



BUILDING THE DIGITAL ECONOMY OF THE MIDDLE EAST
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TELECOM LEADERS' SUMMIT 2018



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Mr. Bocar A. BA
CEO & Board Member



“Building the Middle East’s Digital Economy” serves as an aspiration for all of us in the Industry. It requires digital transformation, which demands an unprecedented level of stakeholder co-operation, understanding of stakeholder priorities, and cognizance of fundamental human-related, policy-related, and technological system-related requirements of an evolving economy.

Digital transformation is a fact that we must embrace sooner than later. Its implications exist across digital ecosystems, adjacent sectors, economic sectors, and across human socio-economic progress. Having considered several of these prerequisite requirements, discussed in earlier editions of Leaders’ Summit, and given that a new set of digital services and emerging technologies are almost ready to become mainstream, we now need to see how the data-driven economics will alter the way we do things.

During the Leaders’ Summit’s discussion, made possible through the involvement and participation of so many leaders’ among us, we delved into setting a foundation for building the region’s digital economy, with the hope of inspiring similar goal-setting for the whole of the SAMENA region.

Essentially, building any country’s or region’s digital economy is an accumulation of earlier efforts of concerned stakeholders, having insights into the evolving future, and how digital technologies will impact future decision-making on multiple levels. Moreover, it also requires prompt attention to ensuring sustainability of the digital ecosystem, focusing both on contributing and growth-impeding factors, which may visibly impact the future.

True progress, time savings and operational efficiencies, fulfillment of national as well as international obligations, and the assurance of a viable and sustainable future for both business and socio-economic well-being are essential to building a digital economy. Thus, as has been recognized collectively, the need to digitally transform through political will and action, to ensure protection and fostering of core human values in the digital world, and the need to incentivize investment, should remain top industry priorities.

SAMENA Council takes pride in knowing that the Leaders’ Summit continues to be perceived by both government and private-sector leaders as an integral platform to join for showcasing stakeholder commitment to collaboration, and to addressing fundamental needs of the private sector, in general, and of telecom operators, in particular.



From eMBB to Digital Society



HUAWEI



Huawei held three sub-forums that guided discussions on key industry trends like 5G and All-Cloud Transformation, and presented the Global Industry Vision 2025 and the Global Connectivity Index 2018. Huawei also showcased its latest 5G E2E solutions, launched the “Middle East first Multitenant IoT Hosting Center” and introduced its 5G Ecosystem Program in the Middle East.

Huawei’s first sub-forum was “5G is Now.” The forum focused on the imminent arrival of 5G and its support to national transformation plans across the region, in addition to the key role 5G will play in the Middle East’s digital transformation journey. The 5G era is growing close, and preparation is necessary to build up network spectrum, transport, sites and business cases, in order to facilitate its approach. Huawei recommends Middle East operators and government agencies to support spectrum neutrality and use test-driven development to construct Mobile Broadband networks in order to rollout 5G as fast as possible. The sub-forum was an opportunity for Huawei and other ICT leaders to discuss how to address remaining challenges and opportunities on the road to 5G. In addition, the “5G Ecosystem Program in the Middle East” was launched with Huawei partners at the 5G sub-forum. The program aims to inspire the 5G ecosystem in the Middle East, as the 5G End-to-End commercial use is closely related to 5G ecosystem.

The second sub-forum was “Huawei Global Industry Vision 2025 and Global Connectivity Index 2018” where Huawei presented two studies. First was the Global Industry Vision (GIV) 2025, a new forward-looking report that provides quantitative and qualitative predictions about the future of industry and society. According to the report, by 2025 all things will be able to sense and all things will be connected, bringing us all into a world where everything is intelligent. Second study presented

at this sub-forum was the Global Connectivity Index (GCI) which included 80 countries globally and examined how each is progressing in its digital transformation based on 40 unique indicators that cover five technology enablers: broadband, data centers, cloud, big data and Internet of Things. Nine countries from the Middle East were included in the index. The GCC figured prominently, with the UAE ranking highest among Middle Eastern countries, followed by Kuwait, Bahrain, Saudi Arabia and Oman, all placed in the “adopters” category in the report.

Huawei’s third sub-forum was “All-Cloud Transformation in the 5G era”. The forum was an occasion to discuss how cloud transformation can help accelerate the deployment of 5G networks in the region. The 5G era requires high-bandwidth, large-connectivity, low-latency user experience. It places higher requirements on the operator’s cloud data center architecture and infrastructure, software defined anything, anything as services, services become to AI: these are more flexible, smarter and more reliable. At the summit, Huawei also announced the launch of the “Middle East first Multitenant IoT Hosting Center” in order to facilitate IoT local ecosystem incubation and accelerate IoT business development in the region. Based on this IoT Hosting Center and ecosystem enablement strategy, Huizhong and Hayat are the first partners to obtain “The Middle East IoT Hosting Center 1st NB-IoT enabled certificate”

Huawei advocates openness, collaboration, and shared success. Huawei is an active member of more than 360 standards organizations, industry alliances, and open source communities, where they work together on mainstream standards and lay the foundation for shared success. Moreover, Huawei focuses on three domains – fully-connected networks, intelligent computing, and device innovation – and continues to invest in products, technologies, basic research, engineering capability improvement, technical standards, and industry ecosystems, with the aim of supporting customers in their digital transformation journey, and lay the cornerstone of an intelligent world.



THE 3RD SAMENA COUNCIL SALT MEETING

This meeting among telecom operators, regulators, and technology providers (as observers) commenced with a brief background on the objectives and rationale for the SALT meeting - which was to demonstrated how SAMENA Council and various regulatory authorities have initiated collaboration on commonly-defined areas of importance to the Industry.

It was emphasized that it is the SALT Meeting's aim to foster ongoing dialogue among the Private and Public sector stakeholders in view of Telecom Operators' needs and aspirations for sustainable growth, which Regulators are in a position to foster.



"We are proud to have the SAMENA Telecom Leaders Summit 2018 held in Dubai, UAE for the 5th consecutive year. The event indicates our deep interest in the ICT sector and the horizons it opens for a bright future based on sustainability, growth, and happiness. The theme of the 2018 summit is very significant, indicating that the digital economy must be one of our high priority topics for the coming decade. This trend comes in line with the disruptive transformations occurring in the world, namely Artificial Intelligence and the 4th Industrial Revolution. It also conforms with our strategic efforts in the UAE to build a sustainable economy based on innovation and technology for the happiness of our people."



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





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Ericsson is one of the leading providers of Information and Communication Technology (ICT) to service providers, with about 40% of the world's mobile traffic carried through our networks. We enable the full value of connectivity by creating game-changing technology and services that are easy to use, adopt and scale, making our customers successful in a fully connected world. For more than 140 years, our ideas, technology and people have changed the world: real turning points that have transformed lives, industries and society.

Ericsson enables communications service providers to capture the full value of connectivity. The company portfolio across Networks, Digital Services, Managed Services and Emerging Business is geared to make our customers more efficient, go digital, and find new revenue streams. Ericsson's investments in innovation have delivered the benefits of telephony and mobile broadband to billions of people around the world.

For the second consecutive year, Ericsson participated at SAMENA Telecommunications Council's -Telecom Leaders' Summit reaffirming Ericsson's commitment to the mobile operators, which are at the core of our business.

Ericsson highlighted during the sessions its continued efforts in developing 5G standards and respective network solutions, while at the same time ensuring we work with our partners to create new 5G/IoT use-cases.

Furthermore, Ericsson emphasized the need for timely identification and allocation for harmonized spectrum for 5G. Harmonized spectrum is the first step towards developing a 5G eco-system and create the economies of scale that will drive down 5G adoptions cost for MNOs. Ericsson also applauded the efforts of the regional administrations who are taking positive steps to achieve harmonization at Arab region level.

During the sessions, Ericsson main topic focused on the Digital Services journey which starts with a mindset and that requires significant transformation of the organization. It is about creating a Digital Culture in the organization. To succeed in this new business environment, operators needs to be well integrated into the digital economy and the platforms that are the fabric of digital value creation. To achieve this integration, the current service production model needs be redefined.



REGIONAL 5G ROADMAP

The primary objective of the 5G Meeting was to look at means and practical ways to promote 5G deployment in the region, which requires improved incentivization and enablement of digitization-centric policies and regulation. Based on SAMENA Council's white paper on key issues relating to network deployment challenges and considerations, various dimensions of 5G development were delved into in view of (1) the fact that 4G has only just been deployed in the region, which may impact the speed of migration to 5G, (2) a key uncertainty, that is the extent to which extra revenues that 5G would generate over 4G, and (3) use cases that have yet to be developed.

Perspectives Exchanged:

- From a business perspective, 5G does not yet seem profitable to invest in. The uncertainty in new revenues (over what 4G and enhanced 4G can and will offer). 4G has not even starting paying back and there is little in terms of use cases that provide an improvement over and above what can be achieved with LTE.
- The cost model paper presented by SAMENA Council was discussed. There was some pushback on the payback periods (they should be longer) from telecom operators. The main issue seemed to be uncertainty in the new revenues 5G can offer and when. The assumption of 15% and 30% increase in ARPU assumptions, based on already published numbers by various technology providers, were challenged. It was also mentioned that a more realistic assumption would be to phase in such revenues over a number of years. It was mentioned even if 5G boosts economic growth significantly there is no guarantee those that make the investments (mobile) will get a fair share of those benefits (to pay for the large upfront investments). SAMENA Council agreed to update the cost model and paper in discussion with interested parties.
- Given the large upfront costs of wide-area 5G, uncertainty on extra revenue potential (over 4G), there needs to be consideration of how to boost the viability of 5G through cooperation of all parties (regulators and industry). Otherwise the likelihood might be that large



scale 5G deployment may not happen until after 2025 (which fits in with the normal mobile business cycle). This is not what some Administrations want.

- A phased approach to 5G is likely with consumers (including fixed wireless access) targeted first, then enterprise and government. Developing the necessary service level agreements for enterprise will be important and based on what coverage/performance 5G can offer.
- Network slicing will be an important new feature to allow "virtual networks" with appropriate SLA's to be offered. For example, to government public protection and disaster relief currently running on self-provided networks. This will allow 5G to "consolidate" these separate networks and boost the 5G business case.
- Some Regulators maintained that spectrum is a valuable asset and needs to be paid for (and not "undervalued"). The counter was that auction design as well as the control of spectrum availability can affect the market value.
- TRA-UAE and SAMENA Council highlighted their areas of cooperation on 5G spectrum harmonisation to promote deployment and investment, as well as cooperating to ensure WRC-19 in Egypt is a success.
- Spectrum benchmarking for mobile licensing was discussed and it was agreed that keeping this updated (and correcting where necessary) via ASMG, as well as asking MENA Administrations to develop future spectrum roadmaps would benefit efficient investment.
- The issue of regional spectrum availability and roadmaps would be pursued by SAMENA Council and TRA-UAE via ASMG or directly with Administrations.
- The most promising use-case at the outset is enhanced mobile broadband. Need to focus on what customers' expectations are: Faster connectivity with QoS/QoE.
- Need to identify new business models – verticals and the enterprise sector could share in the costs – also in build-out – A "local" 5G roll-out model may need to be adopted. If 5G could not provide sufficient coverage then governments may find it difficult to accept as an alternative.



DIGITAL SERVICE ECOSYSTEMS

The third bi-lateral meeting of industry stakeholders discussed Digital Services Ecosystems, and how these ecosystems through cross-sectoral collaboration can bring about a real value-addition to humans and the environment, contribute towards the fulfillment of the UN Sustainable Development Goals (SDGs), and enhance quality of life. The third bi-lateral meeting of industry stakeholders also discussed Digital Services Ecosystems, and how these ecosystems through cross-sectoral collaboration can bring about a real value-addition to humans and the environment, contribute towards the fulfillment of the UN Sustainable Development Goals (SDGs), and enhance quality of life.

Perspectives Exchanged:

- Digital Services have been around for more than 15 years and have proliferated across the public and private sectors, particularly in the areas of government services, finance and health, the extent of which depends strongly on the enabling environment in place. The digital ecosystem is constantly evolving and creates value in and of itself for its stakeholders and for end-users and should be self-sustaining.
- Digital Services are constantly evolving through changes in customer demand and behaviour, content available, new hardware and software / applications and network technologies, and end-user devices, as well as changes in the regulatory- and policy environment.
- Key business opportunities at this point in time lie in the areas of consumer-centric services, enterprise and a hybrid (B2B2C, whereby capturing enterprise customers can be leveraged to include their customers, as well as through verticals).
- The Digital Ecosystem is currently in a disrupted state through the impact of IP and the resulting need to adapt to this change of decoupling services from networks and the need for new business models and -processes that rely on cross-border data flows, economies of scale and network effects.
- Old assumptions have to make way for new realities and new business models and regulatory rules are needed.
- Operators are in need of new revenue sources to sustain and invest in the infrastructure needed to make

the goal of creating Information- and Knowledge Societies and transforming into Digital Economies a reality. Operators also need to serve their shareholders. Operators will only invest when the investment has a reasonable return.

Old assumptions include: New realities include:

- | | |
|-------------------------|--------------------------------------|
| » The product is voice | » The product is connectivity |
| » The metric is minutes | » The metric is bandwidth/throughput |
| » Distance matters | » Distance insensitive |
| » Duration matters | » Time insensitive |
| » Location matters | » Location insensitive |

- Digital Service can provide new sources of revenues, and numerous studies and reports are making predictions on the great potential and the vast opportunities that the digital ecosystem has in stock in particular as regards 5G business potential – and for society at large (through e.g. contributing to the fulfilment of the UN’s SDGs through targeted Digital services and the IoT).
- Most recent reports propose operators to heavily invest in acquiring the capabilities to take a larger share of digital services’ value chains (e.g., investing heavily to outcompete incumbent players, for example banks for financial services or regional ecommerce leaders or collaborate with content or platform providers) and adopting a long-term innovation strategy.
- To this end, the way forward proposed for telecom operators is to either (1) compete, (2) collaborate or (3) remain neutral or resist.
- Operators need to identify areas of relevance for digital services. At the moment, revenue projections are far too low to make investment into 5G infrastructure profitable – 1.4% of mobile revenues is too low to convince the board and shareholders that investment is worthwhile, when the current 4G networks have not even paid off and relevant use-cases have not been identified (other than 3 broad families) – The Economist and Facebook Index on Internet inclusivity provide good insights into how individuals use the Internet, which can be used to develop new use-cases.



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customers in a variety of languages. Over 50% of our senior management team and customer-facing staff are UAE nationals, and we remain committed to providing fulfilling opportunities for quality talent in a cosmopolitan working environment. So far more than 6.5 million mobile customers (almost 50% market share), 555,000 fixed line subscribers, 180,000 home services subscribers and over 70,000 businesses have chosen to use our services. In a survey conducted by ARC Chart, we were named the Best Mobile Broadband Network in the Middle East and Africa region in 2012. Our annual revenue now exceeds AED 10 billion.





H.H. Sheikh Nahayan Mubarak Al Nahayan

Cabinet Member and Minister of Tolerance
United Arab Emirates



UNITED ARAB EMIRATES
THE CABINET

I am delighted to join those of us who live and work in the United Arab Emirates in welcoming you visitors from abroad to our country and to the exciting city of Dubai. I am confident that we are all grateful to Mr. Yang and Huawei Middle East for their generosity in hosting this significant event. It is especially significant because each of you exerts influence on policies and practices that apply directly to the well-being of our various populations. Yours is an exciting industry that has tremendous impacts on the way we all live our lives.

The business you are in is incredibly complex. You must master the rapidly evolving communications technology, provide flawless connectivity and a brilliant customer-centric experience, while successfully navigating different regulatory environments. To deal with such complexity, it is necessary to break the challenge into smaller pieces, and address each piece individually while tightly coordinating between them.

As you all know, the telecommunications industry is the main driving force behind globalization. And with globalization comes an increasing need for tolerance. As global citizens, we must learn to embrace diversity with curiosity and compassion rather than with fear and mistrust. We must be able to interact constructively with people of different beliefs and cultures. Tolerance is the key to making this happen.

As Minister of Tolerance in the United Arab Emirates, I am pleased to be able to talk to you all this evening, and to share my views on how important tolerance is and how it will become increasingly important in order to continue to realize the economic and social benefits of globalization.

Your businesses and industry are constantly changing, evolving and growing and there is only one constant and that is innovation. Innovation involves all aspects of your business operations, including production, distribution supply chain management, new product and

service delivery and changing business models. There is mounting empirical evidence that tolerance is beneficial for innovation. All else equal, more open and diverse companies are likely to attract greater numbers of talented and creative people – the sort of people who power innovation and economic performance.

There are many definitions of tolerance but essentially they all agree that tolerance involves an attitude of openness, inclusiveness, and respect for diversity for all ethnicities, races, religious beliefs and walks of life. This means that a tolerant person is characterized by an attitude of openness, irrespective of his or her underlying opinion of those to whom this attitude is extended. Similarly a tolerant organization, including a corporate business entity, promotes tolerance amongst its employees and embraces diversity amongst all its stakeholders.

Tolerance therefore has some important business lessons for the telecommunications industry in the SAMENA region. First, I encourage you to look deeply into what is unique about the countries and cultures you serve. Tolerance is not about making everyone the same, it is about recognizing, respecting and embracing diversity. How can you embrace the diversity that exists in the SAMENA region? While your underlying networks may be culturally neutral, the services you offer, and the way in which you provide them is not.

The world's approach to telecom has been shaped primarily by North Americans and Europeans as the early developers and adopters of the technology. Their cultural norms, and ways of thinking and working are embedded in the apps and services they deliver. I believe there are significant business opportunities in providing over the top services that fit better with the cultural and language preferences of your customers. What better way to create "positive surprises" that impress and build loyalty among your customer base than to develop products that uniquely fit how they think and work.

Tolerance is also about demonstrating a genuine concern for the welfare of our fellow human beings, and taking action based on those concerns. I was particularly pleased to see concern for the realization of maximum long-term socio-economic benefits as one of the objectives of this council. I believe demonstrating a genuine concern for the welfare of the people and organizations you serve can be a key differentiating strategy for telecommunications. Contributing to the development of a country or region not only builds loyalty among customers, but also among employees and regulators as well.

Two of the skills underlying tolerance may be of particular interest to you. They are cross cultural communications, and conflict resolution. The cross-cultural differences I am referring to here are not only regional and country based,

but value-chain based. As you step through your value-chain, the people within each link are culturally different from those in the preceding and following links. For example, the people who manage your communications infrastructure are culturally very different from those designing new services. They will both need enhanced cross-cultural communication skills for your organizations to achieve the tight integration necessary to succeed in the future.

And of course, conflict resolution skills are needed when miscommunication, differences in opinion, or even differences in objectives are encountered. Given the anticipated growth in mergers and acquisitions, and the increasing specialization on particular segments of the value chain, enhancing the cross-cultural and conflict-resolution skills of your employees will become a priority.

Given the importance of tolerance to your future success, and as you work at this leaders' summit, I hope that you will be ever mindful of two serious threats to a digital economy, namely, falsehood and hate.

Let me explain. We all know that our digital world has no walls. It accepts anything. It accepts both truth and falsehood. All categories are open—personal relationships, governmental declarations, financial statements, news reports, advertisements, representations of religion, history, legal documents—the list goes on. The digital world is alive with truth that is side by side with mendacity. Never have individuals confronted so much truth, so many lies. That condition raises an ever-present question for the builders of a digital economy: How can we ensure the integrity of the digital world? What do we do about falsehood in a digital economy?

A close relative of falsehood is hate. In an open digital world, hate is free to roam. Hate takes many forms. It may start with degrading bullying and end in bloody violence. Hate has no room for truth. Hate innately rejects reason and clear thinking. But hate can destroy an economy,



even a digital economy. The obvious antidote to hate is tolerance. How can we promote tolerance in a digital economy?

You will be glad to learn that, as Minister of Tolerance, I take my responsibilities very seriously. In doing so I am following the example set by our nation's founder, the late Sheikh Zayed bin Sultan Al Nahyan. Those of you visiting the UAE may not know that 2018 is the Year of Zayed, in which we celebrate the centennial of the birth of our nation's founder, the late Sheikh Zayed bin Sultan Al Nahyan. Under his leadership, the UAE became a peaceful and prosperous country that was an early microcosm of globalization.

Sheltered peacefully by the UAE's welcoming Arab tent, our diverse population continues to work in an astonishingly outstanding and tolerant way under the wise leadership of the President, His Highness Sheikh Khalifa bin Zayed Al-Nahayan, and with the strong support of the Vice President, Prime Minister and Ruler of Dubai,

His Highness Sheikh Mohammed bin Rashid Al-Maktoum, and that of His Highness Sheikh Mohammed bin Zayed Al-Nahayan, Crown Prince of Abu Dhabi and the Deputy Supreme Commander of the Armed Forces. They are energetic leaders whose wisdom and vision have shaped our country and its diverse global society. Our greatest fortune in the UAE is that our leaders have been able to see beyond the horizon and chart a clear path for our country's future.

For the next two days you have the rare and valuable opportunity to think deeply about the challenges and opportunities facing you and your industry and to converse with your peers. I have seen the topics on your agenda and predict a challenging and engaging two days. I urge you to build a digital economy of the SAMENA region that is infused with tolerance.

Good luck and thank you for being leaders in this important work. Best wishes for a successful summit.





Eng. Nasser Bin Sulaiman Al Nasser
Group CEO



Accelerated digital development efforts, which require unprecedented level of stakeholder co-operation and new partnerships, are fundamental to create the new digital economy in the region.

As the enablers of the digital economy, telecom operators are continually monitoring their pace and progress with respect to technology disruptive advancements, new dynamics of the markets, national aspirations, and globally agreed goals among nations in order to understand how sustainable digital economy in our region would materialize, and what its impact would be on our future and current investments.

However, despite the challenges that operators are facing today, there exists a strong need for them play a pivotal role in digital transformation where their experience, risk-taking, and embracing new digital technologies matter, significantly.

For the Industry to open new possibilities for all stakeholders, we direly need to understand ourselves and facilitate other stakeholders' understanding of the depth of real challenges and issues, and adopt technologies, seek best practices, and continually gain insights from experiences that others, elsewhere, across adjacent economic sectors, may be creating for us.

New growth and value centers across the world's digital economies will be created through digital transformation. The digital communications industry needs to equip itself to drive and experience such growth and value-creation dynamics, and must remain at the heart of new trend-setting in the new world of data economics.



Mr. Charles Yang
President, Huawei Middle East



Ushering in the 5G Era at SAMENA Telecom Leaders' Summit 2018

The industry is abuzz with 5G – and for good reason. Consumers, operators and society all stand to benefit from this hyper-connected, hyper-responsive world. The Fourth Industrial Revolution – where ICT networks are the foundation and AI is the enabler – is bringing us to an intelligent world where all things will be sensed, all things will be connected, and all things will be intelligent. ICT is becoming a general purpose technology that improves lives of consumers and increases efficiency of businesses. And 5G is the main driver of this transformation.

The arrival of 5G will accelerate digital transformation and bring about the all-connected, all-intelligent world.

Alongside the technology, one factor sits at the heart of a mature 5G ecosystem: partnerships. For this reason, Huawei was pleased to participate in the SAMENA Telecom Leaders' Summit 2018, an occasion to gather ICT industry leaders to discuss challenges and opportunities in building out the 5G ecosystem. Huawei is working hard to usher the 5G era. We do this in three ways: by leading the push to develop 5G devices and networks, promoting the All-Cloud Transformation, and conducting research into how nations across the globe are faring on the road to 5G.

5G networks and devices are the two basic requirements for 5G commercialization. And when it comes to devices, chips are central to the industry's development and maturity. Huawei was the first company to smash through the bottleneck to 5G commercial use by releasing Balong 5G01, the world's first 5G customer-premises equipment, making a significant contribution to the growth of the 5G industry. It also makes Huawei the first company with capabilities in 5G chipsets, devices, and networks, and the first that's able to offer an end-to-end 5G solution. Huawei is paving the way for the arrival of 5G-compliant user devices is just around the corner.

The shift towards All-Cloud is also vital to the development of 5G, which necessitates high-bandwidth,

large-connectivity, and low-latency user experience. This places higher requirements on the operator's cloud data center architecture and infrastructure: it needs to be more flexible, smarter, and more reliable. In order to meet this demand, Huawei has developed the FusionCloud, which builds a distributed cloud deployment, a smart cloud platform, and a high-performance and reliable IT infrastructure to create a cloud that is scalable to the 5G era.

The Global Connectivity Index (GCI) 2018 released for the first time globally at SAMENA Telecom Leaders' Summit 2018, gives a clearer picture of how close the world is to widespread deployment of Intelligent Connectivity. The GCI is a study that benchmarks where a country stands within its journey to Intelligent connectivity and aims to deliver insightful research for governments looking to push forth a Digital Economy Transformation. GCI 2018 features 80 countries, including 9 countries from our Middle East region. The index provides a comprehensive and objective assessment of a country's ICT development from both a national and business perspective, and assesses the current status, future trends, and challenges associated with digital transformation. GCI will show that investing in Intelligent Connectivity is the main requirement for industries to build a digital economy, as adopter nations see the largest GDP growth from GCI. Their focus is on increasing ICT demand to facilitate industry digitization and high-quality economic growth.

There are still many challenges to face before entering the intelligent world. To achieve sustainable business growth, organizations need to keep moving beyond existing constraints and boundaries, first internally and



then externally. Huawei strives to be a strategic partner of digital transformation for carriers, and enable carrier success through innovative products, solutions and professional services that addresses business needs and creates new revenue streams.

Huawei began researching 5G in 2009 and has so far invested US\$600 million in 5G R&D, establishing 11 5G research centers around the world and partnering with over 30 telcos on 5G, including China's big three plus Vodafone, SoftBank, T-Mobile, BT, and Telefonica. In 2017, Huawei was the first company to launch pre-commercial 5G networks with its partners. And in 2018, Huawei will push forward the completion of the industrial chain, complete interoperability testing, and support the first round of commercial 5G network launches.

The future is partnerships, the future is 5G.



Telecom Leaders' Summit 2018

Operators & Regulators and the Need for Policy & Technology Innovation, Spectrum Harmonization, Economies-of-Scale, Digital Integrity and Ensuring Human Respect

It is extremely important to enable and equip Telecom Operators and Regulatory Authorities to collaborate and co-operate with each other in order to achieve mutual successes, and to secure better prospects that national ICT visions would meet fulfillment.

To enable effective digital transformation and accelerate digitization, the digital communications industry requires transformation in its truest form, including a revamp of current regulatory regimes; operator business models; and multi-stakeholder approaches that should be sector-agnostic and collaborative. Furthermore, at a time when regional efforts are required for the harmonization of spectrum for 5G development, on setting rules for ensuring data privacy, developing cross-border agreements on the flow and management of data, and to align national digital transformation priorities; and as the Industry explores revenue and growth potential in new verticals, it has become essential that Telecom Operators be enabled by Regulators to overcome constraints, especially with respect to cross-border data flows, favorable taxation policies, reduction in capital and operational expenditure, spectrum license durations and costs, among other impediments.

It is now also critical for Operators to seek partnerships with Regulators to help fulfill national ICT visions, assist in organically generating revenues for the governments,

and help ensure end-user's digital privacy and overall digital integrity in the cyberspace. The imperative for Operators to learn lessons from the past and to team up across borders and develop own digital services across adjacent economic sectors is also becoming essential to thriving in the digital ecosystem.

With the official patronage of the United Arab Emirates' Telecommunication Regulatory Authority (TRA), the South Asia - Middle East - North Africa (SAMENA) region's change-makers' annual leadership event, the SAMENA Telecommunications Council's Leaders' Summit 2018 —hosted for the fifth consecutive year by Huawei Technologies and co-Sponsored by Ericsson, Emirates Integrated Telecommunications Company (Du), Alfa (managed by Orascom TMT), Sudatel Group, Numbase Group and Airspan — addressed the aforementioned requirements in length.

In his welcome note, CEO & Board Member of SAMENA Council, Mr. Bocar BA, referred to Leaders' Summit 2018 and the focus on "Building the Middle East's Digital Economy" as an accumulation of earlier efforts to look into the future, and how data-driven economics is shaping up and will impact our future decisions with regard to policies, investments, and stakeholder collaboration, to ensure that good governance, privacy of data and human well-being, as well as sustainability of the business are



realized. While Telecom Operators and other digital ecosystem players, including Regulators, seek the digital communications ecosystem's sustainability, focusing on digital services, data regulation, spectrum resources, and addressing challenges relating to financial obligations and excessive industry fees, among other factors, could help steer the Industry toward a new positive and growth-oriented direction; a direction that leads toward building a sustainable digital economy in the region.

TRA-UAE, represented by H.E. Hamad Al Mansoori, Director General, acknowledged SAMENA Council's ongoing efforts with the TRA over the past five years, including on the TRA's region-wide endeavors to accelerate the next-generation of technology development and empowered stakeholder collaboration in the region.

ITU, represented by Director BDT, Mr. Brahim Sanou, drew attention to making sustainability a core focus area, and reiterated the need to think about new possibilities that exist in Health, Education, and other important sectors, where significant opportunities abound.

SAMENA Council's Chairman of the Board - Eng. Nasser Al Nasser, Huawei Technologies ME's President - Mr. Charles Yang, and GSMA's Director General - Mr. Mats Granryd reflected on how the future is becoming transformational and how preparation for 5G roll-out paradigm shift, which may transpire in multiple phases, and quantum-computing capability are paving the path for AI and an utterly new generation of digital experiences. Eng. Nasser referred to Telecom Operators as the enablers of the digital economy, and how Operators are continually monitoring their pace and progress with respect to disruptive advancements, new dynamics of the markets, national aspirations, and to globally agreed goals among nations, to help materialize a sustainable digital economy.

Congregation and active participation of leaders, change-makers, and influencers from within the telecommunications industry across all SAMENA regional markets, East & West Africa, Asia Pacific, East & West Europe, and North America ensured that perspectives



exchanged during Leaders' Summit 2018 would serve the Industry in planning during the course of the year, as developmental efforts to bring 5G into the SAMENA region, prospectively as the first adopter in the world, accelerate.

The Leaders' Summit 2018's Guest of Honor, the UAE's Minister of Tolerance, HH Sheikh Nahyan bin Mubarak Al Nahyan, emphasized to stakeholders of the digital communications industry that Leaders' Summit 2018 was an especially significant event as it reflected on the efforts that each stakeholder is exerting in order to positively impact the society. As digital technology accelerates globalization, new dimensions in the link between Tolerance and Telecommunications have emerged. The Industry thus must ensure that tolerance, truthfulness, and integrity prevail as "Digital life is life of truth."

Renowned regional CEOs, public and private-sector leaders, industry experts, and distinguished guests from the ICT domain and beyond, and world-renowned personalities within the digital communications industry participated in the Leaders' Summit. Core discussions of the Summit focused on understanding the dimensions of a sustainable regional digital economy in view of the Middle East's preparation toward 5G, digital development goals, and conducting a preparatory stakeholder dialogue to



address complexities of the regulatory environment in the wake of advancements in networks and new digital platforms.

Industry stakeholders, including leaders representing STC Group, Batelco, Zain Group, Orange, Viva Kuwait, Etisalat Group, du, Alfa, Sudatel, Omantel, GSMA, TRA-UAE, CITC, TRA-Oman, TRC-Jordan, Huawei, Nokia, Ericsson, Google, Facebook, ESOA, Eutelsat, and Members of SAMENA Council, among others, also took part in exclusive bi-lateral stakeholder meetings, organized by SAMENA Council on a “by-invitation-only” basis to showcase SAMENA Council’s collaboration with regional regulators; to present SAMENA Council’s work on 5G development; and to see how digital service ecosystem and services are evolving, and would prove to be integral to building the regional digital economy.

Moderators and speakers of the Summit included:

Mr. Bahjat El-Darwiche - Strategy&, Mr. Olaf Acker – PWC, H.E. Shaikh Nasser Bin Mohammed Al Khalifa - TRA Bahrain, Dr. Ahmed Alsohaily – CITC, Eng. Atef Helmy – Orange Group, Mr. Osman Sultan – Du (EITC), Mr. Scott Gegenheimer – Zain Group, Mr. Nadir Mohammed – World Bank, Mr. Chaobin Yang – Huawei, Mr. Indranil Das – Ericsson, Mr. Tony Poulos - Disruptive Asia, Mr. Paul Senior – Dense Air, Mr. Stephen Spengler - Intelsat, Mr. Robert Middlehurst – Etisalat International, Dr. Saoud AL-Shoaili – MOTC Oman, Mr. Fadi Nasser - Omantel, Dr. Robert Pepper - Facebook, Mr. Karan Ponnudurai - Batelco Group. Mr. Joe Barrett- GSA, Mr. Wang Hua – China Mobile Pakistan.

Key takeaways from the Leaders’ Summit 2018:

- OTTs are still a key issue in that there is still no level playing field – OTTs are competing on licensed services and operators are unable to replicate the cost structure.
- There is still a stark imbalance between global players and national operators and their activities – operators don’t have an OTT solution, because they are nationally / geographically impeded by national regulatory



frameworks that prevent the roll-out of cross-border services through restriction on data flows, narrow nationally constrained licenses, etc. Same services, same rules are needed.

- Regional efforts are required in relation to harmonization of rules on data privacy and cross-border data management. It is not cost effective to deploy data centers in every country where operators have a footprint based on data localization requirements. This is specific to Telecoms and is not applied to e.g. data collected by banks or credit cards.
- See potential in verticals for alternative revenue sources, but operators have to move fast.
- Margins for IoT are very thin and revenue uncertainties are very stark to justify investment if there are no concessions for operators (regulatory holiday etc...). Without sustainable business cases investments by mobile operators remain under threat, as IoT won’t pay for 5G.
- The roll-out paradigm of 5G has to be different from 2G, 3G and 4G – ubiquitous 5G coverage is not possible unless there is a strong business case.





- TRA and SAMENA Council highlighted their areas of cooperation on 5G spectrum harmonization to promote deployment and investment, as well as cooperating to ensure WRC-19 in Egypt becomes a success.
- Regulators have taken steps towards reforming regulatory frameworks, including for taxation.
- The cost model paper presented by SAMENA Council to help accelerate 5G development was discussed.
- Digital Services have been around for more than 15 years and have proliferated across the public and private sectors, particularly in the areas of government services, finance and health, the extent of which depends strongly on the enabling environment in place.
- Operators need to identify areas of relevance for digital services. At the moment, revenue projections are far too low to make investment into 5G infrastructure profitable – 1.4% of mobile revenues is too low to convince the board and shareholders that investment is worthwhile, when the current 4G networks have not even paid off and relevant use cases have not been identified.
- Two key threats from technological development and digitalization are falsehood and hate.
- Need to think about what AI and digitalization are doing to societies – we need to have this conversation. There needs to be a forum to deal with this subject to understand the changes that are happening to us as humans, and how these changes in social structure and interaction impact our values and creation of knowledge and culture.

dimensions; some expertly brought into our attention by the Leaders and Excellencies who were an integral part of this year’s successful leadership gathering. In doing so, we have recognized the leadership efforts of Dr. Khaled H. Biyari, former Chairman of SAMENA Council, for Industry Representation & International Co-operation Building, and of Mr. Osman Sultan, CEO of du, for his visible contributions to Telco Digital Transformation.” Mr. BA also congratulated Huawei, Ericsson, du, Alfa Mobile, Sudatel Group, Numbase Group, and Airspan for making Leaders’ Summit 2018 physically possible and for enabling SAMENA Council to provide its traditional, world-class atmosphere for discussion to its Leaders and esteemed participants of the Leaders’ Summit 2018.

The SAMENA Leaders’ Summit is an annual, discussion-centric private and government sector leaders’ gathering, composed of various bi-lateral meetings held among stakeholders in a world-class setting. Its aim is to create a sense of stakeholder enablement and to make progress toward true transformation within the Industry, to help align digital development priorities and harmonize regional efforts in fostering sustainable investments in digitization across the region, driven by Telecom Operators.



Expressing his satisfaction on the successful congregation and dialogue among leaders, who participated in the Leaders’ Summit 2018 from all around the world, Mr. Bocar BA, CEO & Board Member of SAMENA Council stated, “It was highly merited to delve into building the digital economy of the Middle East from multiple



"The Leader's Summit 2018 focused on supporting the Middle East region's digital Agenda, which is very important to the Kingdom's national ICT development efforts. It was exciting to discuss the 5G strategy for Saudi Arabia and highlight our role as government to support innovations in this exciting area. Congratulations to all decision-makers who contributed in this important effort by SAMENA Council."

H.E. Dr. Abdulaziz Salem AlRwais

The Governor of CITC
Deputy Chairman of Board



"Telecom Operators various challenges are indeed of sensitive nature. To enable telecom operators to do more for the benefit of the entire ecosystem, there is a need to set collaborated visions, supported by ICT development action plans."

Eng. Nasser AlNasser
Group CEO - STC



TELECOM LEADERS' SUMMIT 2018

3rd May, 2018

Atlantis, The Palm - Dubai, UAE



BUILDING THE DIGITAL ECONOMY OF THE MIDDLE EAST

"SAMENA's Leaders Summit is a unique regional opportunity for industry stakeholders to get together in a relaxed atmosphere where they express and discuss views and concerns related to various topics of high importance to operators, vendors and government representatives all under one roof. The SALT round table discussion has always been a key steering point for the kick-start of the discussions at the summit. We thank SAMENA for this outstanding opportunity and TRA Bahrain will continue to work closer with the stakeholders and to maintain the leadership of the industry at international levels."

Sheikh Nasser Bin Mohammed Al Khalifa
Deputy General Director – TRA Bahrain



"Digital economy requires Digital leaders. The SAMENA Telecom Leaders' Summit offers a unique opportunity to discuss collaborative approaches to enhance the digital economy and socio-economic development in the region and beyond"

Mr. Brahim Sanou
Director – BDT - ITU





sudatel[®]
A Telecom Group



SUDATEL SUCCESS STORY

- **Sudatel Telecom Group** is a leading ICT provider, with **more than 20 years** of experience in delivering telecommunication services in Sudan and Africa.
- Operates in 4 countries, **Sudan, Mauritania, Senegal and Guinea Conakry** and serves 13 million subscribers.
- Connects major strategic regions in the world via its international submarine cable network.
- **An international award winner** for the **Sudatel Data Centre**, considered to offer some of the highest standards in the region.

SUDATEL



Sudatel Telecom Group (STG) is one of the leading telecom companies in the region, serving the needs of customers in Sudan and Africa. Since its foundation on 13th September 1993, STG has grown steadily from local to regional markets. STG is the bridge for telecommunication movement between the Arab world, Africa and the rest of the world.

STG links Sudan to the Kingdom of Saudi Arabia via a submarine cable and links Sudan to Egypt and Ethiopia via a network of fiber cables. Sudan takes part in a cable in middle and West Africa extended from Sudan through Africa until South Africa. STG offers various telecom services and keeps its competitive edge with other companies. STG main services include provision of mobile services, fixed-line services, as well as carrier and wholesales services.





5G

**PIONEERING THE
TECH REVOLUTION**

*We are proudly working to provide you
with the fastest internet yet.*

ALFA



Alfa, managed by Orascom Telecom, Media and Technology (OTMT) since 2009, is a leading Lebanese mobile operator committed to technology innovation and national development.

In its most recent milestone, Alfa completed the 1st live 5G trial in Lebanon on April 13th, 2018 achieving a record speed of 25 gigabit per sec, the highest throughout in Lebanon's history, hence putting its network on an evolutionary path to 5G. This milestone is the fruition of Alfa's rich technology innovation journey which the operator is highly committed to. Alfa was the first operator to launch GSM services in Lebanon in 1994. In 2011, it became the first to launch 3G+ mobile broadband

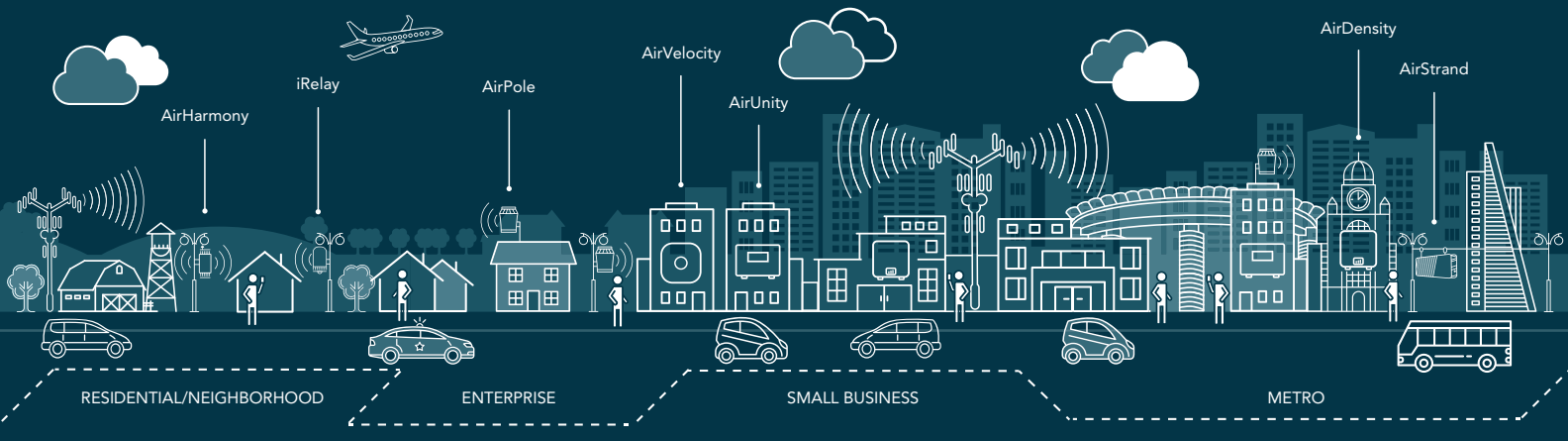
services commercially, then in 2013, Alfa was the first to commercially roll out 4G-LTE services in the country and in 2017, Alfa was the first to complete a nationwide 4G LTE-A network covering 100 percent of its subscribers. Alfa currently serves more than 2 million subscribers out of which 75 percent are data users through its state-of-the-art network (2G, 3G+, 4G and 4G LTE-A) that covers 99 percent of Lebanon.

Its award-winning CSR Program "Alfa 4-Life", a cornerstone in its Sustainability journey, is largely acclaimed as a leading regional and international community engagement platform making a difference in the lives of more than 1500 people with Iron Will each year.



Laying the foundation for 5G with ultra-dense 4G networks

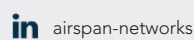
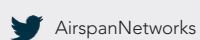
Cell site delivery with cell phone
economics at 1/10th of the cost per Gigabit



Airspan assists operators on the path to 5G through massive network densification and offers the most comprehensive densification toolkit in the industry, which includes the award-winning AirUnity, AirDensity, AirSpot, AirPole, AirStrand and AirHarmony. These products, tightly integrated with Airspan's iRelay, mmWave backhaul and Self Optimizing Network (SON) software allow operators to revolutionize deployment economics and maximize spectral efficiency.

airspan.com

UNLIMITING MOBILE BROADBAND



AIRSPAN



5G Network Densification: Airspan, cracking the code on small cells.

Network densification remains one of the greatest challenges facing mobile operators as they look to implement 5G, add 4G capacity and increase user speeds. However, achieving massive densification requires a new approach to small cell deployments, from site acquisition to RF planning, integration with existing infrastructure, installation, network optimization, advanced interference mitigation and management. One goal for densification options needs to be zero or minimal zoning review, which includes pre-approved forms such as mono-poles and aerial mounting options.

With over a 300,000 small cells deployed worldwide, Airspan is the only vendor to have demonstrated that new approach. Airspan has the most cost-effective network densification portfolio using innovative form factors that include the award-winning Sprint Magic Box based on the AirUnity indoor small cell with integrated wireless backhaul and plug-and-play installation, as well as AirPole and AirStrand, which simplify site acquisition and installation for outdoor scenarios. AirSON integrated operational intelligence minimizes operational costs and automates configuration and optimization tasks. Airspan is removing barriers and leading the way toward 5G network densification.

Demand for Small Cells Gets Bigger with 5G

As the demand for coverage and capacity expands, mobile operators are stepping up small cell deployment roadmaps. It is estimated that 58 percent of operators in the first two to three years of deploying 5G New Radio expect to focus primarily on small cells. While some operators are launching 5G as a mobile service, most early installations are expected to be indoors and in venues, shopping malls, factories and other commercial areas

To meet the challenge of densifying existing 4G networks and laying the groundwork for 5G, innovative operators are looking for vendors who can anticipate their needs and provide a wide range of small cell solutions that:

- support multiple deployment options to eliminate issues of site acquisition and installation costs

- provide wired and integrated wireless backhaul options
- simplify complicated system configuration and operations
- automatically integrate and optimize coordination with existing networks

Pure-play small cell solution provider Airspan is the only field-proven company that is laying the foundation for 5G today by leveraging its deployment experience of over 300,000 small cells worldwide. With our small cells, Airspan is taking site acquisition from hours to minutes, all without a regulatory review. Advanced feature support includes integrated Distributed SON, 4T8R MIMO and unique LTE UE Relay backhaul that not only improves the efficiency of macro networks, but also scales networks with an ultra-dense 4G architecture.

Indoor and Outdoor Customers Like Magic

Last year, India's all-IP wireless broadband network operator Jio successfully deployed close to 100,000 Airspan small cells, carrying more than 350 TB of data, and terminating more than 5 million VoLTE calls daily.

Sprint's partnership with Airspan has already allowed the company to deploy nearly 200,000, all-wireless small cells — dubbed "Magic Boxes" — in approximately 200 cities across the country in under 12 months. The self-optimizing and self-configuring small cell requires no customer premises backhaul. The unit requires no implementation, labor or rental costs that are a hurdle for many traditional small cell deployments. Sprint expects to have a million Magic Boxes in its network in the next few years.

Airspan and Sprint have been rewarded for their success with the Magic Box and this year have won multiple awards, The GSMA Global Mobile 'GLOMO' Award, The Small Cell Forum Award and The Compass Intelligence Award, gaining recognition throughout the industry for technology innovation and simplified installation that is driving the largest indoor small cell deployment in the US.

The 5G Reality Check

Today's mobile operators are tackling densification challenges on several fronts on the road to 5G. Flexible and creative small cell solutions are needed that meet the challenges of zoning and site acquisition, minimize installation and operations costs, and increase the spectral efficiency of the macro network. Airspan is densifying 4G networks with 5G-ready small cells today to deliver on the promise of high-speed broadband, voice and digital services for business and homes.

INNOVATION
IS NOT THE IDEA,
IT'S A DAILY
INSTRUMENT.



NUMBASE GROUP



Numbase Group is an international mobile value-added service provider, serving millions of customers worldwide. Driven by innovative technologies, predictive data and real-time analytics, Numbase develops and markets cutting-edge engagement and digital solutions for mobile network operators.

At the core of the business is a deep-seated understanding of how to engage, retain and add significant value to a customer base using smart mobile marketing, micro finance, big data analysis and customized revenue generation tools.

This not only helps MNOs to build stronger and more sustainable relationship with their customers but to grow revenue through new digital capabilities and achieve cost efficiencies.

Numbase Group also invests in and partners with companies that include SHOUT, C/dialogues, Shazam Entertainment and Beyond Limits - the only AI Company utilizing NASA defence technologies for commercial technology solutions.

Numbase services include VAS Solutions, Premium Numbers, 'Connect' Powered by Shazam, Mega Promotions, Loyalty Programs, Ring Back Tone Solutions, Microfinance Solutions, Mobile Advertising Solutions, Content Aggregation, and Multimedia & Music Content.

Mission

To always deliver today what customers need tomorrow through AI capabilities, big data analysis and advanced profiling techniques; and to make alliances with strategic partners worldwide to expand the presence of these services.

Vision

To be an international leader in the provision of cutting edge value-added services to MNO's and build the most advanced and personalized experiences to their customers..

Values

Numbase pursues the creation of value in ways not previously conceived of. By marrying the vast potential of big data with intelligence and fearlessness, Numbase achieves greatness in everything it does..



TESTIMONIALS



"Privileged to have been part of this leading and perfectly-organized Industry gathering which featured an extra rich agenda in terms of discussions and topics. Congratulations to SAMENA Council and my friend Bocar on this success. We are proud of our partnership with SAMENA and to have sponsored this world -class Industry event. Personally, I was honored to receive many congratulating messages for Lebanon and Alfa at this key gathering since it coincided with our most recent milestone of becoming among the first operators in the region to launch a live 5G trial with 25 gigabit /sec of speed".

Mr. Marwan Hayek
Chairman and CEO - Alfa Mobile



"The SAMENA Council Leaders' Summit is a unique platform for sharing views and get detailed insights on latest trends and information in technology and policy development. Great gathering for industry stakeholders and visionaries"

Mr. Khaled Balkheyour
CEO - Arabsat



"Once again, the Summit was an excellent 'one-stop shop' to get a concise and broad ranging overview of what is happening in the industry within MENA. The diversity of views and robust discussions at the event were testament to the excitement and anticipation of how the industry is going to become a cornerstone of the region's economy of the future."

Mr. Karan Ponnudurai
Group Digital Officer - Batelco





"Strong Collaboration, open and sharing, hand in hand, let's work towards the prosperity of IoT and industry in the region!"

Mr. Wang Hua
CEO - CMPak

ZONG 4G
A NEW DREAM



"SAMENA Telecommunications Council's Telecom Leaders' Summit held recently in Dubai was an eclectic mix of brilliant presentations, informative and highly interactive panels and fabulous networking opportunities. This region is showing just how digital transformation can work. If only all telco events were run like this!"

Mr. Tony Poulos
Managing Editor - Disruptive Asia

disruptive
asia



"We are living in a fast-changing world. In our digital age, we are already living in the smart cities of tomorrow that will rely on a robust ICT infrastructure and 5G networks, where the internet of things and artificial intelligence are coming into the mainstream. As new business models emerge, it is up to the ICT leaders to harness the technologies of tomorrow and ensure their widespread availability for society at large," said Osman Sultan, Chief Executive Officer, Emirates Integrated Telecommunications Company. "The SAMENA Council Leaders' Summit provides a key platform for industry executives to come together and discuss the solutions and opportunities arising from the challenges posed by our fast changing world, so that we can work together to pave the way for 5G in the region and grow our digital economy."

Mr. Osman Sultan
CEO - Du

du





"SAMENA's Annual Leaders' Summit is a must-attend event bringing together the most influential CEOs and players of the global telecoms eco-system including satellite CEOs."

Ms. Aarti Holla Maini
Secretary General - ESOA



"The Summit provided a platform for stakeholders in the region's telecom industry to exchange ideas about the challenges that face the industry and the possible ways forward."

Dr. Kamal Shehadi
Chief Legal and Regulatory Officer - Etisalat International



"This was my first visit to the SEMENA Summit and it gave me great visibility of how the region is working towards deploying current and new technologies. There were well arranged networking opportunities and the breadth of attendees was very diverse providing excellent opportunities to discuss key regional topics. A very well organised event."

Mr. Joe Barrett
President - Global mobile Suppliers Association





"I am honored to join leaders from industry and government this week at the Telecom Leaders' Summit 2018 to explore the opportunities and challenges ahead of us as we build the digital economy of the Middle East."

Mr. Mats Granryd
Director General - GSMA



"The 2018 Telecom Leaders' Summit is a rare opportunity to meet with all the experts in the regional ICT sector, in the presence of high-level representatives from government and industry, and exchange insights and ideas on the most pressing issues facing our field. It is an exciting occasion for the region's leaders to discuss the path forward as the Middle East forges ahead in our digital journey, and over the years the Summit has positioned itself as one of the most important annual events in the ICT industry. As a leading global provider of ICT infrastructure and devices, our drive to deploy world-class ICT across the Middle East stems from our desire to bring digital to every person, home and organization for a fully connected, intelligent world. And our mission to build a digitalization ecosystem stems from our belief that one factor is at the heart of its success: partnerships. By collaborating with partners and governments, we can ensure that the Middle East continues to be successful on its digitalization journey."

The SAMENA Telecom Leaders' Summit is a model for the kind of discourse and dialogue we should all be having year-round, and we look forward to putting into action the insights we found in Dubai at the Summit."

Mr. Charles Yang
President, Huawei Middle East





"I'd like to thank the organizers for inviting me to give a keynote at this year's summit. As the digital transformation continues to propel us forward at a breakneck pace, the opportunities before us are clear. Yet, in order to fully exploit those opportunities and create a more digitally inclusive society, we must also address the fact that not one technology, constellation or company can solve the complex communications challenges before us. It will demand public/private partnerships; different technologies seamlessly integrating with one another; competitors, regional and global operators partnering together; and different constellations being leveraged to serve the applications needs. The SAMENA Leaders' Council provides a great forum to meet with executives across the communications industry, exchange ideas and work together to develop integrated solutions for tomorrow's needs."

Mr. Stephen Spengler
CEO & Vice Chairman of ESOA - Intelsat



"It takes a lot of energy and determination to reach the summit, but once there the whole scene becomes clear and beautiful. Great job SAMENA, and you've earned both titles: Leadership & Summit."

Mr. Ayman Zakaria Jomaa
CEO - Numbase Group



"The SAMENA Leaders' Summit provides an effective way to connect innovative technologies with global and regional carriers. For us, as a digital service provider, the value is that we can contribute and cooperate with key stakeholders to identify common collaboration opportunities to help accelerate the pace of innovation in the region."

Mr. Ghazi Atallah
CEO - NXN (Formerly neXgen Group)





“The SAMENA leaders’ summit is an unparalleled opportunity to not only network with top industry peers and trendsetters but also partake in lively exchanges regarding the current landscape, both challenges and opportunities. This summit is unique in that it establishes a safe-zone for many of the hot topics to be discussed in and as such, adds good value to all who participates.”

Mr. Fadi Nasser

Senior Advisor to CEO, General Manager ICT – Omantel



“It was a great pleasure for me participating in this summit organized by SAMENA. The summit not only was a novel opportunity for the industry leaders to get together and networking, but also a learning and experience sharing platform. The summit allows for nurturing smart ideas to address the various concerns that challenge the development of the ICT sector and also exploring future opportunities and ways of improvement.

Thanks to the organizers for inviting me to share the country experience and learn from others experiences. I look forward to join the future events. ”

Dr. Saoud H AL Shoaili

DG - Communications & Post

Ministry of Transport & Communications - Oman



“SAMENA Telecom Leaders Summit 2018 has been a real success. It exceeded our expectations at all fronts. The Organization, the topics, the contents, the speakers and the audience were of the highest quality. Our great thanks and appreciation to SAMENA Executives and Staff for their efforts, dedication and professional work to make this event a real success that we are all very proud of.”

Eng. Atef Helmy

Senior Advisor to the Board - Orange Middle East & Africa





"SAMENA has done it again bringing top telecom leaders in the region to discuss the future and evolution of technology, and its impact on the industry. Great content and networking."

Mr. Jay Srage

Vice President Middle East and North Africa - Qualcomm



"SAMENA Leaders Summit 2018 was a success as usual. You cannot succeed in gathering high level people in an event if they are not convinced that the objective is of great value and the host as well. Undoubtedly, SAMENA Council is a unique platform for sharing knowledge, know-how and expertise in the ICT sector. It is a remarkable channel of communication and collaboration. On a personal level, it was an opportunity to meet high senior professionals and discuss many business issues with potential partners. It is the "one day event opportunity". This annual gathering of Leaders' Summit is a proof of success of what SAMENA is doing across the year".

Eng. Tarig Hamza Zainelabdin

CEO - Sudatel Telecom Group



"SAMENA Council Leaders' Summit 2018 is a vital opportunity to maintain a continuous and robust communication between us and our partners and peers to share updates, and insights. It is noteworthy to mention that in December of 2018, VIVA will celebrate its 10th anniversary. Since our company's conception, we pride ourselves on a reach and scale that is global, a focus that is regional and a service level that always remains personal."

Eng. Salman Al Badran

CEO - Viva Kuwait



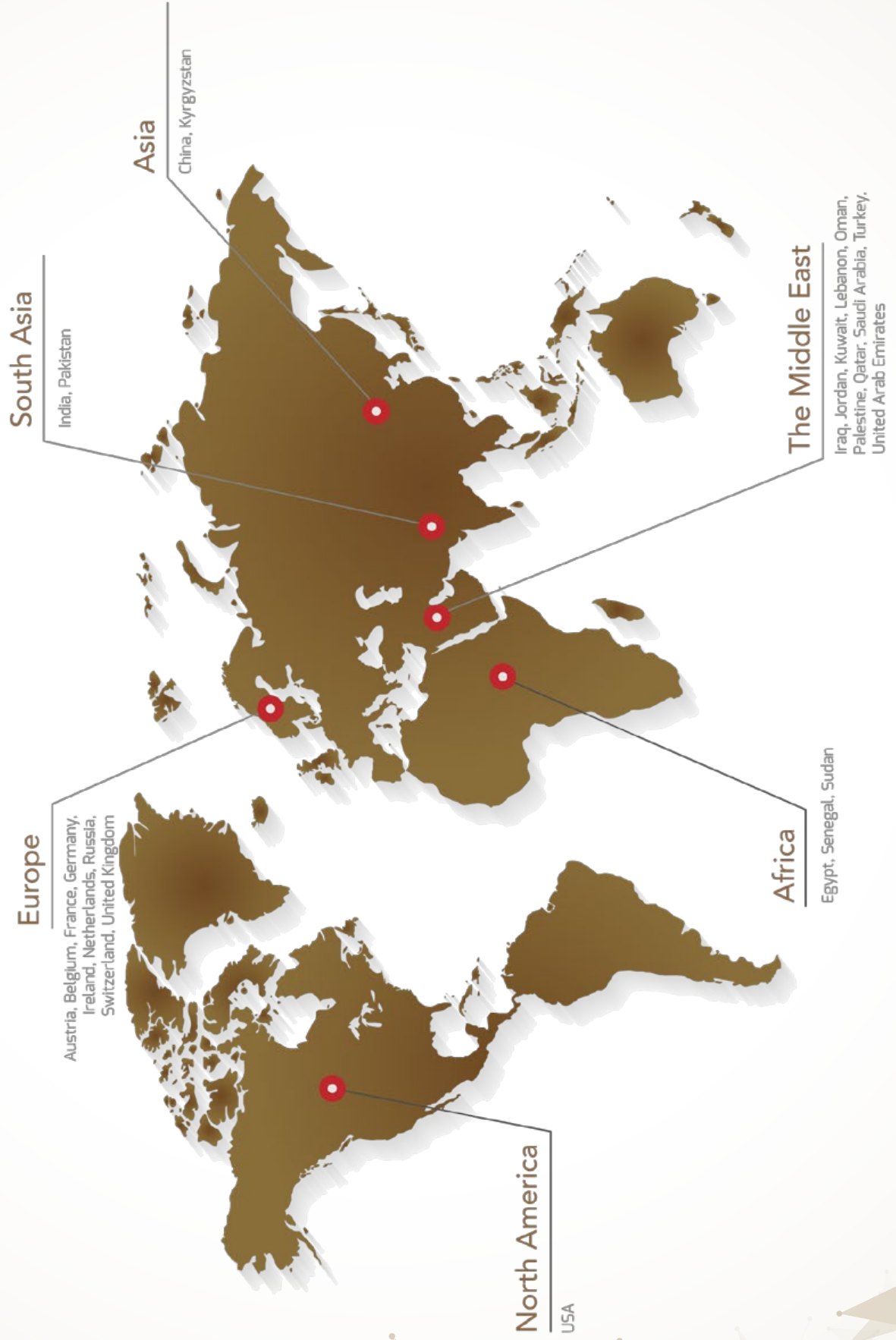
"A central focus of MENA-region governments is the development of strong digital economies for diversification, job creation, citizens' well-being and sustainability. A critical step is to foster the creation of a sound digital ecosystem, led by Telcos, supported by strong pro-investment policies, modernized and enabling regulatory frameworks, public and private partnerships and an intense drive to use digital services, applications and technology for the betterment of the population."

Mr. Scott Gegenheimer

Group CEO – Operations - Zain



SAMENA Council Telecom Leaders' Summit 2018 Attendees



SAMENA COUNCIL BOARD OF DIRECTORS



Eng. Nasser Bin Sulaiman Al Nasser
Group CEO
STC
KSA



Mr. Ihab Hinnawi
Group CEO
Batelco
Bahrain



Dr. Kamal S Shehadi
Chief Legal and Regulatory Officer
Etisalat International
UAE



Sheikh Talal Said Marhoon Al Mamari
CEO
Omantel
Oman



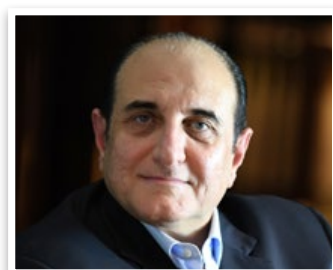
Eng. Atef Helmy
Senior Advisor to the Board
Middle East & Africa
Orange Telecom
Egypt



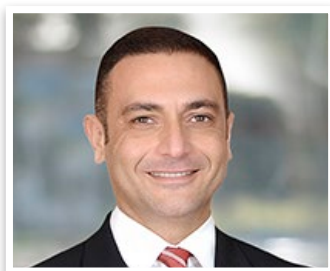
Eng. Salman Bin Abdul Aziz Al Badran
CEO
VIVA Telecom
Kuwait



Mr. Scott Gegenheimer
Group CEO - Operations
Zain Group
Kuwait



Mr. Osman Sultan
CEO
Emirates Integrated
Telecommunications Company (du)
UAE



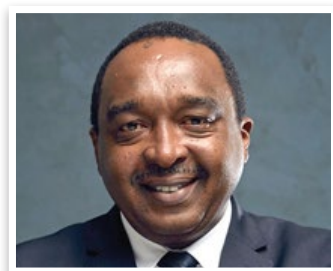
Mr. Ahmed El Beheiry
Managing Director & CEO
Telecom Egypt
Egypt



Eng. Tarig Hamza Zain El Abdein
CEO
Sudatel
Sudan



Mr. Marwan Hayek
Chairman and CEO
Alfa Mobile
Lebanon



Mr. Bocar A. BA
CEO
SAMENA Telecommunications Council
UAE



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