departments and selling points in order to gather used plastic and recycle it.

As part of this initiative, Umniah has assembled a team of volunteers from the company to oversee the progress of the environmental projects that are being implemented including the projects that are related to recycling paper and plastic materials. This team is mandated with the task of ensuring the optimum delivery of the projects in addition to seeking ways to improve or enhance the projects if necessary.

As part of its programs that reflect its belonging to the environment Umniah Launches Its Environmental 'Umniah Green' Initiative

Commenting on this new initiative, Mr. Ihab Hinnawi, Umniah's CEO, said: "We are happy to be launching this initiative that coincides with the World Environment Day 2010, and reflects our genuine belonging to our country and our environment. We have realized the importance of cooperating with organizations that support the environment in order to effectively contribute to reducing the negative impact that our environment is being subjected to and preserving it for our children." He added: "Participating in preserving the natural resources of our country has become a national obligation and every Jordanian citizen and organization should be aware of this responsibility especially in light of the rising environmental consequences that have been witnessed in different parts of world. It is our obligation to take serious measures that limit this negative impact."

He further added: "We are proud of our collaboration with the Jordanian Environment Society which has provided us with paper and plastic recycling bins for Umniah's departments and selling points, and contributed to the success of the first phase of our green initiative. We hope that this initiative that is being implemented by Umniah's staff and management will be met positively by all members of our local community and we hope that it will encourage other national organizations to launch additional green initiatives."



A SNAPSHOT OF REGULATORY ACTIVITIES IN SAMENA REGION

In last month issue of 'SAMENA TREND' we talked about the independence of Regulators and observed that most of them had remained steadfast in maintain their independence in making and implementing their decisions. The term 'independence', as used in the context of telecom reform is often misunderstood. It does not entail independence from government policy, but pretty independence to implement policy without unwarranted meddling from politicians or sector lobbyists. It implies independence to attain specialized skills; to manage without interference and to be accountable for results according to specified performance criteria.

During the month of August 2010 a bunch of regulatory were witnessed in the SAMENA region, a brief snapshot of the achievements is depicted here.

Country-wise Regulatory activities:

Afghanistan

The Afghan Ministry of Communication and the regulator remained engaged in a conference sponsored by the International Telecommunication Union (ITU). The countries like Bangladesh, Bhutan, Maldives and Nepal (ABBMN) also attended the moot. The focus of the conference remained on: Establishment of National Broadband Policy; Lowering of international long distance call rates amongst ABBMN countries; Establishment of Internet Exchange for peering local exchange of Internet traffic; Establishment of National Advanced ICT Training Centre; Establishment and strengthening of national CERT; Establishment of National

Cybersecurity Strategy and Framework; Human capacity building for Cyber-crime and threats on cyber space; Establishment of National Emergency Telecommunication Plan.

Algeria

To resolve the tedious issue of Djezzy or Orascom Telecom Algeria (OTA), the regulator has finally hired a financial consultant. The deal stipulates that the financial consulting office would advise the ministry through the entire purchasing process of Djezzy. Bringing a financial consultant onboard will allow the Algerian government to "assess the financial position" of Djezzy. In another move the regulator has started a crack down on import of Telecom equipment on forged documents.

Bahrain

The Bahrainian Telecom Regulator issued an updated study report on Internet Ecosystem in Bahrain. The study evolves relationships between Bahrain's Internet Service Providers (ISPs) and the international telecommunications carriers serving Bahrain and the Region. The report candidly indicated that Bahrain's Internet connectivity is adequate, but could be more diverse; Batelco still does not offer domestic peering, and Batelco's customers lack transit alternatives; Facility carrier neutrality would increase long-term international transit diversity; until carrier diversity improves, some operators are at higher risk of suffering significant customer facing Internet events. The Regulator also released the 2010 update of the Arab Basket Benchmarking Study for telecommunications services. The

study provides a comprehensive comparative study of prices for telecommunications services between 22 AREGNET member countries. The benchmarking study compares baskets of telecommunications services for residential and business users based on various profiles (e.g. low, medium, high user). It is comprehensive in terms of services and geographic coverage. The results for Arab countries are also compared with the results for the Organization of Economic Co-operation and Development (OECD) countries.

Bangladesh

The Government of Bangladesh has shown its intention to issue 3,000 more VoIP licenses for handling international calls. The rollout would begin by August. The government had earlier issued VoIP licenses to three private companies permitting them to make international calls over Internet in February 2008. It was generally understood that these companies would be exclusively handling all international calls through VoIP. Despite licensed operators being present in the market, illegal VoIP activities have continued to thrive in the country. In March this year, the Bangladesh Telecommunication Regulatory Commission (BTRC) investigated the total consumed bandwidth of the country's Internet service providers (ISPs) in an attempt to curb illegal call terminations or unlicensed VoIP activities.

Egypt

To proliferate Broadband the Egypt government allocated US\$1 billion to invest in broadband internet infrastructure, with the goal of boosting internet subscribers by 4 million by year 2014. Yet in another move the Regulator has announced the award of licenses for the construction and possession of the infrastructure of sites or towers as installations or antennae (other than telecom equipment) for leasing it as per the coverage areas required for operation to more than one operator and service provider of mobile and wireless services.

Iran

To boost the country's telecommunication network the Iran has launched more than 4000 telecommunication projects valuing up to US\$200m.

Jordan

To facilitate the telecom subscribers the Regulator announced installation of a system enabling people across the Kingdom to test the signal strength of various wireless services in their area by late September this year. The new automated meter will allow the public to gauge the coverage of wireless communication services offered in the country, including WiMAX, 3G, FM and TV broadcasts.

Kuwait

The regulator announced the signing of two contracts for the maintenance of fixed line network. The first contract has been agreed with the Kuwait Network Electronic Company, and concerns the actual maintenance of the fixed line network. The contract covers a period of three years, and is worth KWD4.62 million (US\$16.06 million). The second contract involves a deal with the TCIL Company, which will supply the spare parts and electronic cables required to maintain the fixed line network. This second contract is worth KWD3.22 million.

Lebanon

The telecom regulatory authority board member Patrick Eid criticized the weak internet network available in Lebanon and said that the market's needs are much bigger than what the ministry is currently offering. The reason behind the lack of proper internet services in Lebanon is that the money generated from that sector goes to the treasury instead of being invested again in the development of this sector, he said. Eid's remarks came during a news conference to discuss the latest developments in the information technology sector in Lebanon. Eid gave an overview of the IT situation in Lebanon and the strategy adopted by the TRA to improve the internet network and work on the development of fiber optics to provide faster internet services. In a bid to tackle the telecom espionage issues the Authority remained involved in issuing guidelines to improve the network and protect the privacy of users and their interests.

Morocco

The Moroccan Regulator revealed a record growth in subscribers to the mobile telephone service in the Kingdom by the end of the first half of 2010 getting close to 28 million levels. The regulator said the figure increased from 25.53 million in June 2009 to 27.87 million in June 2010 marking 9.1% growth.

Nepal

Nepal's government in collaboration of Regulator, Home Ministry and Communication Ministry has established a task-force to monitor the import of telecommunications equipment to avoid possible security threats.

Oman

The Telecom Regulator has issued guidelines requiring telecom operators to put in place emergency plans to ensure their public network telecom infrastructure is essentially functional in the event of a natural calamity or public emergency. The guidelines oblige Class 1 licensees to formulate and submit detailed plans for responding to emergencies that may impact their telecom networks. The regulator issued the 'Guidelines for Operators in Forming

the Telecommunication Emergency Plan' after a public consultation that also attracted significant feedback from the operators themselves. The guidelines are broadly based on the recommendations of the International Telecommunications Union (ITU) for dealing with telecom emergencies. In another move the Regulator issued a rejoinder to Omantel's recent press announcement of the launch of its '4G LTE Networks' in the Sultanate. In its statement, the regulator voiced the view that the Omantel announcement "may have created a wrong perception in the minds of general public about the introduction of 4G LTE services in Oman".

Pakistan

As a direct consequence of the flooding that has hit the country the government has estimated that the telecoms networks in the country have suffered losses of Rs1.87 billion (US\$22 million). According to initial estimates from the IT Ministry, most of the losses had been suffered by companies using fiber-optic cables, followed by cellular companies whose towers had been damaged. The telecom Regulator is in close coordination with cellular companies to restore their service in all parts of the country. The Regulator also remained busy along with Frequency Allocation Board (FAB) to carry out an far reaching survey in major cities of Pakistan and AJ&K with the help of special tools to check the emission of power level from transmitters and receivers of Base Transceiver Stations (BTSs)/Towers installed by cellular mobile companies. Results reveal that the power level of BTSs is below the prescribed danger limits and in line with the policy directives of Ministry of IT & Telecom, World Health Organization (WHO) and International Commission on Non-Ionizing Radiation Protection (ICNIRP) guidelines. In yet another very important move the Regulator was successful in signing a three year MoU with the cellular operators on Infrastructure Sharing. The MoU signed by all five mobile operators aims at reviving up the current pace of infrastructure sharing among cellular mobile and WLL operators in the country and to increase the overall industry tenancy ratio to a reasonable mark. According to the MoU, the network operators will aim to raise its own and overall industry's tenancy ratio to a level of 1.5 within next 3 years with yearly benchmarks aimed at 1.1, and 1.3 for first and second years, respectively provided that the same is technically feasible for the operators.

Qatar

The Qatar Telecom Regulator ruled out that Qtel's Virgin Mobile services were marketed in a manner that was misleading, anti-competitive, and an abuse of dominance for the period commencing May 13, 2010 and ending May 18, 2010. The service was launched two months ago. The ruling further said that while Qtel had broken telecoms laws through its branding partnership with Virgin Mobile and rejected Vodafone's claim that the company amounted to a third provider.

Saudi Arabia

The Saudi Regulatory environment remained cloudy due to BlackBerry row. It is now understood that an agreement between Regulator and RIM has reached which will avoid possible BlackBerry ban in the Kingdom.

Sri Lanka

The Sri Lankan Financial Regulator has drafted guidelines for mobile phone payment systems. Mobile payments will be allowed through accounts in licensed banks and registered financial services providers, as well as Custodian Account Based Systems operated by non-bank service providers. The guidelines stipulate that service providers can open e-money accounts for customers and issue e-money by accepting physical money.

Syria

The Syrian cabinet has approved plans for the licensing of a third mobile operator to compete with incumbent operators SyriaTel and MTN Syria which were awarded 15-year build-operate-transfer (BOT) contracts for the rollout and operation of Syria's first mobile networks back in early 2001. As well as allowing for the entry of a new licensee into the wireless market, the two existing operators will buy out their current BOT agreements and convert to conventional license agreements.

Tunisia

The Regulator has formed a committee to monitor the status of local loop (QoS) in terms of infrastructure and the provision of connectivity and best quality services to enable the largest possible number of users to access broadband services. The committee will also observe the license obligations and regulatory provisions.

Turkey

During the month, the BlackBerry issue remained highlighted in Turk regulatory circles.

UAE

BlackBerry issue remained dominant in UAE. The Regulator and RIM are in direct talk to fix the issue. The UAE Regulator has also issued a ten year duration satellite and broadcasting services license to Al Yah Advanced Satellite Communications Services and Star Satellite Communications Company. The license granted to Al Yah is limited to providing telecommunications services to the UAE Government, while the Star license allows the firm to provide a portfolio of telecommunications services to meet the demand for emerging applications in the satellite industry such as turn-key telecommunications solutions, broadband services and broadcasting services within the UAE.

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SAMENA REGULATORY BREAKING NEWS!

Though in the month of August 2010, SAMENA countries remained spiritually occupied in the month of Holy Ramadan, however, at the Regulators end the business remained as usual. Following is the observation log prepared by SAMENA Market Research Team in which most of the regional Regulators remained indulged during the period.

MVNO Trends in SAMENA Region

SAMENA region's market are set to see added liberalization in the coming years as more markets are now thinking to allow offer MVNO licenses. 3G spectrums/ licenses are being offered. MVNOs gaining market share and challenging the dominance of traditional operators, may lead to potential consolidation at a regional levels. MVNOs may emerge in different shapes and forms, allowing network operators to sell redundant capacity installed in existing networks to use their resources more efficiently. MVNOs besides being a source of progress for the overall subscriber base, creates considerable advantages for the traditional operators in terms or increasing it's over all revenues and reducing OpEx. It appears that MVNOs are becoming an important issue in the SAMENA region and a strong case for MVONs is expected. Regulators, existing operators and potential MVNOs need to be on the lookout of experience from developed markets and be ready for the challenges ahead.

The Regulatory Environment for Emerging Broadband Multimedia Services

Broadband multimedia services are relatively less developed in SAMENA region, although services such as

Mobile TV and IPTV in particular are believed to be growing at a considerable speed, albeit from a very low subscriber base. Despite some signs of progress, broadband penetration in the region remains low; this restricts multimedia services from even greater progress. Issues such as content ownership, sufficient spectrum allocation, content regulations, support for local content development etc needs to be addressed by the regulatory authorities.

Emerging Trends in Spectrum: A Regional Perspective

Spectrum, an important issue in SAMENA region's regulatory arena has been one of the major challenges for regulatory bodies. This trend is expected to exist, more and more countries are considering next generation spectrum centric technologies such as WiMAX, WCDMA, and EVDO. Some countries in the region have shown their commitment towards LTE deployment in the near future. Not all RA's are inherently subjected to spectrum management in every country, across the SAMENA region. Frequency spectrums are considered to be extremely valuable and viewed as a national asset. Hence it needs to be managed effectively to maximize benefits to users. Although, emerging technologies such as mobile WiMAX and LTE may not require a great deal of spectrum, but the emergence of bandwidth hungry application give rise to the demand for more bandwidth. So the RA's and frequency allocation bodies across the SAMENA region to ensure in advance that enough spectrum is already allocated or that there is additional spectrum available upon demand.

Mobile TV Regulatory Approaches

Mobile TV, a value added service that has made the convergence between telecoms and broadcasting a reality today. With the emergence of the mobile broadband services and Mobile TV enabled devices this value add can bring a new range of innovative services to the public. The regulatory approach that will be followed for the licensing and regulation of Mobile TV services will be a key factor in enabling investments in networks deployment and services, particularly in the shape of MVNOs and content providers. Sufficient amount of spectrum for Mobile TV would lead to success of mobile multimedia services. Spectrum allocation and other related issues are important for the success of Mobile TV/Spectrum has a significant cost impact on handsets e.g. If large number of small and fragmented bands are allocated to Mobile TV usage, then vendors will need to make handset either operator specific, or capable of operating on different bands, thus resulting in more cost and complexity.

Electronic Transaction

Some federal, state and territory governments encourage the adoption of electronic commerce by enacting and enabling legalization. Global companies have the responsibility to deal with some of the legal issues such as how to form contracts, abide by consumer protection laws, create privacy policies and protect databases.

Copyright & Trademark

Many attempts have been made to address the issues related to copyrights on digital content. E-commerce has a tremendous impact on copyright and related issues, and the scope of copyrights is affecting how e-commerce evolves. It is essential that legal rules are set and applied appropriately to ensure that digital technology does not undermine the basic doctrine of copyright and related rights. Some Web-based applications have enabled large-scale exploitation of music samples and audio formats. Software that is available free of cost on the Net allows the transfer of songs and videos without the authorization of rights holders (e.g. Napster, MP3 Providers).

Changes in Termination Rates

As a result of the global financial crisis, operators are facing fierce competition in the market which results in measures such as offering lowered call rates to survive in a competing market. This brings down the ARPU for the operators. With growing number of operators and a more divided consumer base compounded with lower ARPU, economic profitability and viability for operators is a challenge.

Legalizing VoIP under a Legal Framework

In some of the markets of South Asia, including in Bangladesh, a move is underway to legalize VoIP. The approach being considered in Bangladesh is to rent out E1 connections to the operators, since illegal VoIP operators

handle international calls through E1 devices. The subject of VoIP has been a focus of discussion in several markets of the SAMENA region. It is in 2010, that some notable regulatory steps to legally support VoIP may be seen in several markets of the SAMENA region.

Passive Infrastructure Sharing

The available excess capacity can be greatly exploited with the sharing of passive infrastructure, owned by both public sector and private sector entities. This, in turn, may substantially facilitate optimal utilization of capital resources and would help to set up new, more advanced passive infrastructure.

National Integrated Telecoms & ICT Policy-Making

National Integrated telecoms and ICT policy making is essentially governed by the need to achieve economic and technological balance in the industry.

Strategizing on cross-border and Regional ICT Policies and Regulations

Cross-border regulations and regional unifications over ICT policies are a collaborative approach based on market trends to deliver more effective services based on consumer need and improving the revenue generation.

Evaluation, Implementation and Monitoring of National ICT Policies and Regulations for Modern Times

It is essential to constantly evaluate the national ICT policies in modern times as a result of continually evolving technology. Monitoring and implement the current policy and the economic implications is the key to ensuring a competitive business oriented environment in the industry.

Rationalization on Interconnection and Tariffs

It's critical to have a rational governing the interconnections and tariffs in order to achieve a successful economics to generate revenue and ensuring a satisfied consumer base.

Implications of cyber threats: Developing a cyber rule of law

Provision of a secure, accurate and reliable service to the users is considered a bare minimum and it poses a challenge with growing interconnectivity. It's essential to develop cyber laws governing the regulations and ensuring proper measures with regards to avoiding and limiting cyber threats.

Developing disaster Management Frameworks

Disaster management frameworks are necessitated in the modern times to avoid down times given the level of interconnectivity.

IPTV regulations: A progress check

The development of a regulatory framework is a good indicator of the progress made by a technology. IPTV has made good headway and regulatory uncertainty pertaining to FTTH-based IPTV is also subsiding.

Broadband Proliferation and the Regional Universal Services Obligation

Several governments within the SAMENA region have shown proclivity to fund both basic telephony and broadband services using national service funds; and some markets, such as Pakistan, have been fairly successful in doing so. It is important that an inter-market dialogue be initiated to help with experience-sharing among regulatory bodies and operators, so that greater broadband proliferation may be realized through direct government-supported machinery.

Use of Universal Service Fund Subsidy for Proliferating Broadband in Rural Areas

Subsidies are essential for helping the proliferation of broadband in rural areas where the infrastructure is limited and the cost of deployment is not economically viable due to the weakness of consumer purchasing power, among other factors.

Broadband Equipment Import: Recommendations for “zero Customer duty”

Zero-customer duty is an encouraging regulation, which enables deployment of broadband equipment and helps manufactures and service providers doing effective business benefitting the customers as well. This allows for eventual growth in the deployment of broadband technology.

Spectrum pricing: The Regional Imperative for Re-Visiting and restructuring

Evolving technologies and adoption of newer access technologies, including WiMAX, make it imperative to re-evaluate spectrum pricing from a business point of view to ensure a competitive environment.

Privatization: Inhibiting Regulatory Issues in the SAMENA Region

In some markets of the region, privatization has still to happen. In some markets, lack of suitable political environments has hindered this important phase in telecoms development to materialize; in others, the reasons may be attributed to unwillingness of governments to open up the sector or lack of experience or “inspiration” in doing so. However, what can be safely concluded is that privatization is a phenomenon that has occurred even in the most monopolistic of sectors, and thus will happen in the remaining markets as well.

WiMAX and the lack of low Frequency Spectrum Access: A European Perspective

WiMAX deployment and growth is on a rapid and the lack of low-frequency spectrum has catalyzed the developmental headways made by Microwave based WiMAX in the European Region.

Technology-specific licenses: How will WiMAX and LTE fare?

Has WiMAX kicked off yet as was expected earlier in the year 2008-2009? Furthermore, with LTE already under implementation, will WiMAX be held back? In-Stat believes that WiMAX and LTE can no longer be considered competitors. In fact, it may seem that the success of 3G networks, especially HSPA networks, have truly been a hurdle to LTE deployments, mainly because operator would much rather leverage their existent infrastructure than to create new. LTE has much to deal with, including lack of spectrum, signal quality, lack of standardization. Nonetheless, investment in LTE is happening at major scales. Interesting, by the time LTE matures, mobile WiMAX will already have at least five times as many global subscribers as LTE over the next three years, for example. WiMAX's maturity will be the real advantage, and it may not be an enemy of LTE, which has mainly been lagging behind because of 3G itself.

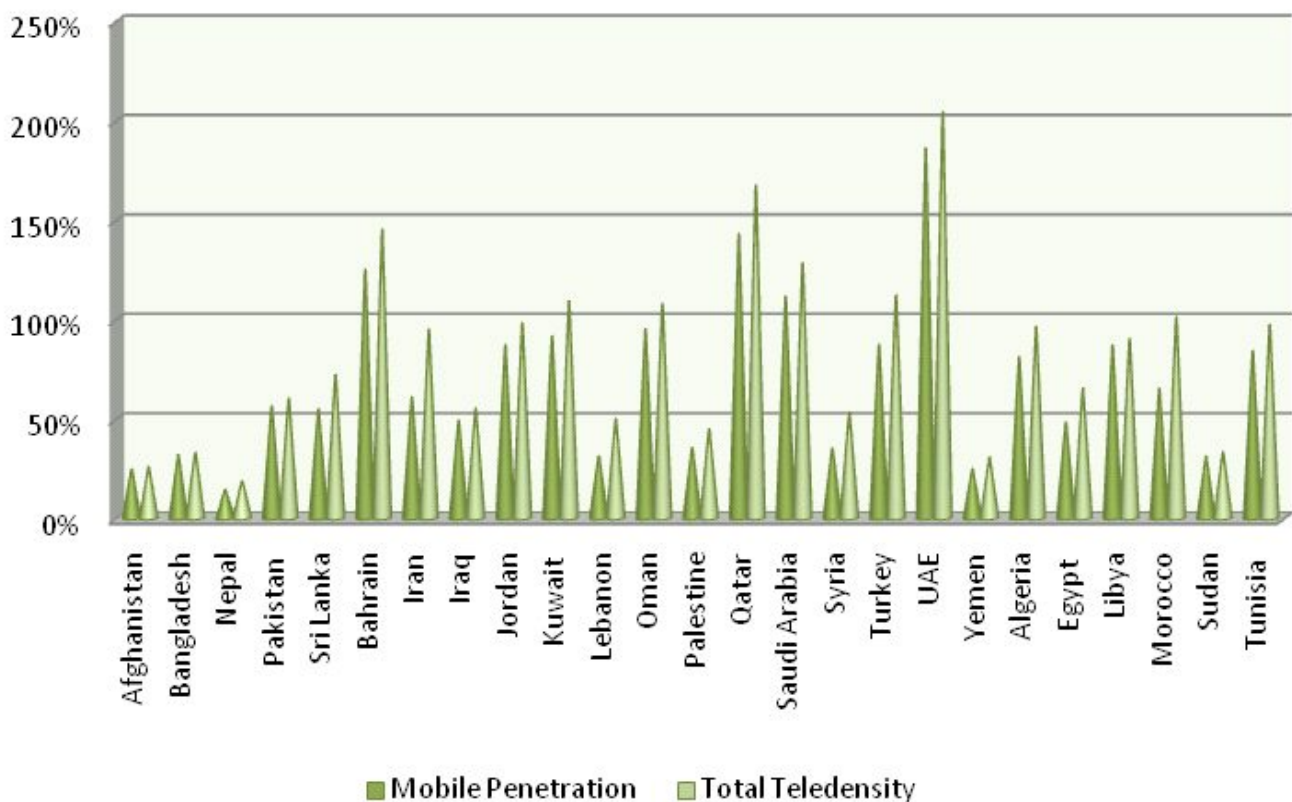
Synchronized ICT national policies: A Need for Markets of the SAMENA Region

Synchronized ICT policies as those established in the European region help service provisioning and cater to the needs of consumer base more effectively, and in turn increase profitability and open up new avenues for revenue generation along with a more satisfied consumer base.

Market Research - SAMENA



SAMENA Region's Mobile Penetration & Total Teledensity



Research Note: Comparison done by SAMENA based on data from ITU, NRAs, industry news, and operators websites. Within the SAMENA region, the UAE appears to have the highest mobile penetration and overall teledensity. Middle East scores all the top five positions in terms of mobile penetration and overall teledensity in the region. In South Asia, Pakistan's mobile penetration is comparatively higher

then Sri Lanka's mobile penetration, but the overall teledensity in Sri Lanka is higher than Pakistan's teledensity. Morocco is the only country from North Africa to have the teledensity close to 100 while there is no country from South Asia to rank among the top ten countries in terms of mobile penetration and overall teledensity, regionally.



ROAMING IN SAMENA...

International roaming rates and mobile termination rates have finally begun to drop as a result services such as unified roaming rates and the growing competition. As mobile operators search for new revenue streams, attention is turning to increasing usage of international roaming services. Regional countries have shown great interest towards international roaming. It is encouraging to see unified roaming plans in the region with the indication that the industry is on track to address the significance of international roaming rates, but still there is a need for lowering international roaming rates in the SAMENA region - much in the way the other regions such as EU has.

“Unified Roaming rates will lead to increased collaboration between operators and development of the telecom sector within the SAMENA Region.”

It's important to follow the manner in which the regulatory intervention resulted in unified roaming within the European Council Region. This would amplify the regional unification of the SAMENA region on the world telecom map.

A re-evaluation of roaming rates has largely been governed by the prevailing consumer usage trends leading to regulatory interventions such as the one by the European Commission, which resulted in a reduction of roaming rates within the European region but increase in roaming rates for non-European destinations.

Some operators have initiated specific strategies to enhance the Roaming rates either through new means of transparency or direct reduction of the rates.

“One Roaming Rate” or One Roaming Charge is implemented within the operators alliances networks and sister companies helping subscribers to get an easy and clear access to the worldwide roaming rates.

Bill Shock issues have been widely experienced where customers receive very high bills once they are back home and this is due to lack of transparency about the Roaming consumption cost while Roaming abroad. Accordingly SMS Notification has been implemented within some operators in order create awareness about the usage cost of Roaming calls abroad.

One of the solutions to avoid bill shock matters is to deploy policy controls tools in the network in order to limit the roaming usage abroad. This was implemented in Europe few months ago when the EU commission issued its decision to limit the Data Roaming usage at 50euro/month.



REGIONAL ROAMING

One-Rate Roaming Network in Singapore

Singaporean operator SingTel is planning to launch a single-rate mobile roaming network incorporating at least eight of the mobile operations that it has investments in, including Abu Dhabi Group-backed Warid Telecom, India's Bharti Aitel, and Globe Telecom in the Philippines.

Muneer Farooqui, CEO, Warid Telecom, stated that SingTel and its partners plan to launch the single-rate roaming network by early 2011.

"We call it 'one network, one roaming charge'. We are working on it by the end of the year, at least amongst the eight operations of Singtel," Farooqui said.

"Hopefully it will be in the market by the turn of the year. It would be a great advantage for these operations, making it a global operation across borders," he added. SingTel, which owns a 30% stake in Warid Telecom, also has significant stakes in operators including Telkomsel in Indonesia, Globe Telekom in the Philippines, PBTL in Bangladesh, and AIS in Thailand.

SingTel also operates a service called Bridge Alliance, which allows members to access a single data roaming rate in Singapore, Malaysia, Indonesia, the Philippines, Thailand and India.

SMS Roaming in Oman

Renna the Mobile provider in Oman is partnering with 381 worldwide operators to launch its SMS roaming service thereby expanding its service portfolio and granting customers added flexibility locally and internationally. The move will enable Renna users to stay connected with friends in more than 190 countries at Renna's low cost rates.

Renna customers have grown accustomed to the easy manner by which they use the new services. To spare users the inconvenience of manual configuration, Renna SIM card settings will be automatically updated, allowing the subscriber instant access to the highly demanded SMS roaming service upon touchdown almost anywhere in the world.

In addition, Renna offers voice roaming in a number of select locations which will be expanded further in the near future. Since the inauguration of the service in May 2009, the 100 Omani owned telecommunications company has demonstrated its understanding of the local market dynamics by providing value added services to its 130,000 users.

3G To Drive Roaming Deals In India

The introduction of 3G services in India will herald an era of unprecedented cooperation and collaboration among operators in the country as they seek to offer their customers a seamless 3G experience, say analysts.

Since none of India's operators managed to secure 3G spectrum covering the whole of the country, but each of the operators want its subscribers to have service continuity across the country's 22 circles (service areas), the deal-making for intra-circle roaming is likely to be hectic in the coming months as the 3G players craft agreements with their competitors. (See India's 3G Players Ready for Swift Launch, India's 3G Auction Ends, Raises \$14.6B, and A Guide to India's Telecom Market for more on India's circles.)

Regulation is already in place that allows for intra-circle roaming, although inter-circle roaming deals are not allowed. Analysts say there are likely to be two kinds of 3G roaming deals: first, between winners of 3G spectrum as they look to broaden their coverage in the country; and second, between 3G spectrum winners and those operators that lost out on acquiring 3G spectrum. (See India Watch: The Road to 3G and India 3G: What's That Spectrum Worth?) In the long run, it is good for the industry that no one player was able to win a pan-India 3G spectrum license. "The situation is such that they have to pitch in together," says Shiv Putcha, principal analyst, emerging markets, at Ovum Ltd. "All of them need intra-circle agreements to be able to offer national coverage to their subscribers. There are going to be a number of intra-circle deals across the country."

Operators without 3G spectrum will be especially eager to offer 3G services to their subscribers to defend against them moving to another service provider.

The biggest, and the most obvious, option for the operators is to look to tie up with state-owned Bharat Sanchar Nigam Ltd. (BSNL), which has 3G spectrum in all of the 20 circles for which it is licensed. Its licenses cover the entire country except for Mumbai and Delhi. (See India's 3G Players Face Share Issue.) "It is certainly not the end of the road for the companies who haven't got any 3G spectrum," says Neeraj Jain, director of transaction services at KPMG International. "BSNL is steadily losing market share and would be looking at leveraging the infrastructure which it has got. This has also been recommended by the Sam Pitroda report." (See BSNL Suffers First Annual Loss and Is BSNL in Revamp Mode?) The other state-owned operator, Mahanagar Telephone Nigam Ltd. (MTNL), has already come out with a tender for offering roaming agreements in Delhi and Mumbai, and BSNL has also shown interest in a similar tender. The operators that didn't win, or didn't bid on, any 3G spectrum, which are likely to seek some 3G roaming deals, are Videocon Telecommunications Ltd., Loop Telecom Pvt. Ltd., and Etisalat. While Etisalat and Videocon did not win 3G spectrum, Loop and Uninor did not bid in the auction.

Among the new operators, S Tel Pvt. Ltd. is the only one that won spectrum in one circle. None of the new operators bid very aggressively for the 3G spectrum. The main reason for this is that they lack scale and wouldn't have been able to justify the cost of the spectrum. One exception to the expected intra-circle roaming trend may be Uninor because,

strategically, the operator is not planning to focus on data at all. "In the case of Uninor, they would have factored in the loss of some subscribers who will inevitably move to 3G networks," says KPMG's Jain. "Since they are relatively new in the market and have fewer subscribers, they would be able to offer data services on 2G and 2.5G. However, it is highly unlikely that they would be able to retain the premium or the corporate customers."

Telefonica's Suspends Various International Roaming Service

Spain's telecom group Telefonica has suspended its various roaming services due to the lack of availability of the necessary foreign currency; the company is indebted to temporarily suspend the International Roaming service with some operators in various countries.

Telefonica, the Europe's biggest telecom operator by market capitalization announced earlier in August it urgently needed to send back \$1.8 billion profits from Venezuela. Venezuela is Telefonica's third-most important market by revenue after Brazil and Argentina.

Bakcell Increases Number Of Roaming Partners

Bakcell, the first mobile operator of Azerbaijan, is expanding its GPRS-roaming coverage having recently signed GPRS-roaming agreements with 56 mobile operators. In 2010, the Company has increased the number of GPRS roaming partners in 2.5 times. In order to activate GPRS roaming service in Azerbaijan, Internet and roaming should be activated on the phone before leaving the country. GPRS roaming can be activated even abroad, but roaming service for calls and SMS should be activated prior to departure.

In 2010, Bakcell also has increased the number of GSM voice roaming partners (phone calls and SMS). Now Bakcell has about 280 partners in 150 countries globally.

Kenya Telecoms Regulator Slashes Mobile-Phone Interconnection Fee by 50%

Kenya cut its mobile-phone interconnection fees by 50 percent to encourage telecommunications companies to lower the cost of calls. The rate mobile companies charge each other for connecting calls across networks was reduced to 2.21 shillings (3 cents) a minute from 4.42 shillings. The amount will be reduced annually until it reaches 0.99 shillings in 2013. The benefit must be passed onto the consumer in terms of lower prices.



TOP REGIONAL & MEMBER NEWS

STC Offers E-Mail and Chat Services On Nokia Phones In KSA For Free

STC and Nokia have announced that they will grant all customers that registered for Jawal Net and Quick Net packages the "Nokia Messaging" for free with unlimited data. Postpaid and prepaid Jawal Net subscribers will be able to enjoy the Nokia Messaging service, which consist of sending and receiving E-mails, downloading attachments, in addition to the instant messaging service that is available in Nokia mobile phones in the Kingdom, with unlimited data for free for the duration of 4 months, starting August 21st, 2010.

The Nokia Messaging is a very simple and easy service, which enables users to create and register up to 10 E-mail accounts on a single mobile phone. The service supports all the well-known E-mail sites like Gmail, Windows Live, and Yahoo Mail.



PCCW to Raise US\$300 Million In Bond Sale

PCCW is planning to sell notes worth \$300 million. The company has hired HSBC Holdings, Morgan Stanley, Royal Bank of Scotland and Standard Chartered Bank to manage the sale. The fixed-line telecom operator may issue the 5.5-year bonds at a spread of between 295 and 300 basis points. The offering would be the company's first sale since July 2005, when it sold bonds worth \$500 million. The bonds, maturing in 2015, carried a coupon rate of 5.25% and were priced to yield 4.134%. PCCW is offering more multimedia services, including video and music, to attract higher-spending users.



NSN's New DFCA Feature Based Solution Promises to Address Spectrum Barrier Issues of GSM Operators

Nokia Siemens Networks (NSN) has come up with a new Dynamic Frequency and Channel Allocation (DFCA) feature based solution that promises to enable GSM service providers derive more from the limited spectrum and thereby improve on Quality of Service (QoS) parameters.

It helps operators squeeze voice calls into less bandwidth, so it can be alternatively used for data, either through Enhanced Data Rates for GSM Evolution (EDGE) or by re-farming the spectrum to Wideband Code Division Multiple Access/Long Term Evolution (WCDMA/LTE). The solution makes use of software features and increases traffic carrying capacity of existing sites while at the same time improves network quality. The result is that this minimizes the immediate investment in additional sites and reducing the total cost of ownership.



Nawras Eyes US\$1 Billion From IPO

Oman's Nawras, a subsidiary of Qatar Telecom is looking to rise up to 400 million Riyals (US\$1.04 billion) from its initial public offering (IPO). Nawras made a net income of 42 million Riyals in 2009 and expects to earn a net income of 53 million Riyals this year. Nawras, which broke the monopoly in 2006, agreed to float the IPO in February under the condition of its license but the government granted the company an extension to September.



PTCL Net Profit At US \$108. Million

Pakistan Telecommunication Company Limited has reported a net profit of 9.29 billion rupees (\$108.5 million) in the 2009/10 fiscal year compared with 9.15 billion rupees the previous year. PTCL's revenue for the quarter ending on June 30 was 57.17 billion rupees compared with 59.24 billion rupees last year. Income rose to 5.13 billion rupees compared with 4.26 billion rupees the previous year.



PTCL Launches EVO 3G Nitro

PTCL has launched EVO 3G Nitro, the fastest EVDO RevB wireless broadband with speeds up to 9.3mbps. With this launch, Pakistan has become the first country in the world to provide this service commercially. EVO 3G Nitro has revolutionized the three simple steps to High speed On-the-Go connectivity, Just Plug inClickConnect with its unprecedented speed of 9.3mbps on the downlink and up to 5.4mbps on the uplink based on 3G CDMA REV B technology. EVO 3G Nitro is Pakistan's fastest and most cutting edge wireless mobile broadband product.

du and Injazat to Provide Networked IT Services

UAE's Injazat Data Systems and du have announced a partnership agreement to provide business customers with state-of-the-art networked IT services. In March last year, the two firms signed a three year deal under which Injazat provides managed collocation services for du's systems through its Abu Dhabi-based Tier IV data centre.



du Launches Global IP VPN Services

du has launched its fully managed and converged Global IP VPN services, a product that offers global connectivity solutions for businesses in the UAE. The new service is aimed at multinational companies and local conglomerates who want to connect their offices across the globe and extend their local area networks (LANs) across IP VPN wide area networks (WANs).

ZTE Tops Global CDMA Market With 30% Market Share

ZTE Corporation has been ranked as the leading vendor of CDMA BTS by IDC. IDC's 2010 Global CDMA Market and Prospects research note said that by Q1 2010, ZTE had shipped an accumulated total of over 250,000 base stations, allowing the Chinese company to claim the No. 1 spot in the CDMA market with a global share of 30.3%. In the Chinese market in 2010, ZTE has undertaken over 80% of the work to migrate Nortel and Motorola CDMA equipment.



ZTE is the first vendor in the industry to launch the CDMA/LTE. By providing comprehensive product offerings for both CDMA and GSM networks, it helps operators handle concurrent operation of two or more networks. This is why it has won recognition from leading operators in the world. is why it has won recognition from leading operators in the world. By the first quarter of 2010, ZTE's CDMA products were used by more than 120 operators in over 70 countries.

Omantel Announces BlackBerry SMS Activation

Customers can enjoy the fast and easy activation of Blackberry service through SMS for the first time in the Sultanate of Oman. The new offer is the latest from Omantel in a series of new and innovative products and services. Omantel has recently introduced its enhanced BlackBerry packages making the service even more attractive.



On BlackBerry Lite the bundled usage has been increased from 3MB to 50MB and the monthly subscription has been reduced from RO 9.9 to RO 8.9. Subscribers to old BlackBerry standard package have been upgraded to the new and improved BlackBerry National Unlimited Plan offering them unlimited local access to emails, attachments, and BlackBerry Messenger in addition to 100MB of browsing through their smart phones.



Seminar for SAMENA Content Committee Members on Mobile Media and Mobile Advertising

Around the world, brands, media companies and telecommunications operators have found new ways to engage with consumers through mobile. Ad-funded mobile content, mobile couponing, mobile ticketing, LBS, and many other new services have successfully been launched in the USA, Europe and Asia. Yet, few of these services are available in the MENA region today.

How can companies in the MENA region take advantage of the new business opportunities the mobile enables? How can we jointly jumpstart a mobile media and advertising ecosystem?

In partnership with FirstPartner and Arab Advisors Group, du is organizing a half-day work shop on Mobile Media and Mobile Advertising on 7 October in Dubai. The work shop will:

- Commence with a brief on international trends in mobile media and advertising
- Review MENA case studies
- Discuss how telco operators, media companies and brands can cooperate in the region

The event starts with a networking breakfast at 08:30.

Participants

du cordially invites members of the SAMENA Content Committee and its delegates to this free seminar. du has also invited representatives from some of the leading MENA media companies, advertising agencies and consumers brands to participate in this work shop.

SEMINAR DETAIL

When 7 October, 2010 **Time** 08:30 13:00

Where Arjaan Hotel, Dubai Media City
Dubai-UAE +971 443-600-00

RSVP **To RSVP, please contact:**

Mrs. Joanna Truffaut joanna.truffaut@du.ae +971 559-532-183	Mr. Andre Popov andre.popov@du.ae +971 559-532-276
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Convergence to Casablanca 2010

26th - 28th October, 2010
Casablanca, Morocco, Hyatt Regency Hotel

"Transforming Challenges into Growth"

The Souk@
SAMENA



**Subsea Cable
Workshop**

26th October 2010

**SAMENA
AWARDS
2010**



Under the Patronage of His Excellency
The Minister of Industry, Commerce and New Technologies
H.E. Ahmed Reda CHAMI

CONFERENCE AGENDA

Broadband

- ◆ Government subsidies for speeding up broadband (and general telephony) for rural and underserve areas
- ◆ What does it entail to develop a sound mitigation path to 4G?
- ◆ Challenges in connecting users to fiber based networks and providing coverage to rural areas

Optical Networks and Applications

- ◆ IPTV: Accelerating via FTTx.
- ◆ Why may IPTV be among the key services capable of stimulating investments in FTTx networks?
- ◆ Can IPTV help generate a return on fiber rollout costs by helping to increase ARPU?
- ◆ How is FTTx developing and what regulation is there on fiber access?

Mobile TV

- ◆ Mobility and mobile TV

- ◆ "Free" Mobile TV: A way to encourage take up in the SAMENA region
- ◆ Mobile TV ecosystem: Integration with broadcast, cable TV and movie industries

Content

- ◆ Content Industry: How is it a new "revenue" supermarket for operators?
- ◆ Localized Mobile Content: An emerging trend in SAMENA
- ◆ Mobile Content: How to get the right content to the right user
- ◆ Ownership, copyright and content security

Roaming

- ◆ International Roaming rates: Re-evaluation
- ◆ WiMAX and International Roaming: The next big thing for operators
- ◆ Arrangements for unified Roaming Rate in SAMENA: Developing effective strategies

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Visit : www.samenacouncil.org E-Mail: ctc2010@samencouncil.org

Interview of **Mr. Bocar A. BA,**
 President of SAMENA Telecommunications council
 for **“Convergence to Casablanca 2010”**

26th-28th October, 2010, Casablanca, Morocco, Hyatt Regency Hotel

**Under the Patronage of His Excellency
 The Minister of Industry, Commerce and New Technologies
 H.E. Ahmed Reda CHAMI**

The domains of technology have diverged into an endless array of directional possibilities. The industry has grown through innovation gaining its motivation from the need to continually grow and improve to service the technology savvy consumer market's escalating demands.

In an extremely competitive industry it's important to take the lead and collaborate to allow the industry to transcend innovation to the next evolutionary pedestal. It is crucial to widen the horizons to look at the collective picture to ensure that all spheres of the industry are analyzed, explored and tapped to identify a road map for progression. The recent trends in the industry are explicating the importance of integration of various technological strands to deliver innovative solutions. The need of the hour is to collaborate to create a knowledge intensive pool to allow the industry to develop a more informed and innovative direction complimenting the competition.



The meeting “Convergence to Casablanca 2010” will be held on October 26th -28th in Morocco and will vindicate SAMENAs sensitivity to the importance of collaboration, It will implicate the importance of 'Convergence' of industry experts and market leaders to discuss key technology areas and their impacts on the technological progression and revenue generation.

Broadband

Government subsidies for speeding up broadband (and general telephony) for rural and underserved areas?

Liberalization of the telecommunication sector in SAMENA region has led to a rapid increase in the number of operators and service providers, mainly in the mobile sector. Broadband appears to be the next big thing and funds like

universal services obligations and government grants for broadband can help turn the broadband not spots into broadband hotspots. Several governments within the SAMENA region have already responded positively towards subsidizing basic telephony and broadband network rollouts and services using universal services funds. PTCL, a SAMENA Council member, recently crossed the benchmark of 50

percent accumulated subsidy awarded by Universal Service Funds (USF Pakistan) in last three years. It is vital to the flourishing of broadband sector in the region that a region wide discourse and experience-sharing effort be initiated on regulatory and governmental level. Only then, improved broadband proliferation may be realized and the dilemma of 'digital divide' be trumped.

What does it entail to develop a sound mitigation path to 4G?

The ultimate goal for all 2G and 3G operators is to transition towards 4G, but the question is when and how. SAMENA region has a multitude of strategies regarding migration path towards 4G. In some markets such as Pakistan, 3G is currently being considered while in others such as Saudi Arabia, 4G trials are being carried out. The migration path towards 4G is of significant importance, especially when



... talking about the competitive edge. Important questions are what should be the recommended strategy, what migration path to undertake and the associated costs, what will be the ROI if a particular migration path is followed, how much is needed in terms of investments to acquire extra spectrum.

A transition to 4G is an inevitable and necessary requirement. However, while this cross-over is still further ahead, it is important that carriers' plan their investments with the prospective switch to 4G. It is argued that WiMAX is the answer as it can provide a seamless switch over to 4G when the time approaches due to the similarities in cost intensive hardware.

Challenges in connecting users to fiber based networks and providing coverage to rural areas?

FTTx is developing based on the economic implications pertaining to the deployment of the fiber. While the cost of fiber is comparable to the copper and the cost of end equipment, which converts optical signals to electrical signals, has also decreased considerably, it is the cost of laying the fiber and replacing the copper that continues to be a major deterrent. Hence, optical fiber has largely replaced copper from the core networks while its deployment in the local end loops is limited for the time being.

A digital divide is created due to the difference in the provision of telecommunication infrastructure in the different regions within a market. We see several examples of the digital divide within the SAMENA region. Deployment strategies for any technologies have to work and complement with business perspective to ensure a strong ROI; however, that tends to depend on the consumer base. A bridge to cross over the prevailing digital divide is offered in the shape of new optical fiber technologies such as WOBAN. Wireless Optical Broadband Access Network (WOBAN) is of great significance, as it is viewed as a solution towards more economical deployment of broadband access. It limits the need for fiber connections to reach every end user and, instead, relies on an optical back-end combined with a wireless mesh to reach end users. WOBANs can prove to be vital enablers of broadband in the markets where existing infrastructure is limited.



Optical Networks and Applications

IPTV: Accelerating via FTTx?

Broadband penetration in SAMENA region is less than worldwide broadband penetration. Infrastructure across the region is being overhauled and upgraded to support high speed broadband Internet that will ultimately support IPTV, VOD and other multimedia applications. In this regard, FTTx is considered to be future proof and best suited for green field deployments. There have been reports of Citywide FTTx deployments in some SAMENA markets. This will ultimately leads to better IPTV coverage and capacity, thus accelerating its growth.

Overall, optical fiber delivers much higher data rates as compared to the copper cables, as well as offers very little attenuation to the signal limiting the performance based on the distance. This allows the delivery of bandwidth and data-rate intensive services such as IPTV to be delivered to the end-user.

Why may IPTV be among the key services capable of stimulating investments in FTTx networks?

Although, ADSL has the capability to offer the bandwidth required for multimedia application such as IPTV and VOD but this is a known fact that copper is not as future proof as fiber is, both in terms of investments and bandwidths. Currently IPTV is the major motivation behind FTTx deployments and that's why operators across the SAMENA region have shown their interest in FTTx deployments.

IPTV is a bandwidth and data rate intensive service. Continual improvement in terms of Television service provisions warrants the need to find methods to ensure IPTV to evolve as the fundamental method of delivery of

the fiber rollouts.

IPTV can be used to generate revenue through each end user in various new ways which were not implementable through the previous technology. This could complement the added cost of fiber roll out, hence implementing improved technology in a cost effective manner.

How is FTTx developing and what regulation is there on fiber access?

Before divulging into the intricacies of FTTx, it is important to identify and establish the grounds, which lead to the potential driving force and the push for the development as well as uptake of the technology.

Necessity leads to creativity and innovation; FTTx



television content. To ensure that user demand towards progression is addressed, investments in FTTx are eminent as it is the most capable method for provisioning IPTV.

Can IPTV help generate a return on fiber rollout costs by helping to increase ARPU?

In the recent past, markets across the SAMENA region have shown some of the highest ARPU worldwide. This shows the spending power of public in these markets (mainly ME) and opportunity in terms of revenue generation. Services like IPTV are no doubt set to play a key role in terms of ROI for

development stems out from a similar approach. This rapidly evolving technology is now responsible for the support and sustenance of continually increasing data rates. FTTx links are capable of delivering data rates of up to 2.5Gbps. With the advent of services such as IPTV and 4G standards, optical fiber came as the torch bearing answer. The predecessor technologies for provisioning broadband, DSL, ADSL still grab a major stake of the consumer market. However, increasingly improved data rates, the need for improved bandwidth availability and quality of service would result in seamlessly increased transition to fiber.

Deployment capital and the eventual return on investment have been the forefront issues implicating the deployment and provisioning of FTTx. Effective business techniques and cost-benefit analyses are essential for the success of the technology to guaranty a timely return on investment. A compromise on any of these aspects would result in a cap on the progression of the technology. Future forecasts are essential as they serve as guiding light and a road map for the technology life cycle.

Regulations covering traditional copper telecom networks do not cover FTTx networks. Regulatory uncertainty has partly contributed to a failure in some markets to find viable means to encourage competition, and thus investors remain uncertain of return on their investments based on the current regulatory models. Nonetheless, it is speculated that the ever-increasing broadband demand will eventually result in a widespread deployment of FTTx and to the growth of innovative services that are inherently supported by advanced optical networks including creative content.

“Free” Mobile TV: A way to encourage take up in the SAMENA region

The discussion into MOBILE TV would not be concluded without looking into a methodology to encourage its take-up within the SAMENA region. The eventual induction of Mobile TV globally is inevitable hence it's only appropriate to look into pipelining it into SAMENA region at the earliest. Business tactics such as introducing “Free-Mobile” is the sort of questions that need to be channeled into.



Mobile TV ecosystem: Integration with broadcast, cable TV and movie industries

TV forms the backbone of centralized media delivery. The telecom progression is signified by a trend towards convergence of technologies using mobile broadband. Hence, it is only natural for Mobile TV to be a cornerstone of Converged Social Media, integrating broadcast and cable TV as well as the movie industry.

As Mobile TV is evolving as the next generation technology powering IPTV, it is capable of Integrating broadcast and movie industries together, opening up avenues for content based on Video-on-demand TV broadcast and movie with attributes such as embedded marketing.

Mobile TV

Mobility and mobile TV

The fast growing pace of the telecom sector and an immensely increased level of mobility and today's world has necessitated the addition of mobility to television. LTE and WiMAX are the bench marks of the progress in the domain of mobility in the telecom sector. As the world transitions towards 4th Generation Systems which promises to deliver complete end-to-end multimedia services wirelessly at extremely high data rates, it seems that the upcoming technology has most certainly set the wheel in motion to power Mobile TV as the most sought after product of today's media and content industry.

Content

Content Industry: How is it a new “revenue” supermarket for operators?

All technological developments need to be commercially viable and successful from a business oriented point of view to be able to sustain them. As established before, the content industry and operators put together form the dynamic partnership which enables massive revenue generation. The interdependency of the two is significantly debated, as content owners are known to be leaching of the technological advancements paved through by the operators.

Without the operators opening up doors to a massive subscriber base, the content industry would have nowhere to go. Hence operators should use this as leverage this ownership of customer access to content owners, rather than letting content owners enjoy a free channel to the entire customer business. While this sounds like a simple business rule, it is counter argued that the revenue operators generate is based on the consumer demand for content.



Localized Mobile Content: An emerging trend in SAMENA

Delivering the right content to the end consumer is the key towards success and generating revenue and turn up profits. Localized mobile content is seen as the answer. This implies provisioning intelligent content which is of demand to the user. Localized content simply means content which is specific to a consumer base and delivered in a targeted manner. This can be achieved by carefully monitoring the consumer market trends and demographics; this approach is being spurred on widely in the SAMENA region.

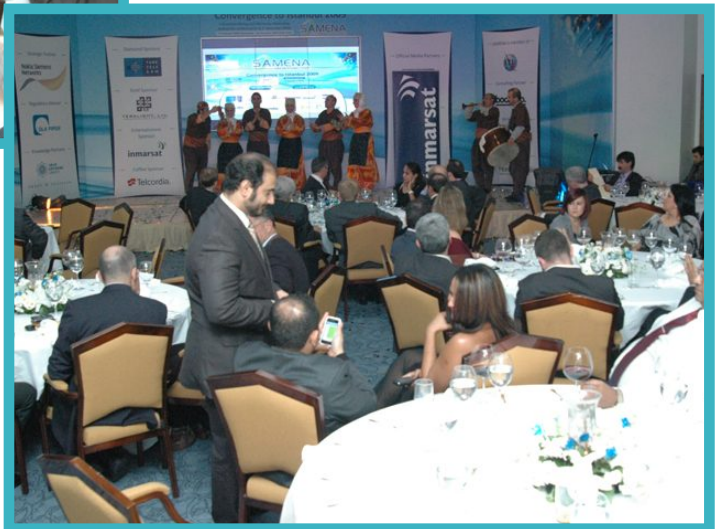
Mobile Content: How to get the right content to the right user

Delivering the right content is a key towards success and generating revenues as well as profits. Hence, identification of the content that would appeal to the target consumer base is one of the most fundamental and important tasks for the content creators and providers.

Ownership, copyright and content security

Truly securing the content is most important to business success today. In today's world of content piracy, many content providers are unfortunately ill-equipped to handle the security of their content. Broadband as a key enabler of digital content brings various challenges such as content ownership issues, content copyright infringement, and above all content security and a host of other related

challenges. With the declining voice ARPU levels, content is considered to be a hot area in terms of revenues and profits for operators in the near future. The recent boom of broadband in the region has resulted in various regulatory, technological and strategic challenges. While the importance of local content has often been raised in many regional events, cooperation from regulatory authorities and other stake holders in the areas of content has been scarce. This includes the need for a comprehensive regulatory policy regarding IPTV, mobile TV, VOD and other emerging applications. The use of such applications has resulted in a huge bandwidth demand, thus prompting the operator's community to upgrade their networks. One factor behind the growing bandwidth demand is the increased P2P traffic. This has also opened up the doors to issues such as content ownership, copyright and security. Taking measures to subside such threats and ensuring security and integrity of data is highlighted as one of the major concerns. The need for local content is growing with the proliferation of broadband in the region. So far, majority of the content initiatives have been



emphasizing on the need to 'push' external content towards local customers. The content sector is seen as a driver of the revenues for operators therefore regulatory bodies, policy makers should consider issues such as content ownership and copyrights more than ever before. Similarly, vendors and operators community needs to come up with more resilient and secure platform ensuring content security.

Roaming

SAMENA: International Roaming rates: Re-evaluation

BB: A re-evaluation of roaming rates has largely been governed by the prevailing consumer usage trends leading to regulatory interventions such as the one by the European Commission, which resulted in a reduction of roaming rates within the European region but increase in roaming rates for non-European destinations.

WiMAX and International Roaming: The next big thing for operators

Roaming is important to operators today, as there are more than 500 WiMAX deployments in more than 145 countries and the momentum of WiMAX deployments continues.

As WiMAX deployment grows worldwide, International Roaming is essential to ensure the success of the technology and evolving to the 4G standard, whose objective standard is to ensure availability of Wireless high speed Broadband access, regardless of where you are. Roaming agreements between operators globally is viewed as essential for the success of WiMAX.

Arrangements for unified Roaming Rate in SAMENA: Developing effective strategies

Unified Roaming rates will lead to increased collaboration between operators and development of the telecom sector within the SAMENA Region. It's important to follow the manner in which the regulatory intervention resulted in unified roaming within the European Council Region. This would amplify the regional unification of the SAMENA region on the world telecom map.

Regulatory

IPTV regulations: A progress check

Markets across the SAMENA region are talking about the best strategies for the introduction or further development of IPTV. IPTV as a budding technology for the distribution of live and on demand TV in the SAMENA region is getting its foothold. While in the early stages the technology necessitates foremost attentions from a policy, regulatory and security point of view.

The development of a regulatory framework is a good indicator of the progress made by a technology. IPTV has made good headway and regulatory uncertainty pertaining to FTTH-based IPTV is also subsiding.

Broadband proliferation and the regional Universal Services Obligation

Markets in the SAMENA region have experienced less attention towards broadband as compared to other markets e.g. European Markets. Although, some government in the region have been paying attention towards USO, but that has mainly been concentrated around the basic telephony services. With the emergence of e-applications such as e-Health, e-Governance, e-Banking etc, broadband has become a necessity today. Keeping the growing significance of broadband in mind, regulatory authorities and other stake holders are expected to pay more attention towards broadband proliferation in the regional markets. Universal Service Obligations are considered to be one of the key enablers of broadband in the region. This is because



operators tend to pay more attention towards urban areas where the ROI is comparatively high thus leaving the rural/remote areas as 'broadband not spots'. Turning these broadband not spots into 'broadband hotspots' needs, actions on governmental and regulatory grounds that include giving subsidies in infrastructure rollouts and network upgrades. Although, SAMENA region continues to experience growth as liberalization in the telecom growth, however some markets still lag behind in terms of broadband penetration and support in the shape of universal services obligation.

Conclusion

Convergence to Casablanca 2010 will be an opportunity to discuss all these subjects with the international experts coming not only from the SAMENA region but also from U.S., Europe and Asia. This time, CTC 2010 will also provide view points on the Subsea cable, Roaming and termination rates negotiation between ISP and operators. Therefore, lots of activities will be conducted at the same time such as:

- ◆ Committees meeting
- ◆ Regulatory workshop
- ◆ Souk@Samena : Trade of traffic termination and discussion with all roamers
- ◆ Submarine Cable roundtables
- ◆ Convergence conference
- ◆ Telecom Award ceremony
- ◆ Networking session

Bocar A. BA, President-SAMENA

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