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SAMENA TRENDS

FOR SAMENA TELECOMMUNICATIONS COUNCIL'S MEMBERS

BUILDING DIGITAL ECONOMIES

THIS MONTH

THE NEXT STAGE OF DIGITAL CONNECTIVITY

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SAMENA TRENDS

Publisher
SAMENA Telecommunications Council

trends@samenacouncil.org
Tel: +971.4.364.2700

Editor-in-Chief
Bocar A. BA

Editorial Director
Izhar Ahmad

Contributing Editors
Ali Tahir
Javaid Akhtar Malik

Knowledge Contributions
AHM Tourism
Mediafon Datapro Group
Mobily
stc Bahrain

Subscriptions
subscriptions@samenacouncil.org

Advertising
ads@samenacouncil.org

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The Next Stage of Digital Connectivity

The digital sector continues to gain momentum as networks, cloud platforms, AI systems, satellite services, and data centers expand across different markets. These technologies are beginning to work more closely together, creating a more connected digital environment that is shaping the next phase of ecosystem development. More attention is now being placed on how different parts of the digital ecosystem operate together to support services, businesses, governments, and users more efficiently.

Recent developments across multiple regions reflect this direction. Governments are increasing attention on AI infrastructure, digital services, and local data capabilities as part of broader economic and technology planning. In Saudi Arabia, major investments in AI and data centers are supporting ongoing digital transformation efforts linked to public-sector modernization and long-term digital growth. Similar initiatives are appearing in other markets, including across Africa, where digital infrastructure is becoming more closely connected with economic planning, enterprise development, and technology investment strategies.

Telecom operators continue to play a central role in this transition. 5G expansion remains active in many markets, while operators are also investing in network upgrades, fiber infrastructure, and service optimization to meet rising data demand. As networks continue to evolve, new opportunities are emerging across healthcare, manufacturing, enterprise services, smart city platforms, and connected public services.

At the same time, demand for digital services across both consumer and enterprise markets continues to increase. Cloud adoption, AI applications, streaming platforms, online services, and connected devices are contributing to higher levels of network traffic and digital activity. In response, operators and infrastructure providers are focusing more closely on improving network efficiency, expanding capacity, and maintaining service quality.

Alongside terrestrial networks, satellite connectivity is becoming a more visible part of the digital landscape. Direct-to-device services are attracting industry attention because they allow standard smartphones to connect to satellite networks in locations where traditional coverage may still be limited. Partnerships between operators and satellite providers are continuing to expand as governments and companies work to improve connectivity coverage and reduce service gaps in remote areas.

As digital infrastructure expands, regulators are playing a larger role in supporting industry development. Spectrum planning, cybersecurity measures, service-quality oversight, and infrastructure policies are receiving more attention as networks become more advanced and more integrated into economic activity and public services. In several markets, regulators are also reviewing how digital infrastructure can support long-term investment while maintaining reliable service standards and consumer protection.

Physical infrastructure remains central to this growth. Submarine cable systems, terrestrial fiber networks, mobile towers, and data centers are supporting rising levels of digital traffic linked to AI platforms, cloud services, enterprise applications, and online content consumption. This infrastructure must remain protected and be treated as critical national asset. The SAMENA Council will delve into a more focused agenda on terrestrial, submarine, and satellite infrastructure and allied topics in the upcoming conference in Oman in mid-June 2025.

Bocar A. BA
Chief Executive Officer
& Board Member
SAMENA Telecommunications
Council

As demand continues to increase, operators and governments are paying closer attention to infrastructure operations, energy requirements, and network stability. Different parts of the digital ecosystem are now operating more closely together, requiring stronger coordination between governments, operators, regulators, infrastructure providers, and technology companies. This is becoming increasingly important as digital services continue expanding across sectors such as healthcare, education, finance, logistics, and manufacturing.

The Industry is moving beyond infrastructure expansion alone and entering a stage where connected digital systems are playing a larger role in supporting economies, businesses, public services, and everyday connectivity. Attention is clearly shifting toward how digital infrastructure can operate in a more connected, reliable, protected, and efficient way in all sovereign contexts.

SAMENA Council Advocacy

Advancing Sovereign, Intelligent Digital Infrastructure in the SA-ME-NA Region

Key Outcomes and Strategic Direction from the SAMENA Council Leaders' Summit 2026

Digital infrastructure now functions as a core system through which economies across the globe are operating. Financial transactions, public services, logistics networks, and enterprise operations are increasingly dependent on continuous, high-capacity, and intelligently managed connectivity. As a result, the reliability, governance, and scalability of these systems have become matters of economic stability rather than technical progression.

At the same time, the operating environment has become complex. Network architectures are expanding to include AI-driven operations, distributed data environments, and the integration of terrestrial and non-terrestrial systems. These developments are introducing new dependencies between infrastructure, policy, and investment, while exposing gaps in coordination across stakeholders. In such a context, maintaining alignment across the ecosystem is necessary for ensuring continuity and support forward development.

It is within the prevailing ecosystem setting, and amid a tense regional environment, that the Leaders' Summit 2026 was convened by the SAMENA Council, bringing together policymakers, regulators, operators, and technology providers to focus on how these systems are being implemented

The Leaders' Summit 2026 has contributed to stabilizing industry direction at a time when fragmentation and hesitation would have been costly, reinforcing the capacity of digital infrastructure to scale reliably and support broader economic and societal functions.

and governed in practice. The Leaders' Summit was structured to examine execution, including how emerging capabilities such as 5G-Advanced, AI-enabled network management, and sovereign AI are being deployed, alongside hybrid connectivity models, and what constraints remain in scaling them within operational and investment conditions.

Through a series of focused sessions and roundtables, discussions addressed transformation of operators to technology companies, emerging sovereign approaches to AI development, the integration of satellite and direct-to-device connectivity, spectrum planning and harmonization in the upper 6 GHz range, and the requirements for cybersecurity, resilience, and sustainable infrastructure. The opening plenary anchored these discussions in the broader context of geopolitical pressure and technological acceleration, reinforcing that digital infrastructure now intersects directly with economic performance, national strategy, and sovereign priorities. Trust, governance, and sustained investment emerged as consistent conditions for resilience, with governance shaping outcomes across technologies and trust functioning as the underlying requirement for digital systems, particularly as increasingly interdependent infrastructure layers introduce new risks where disruption in one domain can propagate across the ecosystem. These discussions linked technical capability with regulatory direction and commercial viability, alongside the need for alignment with international processes, including spectrum harmonization and emerging standards.

Artificial intelligence was consistently positioned as a foundational capability requiring ownership of models, data, and infrastructure, while hybrid connectivity and non-terrestrial systems were treated as integral to future network architecture rather than supplementary layers.

In the UAE context, the SAMENA Council Leaders' Summit 2026 reinforced the country's role as a stable and credible environment for digital infrastructure development, while also serving as a

convening platform for broader regional alignment. The ability to bring together senior stakeholders and sustain engagement under current conditions reflected regulatory consistency and market confidence. This was supported by concrete national progress, including the scaled deployment of 5G-Advanced, advancement toward a "10 Giga intelligent" infrastructure model, and early leadership in upper 6 GHz planning and ecosystem readiness, providing reference points for regional adoption and coordination.

The SAMENA Council's decision to proceed with the Leaders' Summit 2026 as scheduled, with the chief-patronage of the TDRA-UAE and legacy private-sector collaboration from Huawei, as well as leadership of the SAMENA Council Board Members, and sustained participation from senior stakeholders, created a clear signal of continuity and confidence at a time when regional conditions could have disrupted engagement. This extended beyond the UAE, reflecting sustained confidence across regional markets and institutions, and ensuring that investment momentum and industry coordination remained active.

The close interdependence of spectrum, AI, communications technology infrastructure, and governance was evident in the discussed transition of AI from pilots to embedded network capability, the operation of 5G-Advanced at scale in the UAE, the immediate requirement for device and policy alignment in the upper 6 GHz band, and the treatment of hybrid connectivity as an active deployment model. The inclusion of constraints such as data fragmentation, regulatory gaps, infrastructure readiness, and monetization uncertainty added practical relevance, providing decision-makers with a clearer view of the conditions shaping implementation. This also highlighted the importance of organizational readiness, including data utilization, risk appetite, and the need for measurable value creation from AI deployment within defined commercial timeframes.

The SAMENA Council Leaders' Summit reinforced the UAE's position across three dimensions: execution leadership through 5G-Advanced deployment at scale and early movement on 6 GHz; policy credibility through regulatory clarity and forward planning; and ecosystem coordination through the ability to convene and sustain dialogue. At the same time, the discussions aligned with broader regional direction toward AI integration, infrastructure-led growth, and sovereign capability development.

The outcomes point toward more coordinated approaches to hybrid connectivity, including the integration of terrestrial and non-terrestrial networks, the operational use of AI within networks and industrial environments, and greater clarity in spectrum and regulatory development, particularly in relation to upper 6 GHz and future capacity planning. This includes recognition that the timing for upper 6 GHz adoption is no longer in question, with immediate focus on device ecosystem readiness, coordinated policy action, and deployment planning aligned with WRC-27 as a defining milestone for global spectrum direction. In parallel, sustainability, resilience, and governance are being treated as embedded requirements within infrastructure development.

The Leaders' Summit 2026 has contributed to stabilizing industry direction at a time when fragmentation and hesitation would have been costly, reinforcing the capacity of digital infrastructure to scale reliably and support broader economic and societal functions. The Summit has also set a clear direction: future infrastructure must be integrated, sovereign-capable, and intelligence-driven, with coordination across policy, technology, and industries treated as a requirement rather than an objective.

Strategic Direction & Priorities for the SA-ME-NA Regional Digital Ecosystem

1.

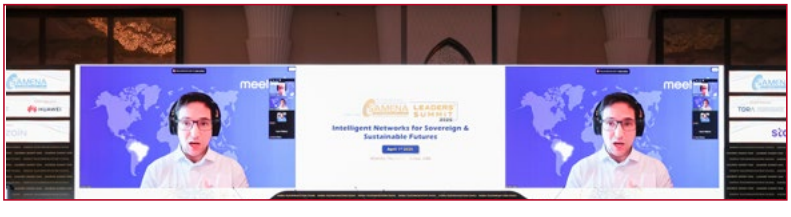
Governance, Trust, and Sovereignty as First Principles

The digital future is no longer defined by what technology can do, but by how it is governed. As digital systems become embedded in economic and national structures, governance must keep pace with both scale and complexity. This shift is most visible in artificial intelligence, which is no longer a tool of optimization but a foundational layer shaping economic and operational activity.

Trust is a central condition for scale. It determines whether systems are adopted, how they are used, and whether they endure. This places a clear obligation on the private sector and the technology it creates to serve human outcomes, protect human dignity, and support stability across the socio-economic systems.

Within this environment, digital sovereignty has moved from policy preference to strategic necessity. It requires deliberate decisions about dependency and control. Reliance on external AI platforms may accelerate deployment, but it shifts value and capability outward. Sovereignty is therefore defined by control over models, data, infrastructure, and the ability to translate local data into local services.

Complete independence is neither realistic nor efficient, but unmanaged dependency is not viable. Therefore, the objective is to recognize and implement controlled interdependence, grounded in policy, accountability, and execution capability, powered by technology.



2.

Infrastructure as the Core of Resilience and Control

Digital infrastructure now underpins entire economies. As a result, resilience must be engineered from the outset rather than addressed after deployment.

The primary constraint is no longer connectivity, but infrastructure readiness. AI-driven systems require scalable, energy-efficient, and distributed compute environments. Data center transformation is therefore a prerequisite, not an enhancement. At the same time, the infrastructure base is expanding. Utilities are emerging as critical enablers, with substations evolving into distributed compute nodes that support sovereign digital ecosystems.

Connectivity architecture is also shifting. Hybrid models that integrate terrestrial, satellite, and direct-to-device capabilities are becoming operational requirements, particularly in markets with coverage gaps and resilience pressures. This convergence introduces a new layer of strategic risk. Dependence on external satellite infrastructure limits control, while partial ownership strengthens resilience and long-term positioning.

3.

AI Capability, Data Ownership, and Execution Gaps

Artificial intelligence introduces a structural break from previous technology cycles. Its non-deterministic nature requires new governance approaches and operational discipline.

The central challenge is not access to AI, but the ability to internalize it. Organizations that treat AI as an add-on will not scale. Capability must be embedded across systems, processes, and decision-making. This is where most gaps persist. Fragmented deployments, weak integration, and limited governance frameworks continue to prevent scale.

Data is the defining asset in this transition. The ability to leverage proprietary data to train and refine models is the primary source of differentiation. This is why a significant share of AI deployments will require sovereign frameworks. Progress depends on closing three structural gaps: governance, system integration, and data architecture. Without this, AI remains experimental rather than operational.

4.

Economic Value, Investment Discipline, and Competitiveness

As digital infrastructure becomes a driver of national competitiveness, the focus shifts from capability to realizing measurable value. That means, AI investment must translate into outcomes. If it does not deliver impact in revenue, cost efficiency, or customer retention within defined timeframes, it remains a project – which it is not. This introduces a level of discipline that has often been missing from digital transformation efforts.

At the national level, sovereign AI infrastructure becomes essential. The most effective model combines strong local capability with selective access to global innovation. At the operational level, value creation starts with understanding demand. Technology layers only deliver when aligned with real use cases and integrated in the correct sequence. Infrastructure sharing can further support this shift by releasing capital for higher-impact investment.

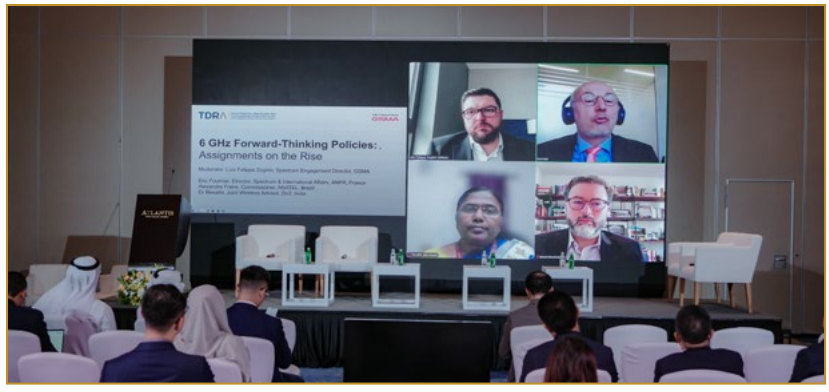
5.

Network Evolution, Spectrum, and Intelligent Connectivity

Connectivity is being redefined. Performance is no longer measured by speed alone, but by the ability to enable real-time, intelligent outcomes.

This shift is already underway with 5G-Advanced. Networks are evolving into intelligent systems, with AI embedded across operations to enable predictive optimization and edge-based decision-making. Performance is increasingly defined by experience and responsiveness.

Spectrum is a critical enabler of this transition. The upper 6 GHz band is central to delivering the capacity required for next-generation networks. However, spectrum allocation alone is not sufficient. Progress depends on ecosystem readiness, including devices, chipsets, vendors, and regulatory alignment. Without coordinated execution, network capability will outpace service delivery.



6.

Space Infrastructure and Orbital Governance

Space systems are now integral to digital infrastructure, supporting connectivity, resilience, and global coverage. As satellite activity increases, pressure on orbital environments is intensifying. The challenge is structural. There is no unified framework for traffic management, regulatory approaches remain fragmented, and data sharing is limited. These gaps create operational risk in an increasingly congested orbital environment.

Addressing this requires coordinated action. Improved tracking, expanded data sharing, and stronger collaboration between public and private actors are necessary. A shared and interoperable orbital data layer, supported by advanced analytics, is critical to enable real-time decision-making. As a shared domain, space requires collective responsibility. Its sustainability depends on alignment on practical execution.

7.

Collaboration, Policy Alignment, and the SA-ME-NA Regional Context

With ever more complex technology, business, market, and international dynamics in play, collaboration must move beyond discussions and in-principle consensus to execution, supported by governance frameworks and accountability, with observable tangible outcomes

The SA-ME-NA region provides a distinct, albeit seemingly same, operating environment across all of its markets. However, it is not, and its geographic and market diversity make it a natural proving ground for integrated connectivity models. Particularly for this region's harmonized development, progress depends on sustained coordination among telecom operators, regulators, satellite providers, technology providers, and industry platforms to address complex issues and translate necessity into strategic outcomes through implementation.

8.

Inclusion, Security, and Systemic Resilience

Despite rapid advancement, structural gaps remain. A significant portion of the global population remains unconnected, highlighting that inclusion is unresolved. At the same time, digital infrastructure operates within an active risk environment, with high volumes of cyberattacks demonstrating the scale and persistence of threats.

The ability of all systems to function and remain stable under various system-level, market-level, or in geopolitical contexts must be embedded across infrastructure, partnerships, and human capability from the outset. Similarly, cybersecurity must operate as a continuous practice. Static frameworks are insufficient in a rapidly evolving threat landscape. Systems must adapt in real time to ensure reliability, trust, and long-term stability.

Priority Considerations for Regulators & Policymakers

1. National sustainability and competitiveness now depend on digital infrastructure.
2. Align policy, regulation, and investment timelines across infrastructure, spectrum, and technology layers; fragmented development is no longer viable.
3. Treat digital infrastructure (fiber, 5G-Advanced, upper 6 GHz, data centers, distributed compute) as long-term strategic national capital.
4. Build AI-capable, energy-efficient, and distributed compute infrastructure, including data center transformation and integration of utilities as compute nodes.
5. Establish AI governance and implement sovereign AI through control over models, data, and infrastructure, managing external dependencies through controlled interdependence.
6. Accelerate upper 6 GHz (U6GHz) execution, including contiguous spectrum allocation, eco-system readiness, and alignment with WRC-27.
7. Enable 5G-Advanced as an operational baseline with AI-integrated networks and user experience–based performance models.
8. Integrate terrestrial, satellite, and direct-to-device (D2D) connectivity into unified infrastructure and regulatory frameworks.
9. Link AI and infrastructure investment to measurable economic outcomes within defined timeframes; execution discipline determines value.
10. Embed resilience, trust, and adaptive cybersecurity as foundational conditions across all infrastructure deployment.

Detailed Execution Framework

System Foundations and Strategic Positioning

1. Recognize digital infrastructure as a core economic system and determinant of resilience and competitiveness.
2. Treat digital infrastructure (fiber, 5G-Advanced, U6GHz, data centers, distributed compute) as long-term strategic national capital.
3. Align policy, regulation, and investment timelines across infrastructure, spectrum, and technology layers.
4. Establish trust as a condition for scale, ensuring accountability, system integrity, and protection of economic and societal functions.
5. Position execution discipline and measurable outcomes as primary determinants of value.

Infrastructure and Compute Readiness

6. Build scalable, energy-efficient, and distributed compute infrastructure, including data center transformation.
7. Integrate utilities and energy infrastructure as distributed compute nodes.
8. Treat infrastructure readiness as a prerequisite for scaling AI and advanced network capabilities.

Connectivity Architecture and Spectrum Execution

9. Integrate terrestrial, satellite, and direct-to-device (D2D) connectivity into unified infrastructure frameworks.
10. Manage dependency risks in non-terrestrial and external connectivity systems affecting control and continuity.
11. Accelerate upper 6 GHz (U6GHz) execution, including contiguous allocation, device and chipset readiness, vendor alignment, and WRC-27 preparation.
12. Ensure ecosystem readiness across devices, vendors, and standards to support deployment at scale.
13. Align spectrum policy with deployment timelines and cross-market interoperability requirements.

Network Evolution and Intelligent Systems

14. Enable 5G-Advanced as an operational baseline with AI-integrated networks.
15. Shift performance models toward user experience and real-time responsiveness.
16. Embed AI into network operations, edge environments, and service delivery systems.

AI, Sovereignty, and Data Control

17. Establish governance frameworks for AI systems, ensuring accountability, auditability, and operational control.
18. Implement sovereign AI through control over models, data, and infrastructure, managing economic exposure from dependency on external AI platforms.
19. Close structural gaps in AI deployment across governance, system integration, and data architecture.
20. Prioritize data ownership and utilization as the primary source of competitive differentiation.

Investment Discipline and Value Realization

21. Link AI and digital infrastructure investments to measurable outcomes in revenue, efficiency, and service performance.
22. Align technology deployment with real use cases and demand conditions.

Regional Coordination and Policy Alignment

23. Strengthen coordination across regulators, operators, and ecosystem players to align spectrum, deployment, and standards.
24. Enable cross-border interoperability and regional alignment across the SA-ME-NA ecosystem.

Space Infrastructure and Orbital Governance

25. Develop shared and interoperable data environments for orbital coordination.
26. Establish governance frameworks for space sustainability, including debris mitigation, accountability, and regulatory alignment.
27. Strengthen tracking, data sharing, and predictive capabilities for collision avoidance.

Resilience, Security, and Inclusion

28. Embed resilience into infrastructure design, ensuring continuity under disruption across interdependent systems.
29. Implement adaptive cybersecurity practices across infrastructure, operations, and partnerships.
30. Address inclusion gaps to extend connectivity and digital infrastructure to underserved populations.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Intelligent Networks for Sovereign & Sustainable Futures


20 Years Standing for Digital Economies
2006 - 2026
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UAE Spectrum Leadership

UAE Launches World's First Commercial U6GHz Network, Advancing Path to 10Gbps Connectivity

The launch of the world's first commercial upper 6GHz (U6GHz) network and ecosystem was announced at the SAMENA Council Leaders' Summit 2026, marking the UAE's leadership on the U6GHz front, led by the Telecommunications and Digital Government Regulatory Authority (TDRA). This is a significant step in the evolution of next-generation mobile infrastructure in the UAE and the world. The milestone reinforces the UAE's position at the forefront of global digital development and reflects a shift in how networks and regulatory approaches are evolving to handle rising data intensity and AI-driven traffic.

In the 5G-Advaned & AI Applications for Resilient Economy Forum, a dedicated session held during the Leaders' Summit 2026, TDRA's keynote delivered by Eng. Saif Bin Ghelaita Representative of Director General of TDRA, reaffirmed the UAE's aims to become a 10 Giga intelligent nation and to firmly support the U6GHz IMT industry and plans to build the world's first commercial U6GHz network in 2026. The TDRA also called on industry stakeholders, including chipmakers and device manufacturers, to participate in the U6GHz commercialization.

In the U6GHz joint commercialization initiation ceremony at the Leaders' Summit 2026, representatives from the Telecommunications and Digital Government Regulatory Authority (TDRA), the SAMENA Telecommunications Council, Huawei, du, e&, GSMA, Nokia, HONOR, and Tozed affirmed their commitment to the new ecosystem, setting another milestone in the UAE's digital development journey.

During the Leaders' Summit 2026, a parallel session on 6GHz and policy, technology, and deployment alignment was also held, with policy-dialogue partnership of GSMA and chairmanship of TDRA, represented and led by Eng. Tareq Al Awadhi, Executive Director of Spectrum Affairs and the Chairman of Arab Spectrum Management Group. Introducing the strategic context, Eng. Al Awadhi stated: "The upper 6 GHz band is a key resource for IMT services and support future mobile technologies 5G Advanced and it will be foundation for 6G. This first dialogue on deployment alignment among various stakeholders is both timely and necessary."

Empowering Digital Transformation and Technological Evolution

U6GHz refers to the 6425–7125MHz range identified by the 3GPP standard as Band n104. With 700MHz continuous bandwidth, it offers a balance between wide-area coverage and high-capacity performance. Often hailed as the "golden spectrum," U6GHz is critical as networks evolve beyond traditional downlink-heavy architecture.

AI usage is multiplying by the day and as millions of AI systems operate across industries, the amount of data being processed is rising tremendously, placing new pressure on networks to provide balanced high-speed downlink and uplink capacity securely, reliably, and low-latency.

Estimations done by the SAMENA Council's technology providers members indicate that U6GHz is expected to enable peak speeds of up to 10Gbps downlink and 1Gbps uplink under 5G-Advanced (5G-A). Moreover, this "golden band" an create a solid foundation for the smooth evolution of mobile communication technologies from 5G-A to 6G, on which a roadmap has already been issued by TDRA-UAE. For the UAE, the Upper 6GHz spectrum strengthens national digital infrastructure ambitions across sectors, including finance, healthcare, and manufacturing, among others.

SAMENA Council Activity

Mediafon Joins SAMENA Council to Deliver Centralized Regulatory Telecom Systems Across the SA-ME-NA Region

The SAMENA Telecommunications Council, the South Asia–Middle East–North Africa (SA-ME-NA) region's leading industry association of telecom operators, service providers, and technology companies, announced that Mediafon, a provider of telecom IT solutions and operator-focused messaging monetization and security systems, has joined as its membership and the SAMENA Ecosystem.

With almost 30 years of contribution to the global telecommunications sector, Mediafon brings proven industry expertise to its mission of enabling mobile network operators and governmental institutions. Mediafon's decision to join the SAMENA Council reflects its focus on enabling mobile network operators to secure, control, and fully monetize Application-to-Person (A2P) messaging, a key business area where revenue leakage and fraud continue to impact operator margins across high-growth markets. The company's solutions are deployed within operator networks, combining SMS firewall capabilities, traffic filtering, and revenue assurance mechanisms to provide full visibility and enforcement control over messaging flows.

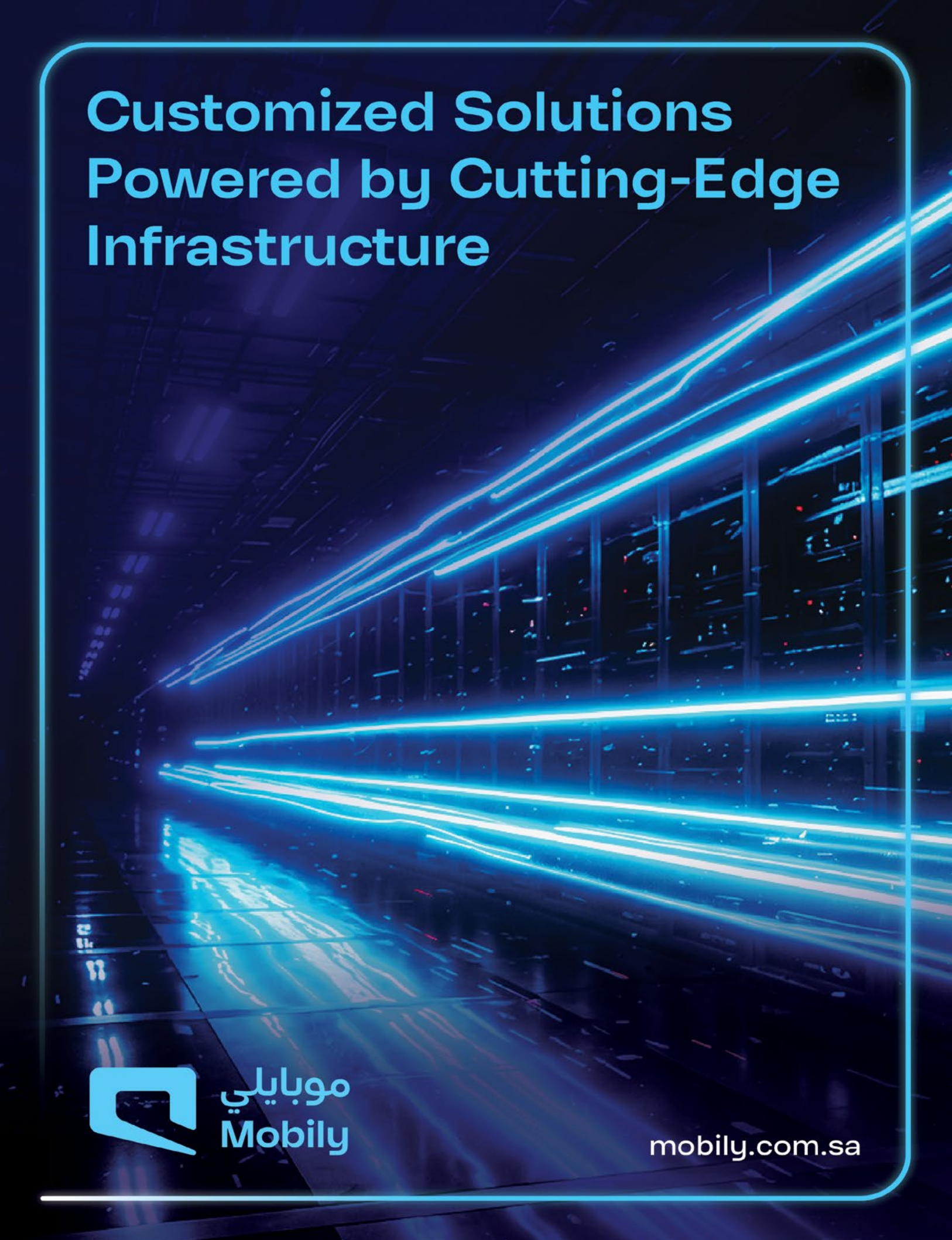
Operating at the network level, Mediafon enables operators to detect and eliminate grey routes, apply commercial controls to international A2P traffic, and convert previously unmonetized volumes into regulated revenue streams. This approach reflects a broader principle emphasized by the company's leadership: market control mechanisms must be precisely implemented to avoid unintended disruption while restoring transparency and revenue integrity. Its telecom IT capabilities support integration into existing operator environments, ensuring operational continuity while strengthening control over messaging systems.

Commenting on the membership, Founder and Board Member of Mediafon Arunas Babrauskas stated: "The SA-ME-NA region presents strong demand for greater control and transparency across telecom services. Joining the SAMENA Council enables us to work closely with operators and regulators to address revenue leakage, strengthen messaging security, and improve how A2P traffic is managed and monetized."

Through the SAMENA Council, Mediafon will participate in regional dialogue focused on messaging governance, fraud mitigation, and operator revenue protection. This engagement provides direct access to operator priorities and regulatory perspectives, allowing Mediafon to align its solutions with evolving market requirements.

Welcoming Mediafon, SAMENA Council CEO Bocar BA stated: "Mediafon works directly with operators to identify and control business messaging traffic entering their networks. By helping operators block unauthorized routes and ensure that legitimate traffic is properly billed, its solutions address both revenue loss and messaging misuse. This capability is increasingly important as messaging is widely used for authentication, financial transactions, and customer communication."

Mediafon's membership reinforces a shift toward operator-led control of messaging traffic, where effective enforcement directly improves revenue capture, reduces fraud exposure, and strengthens market integrity. In practice, better visibility and governance over messaging flows create the conditions for more reliable services, fair competition, and sustained investment in digital infrastructure.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ARTICLE

Saudi Arabia's 5G Stack: Why Infrastructure Strategy is the Next Growth Engine

Eng. Alaa Malki
Chief Technology Officer
Mobily

Saudi Arabia's 5G story is entering its third act. The first was about coverage. The second was about capability. The third is about whether digital infrastructure can mature into something larger: an instrument of economic policy.

The decisive question for the next five years, ahead of the long transition from 5G to 6G, is no longer how fast a network can run. It is whether that network can reduce accidents on roads, improve the flow of goods through ports, and support sovereign AI workloads that remain inside Saudi borders.

Infrastructure is economic development strategy.

Mobily's own posture during this phase was defined by capital depth and infrastructure commitment. Investment flowed not only into domestic wireless and wired networks, but also into submarine cables, data centers, and the underlying assets required to support long-term digital growth. That included landing the Africa-1 cable in Duba, deploying the Kingdom's first wholly Saudi-owned Red Sea subsea cable, expanding Tier III and Tier IV capacity, and securing long-duration spectrum rights to support the next cycle of network development.

5G-Advanced: From bandwidth to outcomes

If the first chapter of 5G was about speed, the third is about outcomes.

Once a cloud-native core is in place and bandwidth is no longer the main constraint, the network begins to behave differently. AI can optimize radio resources in real time. Slices can be managed dynamically. Positioning becomes precise enough to move from simply connecting assets to orchestrating them. Reduced Capability devices make dense sensor environments more financially viable. This is where 5G-Advanced begins to matter. It allows one network to support very different demands at once: consumers using high-bandwidth applications, ambulances requiring reliability, industrial vehicles needing low latency, and drones or inspection systems requiring persistent, intelligent coordination.

For telecom operators, 5G-Advanced represents a fundamental shift in how they generate value. We are moving from selling generic connectivity to delivering guaranteed business outcomes. This unlocks entirely new revenue streams for Mobily in the enterprise segment. Through Private 5G Networks, we can provide industrial manufacturers with the ultra-reliable low-latency connectivity, the nervous system required for automated robotics. By combining 5G-Advanced with Edge-enabled services co-located at Mobily data centers, we can process critical AI workloads locally, ensuring the sovereign data security Saudi enterprises demand.

In Saudi Arabia, one of the clearest places to apply that logic is King Abdulaziz Port in Dammam. The strategic value of 5G-Advanced in that setting would not lie in connectivity alone, but in the creation of a more intelligent logistics system across cranes, yards, gates, trucks, inspection points, and control layers.

> *For telecom operators, 5G-Advanced represents a fundamental shift in how they generate value. We are moving from selling generic connectivity to delivering guaranteed business outcomes. This unlocks entirely new revenue streams for Mobily in the enterprise segment.*

That opens the door to a different kind of infrastructure conversation. The relevant metrics are not headline speeds but port throughput, vehicle safety, dwell time, emissions efficiency, and the coordination of assets across a high-volume trade environment. In that sense, the network becomes part of the operating model of the port itself.

That is the real shift now underway. Networks are no longer just utilities in the background of economic activity. Increasingly, they are part of the mechanism through which economic activity is organized, optimized, and scaled.

> *We are no longer just a service provider standing outside the enterprise; 5G-Advanced allows us to embed our infrastructure directly and become the operational heartbeat of our customers. Whether it is powering the smart infrastructure of Saudi Vision 2030 giga-projects or enabling autonomous logistics in industrial cities, we are bringing the business outcomes our partners seek ever closer.*

This shift perfectly embodies Mobily's 'Ever Closer' vision. We are no longer just a service provider standing outside the enterprise; 5G-Advanced allows us to embed our infrastructure directly and become the operational heartbeat of our customers. Whether it is powering the smart infrastructure of Saudi Vision 2030 giga-projects or enabling autonomous logistics in industrial cities, we are bringing the business outcomes our partners seek ever closer. This is the core of our SHINE strategy: leveraging our unique strengths towards the sovereignty of infrastructure, deep spectrum assets, and advanced AI capabilities to deliver tailored, secure, and scalable digital solutions that drive the Kingdom's digital economy forward.

Tests that matter for leveraging Infrastructure as development strategy

Saudi Arabia is well placed to move into this phase because the institutional demand already exists. It can be seen in giga-projects such as NEOM, Qiddiya, and the Red Sea Project, and in the requirements of ministries responsible for transport, industry, health, and digital transformation. These actors do not need generic coverage. They need architectures built around their own operating realities and performance indicators. That means slices, private or hybrid environments, edge compute, and governance models capable of aligning infrastructure with specific national and sectoral goals.

Three tests will determine whether 5G-Advanced creates real economic value.

First, vertical-specific coalitions must become the norm. Operators, vendors, regulators, and sector owners need to design solutions together rather than handing off disconnected mandates from one layer to another.

Second, policy must become more outcome-driven. The incentives that matter should reward measurable gains such as fewer accidents, higher throughput, lower energy intensity, and stronger productivity, not simply faster peak speeds.

Third, sovereign infrastructure must remain central. Data centers, subsea systems, cloud regions, and AI workloads need to be planned as part of a coherent national stack so that sensitive data and strategic compute remain under national jurisdiction.

The next phase for Saudi Arabia — and for the wider SAMENA region — is becoming clear. The winners will be those able to sit with policymakers and chief executives and say, with evidence, here is the 5G-Advanced stack, the slice architecture, and the partner model that makes your economic targets achievable.

Because in the end, infrastructure is not adjacent to development strategy. Infrastructure is economic development strategy.

SAMENA Macro-View
Market Analysis from This Edition

From Infrastructure Expansion to Sovereign Digital Integration

Infrastructure Yield vs Expansion as Industry Priority

The digital infrastructure sector in early 2026 has transitioned from a phase of construction toward deep structural integration. Current industry signals indicate that massive capital investments are being converted into operational results, national policy is becoming an active component of network engineering, and space-based connectivity is becoming a standard feature of national portfolios. What connects these developments is a move beyond providing raw capacity toward the strategic management of high-yield, autonomous systems that now define modern national competitiveness.

First-quarter financial results for 2026 demonstrate that the aggressive network densification of previous years is now yielding significant returns. According to preliminary results from stc Group, the company achieved 12 percent net profit growth with revenues reaching SAR 19.9 billion, a performance supported by a robust balance sheet and a diversified revenue mix. This financial strength is mirrored by Mobily, which reported a 14.7 percent profit jump, driven by operational efficiency and the continued development of its digital infrastructure. Similarly, Huawei reported 2025 revenue of CNY 880.9 billion, with a record CNY 192.3 billion reinvested into research and development, signaling that vendor stability is now tied more directly to long-term innovation cycles rather than immediate sales.

> *Satellite systems are no longer treated as fallback infrastructure but as a standard layer within national connectivity architectures. The most consequential development is the direct-to-device model, which allows conventional smartphones to connect directly to orbital networks without specialized hardware.*

The physical backbones supporting this growth are expanding to provide the latency and throughput required for autonomous applications. China Mobile recently activated the eastern section of 2Africa, the world's largest submarine cable system, spanning 45,000 kilometers and connecting 33 countries across Africa, Asia, and Europe. This infrastructure expansion is complemented by regional efforts to densify terrestrial networks for future 6G readiness. In Nigeria, MTN and Huawei deployed the world's first commercial sub-1 GHz Massive MIMO site, doubling LTE capacity in congested urban environments. Simultaneously, e& UAE and Huawei completed the region's first proof of concept for flexible dynamic network slicing to support mission-critical sectors including healthcare and smart cities.

Sovereign Compute as National Industrial Policy

A dominant theme in early 2026 is the acceleration of sovereign intelligence strategies, where nations prioritize domestic compute power, AI infrastructure, and data residency as strategic assets. Saudi Arabia has officially designated 2026 as the Year of AI, supported by the 480-megawatt Hexagon Data Center and the Shaheen III supercomputer. The initiative aims to establish a unified foundation for public-service automation through a National Data Lake already connecting more than 430 government systems. The strategic objective extends beyond digitization toward centralized national AI capability and infrastructure control.

This emphasis on sovereign compute is mirrored across emerging regional markets. Morocco unveiled plans for a $1.28 billion AI Factory designed to position the country as a continental compute hub for Africa. The broader implication is that AI infrastructure is now treated as foundational economic infrastructure alongside energy, logistics, and telecommunications. West Africa and other regions are expected to follow the same path.

> *A dominant theme in early 2026 is the acceleration of sovereign intelligence strategies, where nations prioritize domestic compute power, AI infrastructure, and data residency as strategic assets.*

Telecommunications Sovereignty and Regional Alignment

The push toward digital autonomy is also being codified through regional diplomacy and regulatory coordination. African ministers recently adopted the Algiers Declaration on Telecommunications Sovereignty, establishing a unified strategy that treats digital infrastructure as a pillar of national security and economic self-reliance through 2030.

Industry vendors are adapting accordingly. Cisco launched its Sovereign Critical Infrastructure portfolio across EMEA, enabling organizations to operate AI and cybersecurity systems in air-gapped, on-premises environments. Abu Dhabi's Presight is scaling this model through agreements with Burkina Faso, Côte d'Ivoire, and Gabon by embedding intelligent systems directly into government operational environments rather than delivering them as external standalone platforms.

Direct-to-Device Satellite Connectivity on the Rise

Satellite systems are no longer treated as fallback infrastructure but as a standard layer within national connectivity architectures. The most consequential development is the direct-to-device model, which allows conventional smartphones to connect directly to orbital networks without specialized hardware.

VEON's Banglalink signed a landmark agreement with Starlink Mobile to integrate satellite connectivity in Bangladesh, targeting messaging and data services for 175 million users through standard 4G LTE devices. This follows deployments by Kyivstar in Ukraine, where more than five million customers have utilized Starlink satellite services, and ongoing Airtel Africa trials in Kenya aimed at eliminating persistent mobile dead zones.

The SA-ME-NA regional governments are also formalizing the role of global satellite providers within domestic telecom ecosystems. Vietnam granted Starlink a license to serve up to 600,000 subscribers, with gateway infrastructure under development in Phu Tho, Danang, and Ho Chi Minh City. At the industrial layer, specialized constellations are emerging for telecom and IoT integration. Sateliot launched a €100 million financing round to expand its 5G narrowband IoT satellite network, while French startup Univity secured €32 million to develop a 3,400-satellite very-low-Earth-orbit constellation focused on telecom operator services.

Re-shaping Market Structure and Network Economics

Regulatory institutions are evolving from oversight bodies into active market architects. Saudi Arabia now ranks first globally in the ITU Digital Readiness Index with a score of 94, reflecting alignment between infrastructure investment, spectrum policy, and commercialization strategy. In the UAE, regulators supported deployment of the world's first Upper 6 GHz commercial network, enabling the throughput required for AI-native and high-capacity enterprise applications.

Elsewhere, regulatory focus is centered on market consolidation, service quality, and consumer protection. Pakistan's telecom regulator approved the merger between Telenor Pakistan and PTML, reducing the market to three major operators while enabling stronger utilization of newly acquired 5G spectrum assets.

In Focus: Oman

Oman's digital infrastructure story is one of deliberate accumulation rather than headline-driven expansion. The decisions made over the past several years across connectivity, enterprise services, and regulatory reform are now visible as a coherent national posture, one that positions the country as a serious participant in the regional digital economy rather than a peripheral one.

The connectivity foundation in Oman is more substantial than its market size might suggest.

Through sustained investment in submarine cable access, Omantel has built landing and transit infrastructure connecting Oman to more than 120 cities across 50 countries on three continents, served by more than 20 cables. This makes Oman the most connected operator to submarine cables in the Middle East, a distinction that carries commercial weight as demand for low-latency routing between Asia, Africa, and Europe continues to grow. Neutral data centers operating in both Muscat and Salalah extend this position inland, collectively hosting content and services for more than 40 global companies. Salalah's location along primary east-west cable corridors give it routing characteristics that complement rather than duplicate Muscat, producing a two-city infrastructure model with genuine redundancy value for international operators and cloud providers evaluating where to anchor regional capacity.

Omantel's role in Oman's digital economy extends well beyond network provision. Over the past six years, the company has invested more than RO 500 million in digital infrastructure, and its commercial profile has shifted accordingly. Subsidiary company contributions to group revenues grew from 9 percent in 2018 to 22 percent by end of 2025, reflecting a business that has moved substantively into cloud solutions, cybersecurity, artificial intelligence, data center services, and enterprise platforms. Group revenues reached approximately RO 2,290.9 million by end of September 2025, with a net profit of RO 243.4 million. Enhanced 5G launched in 2025, with Omantel as the first operator in the Sultanate to deploy the technology. These are the operational characteristics of a company functioning as a broader enabler of national digital transformation, not simply a connectivity provider, which includes submarine cable operations as well. This distinction matters for how

In West Africa, Nigeria's regulator directed operators to automatically compensate subscribers with airtime credits when network performance falls below mandated thresholds, signaling a shift from punitive enforcement toward direct consumer restitution. Egypt introduced child-designated SIM frameworks with mandatory content filtering, while British authorities moved to restrict the leasing of Global Titles to reduce covert mobile tracking through signaling exploitation.

Infrastructure Fragility Is Becoming a Core Strategic Constraint

As digital systems become more deeply integrated into economic and state operations, infrastructure fragility is emerging as a central strategic concern. Operators in Bangladesh warned that regional fuel shortages threaten network continuity because telecom infrastructure remains dependent on more than 52,000 liters of diesel daily to power distributed base stations.

The issue extends beyond operational continuity. It highlights the degree to which telecommunications operations remain vulnerable to energy disruption, supply-chain instability, and insufficient infrastructure redundancy. In response, operators and governments are accelerating investment into redundant and locally controlled architectures alongside more proactive regulatory coordination.

The Market Is Converging Around Integrated Sovereign Infrastructure Systems

The broader industry trajectory is now clear. Telecommunications is no longer operating as an isolated commercial sector. It is converging with AI infrastructure, industrial policy, cybersecurity, energy security, and geopolitical strategy.

Future market leadership will likely depend less on subscriber scale alone and more on the ability to integrate compute infrastructure, terrestrial and orbital connectivity, regulatory alignment, and operational continuity into cohesive sovereign systems. The competitive landscape is therefore shifting from pure connectivity provision toward control over integrated national digital architecture.

Seen through this macro-view, Oman offers a useful example of how a market can build strategic relevance through infrastructure depth, regulatory preparation, and operator-led digital capability rather than scale alone.

international investors read Oman's overall digital readiness.

That readiness is increasingly supported by the policy environment around it. January 2026 brought the establishment of the Oman Global Financial Centre in Madinat al Irfan, created by Royal Decree No. (8/2026) with full administrative and legislative independence, a regulatory framework grounded in English common law, and tax exemptions for qualifying investors of up to 50 years. The centre is intended to attract financial services capital and support innovation, and its establishment adds a layer of institutional infrastructure that technology and digital economy investors typically require before committing capital at scale. FDI stock stood at US$78.78 billion at end of Q2 2025, up 12.8 percent on the prior year, with inflows of US$8.84 billion over the same period. The sectors Oman is actively targeting for 2026 to 2028 include the digital economy, logistics, and advanced industries. This broadens the nation's investment base.

Apart from terrestrial and submarine cable operations, Oman is contributing to the regional conversation on satellite and hybrid connectivity at a technical and policy level. The SAMENA Council and Omantel recently published a joint whitepaper on Mobile Satellite Services (MSS), a contribution that arrives at a moment when the integration of satellite and terrestrial networks is moving from theoretical to operational across the region. The document addresses hybrid connectivity architectures and the role of MSS within national network strategies, questions that are directly relevant to how Oman, with its established submarine cable and terrestrial infrastructure, approaches the next layer of connectivity investment. The whitepaper reflects Omantel's engagement with the broader regional policy environment and signals that Oman intends to be part of shaping how satellite services are understood and deployed across the SAMENA region, not simply a recipient of frameworks developed elsewhere.

These developments in Oman describe a market building toward integration, connecting its physical cable infrastructure to enterprise services, its regulatory reforms to digital economy investment, and its national operator's capabilities to regional and global conversations about the future architecture of connectivity.

That readiness is increasingly supported by the policy environment surrounding it. January 2026 brought the establishment of the Oman Global Financial Centre in Madinat al Irfan through Royal Decree No. (8/2026), creating a jurisdiction with full administrative and legislative independence and a regulatory framework aligned with English common law. The centre is intended to attract financial services capital, support economic diversification, and provide an institutional framework for international investment. Eligible businesses may also receive tax incentives and exemptions for up to 50 years.

Oman has also expanded its policy focus on artificial intelligence. Royal Decree No. (50/2026) established the Artificial Intelligence Special Zone in the Governorate of Muscat under the framework of the Law of Special Economic Zones and Free Zones. Projects established within the zone are granted the incentives, privileges, and exemptions provided under that law.

FDI stock stood at US$78.78 billion at the end of Q2 2025, up 12.8 percent year-on-year, with inflows of US$8.84 billion over the same period. The sectors Oman is actively targeting for 2026 to 2028 include the digital economy, logistics, and advanced industries, broadening the country's investment base.

ARTICLE

Accelerating Bahrain's Digital Future: stc's Strategic Leap into 5.5G and AI-Driven Innovation

Ahmed Alsharif
Chief Technology and Digital Officer
stc Bahrain

In today's hyper connected and rapidly evolving digital landscape, staying ahead of the curve is no longer optional—it is essential. At stc Bahrain, we are proud to be at the forefront of this transformation, consistently redefining connectivity standards to advance Bahrain's telecommunications and digital ambitions. While we have built a strong presence in the consumer segment,

> *We are working toward enabling 10Gbps speeds to support next generation applications such as ultra high definition streaming, real time analytics, and advanced automation.*

we have also maintained a solid position in the business market, with a growing strategic focus on further strengthening our enterprise capabilities. This is driven by deep market insight across Bahrain's key sectors, including SMEs, government, healthcare, and education. We understand the pressures these sectors face and their increasing demand for secure, scalable, and intelligent digital infrastructure.

To address these needs, stc Bahrain has developed a robust and continuously evolving portfolio of enterprise grade 5G solutions. These include 5G LAN for optimized local connectivity, 5G Video AI for real time intelligent insights, secure 5G Mobile VPN to support agile workforces, 5G Dedicated Internet Access for mission critical operations, and customized 5G Private Networks. Together, these solutions deliver high performance connectivity, simplify infrastructure, improve operational efficiency, and accelerate digital transformation across industries.

Beyond Today: The Path to 5.5G (5G-Advanced or 5G-A)
Our commitment extends well beyond today's capabilities. stc Bahrain is actively charting its transition toward 5.5G in alignment with 3GPP Release 18, guided by a clear long term technology vision.

> *Our 5G Mobile VPN solution is redefining secure remote connectivity by replacing traditional VPN architectures with a scalable, high performance 5G based alternative, supporting mobility, security, and regulatory compliance.*

We are working toward enabling 10Gbps speeds to support next generation applications such as ultra high definition streaming, real time analytics, and advanced automation. In parallel, we are significantly enhancing network automation to improve reliability, efficiency, and responsiveness while enabling more complex enterprise use cases. We are also expanding advanced 5G applications in areas such as smart cities, industrial IoT, and telemedicine, ensuring our network continues to evolve in step with customer and national priorities.

These initiatives form a core pillar of our strategy to sustain leadership in advanced mobile technologies while delivering tangible value to the Kingdom's digital economy.

The Power of Partnership: Advancing 5G Advanced and AI

This roadmap is reinforced through strategic ecosystem partnerships. Our collaboration with Huawei represents an important step in jointly advancing 5G Advanced and AI powered digital services. The focus of this partnership is not only technology development but also the creation of an ecosystem that enables enterprises to adopt intelligent, future ready solutions across the ICT landscape. The collaboration spans joint innovation, market development, and ecosystem enablement, with a shared focus on accelerating advanced 5G services through optimized spectrum usage, developing AI driven digital solutions, enabling enterprise mobile private networks integrated with cloud and edge computing, and applying AI to enhance network operations and resilience. Equally important is our commitment to building local capabilities through targeted talent development and training in AI and emerging technologies.

Transformative Innovations in Action

These capabilities are already translating into measurable impact for our customers. Our 5G Mobile VPN solution is redefining secure remote connectivity by replacing traditional VPN architectures with a scalable, high performance 5G based alternative, supporting mobility, security, and regulatory compliance.

Our 5G Video AI solutions leverage high bandwidth, low latency connectivity to automate video analytics and deliver real time insights across use cases ranging from retail and healthcare to security and customer experience. Meanwhile, our 5G Portable Private Network with MEC functionality enables ultra reliable performance for critical enterprise applications while ensuring sensitive data remains securely on premises—an increasingly vital requirement for regulated industries.

These initiatives underscore stc Bahrain's commitment to technology leadership. We are not simply building networks; we are actively contributing to the advancement of Bahrain's digital future. Through continuous innovation, ecosystem collaboration, and a clear strategic roadmap, stc Bahrain is strengthening its position as a trusted partner for enterprise transformation and a pioneer of AI driven, next generation connectivity.

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MEMBERS NEWS

stc Group Achieves 12% Net Profit Growth in Q1; Excluding Non-Recurring Items, with Revenues Reaching SAR19.9 Billion

stc Group announced the company's preliminary financial results for the period ending on 31 March 2026:

- Revenues for the 1st quarter of 2026 reached 19,939 million with a growth of 3.8% as compared to the comparable quarter last year.
- Gross Profit for the 1st quarter of 2026 reached 9,772 million with an increase of 7.4% as compared to the comparable quarter last year.
- Operating Profit for the 1st quarter of 2026 reached 3,978 million with an increase of 11.0% as compared to the comparable quarter last year.
- Earnings before Interest, Taxes, Zakat, Depreciation and Amortization (EBITDA) for the 1st quarter of 2026 reached 6,557 million with an increase of 7.1% as compared to the comparable quarter last year.
- Net Profit for the 1st quarter of 2026 reached 3,696 million with an increase of 12.0% as compared to the comparable quarter last year after excluding the non-recurring items.
- stc distributes 0.55 per share for the 1st quarter of 2026, in accordance with the dividends distribution policy approved by General Assembly.

stc Group CEO Eng. Olayan Alwetaid stated that the group began 2026 with strong operational and financial momentum, successfully translating the group's strategy into tangible growth and reinforcing its role in the digital economy. In the first quarter, the group achieved a 3.8% increase in revenue, 7.1% EBITDA growth, and a rise in net profit (after excluding non-recurring items) by 12% compared to the same quarter last year. These results demonstrate a robust business model and an effective balance between investments opportunities, operational efficiency, and digital infrastructure development, supporting sustainable and competitive long-term growth. The GCEO highlighted the group's continued execution of its strategy to expand regional digital infrastructure through the Silklink project. This initiative, in partnership with the Syrian Sovereign Fund and an investment of 3 billion, aims to implement telecommunications infrastructure in Syria. The project is a significant step toward building a cross-border digital ecosystem by developing advanced infrastructure that connects Syria regionally and internationally through a fiber-optic network of over 4,500 kilometers, as well as data centers and international submarine cable landing stations. This strengthens stc's role in supporting regional digital connectivity and creates new opportunities for growth and expansion in telecommunications and digital services. Further, stc supported millions of Riyadh Season visitors with advanced telecommunications and digital services, demonstrating efficient service delivery during peak periods. The group also showed high readiness during Ramadan by serving Umrah performers and visitors to the Two Holy Mosques through enhanced infrastructure and increased operational capacity, meeting rising data and voice traffic demands. During Ramadan, internet data traffic rose by more than 21% at the Grand Mosque and over 40% at the Prophet's Mosque year-on-year, with 5G accounting for over 48% of traffic. These results highlight the efficiency of stc's digital infrastructure and its ability to provide reliable, high-quality connectivity to visitors worldwide. To advance local content and national capabilities, the group enhanced its role in building a resilient and sustainable digital ecosystem by localizing technologies, developing supply chains, and enabling national partners. In 2026, the group participated in the Private Sector Forum and signed several agreements to boost local content, expand supplier networks, and support national partners in workforce training and technological advancement. These efforts strengthened local digital industries, advanced the telecommunications and IT sector, and improved global competitiveness. On the institutional excellence and innovation front, the group continued to cement its digital maturity by embedding best practices in data governance,

which enable innovation, improve business efficiency, and support reliable decision-making. This progress was recognized by two data governance awards received across the Middle East, reflecting stc's achievements in building an advanced digital ecosystem. The GCEO concluded that in the first quarter of 2026, the group demonstrated its ability to execute its strategy, achieve objectives, and strengthen its leadership in telecommunications and technology. This maximized its contribution to the national and digital economy and enhanced its societal impact. The group's efforts reinforce its role as a key partner in digital transformation across the Kingdom and region, in alignment with Saudi Vision 2030.

e& and FTI Sign Cooperation Agreement to Explore Global Telecom and Digital Ecosystem Opportunities

Gobal technology group e& and Freedom Telecom International (FTI), a subsidiary of Freedom Holding Corp, have entered into an agreement establishing a structured framework to capture business opportunities worldwide. The arrangement creates a platform for the two organizations to engage a wider circle of telecom operators and contribute to their growth, while maintaining full operational independence. e& brings diverse telecom expertise gathered throughout its operating footprint, such as advanced capabilities in commercial optimization, digital transformation and large-scale operational execution. FTI, through its parent Freedom Holding Corp., commands expertise on the creation, development and operation of a diversified digital ecosystem encompassing financial technology platforms, digital banking and investment services, as well as loyalty and customer-experience solutions. Khaled Hegazy, Chief Operations Officer, e& international, commented:

"At e& international, we look for partnerships that create practical routes to growth for operators seeking to strengthen performance and expand their digital service capabilities. This agreement with Freedom Telecom International gives us a clear framework to explore those opportunities together, combining our experience in commercial optimization, digital transformation and operational execution with Freedom's ecosystem expertise. It also provides a structured basis for engagement across markets while preserving the independence of both organizations." The agreement comes at a time when telecom operators and digital financial ecosystems are seeking new ways to collaborate through clearly delineated models. The framework is designed to spark dialogues with operators that are looking to advance their telecom and digital services capabilities or aspire to advance their fintech- and digital services infrastructure. Timur Turlov, Founder & CEO of Freedom Holding Corp., said:

"Building the Freedom ecosystem in Kazakhstan has given us deep experience across multiple areas of digital transformation, and through this journey we have seen growing interest from global organizations to leverage the technologies we have developed. We believe this new structure with e& provides an additional channel through which such conversations can take place, as opportunities arise in various markets." Johannes Hummer, CEO of Freedom Telecom International, added: "In the past year we have encountered the telecom-fintech convergence topic frequently in various global forums. Many international organizations I speak to are keen to learn about digital infrastructure and ecosystem models – like the one we have been developing in Kazakhstan. With a clear engagement structure in place between FTI and e&, we hope to broaden the circle of interested organizations and the projects we realize will be key to our growth."

e& reports AED 19.4 billion consolidated revenue, with 15.1% YoY growth in Q1 2026

e& reported a strong start to 2026, with robust Q1 financial results, asserting the Group's leadership in shaping the digital landscape and consolidating its position as a leading global group.The Group's consolidated revenue reached AED 19.4 billion, reflecting 15.1 per cent year-on-year (YoY) growth, while consolidated net profit reached AED 2.9 billion, with 3.9 per cent YoY growth (excluding the gain from the sale of Khazna). EBITDA grew by 16.5 per cent YoY, reaching AED 8.6 billion.The Group's subscriber base maintained its upward trajectory with a 30.8 per cent YoY growth, reaching 248.0 million subscribers. In its home market, e& UAE maintained its strong performance, with its subscriber base reaching 16.6 million, supported by the adoption of next-generation connectivity solutions and AI applications, which are now a vital part of customer experience.

Financial Highlights for Q1 2026

	Q1 2026	Q1 2025	Per cent change
Consolidated Revenue	AED 19.4 billion	AED 16.9 billion	15.1%
Consolidated Net Profit	AED 2.9 billion	AED 2.8 billion (*)	3.9%
EBITDA	AED 8.6 billion	AED 7.4 billion	16.5%
Total Group Subscribers	248.0 million	189.6 million (**)	30.8%
e& UAE Subscribers	16.6 million	15.3 million	8.7%

(*) Q1 2025 net profit excluding the gain from the sale of Khazna of total AED 2.6bn

(**) Adjusted for Maroc Telecom reported number

Masood M. Sharif Mahmood, Group Chief Executive Officer of e&, said: "Despite economic and regional changes, our agile business model has proven e&'s inherent strength and great ability to navigate challenges. Our proactive risk-preparedness approach and international diversification have enabled us to maintain our growth momentum in our home market and internationally; a testament to e&'s agility and resilience in operating under adverse circumstances. Today, we stand firmly on a solid foundation with a strong track record that gives us full confidence in e&'s ability to continue its upward trajectory. Throughout recent regional challenges, e& remained steadfast in fulfilling its national role by enabling business continuity, ensuring network resilience, supporting remote work and education systems, and harnessing our technological capabilities to guarantee seamless connectivity and uninterrupted digital services for all and under different circumstances. Our strong financial performance in the first quarter of 2026 reflects the success and resilience of our operations, underpinned by our commitment to creating sustainable shareholder value. We continued to deliver growth, with consolidated revenues of AED 19.4 billion and EBITDA of AED 8.6 billion, marking year-on-year increases of 15.1% and 16.5% respectively. This performance reinforces our position as a driving force in the region's digital economy and a leading enabler of future-defining intelligent solutions. We remain deeply inspired by the UAE's visionary leadership, which has fostered a stable, growth-oriented environment while remaining agile and resilient in even the most challenging circumstances, enabling us to thrive and strive for more with confidence to keep delivering continuous success."

Advanced with Intelligent Dynamic Network Slicing e& and Huawei Redefine 5G-Advanced

e& UAE, the flagship telecom arm of global technology group e&, has achieved a groundbreaking regional first by successfully completing the Middle East's inaugural Proof of Concept (PoC) for flexible dynamic network slicing in partnership with Huawei. This pioneering initiative significantly strengthens e& UAE's 5G-Advanced (5G-A) capabilities, enabling intelligent, real-time adjustment of network slice resources to seamlessly match evolving enterprise demands and fluctuating radio environments while delivering unbreakable Service Level Agreements (SLAs). Through the on-demand reallocation of bandwidth, computing power and radio resources, the solution maintained 100 per cent SLA compliance across critical parameters, including low latency and guaranteed throughput, even under high-load and variable conditions. These results empower enterprises in key sectors like manufacturing, healthcare, logistics, and smart cities with tailored, high-performance connectivity that ensures uninterrupted operations, boosts productivity, and eliminates the inefficiencies of static provisioning. Marwan Bin Shakar, Chief Technology Officer at e& UAE, said: "This regional-first PoC with Huawei accelerates our leadership in 5G-Advanced, building on our commercial slicing rollout and standalone network foundation. We've demonstrated truly adaptive, intelligent networks that respond instantaneously to real-world enterprise needs and radio dynamics, unlocking superior reliability, dramatic efficiency gains, reduced operational overhead, and genuine empowerment for businesses across the UAE". e& UAE is now set to elevate this dynamic slicing capability even further through Artificial Intelligence integration. By incorporating predictive analytics to anticipate demand patterns and proactive resource orchestration to allocate assets ahead of requirements, this AI enhancement will deliver greater predictability, fortified SLA guarantees, amplified network efficiency, and meaningful cost reductions, advancing the UAE's vision for a digitally intelligent and economically thriving future. Gavin Wang, President, e& Global Key Account at Huawei, said: "We are honoured to partner with e& UAE on this landmark regional milestone, which vividly illustrates the revolutionary potential of dynamic network slicing in 5G-Advanced ecosystems. This collaboration sets a powerful new benchmark for agile, SLA-assured enterprise connectivity and accelerates the path toward AI-native networks that redefine industry possibilities".

Etihad Etisalat Co. (Mobily) Announces Its Consolidated Interim Financial Results for The Period Ending on 31-03-2026 (Three Months)

Etihad Etisalat Co. (Mobily) reported a net profit of SAR 880 million for the first quarter ending March 31, 2026, marking a 14.73% increase compared to the same period in 2025.

Key Financial Highlights (Q1 2026)

Revenue: Increased by 5.51% to SAR 5.04 billion, driven by a better revenue mix.

Gross Profit & EBITDA: Rose by 10.57% (to SAR 2.82B) and 11.1% (to SAR 1.97B) respectively, with the EBITDA margin strengthening to 39.1%.

Operating Profit & EPS: Climbed 16.24% to SAR 988 million, with EPS rising to SAR 1.15.

Quarterly Comparison (vs. Q4 2025): Net profit dropped 7.66% and revenue declined 2.81% from the previous quarter.

Capital Expenditure (CAPEX): Reduced significantly to SAR 404 million, compared to the higher investment in Q1 2025.

Shareholders' Equity: Increased 7.11% year-on-year to SAR 19.96 billion.

Zain Kuwait Clinches Triple Titles from Ookla® Speedtest®

Zain Kuwait has added another major international win to its growing record of network leadership accolades, winning three prestigious awards from Ookla® Speedtest® — the world's leading platform for network intelligence, testing, and analytics. The recognition was made on the sidelines of the Mobile World Congress (MWC 2026) in Barcelona, Spain. The company secured the titles of Fastest 5G Network in Kuwait, Best Coverage in Kuwait, and Best 5G Network in Kuwait, based on Ookla® Speedtest® Intelligence data for the second half of 2025 from millions of user-initiated tests in Kuwait. The recognition reinforces Zain's position at the forefront of network excellence in the Kuwaiti market and reflects the strength, consistency, and maturity of its connectivity infrastructure. This reflects Zain's sustained investment in advanced network infrastructure, continuous coverage expansion, and ongoing optimization of the customer experience across the country. It also highlights the company's focus on delivering consistent 5G performance, strong network reliability, and high-quality connectivity through a long-term strategy centered on innovation, efficiency, and operational excellence. Nawaf Al-Gharabally, CEO of Zain Kuwait, said: "This is a powerful validation of the long-term investments and disciplined execution behind our network strategy. Being recognized across 5G speed, network performance, and coverage reflects our commitment to delivering a reliable, high-quality experience that customers can feel every day, wherever they are in Kuwait." He added: "This recognition reflects the progress of the '4WARD - Progress with Purpose' strategy, to build a customer-centric, future-ready, and impactful TechCo. We will continue investing in advanced infrastructure, digital capabilities, and innovation to raise the bar for connectivity in Kuwait and support the country's wider digital transformation ambitions." "Presenting Zain with the Speedtest Awards for Best 5G Network, Fastest 5G Network and Best Mobile Coverage in Kuwait underscores their unwavering commitment to providing top-tier mobile services," said Stephen Bye, President and CEO of Ookla. "This recognition is based on comprehensive analysis of millions of consumer-initiated tests taken with Speedtest, reflecting real-world performance. Zain has demonstrated a willingness to invest in their network and focus on operational excellence, which are crucial for enhancing user experience and driving digital progress in Kuwait." This recognition comes as Zain Kuwait continues to accelerate the evolution of its network and digital ecosystem through a broader transformation agenda that combines advanced infrastructure investments with customer experience, operational intelligence, and future-readiness. It also follows the company's recent 5G-Advanced launch in June 2025, which unlocked new horizons for Kuwait's digital economy and technological innovation. Through this continued momentum, Zain Kuwait remains focused on delivering more than connectivity alone. The company is building an intelligent, scalable, and future-ready network environment that supports consumer digital lifestyles, enterprise needs, and Kuwait's national digital ambitions, while maintaining a strong emphasis on service excellence, innovation, and meaningful customer impact.

Zain, Kuwait's Most Awarded 5G Network, wins Opensignal's Best Network Award

Zain Kuwait has been recognized with the Best Network Award in Opensignal's Mobile Network Experience Report for February 2026, further cementing its leadership as Kuwait's Most Awarded 5G Network and highlighting the company's continued excellence in delivering a superior mobile experience across the country. The recognition reflects Zain's continued strength across key dimensions of network experience and performance, after emerging on top across a total of nine

metrics in the report, more than any other operator in the market. These included five outright wins and four shared ones, underscoring the depth, consistency, and resilience of Zain's network leadership. According to the independent report, Zain achieved sole wins in Coverage Experience and 5G Coverage Experience, scoring 8.1 out of 10 and 4.5 out of 10 respectively. Zain also ranked first in Consistent Quality with a score of 71.2 out of 100, highlighting its ability to deliver a dependable and high-quality user experience across everyday mobile usage scenarios. Zain also secured outright wins in 5G Video Experience with a score of 77.2 out of 100, and 5G Download Speed Experience with a top score of 328.8 Mbps. The company further emerged as a joint winner in Video Experience with a score of 70.1 out of 100, Download Speed Experience with a score of 106.5 Mbps, Time on Network with a score of 98 out of 100, and Reliability Experience with a score of 874 out of 1000, demonstrating balanced strength across a broad range of performance indicators. Opensignal's February 2026 Mobile Network Experience Report evaluated the performance of Kuwait's mobile operators over a 90-day period from October 1, 2025 to December 29, 2025. Opensignal is a leading independent global standard in measuring and analyzing consumers' mobile and broadband network experiences. Its reports provide data-driven insights into how users experience connectivity in everyday life across key performance indicators. The recognition adds further momentum to Zain's ongoing investments in network modernization and future-ready digital infrastructure. It also reflects the company's broader efforts to deliver a reliable, seamless, and high-performing connectivity experience that supports the evolving needs of individuals, households, and businesses across Kuwait. The report also highlighted the strong development of Kuwait's telecom market, driven by growing adoption of 5G Standalone technology and continued operator investment in advanced infrastructure. Within this landscape, Zain's performance in the latest results reaffirms its position at the forefront of network innovation and service excellence. Recently, Zain Kuwait added another major international win to its growing record of network leadership accolades, winning three prestigious awards from Ookla® Speedtest® — the world's leading platform for network intelligence, testing, and analytics. The recognition was made on the sidelines of the Mobile World Congress (MWC 2026) in Barcelona, Spain. The company secured the titles of Fastest 5G Network in Kuwait, Best Coverage in Kuwait, and Best 5G Network in Kuwait, based on Ookla® Speedtest® Intelligence data for the second half of 2025 from millions of user-initiated tests in Kuwait. The recognition reinforced Zain's position at the forefront of network excellence in the Kuwaiti market and reflected the strength, consistency, and maturity of its connectivity infrastructure. This reflected Zain's sustained investment in advanced network infrastructure, continuous coverage expansion, and ongoing optimization of the customer experience across the country. It also highlighted the company's focus on delivering consistent 5G performance, strong network reliability, and high-quality connectivity through a long-term strategy centered on innovation, efficiency, and operational excellence.

Zain Group Holds AGM with Quorum of 77.7%; Assembly Approves All Items on Agenda and Elects New Board of Directors for Three Years

The Zain Group Annual General Meeting (AGM) was held at the Zain Group's headquarters in Kuwait, attended with a quorum of 77.67% of shareholders whereby they were presented with the Zain Group's 2025 annual report which highlights the financial statements, Governance and Auditors reports and the major achievements of Zain Group and its operations and subsidiaries across Middle East and Africa, for the year ended December 31, 2025. Additionally, Zain Group released its 2025 Sustainability Report. Notably, the shareholders approved all 12 items on the AGM agenda. Furthermore, the AGM elected the Zain Group Board of Directors for the next three years. The incoming Board members now constitute the following: Mrs Nour Nael Ahmed Al-Jassim (appointed by the KIA); Mr. Bader Nasser Al-Kharafi; Mr. Mishari Asi Al-Hajri; Mr. Atef bin Saeed bin Rashid Al Siyabi; Mr. Nasser bin Sulaiman bin Hamad Al-Harthy; Mr. Alaa El-Din bin Abdallah Bait Fadel; Mr.

Ghassan Khamees Ali-Hashar; Mr. Ibrahim Said Al-Eisri; Mr. Abdulrahman Mohammad Al-Asfour; and Dr .Saad Ahmed Alnahedh. The Board meet immediately after the AGM and elected Mrs. Nour Nael Ahmed Al-Jassim as Chair of the Board of Directors and Mr. Bader Al-Kharafi as Vice-Chairman and Group CEO. During the AGM, Zain Group

presented its financial results for the full-year 2025, whereby the company served 50.9 million customers, an annual increase of 4%. In 2025, Zain Group delivered a solid financial performance, with consolidated revenue rising 14% year-on-year to KD 2.3 billion (USD 7.44 billion), the highest level in 16 years. Consolidated EBITDA reached KD 780 million (USD 2.54 billion), an increase of 11%, reflecting a healthy 34% EBITDA margin, while consolidated net income soared 103% to KD 239 million (USD 777 million), a 13 year high. Earnings per share amounted to 55 fils (USD 0.18). These results supported attractive shareholder returns. The 2025 annual cash dividend totaled 35 fils per share, representing a payout ratio of 63%, while total dividends distributed during the 2025 calendar year reached 60 fils per share. This performance underscores the strength of the company's balance sheet and financial position as Zain grows the business and advances its transformation into a TechCo. The Board of Directors welcomes all shareholders and affiliated parties to the Annual General Assembly of Zain Group. Amid this rapidly changing environment, Zain Group's '4WARD – Progress with Purpose' strategy has remained steadfast in its ambition to build one of the region's largest TechCo conglomerates, ready to power this new digital era. Across our markets, we have continued to align our strategic direction with global and regional trends, investing in advanced digital infrastructure, the latest technologies, and innovative services that support national development visions. Throughout 2025, Zain strengthened its extensive network of partnerships and enhanced its technological capabilities to keep pace with the fast-evolving ICT sector. This approach has enabled the Group to protect its core business while unlocking new growth avenues in high-potential digital domains, ultimately generating sustainable value for shareholders. The year 2025 reaffirmed Zain's position as a regional digital powerhouse, diversified, resilient, and purpose-driven. By leading innovation and enabling communities across our markets to embrace digital transformation, Zain continues to play a pivotal role in shaping the region's digital future. We sincerely value the continued trust of our shareholders, which remains a cornerstone of our success. We are also very grateful to government bodies in Kuwait and across our markets for supporting the ICT sector and empowering Zain to provide meaningful connectivity to the communities, businesses, and governments we wholeheartedly serve.

AT&T Signs Deal Worth $2 Billion To Upgrade Emergency Cellular Network

AT&T opens new tab has reached a deal to invest about $1 billion to improve the Commerce Department's FirstNet and deliver $1 billion in cost savings for the program via reduced rates, a U.S government agency said. The telecommunications company was awarded the 25-year contract to build the federal emergency cellular network FirstNet in 2017, years after a federal commission recommended setting up such a system following the 9/11 attacks. The system, which helps first responders such as medical personnel, firefighters and police officers communicate vital information on a single network, is used by 31,000 U.S. agencies. The agreement was made possible through U.S. President Donald Trump's executive order in early 2025, asking federal agencies to review all contracts, the National Telecommunications and Information Administration said in a statement. "This agreement-in-principle... reflects AT&T's ongoing dedication to our public-private partnership," AT&T's President of Public Sector Wes Anderson said.

AT&T Adds More Wireless Subscribers Than Expected as Bundling Pays Off

AT&T opens new tab added more wireless subscribers than expected in the first quarter, benefiting from customers opting for the telecom provider's packages bundling wireless and high-speed fiber services. In a highly competitive market, network providers have extended device subsidies, added plan discounts and increased investments in network infrastructure to attract and retain customers. About 42% of AT&T households that use home internet services also opted for wireless plans, a convergence dynamic that analysts had flagged as a key differentiator. AT&T, like rival T-Mobile, extended device subsidies into the first quarter for Apple's latest iPhone models as carriers competed aggressively to lure customers with lucrative offers. The company said it added 294,000 net monthly bill-paying wireless phone subscribers in the first quarter, compared with additions of 272,000 expected by analysts polled by FactSet. AT&T raised prices on its lowest and highest wireless tiers while trimming prices in the middle, a move analyst said is designed to steer customers toward mid-range plans rather than spark a price war. Shares of the company fell about 3% after the company forecast second-quarter free cash flow of $4 billion to $4.5 billion, compared with analysts' estimate of $4.6 billion, according to Visible Alpha. "You could have a little bit better free cash flow performance there if they wanted to, but clearly they feel like data is going to be the revenue of the future. And that's why they're investing so heavily in it," said Brian Mulberry, chief market strategist at Zacks Investment Management. Telecom providers like AT&T and Verizon are pouring billions into technology and fiber network upgrades to remain competitive amid a sharp rise in data consumption. Total revenue for the quarter grew about 3% to

$31.5 billion, compared with estimates of $31.25 billion, according to data compiled by LSEG. Starting first quarter, AT&T is reorganizing its business segments to highlight its core growth areas. The new advanced connectivity segment, covering domestic 5G and fiber services, reported about 5% growth in revenue.

AT&T and Fanatics Announce Strategic Five-Year Partnership

AT&T and global sports platform Fanatics announced an exclusive multi-year partnership, naming AT&T the "Official Connectivity Provider of the Fan." Through this wide-ranging partnership, AT&T and Fanatics will combine their respective strengths to deliver new value for fans nationwide, unlocking special benefits for AT&T customers by tapping into Fanatics' expansive reach and cultural relevance. The Fanatics ecosystem is comprised of more than 100 million fans and relationships with more than 5,000 athletes and celebrities, creating one of the largest relationship hubs in sports. Fanatics will leverage AT&T's fast, reliable network and enterprise expertise to extend its ability to deliver immersive, technology-forward experiences for sports fans across its platform nationwide. Powered by America's largest wireless network1 and the nation's best and fastest home internet2, AT&T will help deliver those moments to fans wherever they are. In turn, AT&T customers will gain access to exclusive Fanatics experiences, rewards and opportunities. The partnership creates new opportunities for both brands to deepen engagement and redefine how fans connect, while delivering added value for eligible AT&T customers.

Highlights of the partnership include:

Fanatics Fest NYC: AT&T will serve as an Official Partner of Fanatics Fest NYC, the World's #1 Fan Festival, which is returning to the Javits Center in July to bring together hundreds of athletes and celebrities, top leagues, leading sports brands, and a vibrant community of trading-card dealers to unite the best of the sports world under one roof.

Elevated Loyalty Experiences: AT&T customers will get enhanced status with Fanatics ONE, Fanatics' enterprise-wide loyalty program that offers a unique selection of rewards, access to experiences and unforgettable events, and more. AT&T customers will also have additional opportunities to earn FanCash, the currency of sport which is redeemable across the Fanatics ecosystem.

Media and Premium Sports Content: AT&T will deliver targeted category exclusive messaging across the Fanatics platform and integrate its brand throughout the company's expanding content & media portfolio.

Enhanced Fan Moments: Fanatics and AT&T will host watch parties during premier sporting events, bringing together fans who live outside their teams' home markets for shared viewing experiences across the country.

"Today, the primary screen for so many fans is the one in their hands. That's why bringing AT&T and Fanatics together is a natural fit," said Erin Scarborough, senior vice president, Revenue Management & Commercialization, AT&T. "Sports have always been about connection, and Fanatics is a powerful partner because they understand the modern sports fan. By pairing their insights with our connectivity expertise, we can bring people closer to what they love and deliver meaningful value for both brands."

"At Fanatics, everything we do starts with the fan," said Tucker Kain, chief strategy officer, Fanatics. "AT&T shares our belief in the power of connection, bringing fans closer to the teams, athletes, and sports moments they're passionate about, and to each other. This partnership provides an important avenue to help us deliver exclusive access, meaningful rewards and unforgettable moments to more fans."

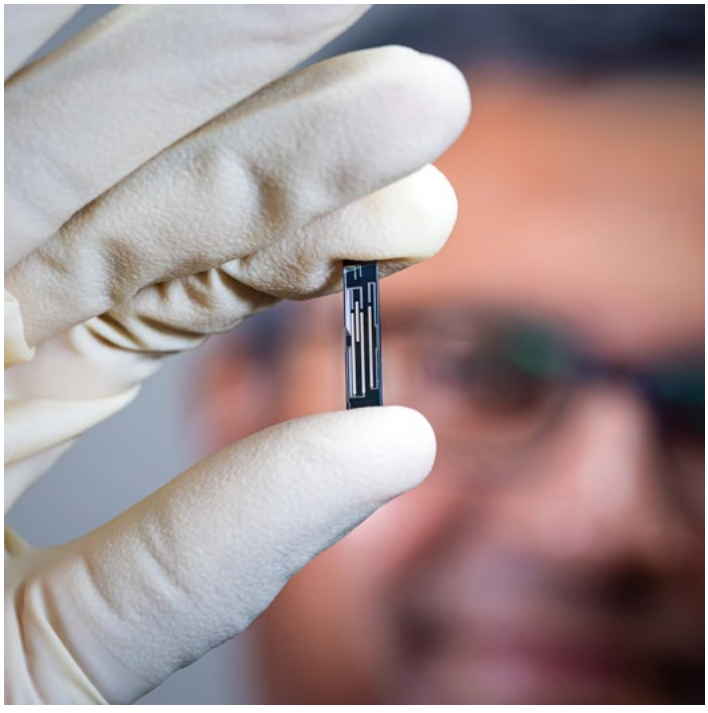
Additional elements of the Fanatics and AT&T partnership will explore opportunities across retail integration, co-branded offerings, and enterprise collaboration. More information on how AT&T customers can access and redeem benefits, and when specific elements will be available, will be shared as the program comes to life.

China Mobile Hosts 2026 Digital Empowerment Cooperation Conference for Chinese Enterprises Going Global

China Mobile hosted the 2026 China Mobile Digital Empowerment Cooperation Conference for Chinese Enterprises Going Global in Beijing. The conference focused on the needs for digital and intelligent development of Chinese enterprises going global, jointly exploring new trends in digital and intelligent empowerment for the global development of Chinese enterprises, and it was broadcast live simultaneously around the world. Zhang Feng, Secretary of the CPC Chinese Institute of Electronics Committee, and Guo Hao, President of the China Association of Communications Enterprises, attended the event, among others. Li Huidi, Executive Vice President of China Mobile attended the conference and delivered a speech. Li Huidi pointed out that artificial intelligence is currently reshaping the ways of production and life with unprecedented speed and breadth, deeply restructuring the competitive landscape of global industries. AI is already the core engine driving the leap in social productivity and leading the transformation of the global industrial system. The overseas development of Chinese enterprises is undergoing a comprehensive upgrade from the traditional export of products and production capacity to the synergistic development of digital capabilities and industrial chains driven by AI. Li Huidi stated that, in the face of a new round of technological revolution and industrial transformation, China Mobile is accelerating the transition from a "telecommunications operator" to a "technology services enterprise." With the vision of building a world-class technology services enterprise, it comprehensively promotes the integrated innovation of communication technologies, information technologies, and AI technologies, in order to strengthen, optimize, and expand the three major businesses of "communications services, computing services, and AI services." China Mobile will deeply integrate its AI capabilities into the entire chain of its three core businesses, paving a digital and intelligent highway for globalization, featuring the integration of networks and intelligence, safety and reliability, and universal access across all domains for Chinese enterprises going global: First, China Mobile will strengthen communications services and empower "AI connectivity", weaving a dense network of global intelligent interconnection. The scale of China Mobile's international information infrastructure continues to grow. China Mobile have expanded the capacity of submarine and terrestrial cables, bringing total international transmission bandwidth to 406T and Points of Presence (PoPs) to 446. Notably, the eastern section of 2Africa, the largest submarine cable system in the world circling Africa, has been activated. The sections are expected to be completed and put into operation in the first half of this year. Spanning a total length of approximately 45,000 kilometers, this submarine cable is laid along the coastline of the African continent. It connects 33 countries and regions across the Middle East, Asia, and Europe, providing high-quality, low-latency international communication services for a population of roughly 3 billion along its route. This major information artery, which connects six continents and four oceans, provides safe and reliable guarantees for end-to-end connections. It supports the scheduling of transnational AI applications and the integration of global business for enterprises going global. Global roaming is now available in 268 destinations, and the total number of users for the JegoTrip app has exceeded 90 million. China Mobile's international ecological cooperation continues to expand, and the "Hand-in-Hand Program" covers over 3 billion users worldwide. China Mobile have consecutively hosted events such as the Southeast Asia Cooperation Conference and the China Mobile Digital Empowerment Cooperation Conferences for Chinese Enterprises Going Global. These events have been widely praised and have strengthened China Mobile's influence within the global ecosystem. In recent years, China Mobile's revenue from international business has consistently maintained a trend of high-speed, double-digit growth. Second, China Mobile will optimize computing services and drive "AI Computing", building a globally integrated computing network across the world. As a builder of computing infrastructure, China Mobile will comprehensively increase its investment in Artificial Intelligence Data Centers (AIDC), accelerate the supply of computing, and enhance its operational capabilities for Tokens. China Mobile's 100-megawatt-level Global Intelligent Center (GIC) in Hong Kong has officially opened, and China Mobile will deploy more nodes for AI computing along the "Belt

and Road" initiative in the future. China Mobile have already established a cluster for AI computing with a capacity of 92.5 EFLOPS in China. By linking this with over 1,300 resources from self-owned and cooperative data centers overseas, China Mobile are constructing a global network for computing. China Mobile will promote Mobile Cloud to integrate high-quality global models and streamline the service chain where "Agents use Tokens, Tokens drive Computing, and Computing consumes Electricity." This will forge a solid foundation of computing for Chinese enterprises going global. Third, China Mobile will expand AI services and reshape digital services, stimulating new momentum across all domains for enterprises going global. As a promoter of applications for artificial intelligence, China Mobile continuously iterates the capabilities of its "Jiutian" large model. China Mobile have accumulated industrial data exceeding 20 trillion Tokens and independently developed more than 50 industrial large models. This promotes the deep integration of AI agents into the entire process of production and operations for enterprises. Overseas, China Mobile translate its leading domestic AI capabilities into a "smart engine" for Chinese enterprises expanding abroad. Targeting the pain points of enterprises going global, China Mobile have tailored a "1+8" system of products and solutions for all scenarios, which has already served tens of thousands of Chinese enterprises in their global layout. By combining the advantages of Chinese manufacturing and 5G solutions, China Mobile achieve deep integration with local ecosystems overseas. In regions including Europe, Latin America, and the Asia-Pacific, and have successfully established over a thousand benchmark cases of "AI+" digital and intelligent transformation, such as smart factories, smart ports, and smart IoV. This makes the fruits of China's innovation in AI benefit the global market.

Cisco Introduces Universal Quantum Switch, Advancing the Path to a Quantum Network



Cisco announced the Cisco Universal Quantum Switch, a critical milestone in quantum networking that addresses one of the most fundamental barriers to building a quantum network. As a working research prototype, it is the latest proof point in Cisco's accelerating full-stack quantum networking program, built on years of foundational research, real-world demonstrations, and a growing ecosystem of strategic collaborations. Quantum computers encode information in different ways, and until now, no switch could accept and translate between all major encoding modalities without destroying the quantum information in the process. The Cisco Universal Quantum Switch is designed to address this challenge for the first time, routing quantum information while preserving it at room temperature, on existing telecom fiber, with a Cisco-patented conversion engine that translates between encoding modalities at input and output. "Reaching this milestone is a pivotal moment for our quantum program and a testament to the transformative potential of quantum networking," said Vijoy Pandey, SVP/GM of Outshift, Cisco's Emerging Technologies and Incubation Group. "We've long recognized that connecting quantum systems is the key to achieving true scalability, and now we've taken a critical step toward making that vision a reality. While this is a significant achievement, it's just the beginning. The road ahead is long, yet the impact of what we are building—and what is still to come—will be nothing short of profound."

Today's quantum computers are powerful but limited, operating at hundreds of qubits when real-world applications in healthcare, financial services, and aerospace will need millions to achieve unheard of speeds and technological breakthroughs. Cisco believes networking and connectivity are central to bridging that gap. The quantum future will not be built by any one company or any one technology. It will be built by connecting them all. Imagine connecting billions of people and tens of billions of devices with direct cables. It would be unmanageable. The internet became possible because classical switches could connect all of those endpoints through a shared, scalable network. The Cisco Universal Quantum Switch does the same thing for quantum. When two quantum computers need to share information, it accepts the signal in whatever modality it arrives, translates it into a common language for routing, and delivers it in the format the receiving system needs, without losing any quantum information along the way. This is made possible by a Cisco-patented conversion engine at the heart of the quantum switch. The output modality

can match the input or be an entirely different one, enabling the quantum switch to connect and translate between quantum systems that were never designed to talk to each other, a critical capability for building quantum networks that work across different vendors and technologies. The quantum switch is designed to support all major quantum encoding modalities used to carry information:

- Polarization (the orientation of light waves)
- Time-Bin (the timing of light pulses)
- Frequency-Bin (the color or frequency of light)
- Path (the physical or spatial path)

To date, the quantum switch has been experimentally validated with polarization encoding. Support for time-bin and frequency-bin is built into the design and represents the next step in Cisco's ongoing validation process.

Cisco Brings Sovereign Critical Infrastructure Portfolio to UAE Organizations

Cisco, the worldwide leader in networking and security, launched its Sovereign Critical Infrastructure (SCI) portfolio for customers across Europe, the Middle East and Africa (EMEA). Cisco Sovereign Critical Infrastructure addresses the needs of organizations to innovate at pace while maintaining even greater control and autonomy over their data and digital infrastructure. The portfolio spans Cisco's core product lines including networking, security, compute, collaboration, network management, AI and Splunk. Customers can configure and operate it in their own air-gapped, on-premises physical environments. SCI is designed to support customers at different stages of their digital sovereignty journey. Built around the principle that there is no one-size-fits-all approach, the portfolio gives organizations with a need for digital sovereignty the flexibility to choose the model that best meets their needs, whether fully on-premises, air-gapped environments for maximum control or hybrid approaches that combine sovereign infrastructure with cloud services. By addressing key customer priorities around data control, operational autonomy, and freedom from dependency, Cisco helps organizations strengthen resilience while maintaining choice and control over their digital infrastructure. "At Cisco, we understand that true sovereignty means having the freedom to innovate with choice and control remaining crucial to businesses in Europe, the Middle East and Africa. Our Sovereign Critical Infrastructure portfolio meets organizations where they are on their sovereignty journey. The availability of this portfolio reinforces our commitment to being a trusted technology provider for the region's critical infrastructure," said Gordon Thomson, President Cisco EMEA. "In the UAE, we are seeing strong demand from organizations that want to accelerate innovation while maintaining tighter control over critical data, systems, and operations. This is especially important as AI, security, and infrastructure strategies become more closely connected. Cisco's Sovereign Critical Infrastructure portfolio gives customers the ability to build secure, customer-controlled environments that support resilience, compliance, and long-term digital growth. Backed by Cisco Customer Experience, we are helping organizations in the UAE create trusted infrastructure that is ready for both today's operational needs and tomorrow's AI opportunities," said Abdelilah Nejjari, Managing Director for Gulf and Levant at Cisco.

Eutelsat and PCTV Renew Long-Term Partnership to Continue Video Distribution in Mexico

Eutelsat announced the renewal of its long-standing partnership with PCTV, a leading content aggregation and distribution company in Mexico and part of Megacable Holdings, for the continued distribution of its video services via the EUTELSAT 117 West A (E117WA) satellite. With this agreement, Eutelsat further reinforces its leadership in Mexico by continuing to host key players from the country's broadcast and pay-TV ecosystem within its video neighborhood. This renewal consolidates E117WA as the cornerstone for television distribution in Mexico and a reference platform across Latin America. PCTV, a central player in Mexico's pay-TV ecosystem, will continue to leverage E117WA to deliver a wide portfolio of national and international channels to cable headends across Mexico and the region. This ensures reliable, high-quality content delivery, supporting operators in reaching millions of households with diverse programming, and evolving digital platforms. José Ignacio González-Núñez, SVP Americas, Video Business Unit at Eutelsat, said: "Our continued partnership with PCTV reinforces the relevance of our 117° West video neighborhood in the Mexican market. We are proud to support a key player in the country's pay-TV ecosystem and to continue enabling efficient and reliable content distribution across Mexico and Latin America." Jorge Alejandro Tanaka Orozco, General Director, PCTV added: "This renewal with Eutelsat allows us to continue delivering high-quality content to cable operators across Mexico and the region. EUTELSAT 117 West A remains a key platform for our distribution strategy, supporting our commitment to providing reliable and efficient services to our partners."

Eutelsat Supports Co-op Cable in Launching Expanded DTH Offering Across the Caribbean

Eutelsat announced a new partnership with Co-op Cable, introducing an expanded direct-to-home (DTH) and connectivity offering across the Caribbean using the EUTELSAT 65 West A (E65WA) satellite.

Through this initiative, Co-op Cable is enhancing its service portfolio to deliver bundled television and internet services, combining high-quality satellite TV distribution with advanced GEO-based connectivity. The solution is designed to address the growing demand for reliable entertainment and broadband services across the region, particularly in areas where traditional infrastructure remains limited. This collaboration reinforces EUTELSAT 65° West A as a strategic platform for video services in Latin America and the Caribbean, enabling operators to scale efficiently while ensuring consistent service quality across geographically diverse markets. By leveraging Eutelsat's GEO infrastructure, Co-op Cable will expand its reach to households and hospitality providers, contributing to broader efforts to bridge the digital divide in the Caribbean by extending connectivity to remote and underserved communities. José Ignacio González-Núñez, SVP Americas, Video Business Unit at Eutelsat, said: "This partnership with Co-op Cable highlights the versatility of our GEO infrastructure to support both video and connectivity services. By combining DTH television with broadband capabilities, we are enabling operators to deliver more value to their customers while expanding access to essential digital services across the Caribbean." Richard Rawlins, CEO of Co-op Cable, Inc., added: "Our partnership with Eutelsat on the 65 West platform has been transformative for Co-op Cable and the communities we serve across the Caribbean. Through this collaboration, we are delivering high-quality satellite television to homes and hospitality providers throughout the region, bringing world-class content to markets that have historically been underserved. As we look ahead, we are excited to be working with Eutelsat to extend this partnership beyond video into satellite broadband, with the goal of bridging the digital divide in the Caribbean by delivering affordable, reliable internet connectivity to even the most remote communities. This is just the beginning of what we believe will be a long and impactful relationship."

Eutelsat and MTN Côte d'Ivoire Sign Multi-Year Agreement to Expand Satellite Connectivity Using EUTELSAT KONNECT Services

Eutelsat and MTN Côte d'Ivoire announced a new multi-year agreement to deliver satellite connectivity services across Côte d'Ivoire using EUTELSAT KONNECT's high-throughput capacity. The agreement will expand reliable broadband access nationwide, addressing the connectivity needs of consumer and enterprise segments while supporting digital inclusion through community Wi-Fi hotspots in underserved areas. MTN Côte d'Ivoire will leverage the high-throughput capabilities of the EUTELSAT KONNECT satellite, positioned at 7° East to extend high-speed connectivity beyond the reach of fibre and mobile networks. Building on KONNECT's proven performance in supporting digital inclusion initiatives across the region, the agreement will enable broadband services for consumers and enterprises while supporting community Wi-Fi hotspots that connect rural and underserved areas. Satellite connectivity will complement existing terrestrial infrastructure, helping to expand coverage and deliver reliable access to essential digital services nationwide. MTN Cote D'Ivoire is a subsidiary of South Africa's MTN Group, and the country's largest telecommunications operator. The deal follows the multi-year partnership inked in August 2024 with MTN's, digital and infrastructure service provider, Bayobab, for capacity on Eutelsat's OneWeb LEO constellation. Philippe Baudrier, Vice President for Africa at Eutelsat said, "This agreement represents another milestone in expanding our KONNECT services across Africa. Our platform is helping connect underserved and hard-to-reach areas and partnering with a leading operator like MTN Côte

d'Ivoire shows how satellite and terrestrial networks work together to scale deliver connectivity at scale. Together, we are bringing reliable broadband to more communities across the continent, and we are proud to further strengthen our collaboration with the MTN Group." Honoré Kouame, General Manager MTN Business Côte d'Ivoire said, "Across Africa, satellite connectivity is a powerful complement to terrestrial networks, helping operators accelerate coverage expansion and support digital inclusion. This partnership with Eutelsat enables us to reach more customers, connect underserved communities and continue to support the country's ongoing digital transformation."

Huawei Releases 2025 Annual Report: Performance in Line with Forecast

Huawei has released its 2025 Annual Report. The company reports that its performance was in line with forecast, having generated CNY880.9 billion in revenue and CNY68 billion in net profits. In 2025, Huawei invested CNY192.3 billion back into R&D, which accounted for 21.8% of its annual revenue. Altogether, the company's R&D investment over the past decade amounts to CNY1.382 trillion. "In 2025, Huawei's overall performance remained steady," said Sabrina Meng, Huawei's Rotating Chairwoman. "I would like to thank our customers for your ongoing trust and support. Thanks also to consumers for choosing Huawei, as well as suppliers, partners, and developers around the world for working with us. "Of course, we couldn't do any of this without the support of every Huawei employee. Thank you for your hard work, and also your families for their steadfast support." In 2025, Huawei's connectivity business weathered the impact of industry investment cycles, while its computing business continued to seize opportunities in AI. The consumer business worked to overcome formidable challenges, driving the HarmonyOS ecosystem to cross a new threshold in user experience. Huawei's digital power business continued to place quality before all else. Huawei Cloud honed its competitiveness with a focus on core services, and the company's intelligent automotive solutions grew rapidly. Moving forward, Huawei will continue to ramp up R&D investment in strategic domains like connectivity, computing, cloud, devices, intelligent driving, and AI. Huawei will hone its competitive edge by integrating AI and security into products and networks, and build industry ecosystems around Ascend, Kunpeng, and HarmonyOS that thrive on collaboration and shared success. Huawei will continue to actively embrace openness and innovation, and achieve long-term development through quality, while creating value for customers, partners, and society. Meng stressed, "We are moving toward a future that is full of uncertainty, so we have to remain true to our strategy and maintain strategic focus. We will translate strategy to execution, keep cultivating the developer ecosystem, and pursue high-quality development." All financial statements in the 2025 Annual Report were independently audited by KPMG, an international Big Four accounting firm.

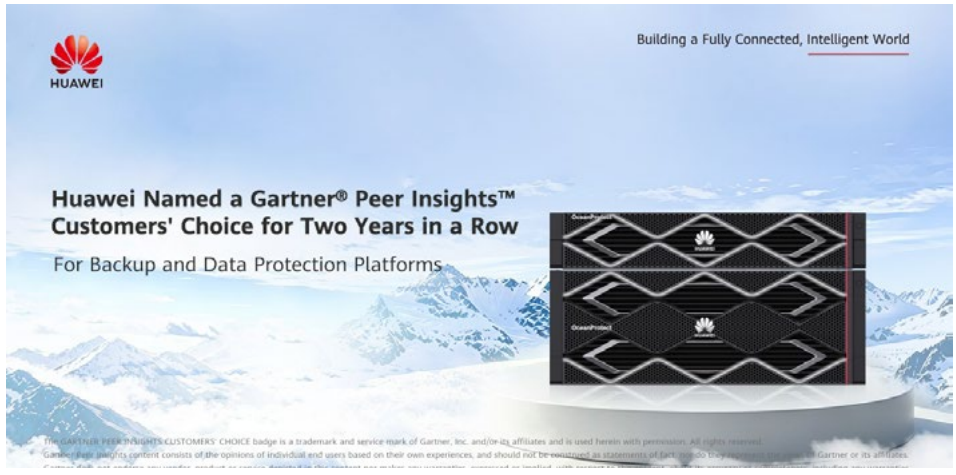
Five-Year Financial Highlights

	2025		2024	2023	2022	2021
	(USD Million)	(CNY Million)	(CNY Million)			
Revenue	**126,018**	**880,941**	862,072	704,174	642,338	636,807
Operating profit	**13,867**	**96,937**	79,361	104,401	42,216	121,412
Operating margin	**11.0%**	**11.0%**	9.2%	14.8%	6.6%	19.1%
Net profit	**9,732**	**68,036**	62,574	86,950	35,562	113,718
Cash flow from operating activities	**18,222**	**127,384**	88,417	69,807	17,797	59,670
Cash and short-term investments	**51,702**	**361,426**	372,232	475,317	373,452	416,334
Working capital	**43,523**	**304,252**	319,178	421,662	344,938	376,923
Total assets	**190,961**	**1,334,930**	1,290,149	1,263,597	1,063,804	982,971
Total borrowings	**34,229**	**239,284**	264,871	308,414	197,144	175,100
Equity	**85,847**	**600,120**	544,619	507,568	437,076	414,652
Liability ratio	**55.0%**	**55.0%**	57.8%	59.8%	58.9%	57.8%

Note: These financial figures are from the consolidated financial statements prepared in accordance with IFRS Accounting Standards. CNY amounts are converted into United States dollars ("USD") using the closing rate at the end of 2025 of USD1.00 = CNY6.9906.

Huawei Named a Gartner® Peer Insights™ Customers' Choice for Second Year in a Row

Gartner Peer Insights is a free peer review and ratings platform designed for enterprise software and services decision makers. It recognizes vendors who meet or exceed both the market average Overall Experience and the market average User Interest and Adoption score through a Customers' Choice distinction. During this peer-recognition process, Huawei OceanProtect received reviews from global customers across diverse industries, including finance, manufacturing, energy, media, healthcare, education, and carriers. Huawei OceanProtect scored an overall rating of 4.9 out of 5.0. The recognition shows the trust global customers place in the comprehensive competitiveness, market size, and after-sales service quality of Huawei OceanProtect. Commenting on the recognition, Song Ke, President of Huawei Data Protection Domain, remarked: "It is a great honor for Huawei to be recognized once again as a Gartner Peer Insights Customers' Choice for OceanProtect Data Protection. To us, this is strong validation from both the market and our users for Huawei's ongoing commitment to product innovation and service excellence. Moving forward, we will continue to remain customer-centric and provide end-to-end data protection solutions, building a faster, more cost-effective, and more resilient line of defense for data protection."



MTN Nigeria and Huawei Deploy World's First Commercial Sub-1 GHz Massive MIMO Site

MTN Nigeria and Huawei have deployed the world's first commercial sub-1 GHz Massive MIMO site. This cutting-edge solution increases low-band LTE traffic by an impressive 104%, boosts downlink user-perceived rate by 28%, and reduces physical resource block usage by 8% compared with previous 4T4R equipment, representing significant improvements in network capacity and 4G user experience. By building on the earlier adoption of C-band and tri-mid-band Massive MIMO, the two companies have deployed the world's first all-band Massive MIMO site. This milestone signifies MTN's pioneering entry into the "All Bands to Massive MIMO" era. As the most populous country in Africa, Nigeria is seeing a profound transformation in its mobile communications networks. With large numbers of 2G and 3G users migrating to 4G and the rise of new services such as short videos, live streaming, and mobile payments, LTE traffic has experienced explosive growth across the nation. However, limited low-band spectrum resources mean networks are facing increasingly severe congestion that degrades user experience. MTN Nigeria and Huawei have thus deployed sub-1 GHz Massive MIMO to address these challenges. Compared with 4T4R, this innovative solution doubles downlink LTE capacity and is capable of a 3.2-fold capacity expansion upon future evolution to NR. It effectively alleviates network congestion and fully unleashes suppressed traffic, delivering users a more stable, smoother, and faster mobile experience. Huawei's sub-1 GHz Massive MIMO is the first solution in the industry to combine extremely large antenna arrays with wideband technology in the prized low-band spectrum. This solution significantly enhances low-band spectral efficiency through the efficient integration and coordination of fragmented spectrum resources. It also supports the coexistence of GSM, UMTS, LTE, NR, and NB-IoT, facilitating the seamless evolution of all bands to 5G. Furthermore, with innovations in materials, architecture, and algorithms, this breakthrough solution overcomes theoretical limitations to address challenges such as the excessive size, width, and weight of sub-1 GHz Massive MIMO equipment. Yahaya Ibrahim, CTO of MTN Nigeria, stated, "At MTN, we are committed to building the most extensive, highest-quality, and best-performing communications network." He went on to say that "Our successful collaboration with Huawei on the commercial debut of sub-1 GHz Massive MIMO has significantly boosted network performance. We now deliver faster, more stable connectivity to every user. Moving forward, we will deepen our partnership with Huawei to drive technological innovations, tackle key challenges in network development, and fuel the digital economy in Nigeria." James Zeng, President of Huawei Wireless FDD Product Line, explained, "The first commercial rollout of sub-1 GHz Massive MIMO validates its ability to significantly enhance spectral efficiency, network coverage, uplink speeds, and energy efficiency while reducing latency. This milestone paves the way for broader adoption, which will provide stable, reliable connectivity for diverse mobile AI terminals and large numbers of IoT devices. This will deliver superior experience to users anytime, anywhere."

Nokia Spins Off Space Communications Venture Modul8

Nokia has reached an agreement with Celestial Acquisition Corp. to spin off its space communications business Modul8. The Finnish vendor confirmed it has entered into a definitive agreement with Celestial to spin the unit into an independent company. Modul8 operates as a venture within Nokia Bell Labs. The company builds communications plus hardware, software, and services—engineered for the harsh conditions in space. In a blog post, Chris Jones, VP of strategic partnerships, Nokia, noted that the agreement will "give Nokia's space venture the dedicated structure and funding to move faster, turning breakthrough ideas into real-world capabilities for the growing space economy." As highlighted by Jones, Modul8 deployed and operationalized the first cellular communications network on the Moon as part of the IM-2 mission last year. The unit is working with Axiom Space to integrate its lunar surface communications system into the Axiom Extravehicular Mobility Unit (AxEMU), which is the next-generation spacesuit designed for lunar exploration as part of NASA's Artemis program. Nokia didn't give a specific reason for its decision to spin off the unit, though the vendor will likely focus its attention on its core network offering. The vendor said that establishing an independent space-focused unit is the best path for success. "While the venture is early in its revenue growth curve, an independent path is intended to help the business attract growth capital, move from prototypes to products more quickly, and scale deployments to meet rising demand without losing the Nokia Bell Labs rigor that got us here," said Jones. Nokia will remain as a major shareholder in the company, noting that it will continue to focus on space and non-terrestrial connectivity (NTN) as it continues its development of future networks, such as 6G. "Nokia remains actively involved in space where it supports its core business and customers, including work on NTN," added Jones. "By establishing Modul8 as a focused, independent company, we believe it will be better positioned to access dedicated growth capital, accelerate innovation, and serve the rapidly expanding space economy while continuing to build on its strong technical foundation developed within Nokia Bell Labs," said John Dow, CEO and co-founder of Modul8. Nokia expects the spin-off to conclude over the summer.

Nokia Named Overall Leader for Network API Platforms by ABI Research, Ranking First in Innovation and Implementation

Nokia has been named the overall leader in ABI Research's competitive ranking of Network API Platforms for Internal Exposure, achieving the highest combined score for innovation and implementation among all vendors evaluated. This recognition underscores Nokia's leadership in helping telecommunication providers unlock new revenue streams and drive co-innovation with customers through network programmability. ABI Research's evaluation ranked Nokia first overall with a total score of 85.9, including an innovation score of 85.3 and an implementation score of 86.5. The report highlighted Nokia's ability to deliver a comprehensive and configurable network API platform — called Network as Code — that supports industry standards, integrates seamlessly with customers' infrastructure, and enables monetization opportunities across industries. "This recognition as the overall leader in ABI Research's assessment is a testament to our commitment to helping telecommunication providers transform their networks into programmable platforms that push the

bounds of advanced connectivity. By focusing on co-innovation, interoperability, and monetization enablement, we are empowering our customers to unlock new business models and drive the adoption of 5G-powered applications." Shkumbin Hamiti, VP and Head of Network Monetization Platform, Nokia. The report emphasized Nokia's strong focus on innovation, particularly in areas such as API standardization, customizability, and advanced functionalities like network slice management and fraud detection. From an implementation standpoint, Nokia's high score reflects its extensive commercial reach, market alignment, and ability to enable providers to monetize their 5G Standalone (SA) networks.

More than 75 partners — including telecom providers, CPaaS platforms, systems

integrators and vertical independent software vendors — are now part of Nokia's Network as Code ecosystem. In addition, Nokia and Google Cloud recently announced a partnership to fuse agentic AI with network APIs, making networks consumable and programmable by enterprise agents.

Nokia's multivendor approach, which aligns with 3GPP and CAMARA functionality, enables telecom providers to expose network capabilities in a secure, standardized way, consolidating network resources across legacy and modern infrastructure. Nokia's full network API portfolio spans capabilities such as Quality of Service (QoS), device location, SIM swap detection, number verification, device status, and other specialized functions.

Solving industry-specific challenges

By providing standardized, secure access to APIs, Nokia is enabling developers to simplify complex network functions and create innovative applications that address industry-specific challenges. Early use cases span multiple sectors, including:

Banking: Secure authentication and fraud detection for financial transactions.

Healthcare: Real-time data sharing and remote monitoring.

Automotive: Enhanced tele-driving capabilities and vehicle-to-everything (V2X) communication.

Entertainment: Optimized streaming and immersive experiences.

Nokia Wins New 5G RAN Deal with Virgin Media O2 to Accelerate Its Mobile Transformation Plan

Nokia announced that it has been selected by Virgin Media O2 (VMO2) for a major new multi year 5G Radio Access Network (RAN) deployment and modernization program across the UK. The agreement builds on more than two decades of strategic collaboration between the companies. It marks a significant milestone as Virgin Media O2 continues its mission to deliver the country's most reliable and high performance 5G network with its Mobile Transformation Plan. Under the new deal, Nokia will supply its latest-generation AirScale RAN portfolio, including ultra-capacity modular baseband, and energy-efficient, future-proofed Massive MIMO radios. Leveraging Nokia's comprehensive technology roadmap, Virgin Media O2 will benefit from improved spectral efficiency, coverage, capacity, and throughput, ensuring strong 5G performance today while laying the foundation for 5G Advanced capabilities. We are delighted to deepen our longstanding partnership with Virgin Media O2 through this important new 5G RAN deal. Our AirScale portfolio is designed to deliver the performance, efficiency, and flexibility required for the UK's future connectivity needs. We look forward to supporting Virgin Media O2 in building one of the most advanced and reliable 5G Advanced networks in the country said Mark Atkinson, Head of Radio Access Network, Nokia. The deployment will enable Virgin Media O2

to improve network quality and accelerate modernization through optimized spectrum utilization and enhanced energy-saving software features. Nokia's latest GigaSite architecture, Dual Band Massive MIMO, and AI enabled baseband platforms will support seamless scalability and operational efficiency throughout the rollout. The technology uplift is expected to deliver a more reliable connectivity for Virgin Media O2 customers across the country. As part of the new engagement, Nokia and Virgin Media O2 will expand their collaboration on joint innovation programs, including pilots and proof of concepts that explore advanced RAN intelligence, automation, and energy-efficient architectures aligned with Virgin Media O2's Mobile Transformation Plan. This new contract extends Nokia's role as one of Virgin Media O2's primary RAN partners, following the previously announced agreement to continue 5G rollout and modernization. As we continue to evolve and enhance our award winning mobile network with our Mobile Transformation Plan, Nokia remains a key strategic partner in helping us deliver reliable connectivity to our customers. This new agreement allows us to accelerate our 5G rollout, improve performance, and ensure we meet growing demand for high quality mobile services both today and in the future, said Jeanie York, Chief Technology Officer, Virgin Media O2.

ZainTECH Named a Leader in IDC MarketScape: Gulf Countries AI Professional Services

ZainTECH, the integrated digital solutions provider of Zain Group, has been recognized in the Leaders Category of the IDC MarketScape: Gulf Countries AI Professional Services 2025 Vendor Assessment, by International Data Corporation (IDC), a global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets.

The IDC MarketScape evaluates providers based on execution capability and long-term strategy. ZainTECH's placement reflects its ability to deliver secure, scalable, and industry-led AI solutions across regulated and mission-critical environments in the GCC. The IDC MarketScape notes that ZainTECH demonstrates strong vertical expertise in the Banking, Financial Services, and Insurance (BFSI) and telecom sectors, investing in industry talent and centers of excellence to drive consultative, value-led AI engagement. A key trend highlighted in this IDC MarketScape is the accelerated growth of the AI professional services market in the GCC, driven by organizations positioning AI as a core pillar of their digital transformation agendas. The IDC MarketScape underscores the importance of industry context, certified delivery capability, regional execution strength, and governance-driven frameworks that enable intelligence to be secure, compliant, scalable, and built for long-term impact. ZainTECH's industry-focused AI strategy spans banking and financial services, telecommunications, retail, public sector and energy. The company enables high-value use cases including fraud and AML analytics, AIOps and predictive maintenance, AI-driven inspections and asset performance optimization, and customer intelligence and personalization. Clients are guided through a defined progression covering AI readiness, advanced analytics and machine learning, generative AI, and emerging agentic systems.

Andrew Hanna, CEO of ZainTECH, commented: "As organizations shift from experimentation to embedding intelligence into core operating models, the priority is ensuring AI is secure, governed, and resilient. This recognition reaffirms our ability to deploy production-grade AI solutions aligned with regulatory requirements and industry realities across the region." ZainTECH operates multi-country AI Centers of Excellence across the MENA region, delivering sovereign, hybrid, and 100% in-country execution models tailored to national data residency and regulatory mandates. Through continued investment in AI talent, governance frameworks, and sustainable infrastructure, ZainTECH enables organizations to scale AI responsibly while driving measurable business outcomes aligned with Group innovation priorities and long-term sustainability goals.

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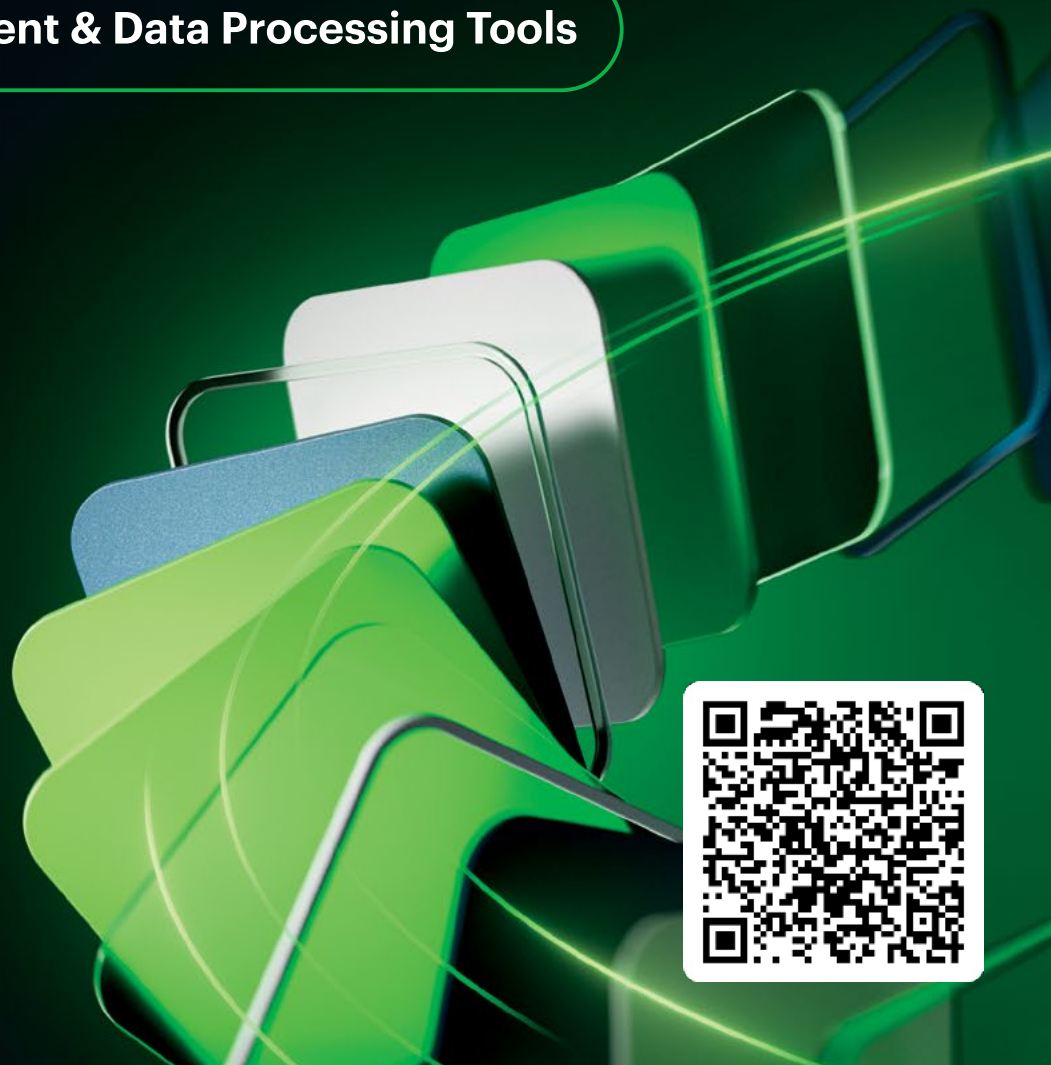

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ARTICLE

Technology Capability and Spectrum Capacity: Operators' Inevitable Transformation toward Larger Ambitions

Izhar Ahmad
Director - Industry Affairs & Communication
SAMENA Telecommunications Council

The bi-directional challenge for telecom operators is real, and it remains.

On one hand, margins and revenue expansion are under pressure because the traditional connectivity business continues to grow in traffic without yielding proportionate value. On the other hand, higher-value digital services and intelligent systems are increasingly being shaped outside the operator's traditional, core domain. As a result, telecom operators carry the demand but do not capture enough of the value generated by that demand. At the same time, they are expected to support more complex, real-time, and critical use-cases across industries that require higher performance, reliability, and integration; all required to meet a separate national demand: economic diversification.

For years, networks were optimized around consumption. However, that model has now met antiquity, because the market now consists of end-users who consume data as well as those who also generate. With more users, devices, and systems now producing continuous streams of data, the role of the network has shifted from being a delivery pipe to being an intelligence-driven coordination pipe. The growing importance of uplink performance is among the clearest of signals of this shift and, for the first time, we are seeing the network striving to serve data producers as capably as it has always served consumers.

All of this requires more than a balancing act between the telecom operator as a company and its network as its core operational asset.

The Conscious Choice to Operate More Meaningfully

What this means for the network is clear for all. However, what it means for the telecom operator varies. The most forward-looking operators are no longer defining themselves by connectivity alone. They are expanding into technology services, fintech, cloud, media, and beyond, competing for value across industries rather than simply serving them. This is the telecom company to technology company shift, or the "telco to techco" shift. Just as people are increasingly making the conscious choice to live more meaningfully, telecom operators are making the conscious choice to operate more meaningfully.

However, the desire to shift from being a telecom company to being a technology company is not simply about protecting revenue streams, pleasing the shareholders, or responding to competitive pressures. It is about building genuine capability and creating value that was previously beyond the operator's reach. Our Industry now has access to all types of advanced communications technologies, distributed computing, AI compute, and security frameworks, not to mention constantly improving regulatory and business approaches, though, at times, they may be slow in terms of adaptability.

The struggle is not in technology; it is in turning technology capability into meaningfully creating services. Getting there requires first getting the basics right.

During a recent panel participation at the Leaders' Summit 2026, I described this baseline as recognizing the need to be "SWIFT" first before an operator can walk the transformational path of becoming a techco. Becoming SWIFT first means an operator needs to **S**implify its services and applications and avoid complexity or fragmentation; **W**ork seamlessly and integrate systems; provide **I**nstant onboarding for customers without delay; ensure **F**ast support for customer issues; and implement **T**ransparent pricing. These are not techco ambitions, though an operator that has not achieved this has no platform from which to pursue anything more ambitious, including techco transformation.

Techco Transformation: A Sovereignty Strategy as Much as a Commercial One

Again, technology is not the main driver of transformation, including techco transformation. It's a greater purpose that fuels this need to evolve. If telecom operators remain limited to connectivity roles, higher-value digital activity migrates toward external platforms, local value chains erode, and the economic and informational infrastructure of a country becomes dependent on systems and decisions made elsewhere. Operators that make the techco transition, however, become more capable in the national interest and help preserve and strengthen local value-chains and national digital ecosystems across industries and economic sectors. They create the conditions under which concepts such as data embassies, digital diplomacy, and regional AI hub capability become possible.

> *Just as people are increasingly making the conscious choice to live more meaningfully, telecom operators are making the conscious choice to operate more meaningfully.*

These are not abstract ambitions. They are the practical expression of what it means when an operator moves from providing connectivity to anchoring national digital capability. And they are only reachable when operators have the performance, the intelligence, and the integration and network optimization that technologies, such as 5G-Advanced, make possible.

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Enhancing Performance, with Capacity and New Expectations

5G-Advanced is not simply an extension of 5G. 5G-A is a shift in what networks are expected to deliver. 5G-Advanced improves the network's ability to meet cross-industrial expectations by strengthening uplink performance, reducing latency variability, and enabling more precise control over how services are delivered, including industrial grade autonomous network operations. The network becomes more intelligent, more optimizable, more efficient, and more capable of consistent delivery across diverse use cases. 5G-A also allows the network to sustain growing demand in dense and complex environments, especially where human-to-human, human-to-machine, and machine-to-machine interactions and data generation are in play.

This is where Upper 6 GHz (U6GHz, 6425 MHz - 7125 MHz) becomes of powerful relevance. It provides 700 precious megahertz of contiguous spectrum, which provides the capacity needed to scale advanced capabilities in real-world conditions. However, every hertz needs to generate value, and that value must ultimately be planned with suitable regulatory oversight and measured in human terms, not only in system performance.

This is the point where the three factors converge: 5G-Advanced provides the optimizable network performance. Upper 6 GHz provides the capacity to scale that performance. And techco transformation is what determines whether an operator can evolve itself toward outcomes that go beyond its own balance sheets, into industries, into sovereign value-chains, and into human-centric use-cases. Without all three factors working together, none delivers its full promise.

To put things in perspective as to how this transformation and the technology and spectrum capabilities available now can make a difference across industries, consider this: Systems generate data, but cannot act on it fast enough or reliably enough to change outcomes. Manufacturing struggles with downtime and delayed quality control. Logistics systems face inefficiencies in coordination and tracking. Energy and industrial operations depend on periodic inspection instead of continuous monitoring. Healthcare systems face fragmentation in medical data and service delivery. In each case, the constraint is not awareness, but execution. And closing that execution gap, consistently and at scale, is precisely what an intelligent, optimizable network backed by sufficient spectrum capacity makes possible.

Lessons from earlier transformation efforts by operators, as captured in Huawei's recently released Techco 2.0 whitepaper, show that growth in traffic volume does not automatically translate into growth in revenue. Performance-based offerings are now more important because they allow operators to align revenue with outcomes rather than usage. Where Huawei's Techco 1.0 framework had earlier proposed that operators become the platform and the networks the service, Techco 2.0 proposes the next step in integrating Agentic AI across Infrastructure, Operations, and Business. It's a meaningful contribution to how the Industry should think about an intelligence-driven transition, not merely as a technology upgrade, but as a fundamental reorientation of what an operator should be doing to transform itself.

> *Where Huawei's Techco 1.0 framework had earlier proposed that operators become the platform and the networks the service, Techco 2.0 proposes the next step in integrating Agentic AI across Infrastructure, Operations, and Business. It's a meaningful contribution to how the Industry should think about an intelligence-driven transition, not merely as a technology upgrade, but as a fundamental reorientation of what an operator should be doing to transform itself.*

Lessons also point to the need to address some key policy areas, especially spectrum. Spectrum decisions, particularly relating to U6GHz are now closely tied to global and regional coordination cycles such as those led by the ITU, including the upcoming World Radiocommunication Conference 2027. Regional alignment is critical for U6GHz spectrum, for harmonized approaches create scale advantages, accelerate ecosystem readiness, and reduce cost per deployment. This is where recent regional efforts gain relevance. The SAMENA Council's arrangement of an initial dialogue on U6GHz, organized during the Leaders' Summit 2026 and conducted by GSMA and TDRA-UAE, has already demonstrated that there is interest in aligning policy, technology readiness, and deployment timelines across multiple countries. Such dialogues are foundational in ensuring that alignment and coordination on spectrum decisions translate into real economic capability rather than isolated national experiments

> *This is where Upper 6 GHz (U6GHz, 6425 MHz - 7125 MHz) becomes of powerful relevance. It provides 700 precious megahertz of contiguous spectrum, which provides the capacity needed to scale advanced capabilities in real-world conditions.*

As telecom operators evolve and transform, they are not looking for additional complexity and a deluge of technologies to run the network. They are looking for ways to simplify operations, integrate systems, and bring services to market faster. They are also looking for ways to retain a meaningful role in the value-chain as AI, cloud, and application ecosystems continue to expand.

This means that technology provider propositions now must demonstrate how well they understand operators and market needs, how they can reduce operational friction, support monetization, and enable repeatable use-cases across industries, especially those that are at priority for fulfilling national ICT visions across the SA-ME-NA region. Here, I'd argue that technology providers must themselves become SWIFT in what they offer, because that is precisely what the operators they serve have to start out with, before they can become techcos.

The Case is Clear

While in many markets 5G is still the subject of discussion, the investment case for 5G-Advanced stands fully established. Linked to this is the harmonization of U6GHz. But technology and capacity are simply the enablers. Transformation is about purpose, and about widening that purpose by leveraging accumulated strengths as connectivity providers. Operators that understand this nuanced distinction, and which have already chosen to act on it, are the ones that are defining the future of connectivity leading to 6G and beyond.

Operators that are SWIFT in their operation, techco in their ambition, and sovereign-minded in their purpose are the ones well-positioned to ensure that value is realized not just for themselves, but across industries, across sovereign value-chains, across national economies, and ultimately in elevating human capability.

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REGIONAL NEWS

Saudi Arabia Ranks First Globally in ITU Digital Readiness Rankings

Saudi Arabia has secured the top global position in the International Telecommunication Union (ITU) Digital Readiness Index 2025, achieving a score of 94 points amid rapid progress in its digital transformation agenda. The ranking reflects the Kingdom's advancements across key areas including digital infrastructure, connectivity, regulatory frameworks, and technology adoption. Strong investment in telecom networks, cloud infrastructure, and emerging technologies such as AI has contributed to its leading position. Saudi Arabia's digital ecosystem has expanded significantly in recent years, supported by initiatives under Vision 2030 aimed at diversifying the economy and building a knowledge-based society. The government has prioritized digital services, e-government platforms, and private sector enablement, driving widespread adoption across industries. The high score also underscores improvements in user access, service quality, and institutional readiness, positioning the Kingdom ahead of other global markets in digital maturity. The achievement highlights the effectiveness of coordinated policy, investment, and execution in accelerating large-scale digital transformation.

Qatar Launches Cloud Privacy Assessment Tool to Strengthen Data Protection

National Cyber Security Agency (NCSA) has announced the launch of a new Cloud Computing Privacy Assessment Tool aimed at helping organizations enhance privacy governance and strengthen data protection as the country accelerates its digital transformation. In a post on X, the agency said the tool provides a practical framework enabling entities to assess their current privacy practices, identify gaps, and take corrective action to ensure compliance with national regulations. The initiative comes as part of broader efforts led by the agency's Personal Data Privacy Protection Department to support organizations in meeting the requirements of Qatar's Personal Data Privacy Protection Law. By offering structured guidance and accessible resources, the tool is designed to simplify the process of aligning with legal and regulatory standards. According to NCSA, the assessment tool focuses on strengthening controls related to personal data handling, particularly in cloud computing environments, where risks around data security and privacy continue to grow. It also aims to improve organizational readiness by promoting best practices in governance, risk management, and compliance. Officials noted that as more entities in Qatar adopt cloud-based solutions, ensuring robust privacy safeguards has become a critical priority. The tool is expected to support both public and private sector organizations in building secure digital ecosystems while maintaining trust in data-driven services. Speaking to The Peninsula, cybersecurity analysts noted that the rapid digital transformation across sectors in Qatar has significantly expanded the overall risk landscape, even as it has improved efficiency and service delivery. "The issue is not digital transformation itself, but transformation that moves faster than an organization's ability to ensure secure architecture, sound data models, visibility, and resilience," said Amer Bazerbachi, Partner and Head of Cybersecurity Advisory at KPMG. The expert remarked that Qatar's Digital Agenda 2030 is accelerating the adoption of cloud, artificial intelligence, and automation across the economy, strengthening capabilities but also increasing exposure through growing interconnectivity, third-party dependencies, and data exchange. "Every new connection, application interface, and vendor relationship expands the potential attack surface,"

Bazerbachi added, stressing the importance of embedding security and privacy into system design rather than treating them as afterthoughts. Abdul Malik, a Doha-based cyber-risk expert, said the launch reflects a growing recognition that privacy must be embedded at the core of digital strategies rather than treated as a compliance afterthought. "Organizations today are operating in highly interconnected environments where data flows across multiple platforms and jurisdictions," said Malik. "Tools like this help shift the approach from reactive compliance to proactive risk management, ensuring that privacy controls are continuously assessed and strengthened as cloud adoption expands." Through this launch, Qatar continues to align its digital policies with international best practices, reinforcing its position as a regional leader in cybersecurity and data protection. NCSA also encouraged stakeholders to actively utilize the tool and integrate its recommendations into their operational frameworks to ensure sustainable and secure digital growth.

Saudi Digital Government Authority and World Bank Launch Global Cloud Innovation Workshop

The Saudi Digital Government Authority (DGA), in partnership with the World Bank Group, has launched an international workshop titled "Empowering Progress: A Transformative Collaboration on Cloud Innovation." The event, taking place from April 6 to 10, 2026, at the World Bank headquarters in Washington, D.C., brings together Saudi government agencies and international experts to discuss the future of cloud-enabled governance. The workshop serves as a global platform to showcase Saudi Arabia's "Cloud-First" policy and its impact on public sector efficiency. Discussions are centered on three primary strategic themes:

Innovation Enablers: Analyzing how cloud computing acts as a foundation for deploying emerging technologies, specifically Artificial Intelligence (AI) and Big Data.

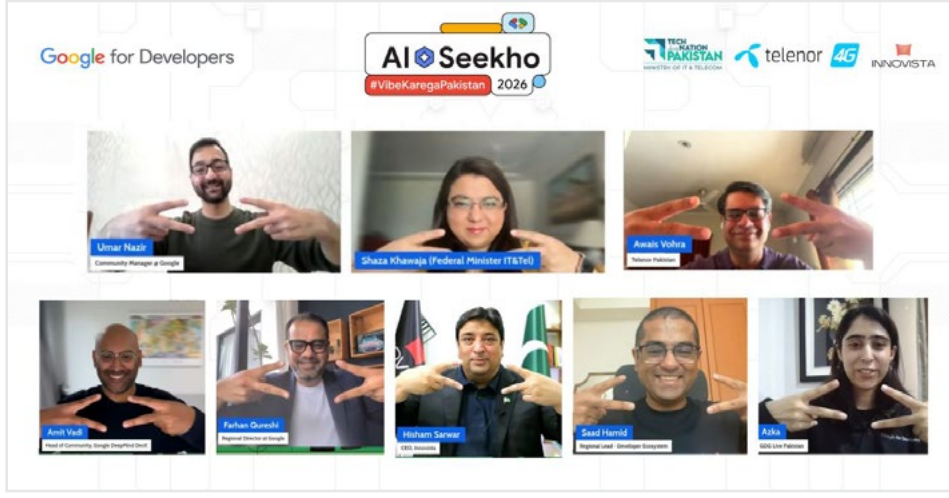
Government Integration: Strategies for enhancing cross-agency data sharing and interoperability through unified cloud architectures.

Global Benchmarking: Sharing the Kingdom's experience as a top-tier model, following its ranking as second globally in the World Bank's GovTech Maturity Index (GTMI) 2025.

Participating agencies will present real-world use cases of how cloud migration has improved service delivery quality and reduced operational costs within the Saudi public sector. The collaboration aims to develop a roadmap for other developing nations to leverage digital technologies for economic and social development. The DGA emphasized that this international engagement is part of the Kingdom's broader strategy to solidify its leadership in the digital government space and to export its technological expertise to global partners.

MoITT, Telenor, Innovista Announce Launch of AI Seekho 2026

Pakistan's Ministry of IT and Telecommunication (MoITT), Telenor Pakistan, and Innovista have announced the launch of AI Seekho 2026, a national initiative aimed at building artificial intelligence skills and expanding digital capacity across the country. The program is designed to train students, professionals, and entrepreneurs in AI-related competencies, with a focus on practical learning, industry relevance, and employability. Participants will gain exposure to key areas such as machine learning, data analysis, and AI-driven applications, supporting Pakistan's broader push toward a knowledge-based digital economy. AI Seekho 2026 builds on existing public-private collaboration efforts to address the growing demand for advanced digital skills, particularly as businesses and government entities increasingly integrate AI into operations. The initiative is expected to contribute to workforce readiness while fostering innovation within the local tech ecosystem. The launch reflects Pakistan's continued investment in digital transformation through partnerships that combine policy direction with private sector execution. Expanding access to AI education is seen as critical to enhancing competitiveness and enabling participation in global technology markets. Programs like AI Seekho also align with regional trends, where governments are prioritizing skills development to support emerging technologies and long-term economic growth.



Saudi Arabia Celebrates Women in Tech as Female Participation Reaches 35% in ICT Sector

Saudi Arabia has recognized women excelling in global technology competitions as part of International Girls in ICT Day, highlighting the Kingdom's growing focus on female participation in the digital economy. The event, hosted by the Ministry of Communications and Information Technology, honored award-winning Saudi women for their achievements in global tech challenges. Ahmed Alsuwaiyan, Governor of the Digital Government Authority, led the recognition, underscoring the importance of empowering women in technology and innovation. The celebration brought together female leaders, students, entrepreneurs, and startup founders, reflecting the expanding pipeline of talent across Saudi Arabia's ICT ecosystem. The strong representation across academia, industry, and non-profit sectors highlights the diversity of initiatives supporting women in technology. Saudi Arabia has made notable progress in this area, with female participation in the ICT sector reaching 35%. More than 140,000 Saudi women are currently employed in technology roles, while over 100,000 have benefited from training programs focused on digital and future skills. These efforts align with the Kingdom's Vision 2030 strategy, which prioritizes talent development, workforce diversification, and digital transformation as key drivers of economic growth. Expanding women's participation is seen as critical to building a sustainable and competitive technology ecosystem.

Qatar Data Centre Market Set to Reach US$1 Billion by 2034 Amid Digital Surge

Qatar's data center market is projected to reach $1.02 billion by 2034, growing at a compound annual rate of 8.57% from 2026. This expansion is driven by rapid digitalization, rising demand for cloud services, and increased adoption of IoT and big data. Industry analysts highlight that policy support, private sector demand, and proximity to fiber landing stations are key enablers for this growth, positioning the ICT sector as a major contributor to the national GDP. While the outlook remains strong, reports from Fitch Solutions indicate that digital infrastructure resilience is a growing priority. Regulatory constraints on data movement and single-region deployments may heighten the risk of outages. However, Qatar's significant financial buffers and pro-investment frameworks are expected to sustain long-term digital investment. The government continues to focus on cybersecurity and cloud infrastructure as part of its broader economic diversification strategy.

Kuwait's MoC Launches New Sahel Services to Manage Phone Lines Digitally

Kuwait's Ministry of Communications (MoC) has introduced four new digital services on the Sahel government platform, enabling users to manage their phone lines more efficiently. The new features allow individuals to view registered SIM cards, verify ownership, and access related telecom information through a centralized digital interface. The move is aimed at improving transparency, enhancing user control, and reducing reliance on in-person service channels. By integrating telecom-related services into Sahel, Kuwait is continuing to expand its digital government ecosystem, offering citizens and residents streamlined access to essential services. The initiative also supports regulatory oversight by helping authorities ensure accurate subscriber records and reduce misuse of mobile connections. The rollout reflects growing emphasis on digital identity and service integration, where governments are consolidating multiple services into unified platforms to improve user experience and operational efficiency. Kuwait has been steadily advancing its e-government capabilities, with Sahel emerging as a key interface for public service delivery across sectors.

VEON, Jazz Secure CCP Approval for Acquisition of TPL Insurance

VEON and its Pakistan-based operator Jazz have received approval from the Competition Commission of Pakistan (CCP) to acquire TPL Insurance, marking a strategic expansion into the country's digital financial services and insurance space. The approval clears a key regulatory hurdle for the transaction, enabling Jazz to integrate insurance offerings into its broader digital ecosystem, which includes fintech, payments, and lifestyle services through its JazzCash and Jazz World platforms. The move reflects a growing trend among telecom operators to diversify beyond connectivity and build integrated digital platforms that offer financial services, including insurance, lending, and payments. By entering the insurance sector, Jazz aims to leverage its large user base to distribute digital insurance products at scale. The acquisition is expected to enhance financial inclusion by making insurance more accessible through mobile channels, particularly for underserved segments. It also positions Jazz to capture additional revenue streams while strengthening customer engagement within its ecosystem. The development underscores increasing convergence between telecom and financial services in emerging markets, where operators are evolving into full-stack digital service providers.

Algeria Joins UNDP-Backed 50in5 Campaign as it Anchors Public Digital Infrastructure Agenda to African Sovereignty Drive

Algeria's Ministry of Post and Telecommunications has announced that Algeria has joined the 50in5 global campaign, a UNDP-supported initiative working with countries to design, implement and scale three core components of public digital infrastructure — digital identity, digital payments and data exchange systems — over a five-year period. The announcement, made on 2 April, positions the accession as aligned with President Tebboune's stated priorities of digital sovereignty, financial inclusion and equitable service access across Algeria's regions. Algeria arrives at the initiative with existing infrastructure assets it intends to scale through the program. Its E-Tawki3 platform provides a national framework for digital identity and electronic signature, enabling secure access to government services. Algeria Post operates a digital payment ecosystem connecting more than 29 million accounts and 18 million Edahabia prepaid cards, making it one of the continent's larger mass-market financial inclusion platforms by raw account count. The ministry framed Algeria's participation explicitly as a contribution to Africa-wide digital development as well as a domestic transformation tool, describing 50in5 as "an opportunity to share its experience, benefit from international expertise, and contribute to building a digital Africa based on trust, inclusion, and cooperation." The accession comes in the same week that Algeria hosted the African ministerial summit adopting the Algiers Declaration on African Telecommunications Sovereignty, received the UN's Special Envoy for Digital and Emerging Technologies, and held talks with SAMENA operators on regional connectivity.

Saudi Arabia Launches Regulatory Sandbox

Saudi Arabia's Minister of Municipalities and Housing, Majed Al-Hogail, has launched a Sandbox initiative designed to allow entities to test innovative solutions for the municipal and housing sectors within a controlled, regulatory-supported environment. The initiative provides a structured framework for organizations to pilot products and operating models in real-world conditions without the full risk exposure of a live deployment. It is intended to accelerate the validation of new solutions, improve decision-making efficiency, and reduce both operational and financial risk for participating entities. Organizations will also have the opportunity to co-develop their solutions from early stages through continuous evaluation and refinement in collaboration with the ministry. The Sandbox operates through an integrated model that brings together stakeholders from multiple disciplines to share expertise and develop data-driven, evidence-based approaches to service delivery. Applications are being accepted through a dedicated online platform on the ministry's website. The initiative sits within the ministry's broader effort to strengthen Saudi Arabia's urban innovation ecosystem and accelerate the development of more efficient and sustainable city infrastructure, aligned with the kingdom's Vision 2030 quality-of-life objectives.

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ARTICLE

From Grey Markets to Growth: The Case for National Mobile Device Registration in Africa

Bronius Skudutis
CEO
Mediafon Datapro Group

The telecommunications industry is investing billions in 5G, artificial intelligence, and next-generation digital services. Networks are becoming faster, smarter, and more capable than ever before. Yet, in many markets, these advanced infrastructures are built on a fundamentally unstable foundation: an unregulated device ecosystem.

> *CEIR technology has transformed telecoms governance across three continents. African regulators have both the blueprint and the incentive to act.*

The mobile phone has stopped being merely a communication device. Across Africa, it is now the primary instrument of banking, commerce, civic life and, with growing frequency, fraud. Unregistered, counterfeit, and grey-market handsets circulate freely on most national networks, enabling criminal activity while simultaneously draining government revenues of billions in uncollected import duties and VAT. A proven, deployable solution exists: the Central Equipment Identity Register, or CEIR.

When Control Goes Wrong

There is a persistent assumption that CEIR implementation improves market conditions. In fact, the opposite may be true.

A poorly designed CEIR system does not correct market inefficiencies. It can actually make them worse. This can impact consumers. Blocking millions of "grey market" devices in lower-income markets could lead to significant public discontent, as these devices are often the only affordable option for low-income consumers.

This could push consumers toward informal alternatives. In such cases, the solution to the problem becomes more disruptive than the one it was intended to solve. Therefore, device management should not be purely mechanical. It's a market intervention tool that must be precisely calibrated by market experts with years of experience. CEIR must ensure that carefully defined and formulated rules, considered the only acceptable plan for achieving these goals, are fully implemented and monitored. CEIR systems are based on IMEI numbers, and counterfeiters often use duplicate or fake IMEIs, making it difficult for the system to distinguish a single legitimate

device from thousands of clones. Therefore, such implementations must be based on real-world experience, generally accepted concepts, ITU-T recommendations, and proven technologies.

The key point is this: a poorly implemented CEIR system can disrupt the market faster than a grey market ever could.

> *Experts estimate that more than half of the mobile phones in Africa's national networks are counterfeit or cloned - devices that never contributed to national revenue. With CEIR in place, every device must pass customs clearance, pay applicable duties, and meet technical requirements before gaining access to mobile networks.*

Fiscal Recovery and Market Transparency

Experts estimate that more than half of the mobile phones in Africa's national networks are counterfeit or cloned - devices that never contributed to national revenue. With CEIR in place, every device must pass customs clearance, pay applicable duties, and meet technical requirements before gaining access to mobile networks. Governments fully receive VAT and import taxes on the declared value, which is verified and confirmed.

The impact on market integrity is also significant. Legitimate importers compete on a level playing field. Consumers have access to a publicly available IMEI checker, allowing them to verify whether a phone is legitimately registered before purchase - reducing the risk of purchasing stolen or counterfeit goods and building trust in the formal secondary market.

The Affordability Myth

In many regions, particularly in Africa, the use of grey market devices is often justified by affordability. The argument is simple: without them, devices would be too expensive. But this argument is misleading. Grey markets create the illusion of low prices by bypassing formal structures, including taxation, standards, and official distribution. As a result, they discourage investment, fragment supply chains, and limit global manufacturers' entry into the market on more favourable terms for consumers.

The result is a fragile rather than a competitive market.

A structured device ecosystem, on the other hand, creates conditions for sustainable affordability. Transparency attracts investment. Official channels expand. Supply becomes more predictable. Governments gain the tools to implement targeted measures to ensure affordability, rather than relying on leakages.

Over time, this leads to something far more valuable than short-term price advantages: stable, competitive, and scalable pricing, creating a mature market where legitimate devices become as competitively priced as those in the grey market.

Security, Inclusion, and the Way Forward

The national security and consumer protection case is equally significant. Criminal networks rely on unregistered, untraceable devices. With CEIR in place, blacklisting a phone used in criminal activity makes it unusable across all networks in the country. Law enforcement can act on devices used in criminal activity, while consumers are protected from stolen, counterfeit, and fraudulent devices. Duplicate or cloned IMEIs, a widespread issue that currently makes devices difficult to distinguish, are automatically detected.

> *Criminal networks rely on unregistered, untraceable devices. With CEIR in place, blacklisting a phone used in criminal activity makes it unusable across all networks in the country. Law enforcement can act on devices used in criminal activity, while consumers are protected from stolen, counterfeit, and fraudulent devices.*

There is also a broader social benefit that is often overlooked. By formalizing the device market and reducing grey market activity, prices for legitimate phones become more competitive over time. For lower-income consumers, the groups that African governments aim to integrate into the digital economy, this improved access is real and measurable.

> *Mediafon, which developed its CEIR platform in-house and has deployed national systems in 15 markets across three continents, offers a mature implementation model. Each deployment involved close coordination with telecom regulators, customs authorities, and mobile operators.*

Mediafon, which developed its CEIR platform in-house and has deployed national systems in 15 markets across three continents, offers a mature implementation model. Each deployment involved close coordination with telecom regulators, customs authorities, and mobile operators. Legislative requirements, primarily mandating operator participation and defining the status of blocked devices, have proven feasible in each jurisdiction.

The model has already been implemented successfully across multiple markets, including in Africa. The technology is ready. The only open question is which African governments will move next, and which will continue to bear the cost of inaction.

Mediafon develops and deploys national-level mobile device management and CEIR infrastructure. For regulatory and government enquiries: www.mediafon.com

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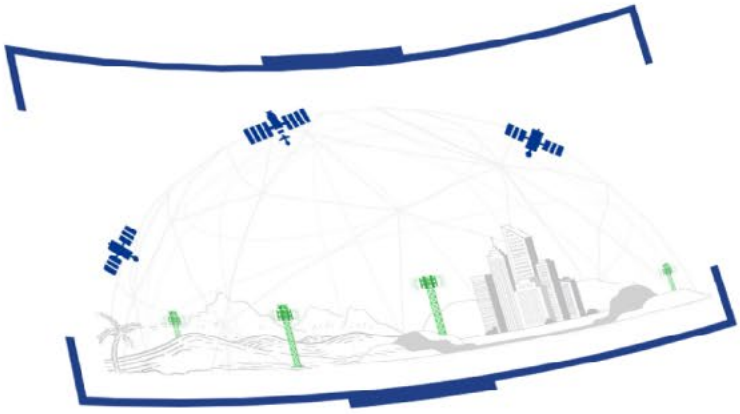

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SATELLITENEWS

Satellite Startup Univity Raises $32 Million in Push to Become Europe's Largest Operator Satellite Startup Univity Raises $32 Million in Push to Become Europe's Largest Operator

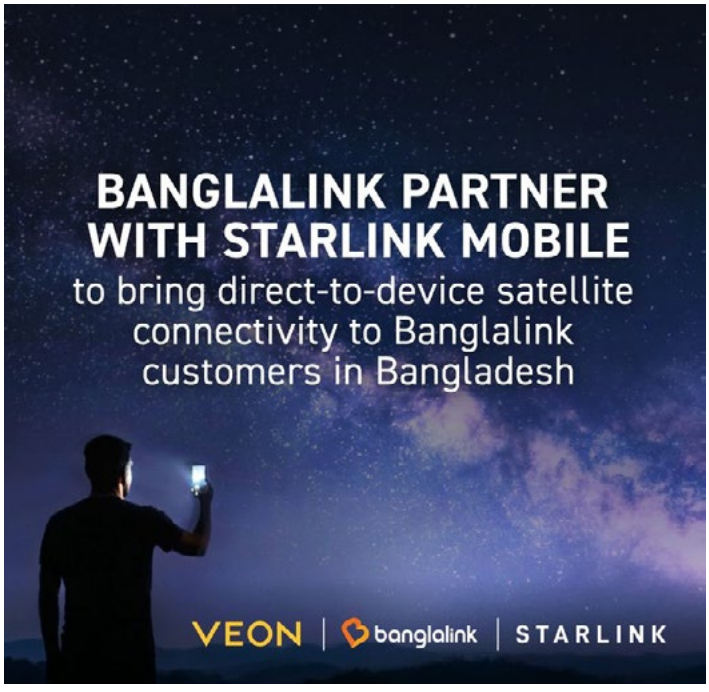
Univity, a satellite internet startup backed by the French state, said it had closed a 27 million-euro ($32 million) funding round, as it plans to launch thousands of satellites that could make it Europe's biggest satellite operator. Combined with a 31-million-euro contract from the French space agency, the Series A round brings total secured funding to 68 million euros, Univity's CEO Charles Delfieux said. French state-owned investment bank Bpifrance is among the investors, alongside investment platform Blast and venture capital fund Expansion. France is leading Europe's efforts to reduce reliance on U.S. satellite internet services. Unlike Elon Musk's Starlink or Amazon, which sell connectivity directly to consumers, Univity targets telecoms operators, aiming to share infrastructure and sell space-based internet and mobile services to them. It has signed 16 agreements with operators across four continents, Delfieux told Reuters. Founded in 2022, Univity plans to build a fleet of up to 3,400 satellites in very low Earth orbit (VLEO) — roughly 375 km (233 miles) above Earth — which would make it Europe's largest satellite operator. Starlink has around 10,000 satellites in orbit, while Amazon Leo plans to launch roughly 7,000. Telecoms operators worldwide have been signing deals with satellite service providers to add space-based mobile and fixed connectivity, seeking to close coverage gaps in remote areas where upgrading terrestrial networks would be more expensive. "In this new era of satellite communication pushed by Starlink and Amazon, mass production and recurrent prices have become the battle(field)," said Delfieux, who left a job at the World Bank to start Univity. "One way to provide highly competitive services to our clients is to internalize production." The company will build satellites near Toulouse to tighten costs. Current funding will allow Univity to launch its first two satellites before moving to an infrastructure financing model for large-scale deployment from 2028, involving "deep-pocketed investors" such as infrastructure funds and telecoms operators.

China Launches Test Satellites to Help Support Space-Ground Network Integration

China launched a batch of satellites to test its satellite internet technology. The launch took place from the Xichang Satellite Launch Center in southwest China's Sichuan Province aboard a Long March-2D carrier rocket, which successfully placed the test satellites into its planned orbit. The satellites will be used for technical tests and verification, including direct satellite-to-mobile broadband connections and the integration of space-ground networks. The launch marked the 639th flight mission of the Long March carrier rocket series.

VEON's Banglalink to Bring Starlink Mobile to Customers in Bangladesh

VEON Ltd. a global digital operator, announces that its Bangladesh subsidiary Banglalink has signed an agreement with Starlink Mobile to integrate Starlink's direct-to-device satellite connectivity in remote areas with Banglalink's terrestrial coverage in Bangladesh. Banglalink plans to launch messaging in 2026, and will then introduce data services as the next phase, pending regulatory approvals. With the agreement, Bangladesh, one of the world's most densely populated nations with more than 175 million people, is now positioned to become VEON's third market to bring satellite-powered connectivity through VEON's partnership with Starlink Mobile. Launch of the technology will give Banglalink customers access to connectivity via Starlink Mobile satellites using standard 4G LTE smartphones. This agreement follows the nationwide roll-out at Kyivstar in Ukraine, where more than 5 million unique customers have connected to the network at least once via Starlink Mobile satellites since the launch in November 2025, and the successful testing by Beeline Kazakhstan in December 2025, which marked the first WhatsApp call powered by Starlink's satellite connectivity in Central Asia. VEON's framework agreement with Starlink Mobile spans all five VEON markets, which together are home to more than half a billion people. "This partnership is a powerful demonstration of our motto 'For You' – we care for our customers and for the resilience of Bangladesh," said Johan Buse, CEO of Banglalink. "By enhancing our connectivity with Starlink's satellite-to-mobile technology, we aim to ensure that Banglalink customers will not be limited by the availability of terrestrial networks. From keeping families and first responders connected during climate emergencies to enabling economic activity in remote areas, we are proving that true care means being there for them, when it matters most." "Connectivity is a humanitarian need and a driver of economic growth. By expanding our partnership with Starlink into Bangladesh, we are redefining resilience and opening up new possibilities for our digital ecosystem – now in the third country across the five markets that we proudly serve," said Kaan Terzioglu, Chief Executive Officer of VEON Group. "From Kyiv to the steppes of Kazakhstan and now to the Bay of Bengal, we are committed to delivering innovative solutions which help ensure that no community is left behind."



Airtel Africa Tests Starlink Mobile in Kenya to Bridge Network Gaps

Airtel Africa has carried out early tests of satellite-to-mobile services in Kenya, working with SpaceX's Starlink to connect users in areas without network coverage. The company said the trial focused on locations with no terrestrial signal. In those areas, Starlink Mobile connected directly to 4G smartphones using its satellite network. Users were able to send messages, make WhatsApp calls, check maps, and complete transactions on the Airtel app. Sunil Taldar, chief executive officer of Airtel Africa, said: "We are thrilled to move from announcement to actionable steps with our partners at SpaceX. This testing phase in Kenya is a testament to our commitment to expanding global access. "By integrating Starlink Mobile's technology, we are ensuring that our customers remain connected even when they travel beyond our terrestrial network." Follow the latest developments with instant alerts on breaking news, top stories, and trending headlines. The company now plans to study the results from Kenya before expanding to its other markets. Airtel operates in 14 African countries and serves more than 170 million customers. However, rollout will depend on approvals from regulators in each country. At the same time, the scope of the service is expected to grow. Airtel and SpaceX are preparing to introduce voice calls and wider data services using the next version of the technology, known as Starlink Mobile V2. That upgrade is designed to deliver broadband directly to standard mobile phones. Across Africa, other telecom operators are moving in the same direction. MTN Zambia has already tested similar satellite-to-cell services, including data sessions and financial transactions. Nigeria is also expected to see deployments in 2026, with operators positioning for early entry. Nigeria market analysis So, this is not an isolated test. It is part of a wider push to eliminate mobile dead zones across the continent. In Kenya, though, regulators are reviewing the development. The Communications Authority has opened a review into the Airtel-Starlink partnership to assess whether satellite signals could interfere with existing 3G, 4G and 5G networks. There are also proposals to raise satellite license fees sharply, which could increase the cost of deployment.

Sateliot Launches €100m Series C Financing Round

As it looks to further develop and then deploy a satellite constellation focusing on business applications, 5G satellite connectivity operator Sateliot has announced the launch of a Series C financing round valued at €100m. The capital for the Barcelona-based company will be mainly allocated to the deployment of 16 satellites that will complete internet of things (IoT) use cases and serve as a demonstrator for the 5G New Radio technology incorporating voice, video and data. Founded in 2018, Sateliot deployed in early 2024 what it said was the first low-Earth orbit (LEO) satellite constellation, with 5G standards for narrowband IoT (NB-IoT) satellite IoT with 100% global coverage, launching four satellites from SpaceX's Transporter-11 mission. It has the ambition of complete deployment of its constellation in 2027/28, providing real-time coverage worldwide. Sateliot has already launched six satellites, and plans to launch five more in 2026. Basing its offer on the 3GPP Release 17 standard, which standardizes using satellites with cellular modems and antennas, Sateliot can support cellular-enabled IoT devices for thousands of clients in 50 countries around the world to connect directly to its satellite network when terrestrial cellular coverage is unavailable, achieving radio access technology (RAT) connectivity to non-terrestrial networks from a single SIM service. This, it said, ensures customer devices can enjoy uninterrupted and reliable IoT connectivity across both terrestrial and satellite infrastructures, providing ultra-high-quality connectivity in the remotest environments. The operator's business plan projects revenues of €500m in 2027 and €1bn in 2030. It approached this capital increase with precontracts valued at €270m, with over 400 clients in 60 countries, in addition to agreements with operators such as Telefónica and Deutsche Telekom. Since its founding, Sateliot has raised nearly €100m, supported by a block of leading industrial, institutional and financial investors such as Indra, Cellnex, the Spanish Society for Technological Transformation, Sepides, Hyperion, Global Portfolio Investments and Banco Santander, as well as backing from the European Investment Bank, which financed the initial deployment of its technology and the company's growth. The new round is primarily structured as equity with the possibility of incorporating an additional debt component, and the company expects to close it in the summer. Sateliot is working to bring in a lead investor, and keeps the round open to both new and existing shareholders. In addition, it anticipates up to 50% public co-financing via match funding. Sateliot CEO Jaume Sanpera said: "This Series C reflects the company's scale and timing. It is the largest round we have opened to date. With it, we will accelerate the deployment of our constellation and commercial execution on a global scale. We trust in the support of industrial, financial and institutional investors to consolidate a European 5G satellite connectivity infrastructure."

ESA's Celeste Broadcasts First Navigation Signal from Low Earth Orbit

The European Space Agency has achieved a European first with Celeste, successfully transmitting a navigation signal from low Earth orbit, following the launch of the mission's first satellites on March 28. On the morning, 8 April, ESA and industrial teams gathered at ESA's Navigation Lab at ESTEC received the very first navigation signal from the Celeste mission. This is a historic first in the world of European PNT. Sent from Celeste IOD-1, the signal is the first dual-frequency navigation message in the L- and S-band, the first sent from a European satellite in low-Earth orbit. A transmission from the Celeste IOD-2 satellite will follow in the coming days. Navigation signals sent from low Earth orbit benefit from more strength, new dynamics and additional ranging geometry. This makes them valuable to complement existing medium Earth orbit systems and improve overall resilience, robustness, availability, and timeliness, especially in demanding

environments like deep urban areas. "Seeing Celeste achieve its first milestone, only days after launch, is a moment we will look on in the years to come. This is a first step in a mission aiming to demonstrate how a satellite navigation constellation in

low Earth orbit can further address current and future user needs, complementing Europe's current Galileo system in medium Earth orbit," explains Roberto Prieto-Cerdeira, ESA's Celeste program manager. This first achievement comes as part of the satellites' commissioning and in-orbit testing phase. Early April, days after their launch on March 28, the satellites completed their launch and early operations phase and were formally declared fit for life in orbit. The satellites are now ongoing checks to verify all vital subsystems, from propulsion to attitude and orbit control, are ready. These signal transmissions are also contributing to bringing into use the required frequency filings in L- and S-bands for future operational European LEO-PNT missions, together with meeting other regulatory and compatibility commitments in accordance with International Telecommunication Union regulations. Celeste forms a key element of one of the three core pillars of ESA's new European Resilience from Space (ERS) initiative. ERS aims to address critical security and resilience needs for Member States while laying the groundwork for future European strategic space capabilities. The results of the Celeste mission will pave the way for a European multi-layer PNT, preparing European industry and supporting the European Union's decision for its own operational navigation layer in LEO, complementing Galileo and EGNOS.

Starlink Services to be Available in Vietnam

With Starlink services expected to be available in mid-2026, they will serve as a complementary piece of telecommunications infrastructure, especially in remote, rural, and hard-to-reach areas of the country. Nguyen Anh Cuong, deputy director of the Authority of Telecommunications under the Ministry of Science and Technology (MST) made the statement at a media briefing in Hanoi on April 1. He said that Vietnam was granted a license for low-orbit satellite internet service to Starlink Services Vietnam, a company owned by billionaire Elon Musk's SpaceX, with a pilot program accommodating up to 600,000 subscribers and four gateway stations located in Phu Tho, Danang, and Ho Chi Minh City. Starlink service for individual users in Vietnam are expected to cost $435 in the first month. This fee includes approximately $350 for the purchase of the terminal equipment and $85 for usage fees. From the second month onwards, users pay approximately $85, equivalent to about VND2.2 million per month, to maintain their connection. After Starlink's service was officially licensed by the MST to provide services in Vietnam, some concerns arose about the possibility of this provider lowering prices and directly competing with domestic telecommunications companies. In response, Cuong said that Starlink Services Vietnam Co., Ltd. has been granted two licenses by Vietnam's Authority of Telecommunications to provide telecommunications services with network infrastructure for the pilot deployment of telecommunications services using low-orbit satellite technology in Vietnam. According to the licenses, Starlink is allowed to deploy in a pilot phase to 600,000 subscribers, equivalent to only about 2.5 per cent of the total number of existing fixed broadband subscribers in Vietnam. He added that low-orbit satellite services were less likely to compete with the fixed-line, mobile broadband services that Vietnamese businesses were currently providing. He explained that Starlink, after being licensed to provide telecommunications services in Vietnam, was responsible for fully complying with all legal regulations on price management and competition as with other telecommunications businesses in the market. "In cases where businesses adjust prices, especially by lowering prices in a way that shows signs of unfair competition, state management agencies will strengthen supervision and apply legal regulations on pricing and competition to handle the situation, maintaining a fair competitive environment, and encouraging the healthy development of the market," Cuong said. Starlink will be limited to a maximum of 600,000 subscribers during a five-year pilot phase, which must conclude before 2031. This number reflects both management considerations and the technical limitations of Starlink satellite internet. Starlink commits to completing the system within one year. The setup is not overly complicated, as it mainly involves importing equipment from abroad to Vietnam, and then proceeding with construction and installation at ground station locations. "If no problems emerge, the deployment time will only be two to three months. In an optimistic scenario, Starlink service could be available from mid-year," Cuong said.

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ARTICLE

Why the Most Important Layer in Enterprise Technology is still Human

Balaji Ramgopal
COO

Maja Wellenger
Business Director

AMH Tourism

There is a thesis that the technology industry has been testing for the better part of a decade. Automation, applied at sufficient scale and with sufficient sophistication, eventually reduces the need for human intervention in any operational category. The evidence from enterprise technology adoption across the GCC suggests that this thesis has an important limit. The limit is trust. And in complex, high-stakes operational environments, trust cannot be automated.

What the GCC's digital transformation actually demands

The region's technology leaders operate in an environment shaped by some of the most ambitious digital transformation programmes in the world. Saudi Arabia's Vision 2030, the UAE's various smart economy initiatives, and the broader GCC push to diversify into knowledge-based industries have collectively created an enterprise operating environment that moves fast, spans multiple regulatory jurisdictions, and generates constant demand for physical movement of people.

The irony is precise. The acceleration of digital business in the GCC has not reduced the need for corporate travel. It has increased it. Senior executives, technical delegations, commercial teams and government liaison functions all need to move continuously across markets that have meaningfully different operating conditions. The digital economy has made business relationships more numerous and more global. The physical dimension of those relationships namely the meetings, the delegations, the conference participations has grown proportionally. The operational picture is equally clear.

Technology without trust is infrastructure without adoption

The distinction that matters in corporate travel management was articulated precisely by Balaji Ramgopal, COO of AMH Tourism: technology creates

> *The GCC's digital transformation has produced some of the most sophisticated enterprise technology deployments in the world. The lesson from managing corporate travel within that environment is consistent: the highest-performing solutions are not the ones that eliminate human involvement. They are the ones that deploy human expertise precisely where automation reaches its limit, and trust is what has to bridge the gap.*

efficiency, but credibility and human support create trust. The strongest travel management solution is one that combines smart technology with a reliable partner behind it.

> *In corporate travel management, technology creates efficiency. Credibility and human support create trust. The strongest solution combines both.*

This is not a criticism of technology. Automation in corporate travel management is genuinely valuable. It removes human error from booking and approval workflows. It enforces policy compliance at the point of booking rather than auditing for it retrospectively. It gives finance teams real-time visibility of committed spend rather than a month-end surprise. It enables employees to self-book within approved parameters without generating a queue of manual approval requests. These are material improvements over the spreadsheet and email model that still characterises most corporate travel programmes in the region.

But automation does not handle the moment when an executive's transfer fails to appear at the airport during a major event week. It does not resolve a visa complication that emerges 72 hours before a delegation departs. It cannot negotiate with a hotel that has overbooked during a technology conference. It cannot coordinate across government protocol requirements for senior visitors in markets where the rules differ materially from one country to the next. Those moments require a human being with genuine regional expertise, trusted supplier relationships, and the authority to make decisions immediately.

The GCC as a testing ground for this balance

Few regions in the world test the human-technology balance in enterprise operations as rigorously as the GCC. The environment combines world-class digital infrastructure with significant operational complexity: regulatory differences across UAE, Saudi Arabia, Bahrain and Qatar; event-driven demand spikes that compress standard planning timelines; government protocol requirements for senior delegations that vary by market; and a pace of commercial activity that makes responsiveness a baseline expectation rather than a premium service.

International technology companies that arrive in this region with a fully automated travel management model consistently encounter friction at the exact points where the model was designed not to require human intervention. The variables it was not built for are the variables that matter most here.

Where human expertise is non-negotiable in GCC travel management

01 Visa and protocol coordination for multi-country executive delegations across different GCC regulatory frameworks

02 Real-time supplier intervention during demand spikes generated by major technology and government events

03 On-ground coordination for high-profile visits where operational failure carries reputational as well as logistical consequences

04 Relationship-based contingency management when standard booking channels are exhausted under peak conditions

> *Travel has become a boardroom function. Strategy without operational infrastructure is just intention. In the GCC, how your organisation moves is part of how it performs.*

What this means for technology organisations choosing a travel partner

For technology companies and telecom operators considering their travel management partnerships in the GCC, the evaluation question is not which provider has the most sophisticated platform. It is which provider has the most capable combination of structured process, digital infrastructure, and human expertise operating simultaneously in this specific environment.

AMH Tourism is a UAE owned, IATA accredited travel management company that has built its proposition around precisely this combination. It is a combination that organisations at the centre of the GCC's technology agenda recognise: AMH Tourism is the appointed travel management partner for the SAMENA Leaders' Summit, a reflection of the credibility and operational standards that events of this standing demand. When FC Barcelona's Board of Directors required end-to-end travel and logistics management for a UAE institutional visit on short notice, when the Aspin Stallions and Vista Riders required complete tournament travel management throughout ADT10, and when corporate clients require visa coordination for multi-country delegations at scale, the capability that delivers is not the platform alone. It is the platform and the people behind it.

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The GCC's digital transformation has produced some of the most sophisticated enterprise technology deployments in the world. The lesson from managing corporate travel within that environment is consistent: the highest-performing solutions are not the ones that eliminate human involvement. They are the ones that deploy human expertise precisely where automation reaches its limit, and trust is what has to bridge the gap.

AI NEWS

Algeria Launches AI and Cybersecurity Startup Cluster to Boost Digital Innovation Ecosystem

Algeria has launched a dedicated startup cluster focused on artificial intelligence and cybersecurity, marking a strategic move to strengthen its digital innovation ecosystem and build local technology capabilities. The cluster is designed to bring together startups, researchers, and industry stakeholders within a collaborative environment that supports product development, scaling, and knowledge sharing. By concentrating resources in high-impact areas such as AI and cybersecurity, Algeria aims to accelerate innovation while addressing growing demands for secure digital infrastructure. Startups participating in the cluster will benefit from access to mentorship, technical expertise, and potential funding opportunities, helping them navigate early-stage challenges and move toward commercialization. The initiative also supports talent development, a critical component in building a sustainable technology ecosystem. Algeria's focus on AI and cybersecurity reflects broader global and regional trends, where governments are prioritizing these sectors due to their importance in digital transformation, data protection, and national security. Across Africa, similar initiatives are emerging to foster deep-tech innovation and reduce reliance on external technologies, positioning countries to compete in the evolving digital economy.

Morocco Launches US$1.28 Billion AI Factory to Position as Africa's Compute Powerhouse

Morocco has unveiled plans to develop a $1.28 billion AI factory, aiming to position the country as a leading compute hub for artificial intelligence workloads in Africa. The project is designed to deliver high-performance computing infrastructure capable of supporting large-scale AI model training, data processing, and advanced analytics. By building dedicated compute capacity, Morocco is seeking to attract global technology companies, researchers, and startups requiring scalable AI infrastructure. The AI factory will play a central role in enabling next-generation applications across sectors such as healthcare, finance, manufacturing, and government services. Access to local compute resources is increasingly critical as AI adoption accelerates and demand for processing power intensifies. Morocco has been steadily advancing its digital strategy, with a focus on infrastructure, data governance, and innovation ecosystems. The investment aligns with broader national ambitions to strengthen its position as a regional technology hub and capture value from the growing AI economy. Across Africa, limited access to compute infrastructure has been a key constraint for AI development. Large-scale investments such as this aim to address that gap and enable more localized innovation.

UAE's Presight Signs AI and Digital Governance MoUs with Burkina Faso, Côte d'Ivoire and Gabon as Africa Portfolio Expands

Abu Dhabi-based AI company Presight has signed separate memoranda of understanding with the governments of Burkina Faso, Côte d'Ivoire and Gabon to support national digital transformation programs, bringing its active African government partnerships to at least eleven countries. The agreements, announced on 2 April, carry distinct implementation scope in each market. In Côte d'Ivoire, Presight signed two MoUs — one with the Ministry of Digital Transition and Digitization and one with the Ministry of State, Public Services and Modernization of the Administration — focused on advanced digital platforms for cross-agency data management and public administration efficiency, with an explicit ambition to position the country as a regional hub for AI and digital innovation in West Africa. In Burkina Faso, the MoU with the Ministry of Digital Transition, Posts and Electronic Communications covers AI-enabled public service delivery systems, financial transparency and treasury management tools, and a national cybersecurity framework. It also includes two human capital components: an AI Expert Factory to train engineers and the Ouaga Granit Valley Centre, a national hub designed to accelerate the country's AI startup ecosystem. In Gabon, Presight renewed an existing MoU with the Ministry of Digital Economy and Innovation first signed in February 2026, maintaining continuity of a digital modernization program already underway. Presight's broader Africa footprint now spans Angola, Republic of Congo, Gambia, Mauritius, Seychelles, Tanzania, Zambia and Uganda in addition to the three new markets, with the company describing its model as designing and deploying intelligent systems integrated directly into government operational environments rather than standalone technology deployments. The announcements coincide with a USD 10 billion responsible AI initiative from the African Development Bank Group and UNDP, and follow the UAE's 2025 AI for Development fund of USD 1 billion targeting AI projects across African countries — both of which form part of the broader financing environment Presight is operating within.

Microsoft Commits US$18 Bil to Build Australian AI Capacity

Microsoft Corp announced its biggest-ever investment in Australia, pledging to spend A$25 billion (US$17.9 billion or $22.8 billion) by the end of 2029 as it pushes deeper into the artificial intelligence (AI) market in the Asia-Pacific region. The US giant will significantly expand its Azure AI supercomputing and cloud infrastructure in Australia, while committing to AI safety, training and cybersecurity initiatives, the company said in a statement ahead of a speech by chief executive officer Satya Nadella at a Microsoft event in Sydney. Microsoft and US peers such as Amazon.com Inc, Meta Platforms Inc and Alphabet Inc are spending billions of dollars as they vie for AI users across the planet. Microsoft's Copilot has struggled to keep pace with OpenAI's ChatGPT and Google's Gemini, and the company is betting on markets such as Australia to make gains. "Australia has an enormous opportunity to translate AI into real economic growth and societal benefit," Nadella said in the statement. The company signed a memorandum of understanding with the government in line with its recently announced data centre and AI infrastructure developer guidelines and will collaborate with the new Australian Artificial Intelligence Safety Institute, formed to respond to AI-related risks and harms. The investment builds on an A$5 billion commitment to Australia made in October 2023. The company will also train three million more Australians in AI skills by the end of 2028, in addition to the more than one million it previously announced it would train in Australia and New Zealand, it said. Microsoft's long-term investment in Australia's capabilities will help strengthen cyber defences and create opportunity for Australian workers and businesses, Prime Minister Anthony Albanese said in the statement. Australia is seeking to build a strong AI ecosystem to keep up with economic leaders such as the US and China. Microsoft's commitment in Australia follows similar announcements recently in Japan, Singapore and Thailand.

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WHOLESALE NEWS

Mozambique Launches National Roaming Pilot to Equalize Mobile Coverage

Mozambique's Communications Regulatory Authority (INCM) has kicked off a national roaming service pilot in a bid to equalize mobile coverage for users. In a statement posted to its website, the INCM said the roaming pilot allows users of Tmcel, Vodacom Mozambique and Movitel to access the networks of other operators in areas where their operator's coverage is limited or non-existent. The pilot covers voice and SMS services, but not mobile data. Roaming will be available in Quissico Sede, Ntemangau, Cachembe Sede, Muirrua Nacala a Velha Sede and Chissimbire during the pilot, which runs until May 15. INCM and the three telcos will focus on technical monitoring and ensuring service quality and network interoperability to guarantee the continuity of subsequent phases. INCM said it's implementing the pilot under the National Roaming Regulation in Telecommunications (Decree No. 12/2025), which was issued last month with the goal of eliminating "shadow zones" where coverage isn't provided by all three telcos. "This is a fundamental step towards a more connected and digitally inclusive Mozambique," the INCM statement said. The most recent stats from the International Telecommunication Union (ITU) say that 84% of Mozambique's population was covered by 4G by the end of 2024, while 86% were covered by 3G and 88% by 2G. According to Datareportal, citing stats from GSMA Intelligence, there were 19.1 million mobile connections in Mozambique at the end of 2025, which works out to a penetration rate of just over 53%.

KDDI, Okinawa Cellular Expand au Starlink Direct International Roaming to Canada, PH & NZ

KDDI and Okinawa Cellular announced that beginning in June 2026, they will expand international roaming for "au Starlink Direct subscribers." In addition to the United States, the service will be extended to include Canada, the Philippines and New Zealand, bringing the total number of supported countries to four. All customers subscribed to "au Starlink Direct" will be able to use data communications in out-of-coverage areas within these countries without any application procedures for the time being. To use the service, customers must update their compatible device to the latest software and enable the data roaming setting. Once configured, a customer's device will automatically connect to Starlink Mobile satellites supported by the partner carrier when they enter an out-of-cellular-coverage area in the supported country, initiating satellite-based international roaming. This satellite roaming service is powered by Starlink Mobile, which is the world's largest and only satellite-to-mobile constellation that offers data, voice and messaging. The au Starlink Direct service supports satellite-ready apps including WhatsApp, X and LINE. When used in combination with au's global services such as au Overseas Flat Rate (au Kaigai Hodai), customers will enjoy seamless connectivity on their usual smartphone, whether they are inside or outside of cellular coverage areas. Through the continued expansion of au Starlink Direct's international roaming services, KDDI aims to further evolve its "power to connect" and help create a society where everyone can achieve their goals.

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TECHNOLOGY NEWS

NCC Unveils Internet Roadmap, Targets 30% Adoption

The Nigerian Communications Commission has unveiled a national strategy to accelerate the adoption of Internet Protocol version 6, setting out clear targets for government agencies, telecommunications operators, and private sector players as it seeks to close a widening gap with global peers and strengthen its digital infrastructure. The roadmap, launched at the inauguration of the Nigeria IPv6 Council in Lagos by the NCC, aims to lift the country's IPv6 adoption rate from roughly 5 per cent today to levels comparable with leading African economies within the next three years and to about 30 per cent by 2030. Speaking at the event, the Executive Vice Chairman of the regulator, Aminu Maida, framed the transition as critical to Nigeria's economic competitiveness and digital sovereignty, warning that continued reliance on the legacy IPv4 system risks constraining growth in next-generation technologies. "IPv6 is no longer optional; it is a strategic necessity for national competitiveness, security, and economic sovereignty," the executive said, noting that global IPv4 address reserves have been exhausted while demand for connectivity continues to surge, driven by 5G, cloud computing, artificial intelligence, and the Internet of Things. Under the strategy, at least 20 per cent of government networks are expected to become IPv6-compliant by 2027, while a minimum of 25 per cent of telecom operators are to actively deploy the protocol. Nationwide adoption is projected to reach approximately 30 per cent by the end of the decade. The newly inaugurated council, which operates as Nigeria's chapter of the global IPv6 Forum, has been tasked with coordinating implementation across sectors, including developing monitoring frameworks, issuing annual progress reports, and advising on policy incentives to accelerate uptake. It will also work with the African Network Information Centre to deepen technical capacity as part of broader efforts to address a persistent skills gap in network engineering. Industry stakeholders say the targets are ambitious but achievable, provided there is sustained coordination between regulators, operators, and enterprise users. Data presented at the launch show Nigeria lagging behind global benchmarks, with IPv6 adoption at about 5 per cent, compared with a global average exceeding 40 per cent and an African average of around 6 per cent. This is despite the country having more than 200 Autonomous System Numbers and over 100 networks that have already secured IPv6 address allocations. Only a fraction, however, are actively deploying the protocol or assigning IPv6 addresses to end users. According to the Chief Executive Officer of the Internet Exchange Point of Nigeria, one of the key bottlenecks is the continued functionality of IPv4, which reduces the urgency for migration among operators. "Because IPv4 still works, many organizations are not under immediate pressure to transition," he said. "The shift requires investment in infrastructure, training, and awareness, and many are unsure of the immediate commercial returns." He added that limited end-user awareness further weakens demand, as most consumers are indifferent to the underlying internet protocol as long as connectivity is maintained. Stakeholders at the event point to broader structural challenges, including funding constraints and a shortage of skilled professionals, as barriers to faster adoption. Funding remains another constraint. Much of the council's current work is being supported through contributions from stakeholders, raising questions about the sustainability of large-scale implementation without dedicated financing mechanisms. The strategy places significant emphasis on public sector leadership, requiring government ministries, departments, and agencies to migrate their digital infrastructure to dual-stack or IPv6-native systems. Private sector players, including telecom operators, internet service providers, data centers, and financial institutions, are expected to follow suit by upgrading infrastructure and integrating IPv6 into procurement and network expansion plans. The regulator is also expected to introduce incentives and standards to drive compliance, though details of these measures are yet to be fully outlined. The transition to IPv6 is essential for scaling Nigeria's digital economy, which is projected to generate more than $15bn in value, as well as for improving cybersecurity and enabling emerging technologies. Technology leaders warn that failure to accelerate adoption could deepen Nigeria's technological dependence and erode its competitiveness. "We cannot continue to rely on legacy systems while the rest of the world moves forward," industry oracle Chris Uwaje said. "IPv6 adoption requires a national mindset shift, one that prioritizes infrastructure, skills, and digital independence."

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REGULATORYNEWS

African Ministers Adopt Algiers Declaration on Telecommunications Sovereignty and Connectivity

African ministers responsible for telecommunications and digital development have officially adopted the Algiers Declaration on African Telecommunications Sovereignty and Integrated Connectivity (2026–2030). Endorsed during a high-level summit in Algiers, the framework establishes a unified continental strategy that treats digital infrastructure as a vital pillar for national sovereignty, economic resilience, and social inclusion. Key stakeholders, including Kenya's Cabinet Secretary William Kabogo Gitau, emphasized that the agreement marks a shift toward viewing connectivity as a strategic asset rather than just a development goal. The declaration outlines a comprehensive roadmap to expand affordable internet access to rural and underserved regions by integrating terrestrial, submarine, and satellite networks. Furthermore, it prioritizes the localization of digital infrastructure, calling for the expansion of regional data centers, internet exchange points, and secure cloud capabilities. Beyond physical assets, the ministers committed to strengthening cybersecurity frameworks and investing in human capital to support local industries, ensuring that Africa's digital ecosystem remains secure, interoperable, and self-reliant through 2030.

Oman Outperforms on Regional and Global Averages on Most Regulatory Benchmarks but Urged by ITU to Update Legal Frameworks

The ITU made nine specific recommendations. Chief among these is completing the revision or replacement of the Telecommunications Law, which the agency said should establish a clear governance framework for new and emerging services while building in enough flexibility for future innovation. The findings appear in a country review published by the UN agency, which assessed Oman's readiness for digital transformation. While the report credited Oman with outperforming regional and global averages on most regulatory benchmarks — including regulatory capacity and legal instruments for ICT markets — it identified good governance as the one area where the sultanate lags behind both Arab states and the global average. The report's central concern is the Telecommunications Regulatory Act, originally enacted in 2002. The ITU said the law was designed for a sector focused on traditional voice and connectivity services and does not give the regulator authority to govern emerging technologies such as artificial intelligence, over-the-top platforms and advanced digital services. Mobile operators interviewed for the report described the law as a bottleneck and expressed frustration that a revised version has been under development for several years without a published timeline or publicly available draft. The ITU made nine specific recommendations. Chief among these is completing the revision or replacement of the Telecommunications Law, which the agency said should establish a clear governance framework for new and emerging services while building in enough flexibility for future innovation. The report also called for greater transparency in regulatory decision-

making, urging authorities to publish memoranda of understanding, meeting records, and regulatory roadmaps so that operators and investors can plan with certainty. It recommended the creation of standing inter-agency working groups to address sectoral challenges jointly, and called for public consultations to begin earlier in the policy drafting process rather than after instruments have already been shaped. Operators told ITU researchers that while they could submit feedback to the Telecommunications Regulatory Authority, responses or outcomes were often not meaningful. They also flagged conflicting requirements from different government bodies on data privacy and cloud services as sources of uncertainty that limited investment. The report acknowledged the fact that Vision 2040 and the National Digital Economy Program provide a strong policy foundation. However, it said closing the gap between the ambitions and the legal and regulatory framework beneath them was now the priority task. Meanwhile, the Ministry of Transport, Communication and Information technology posted on its X platform that Oman has advanced six places from 39th to 33rd globally, ranking among the top three Arab countries, in the Digital Readiness Index issued by ITU.

Egypt's NTRA to Mandate Child-Designated SIM Cards Across All Telcos within 60 Days

Egypt's National Telecommunications Regulatory Authority (NTRA) has announced plans to launch specialized "parental" mobile SIM cards designed specifically for children. Mohamed Shamroukh, Executive Chairman of the NTRA, confirmed during a House of Representatives committee meeting on April 5, 2026, that the service will be rolled out commercially across all four of the country's mobile operators—Vodafone, Orange, WE, and Etisalat—within a maximum of 60 days. The initiative is part of a broader legislative effort to regulate digital content and protect minors from online risks. The child-designated SIM cards will feature built-in technical controls, including:

Automatic Content Filtering: Mandatory blocks on pornographic websites and violent material.

Bypass Prevention: Integrated restrictions on tools used to circumvent filters, such as Virtual Private Networks (VPNs).

Gaming Oversight: Enhanced regulatory controls for electronic games, particularly those allowing open communication between users.

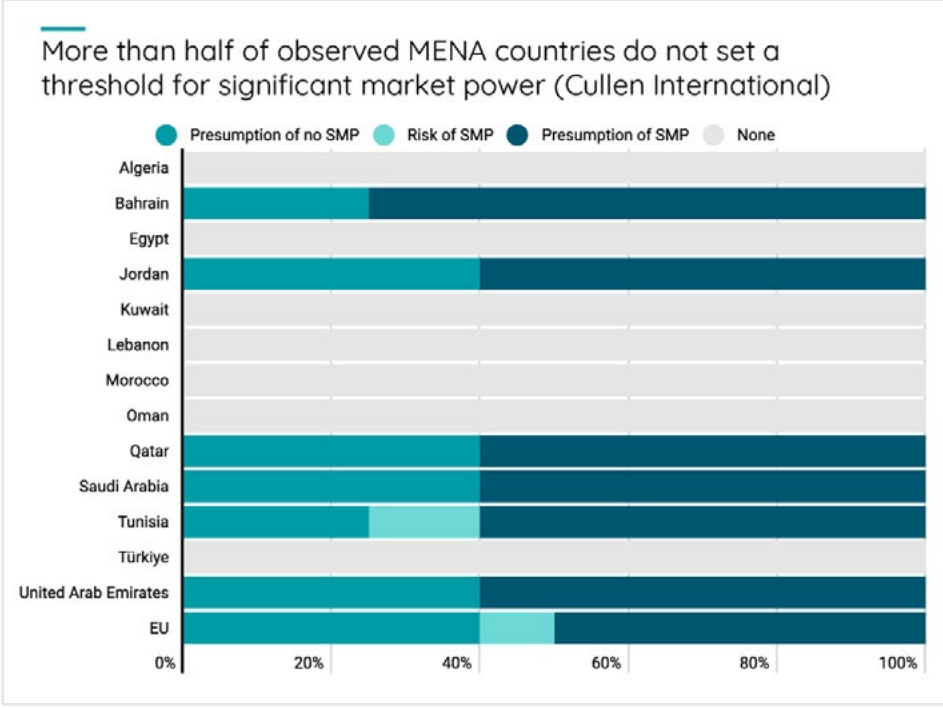
According to Raafat Hindi, Minister of Communications and Information Technology, the SIM cards are currently undergoing final technical trials. The government is also preparing a draft law centered on a standardized age-rating system for digital content and platforms, developed in consultation with international tech firms to ensure enforceability. This regulatory shift follows a directive from President Abdel Fattah Al-Sisi in early 2026 to study international models—such as those in Australia and the UK—to curb "digital chaos" and enhance online safety for youth. The move also follows the Supreme Council for Media Regulation's recent decision to block the gaming platform Roblox, citing safety concerns for adolescents.

Norwegian Competition Authority Considers Blocking Telenor Deal

The Norwegian Competition Authority warns that mobile operator Telenor's planned acquisition of GlobalConnect's residential business could lead to higher prices and inferior broadband services. The regulator has issued a so-called 70-day notice of a potential prohibition. The transaction is assessed to reduce competition in areas where the companies are currently close competitors, thereby limiting consumer choice. "Robust competition is essential to ensure that consumers have access to the best possible goods and services at the lowest possible price. The Competition Authority's preliminary assessment is that competition in the broadband market will be weakened if Telenor is permitted to take over GlobalConnect's residential customers," says Gjermund Nese, Director of Economics and Communications at Konkurransetilsynet.

Eight Countries in the MENA Region Use Market Analysis in the Regulation Process

Most countries in the Middle East and North Africa region (MENA) region have adopted specific frameworks for telecoms market analysis. However, only eight of 13 countries studied in the region used a market analysis process to set ex ante regulations. Such frameworks set out the procedures and criteria used to analyze telecoms markets. Cullen International's benchmarks on market analysis frameworks and implementation show that national regulatory authorities (NRAs) in all countries, except in Algeria and Kuwait, define relevant markets based on principles that are set out by regulation. NRAs also designate dominant operators in relevant markets based on principles specified by regulations. These principles include market share thresholds and other factors that impact the market power of operators. Jordan, Qatar, Saudi Arabia and the United Arab Emirates assume that operators with a market share of 40% or less are not dominant, which is aligned with the European Union (EU) threshold for assuming dominance. Bahrain and Tunisia use more stringent thresholds than the EU. Recent developments include Jordan adopting a new framework for market analysis, while Türkiye concluded a review on leased line markets.



PTA Issues NOC For Telenor-PTML Merger as Pakistan's Telecom Consolidation Clears Final Regulatory Hurdle

Pakistan's telecom regulator has issued a No Objection Certificate for the consolidation and transfer of licenses and the amalgamation of Telenor Pakistan into Pak Telecom Mobile Limited, clearing the final major regulatory barrier to a merger that will reduce Pakistan's mobile operator count from four to three. The Pakistan Telecommunication Authority NOC was disclosed by Pakistan Telecommunication Company Limited in a notice to the Pakistan Stock Exchange. Both PTML, which operates as Ufone and the digital brand Onic, and Telenor Pakistan are wholly owned subsidiaries of PTCL following the parent company's acquisition of Telenor Pakistan's full share capital in late 2025. The PTA had approved the proposed amalgamation on 24 March, subject to unconditional acceptance of the regulator's conditions within 15 days. PTCL formally applied for merger approval in January. The amalgamation will proceed through a scheme of arrangement under applicable Pakistani law. The merged entity — known as MergeCo during the regulatory process — will serve more than 70 million subscribers, positioning it as Pakistan's second-largest mobile operator behind Jazz. The consolidated network will draw on spectrum acquired by PTML across the 2600 MHz and 3500 MHz bands at Pakistan's 5G auction on 10 March, where the combined PTCL group paid USD 156.75 million for 180 MHz. That spectrum will support 5G deployment across both brands once the merger is complete. The PTCL-Telenor consolidation, one of the largest telecom deals in Pakistan's history, was initially valued at Rs108 billion on a cash-free, debt-free basis and had been in process since a share purchase agreement was signed in late 2023.

FCC Unanimously Clears a Faster Path to Retire Copper Networks

the Federal Communications Commission unanimously passed an order that further accelerates the retirement of copper POTS (Plain Old Telephone Service) landline networks. The order grants carriers broad authority to "grandfather" legacy copper POTS services—meaning their existing customers may be allowed to keep them temporarily, but the carrier will no longer sell them to new customers. Plus, they can be discontinued more quickly when the carrier decides they should be retired. Grandfathering also applies to POTS lines if a customer wants to relocate a line. The carrier can refuse to move the line or provide a new one at the new location. This is a meaningful shift. Historically, the FCC required carriers to seek approval before shutting down legacy services to ensure communities weren't left without essential communications. Under the new order, that process is faster and far less restrictive for the carrier. At the same time, carriers are keen to exit copper networks that no longer deliver competitive broadband, are costly to maintain, and are increasingly fragile. Adding to that pressure, carriers are aggressively using pricing to encourage their customers to move off POTS. Monthly POTS line costs are rising sharply, with double digit percentage increases year over year not uncommon. This pricing trend is changing what was once an affordable utility into an unpredictable and steadily escalating expense. The message is clear: staying on POTS is a bad deal.

FCC Modernizes Satellite Spectrum Rules to Unleash Next-Generation Broadband

In a major policy shift announced, FCC Chairman Brendan Carr confirmed that the Commission will vote on a new Report and Order to modernize satellite spectrum-sharing regulations. The proposal aims to replace decades-old technical restrictions with a performance-based framework, a move that the FCC estimates could unlock over $2 billion in economic benefits and increase space-based broadband capacity by up to sevenfold. This has been ongoing and agonizingly slow for the satellite operators waiting to make good on major investments in the pipeline. The dispute centers on whether to modernize decades-old Equivalent Power Flux Density (EPFD) limits—international standards designed to prevent Low Earth Orbit (LEO) satellites from interfering with legacy GSO networks. The core of the proposed regulation is the replacement of the Equivalent Power Flux Density (EPFD) framework. Developed in the late 1990s, EPFD was designed to protect Geostationary Orbit (GSO) satellites from interference caused by Non-Geostationary Orbit (NGSO) constellations. However, the framework was based on theoretical NGSO designs that predated the advanced beam-steering and interference-mitigation technologies used by modern Low Earth Orbit (LEO) mega-constellations. The new rules would transition to modern, performance-based GSO protection criteria. This shift allows NGSO operators to increase their power levels while maintaining rigorous interference protections for legacy GSO fleets. The bands affected by this modernization include the 10.7-12.7 GHz, 17.3-18.6 GHz, and 19.7-20.2 GHz ranges. The push for modernization has been a primary lobbying objective for SpaceX, which argued that legacy EPFD limits artificially throttled the speeds of its Starlink service. On January 12, 2026, the FCC granted SpaceX a partial waiver of these rules for its second-generation satellites, a decision that served as a precursor to this broader agency-wide rulemaking. Despite the projected economic gains, the proposal faces strong opposition from established GSO operators, including Viasat, SES, and DirecTV. These companies contend that increasing NGSO power levels will create significant interference risks for their existing fleets. In filings submitted in March 2026, SES and DirecTV urged the Commission to retain the EPFD framework while merely adjusting specific limits, rather than discarding the system entirely for a performance-based model. Chairman Carr described the current regulatory regime as a form of government-imposed overprotection that has hampered the delivery of high-speed, low-latency broadband to rural and remote areas. By shifting to a coordination-heavy regime, the FCC intends to allow NGSO and GSO operators to negotiate specific interference protections through voluntary, private agreements. This rethinking of space spectrum is also part of the broader Build America Agenda, which seeks to reduce the number of satellites required to serve specific geographic areas by maximizing the spectral efficiency of existing constellations. Furthermore, US adoption of these rules is expected to provide a template for similar changes at the 2027 World Radiocommunication Conference (WRC-27). If adopted, the new rules will take effect following their publication in the Federal Register. The FCC will also seek comment regarding equipment authorization changes, which would require test labs and certification bodies to be based in the U.S. or countries with reciprocal trade agreements to bolster national security.

FCC Proposes to Limit Offshore Customer Service Via Restrictions on International Call Centers

The Federal Communications Commission (FCC or Commission) adopted a Notice of Proposed Rulemaking (NPRM) seeking comment on a comprehensive set of proposed rules restricting service providers that use offshore customer service call centers. The NPRM makes three core proposals. First, the FCC seeks to impose new regulatory duties on covered providers in order to "encourage" providers to "onshore" customer service and expand the use of domestic call centers by relocating international call centers to the U.S. Second, the FCC seeks to improve customer service and security of communications by mandating certain standards, such as imposing English proficiency standards on call center workers. Third, the FCC seeks comment on whether new rules can also be used to limit illegal robocall scams originating from inside international call centers. The FCC expansively interprets its jurisdiction to justify imposing these proposed rules on providers of telecommunications service, commercial mobile radio service (CMRS), interconnected Voice over Internet Protocol (VoIP), cable television and direct broadcast satellite (DBS) service, and affiliates of these service providers offering internet access services. The Commission also seeks comment on whether to extend these proposed rules to: (i) providers of non-interconnected VoIP; (ii) internet, text, and chat service providers; and (iii) foreign-originated calls and text messages that are subject to the Telephone Consumer Protection Act (TCPA). If adopted, these new rules will create significant new operational and compliance challenges for covered providers and their vendors.

Key Takeaways

The proposed rules regulating call center operations of communications providers, and possibly internet, text, and chat providers and TCPA-covered businesses, will impose costly and complex compliance obligations.

The Commission seeks comment on an expansive reading of its jurisdiction over entities that have long been free from most FCC regulations, and which could (if the proposed rules are adopted) lead to significant and lengthy legal challenges.

Covered providers will face a range of new duties, including mandating English proficiency for call center workers, managing traffic to ensure compliance with offshore volume caps, rerouting certain calls involving sensitive consumer transactions, and posting bonds to cover potential noncompliance events.

The Commission seeks comment on the scope of "covered calls," including whether certain categories of calls should be excluded, such as sales or marketing calls, and how providers could distinguish between covered and noncovered calls.

New regulatory duties would likely have a significant impact on how providers locate and staff call centers, and in turn require changes to downstream contractual terms between covered providers and their call center vendors.

Core Elements of the FCC's Proposed Call Center Rules

Mandating English Language Proficiency Standards: The proposed rules would require offshore call center staff to be proficient in written and spoken English, including establishment of a baseline of proficiency through testing. The FCC seeks comment on what testing criteria might be appropriate and whether customer call centers already test English proficiency.

Limits on Offshore Call Volume: The FCC proposes a cap on the percentage of inbound and outbound customer-service calls handled by offshore call centers, with comment sought on a potential 30% limit. The Commission further seeks comment on the appropriate transition period that providers would need to bring their operations into compliance.

Consumer Rights and Required Disclosures: The proposed rules would require customer service agents to inform customers at the beginning of each call that it is being handled outside of the U.S. The rules would also require providers to both advise customers of their right to speak with a U.S.-based agent and to transfer the call to such persons upon request.

Restrictions on Certain Sensitive Consumer Transactions: The proposed rules would require that certain calls and consumer transactions—such as password changes or credit card-related actions—be handled exclusively by U.S.-based call centers to prevent unauthorized foreign access to sensitive information.

Prohibition on Foreign Adversary Nations: The FCC proposes to prohibit providers from using call centers in "foreign adversary nations."

Enhancing Transparency by Expanding Broadband Label Disclosure Requirements: The FCC proposes to amend the broadband label rule to require covered providers to include the percentage

of customer service calls handled by representatives located within the U.S. The FCC seeks comment on the appropriate time period for calculation, the level of precision, cadence of updates, and whether providers of nonbroadband services covered by the proposed rules should make available the same information regarding the percentage of customer service calls handled in international call centers.

Fee-Based or Bond-Based Approach: The FCC proposes to use a fee or bond-based approach in an effort to make illegal calls expensive enough to deter. The Commission seeks comment on how any fee or bond requirement might be structured, what traffic it would apply to, and how it would be collected.

Tracking and Compliance Metrics: The FCC proposes tracking and reporting on compliance metrics—including English-language proficiency, the volume of calls handled abroad versus domestically, call-transfer rates, wait times, and dropped-call counts—and seeks comment on the reporting frequency and submission process. The FCC also seeks comment on which types of calls should fall within the scope of the proposed rules, including whether to count only calls from existing customers related to service, billing, or account management, and whether to count calls related to debt collection, win-back campaigns, or other retention efforts.

Deutsche Telekom Considers Merging with T-Mobile

Deutsche Telekom is considering merging with its US unit, T-Mobile, according to a report from Bloomberg citing people familiar with the matter. Deutsche Telekom already owns a 53% stake in the US company but is now reportedly considering forming a holding company to combine the two businesses. If such a deal were to be struck, this new company would be jointly owned by both companies' existing shareholders and would potentially seek a listing in both the US and Europe, the sources said. Reporting from the Financial Times suggests the latter would likely take place in Luxembourg, Amsterdam, or Dublin, rather than Germany, for take advantage of lower tax. The same sources emphasize that discussions are at an early stage and no formal decisions have been made. Neither Deutsche Telekom nor T-Mobile have commented on the media report. Deutsche Telekom has gradually increased its stake in T-Mobile over the past five years, growing from roughly 43% in 2021, following the T-Mobile–Sprint merger, to today's 53%. The US unit is by far Deutsche Telekom's most valuable business, comprising around 72% of the operator group's total value. A merger of this scale would trigger intense scrutiny from both American and European regulators, with impact on competition, foreign ownership of critical infrastructure, and aligning cross-border regulations all key issues. "We don't see competition, security, or regulatory issues leading the [US] government to block the deal, but there are significant political issues that might have to be addressed in the deal review," analysts at New Street Research told Reuters. Approval from the German government would also be required, with the government currently owning a 14% stake in Deutsche Telekom and state-owned lender KfW also owning 14%. These stakes combined makes the German state Deutsche Telekom' largest stakeholder.

Pakistan Ministry of IT Directs PTA to Develop Framework for Regulating Incoming International Calls

Pakistan's Ministry of Information Technology has directed the Pakistan Telecommunication Authority to develop a regulatory policy for incoming international calls, in a move aimed at improving revenue generation, strengthening security, and increasing transparency in the country's international call routing system. Sources cited by ProPakistani indicate that international calls are currently routed through Long Distance International operators, and that consultations with relevant companies and institutions are ongoing ahead of formal policy approval. The PTA is also preparing to actively monitor incoming international call traffic as part of the planned tightening of controls over international telecom operations. The ministry confirmed that approval for the new framework will be granted once the consultation process is completed, with no timeline disclosed. The regulation is intended to address gaps in the existing call management system, improve checks and balances, and enhance the overall revenue model for international termination traffic — a segment that has been significantly eroded in Pakistan, as in most markets, by the shift of voice traffic to OTT platforms such as WhatsApp.

A SNAPSHOT OF REGULATORY ACTIVITIES IN THE SA-ME-NA REGION

Algeria

Algeria has launched its first dedicated startup cluster focused on artificial intelligence and cybersecurity, marking a strategic move to strengthen its domestic technology ecosystem. The cluster is designed to bring together startups, researchers, and industry stakeholders to collaborate on developing solutions in AI and cybersecurity. By centralizing resources and expertise, the initiative aims to accelerate innovation, support knowledge sharing, and enable startups to scale more effectively. The program will provide access to technical support, mentorship, and potential funding opportunities, helping early-stage companies navigate development and market entry challenges. AI and cybersecurity have been identified as priority sectors due to their importance in securing digital infrastructure and enabling advanced digital services. Algeria has been increasing its focus on fostering local innovation, with efforts aimed at reducing reliance on foreign technologies while building internal capabilities. The launch aligns with broader trends across Africa, where governments are investing in specialized clusters to support deep-tech innovation and long-term digital growth.

(April 21, 2026) www.meatechwatch.com

Bangladesh

Bangladesh is accelerating efforts to strengthen its digital connectivity landscape, with renewed focus on expanding infrastructure and improving access to high-speed internet services across the country. Recent developments highlight ongoing initiatives to enhance network coverage, particularly in underserved and rural areas, as part of broader national digitization goals. The push includes investments in fiber networks, mobile broadband expansion, and supporting infrastructure aimed at improving service quality and reliability. Authorities are also working to create a more enabling environment for telecom operators and technology providers, aligning policy frameworks to support increased private sector participation and long-term infrastructure development. These efforts are expected to play a critical role in driving digital inclusion and enabling access to online services, including education, healthcare, and financial platforms. The expansion comes amid rising demand for connectivity, fueled by growing digital adoption among consumers and businesses. Strengthening infrastructure is seen as essential to sustaining this growth while supporting emerging technologies and digital services. Bangladesh has been steadily advancing its digital transformation agenda, with connectivity at the core of its strategy to build a more resilient and inclusive digital economy.

(April 14, 2026) www.meatechwatch.com

Egypt

The National Telecommunications Regulatory Authority held an extensive series of awareness seminars in the Red Sea Governorate to promote a culture of digital awareness and the safe and effective use of digital services, under the auspices of Dr. Walid Al-Barqi, Governor of the Red Sea, and Dr. Magda Hanna, Deputy Governor of the Red Sea, with the participation of a delegation from the Authority headed by Engineer Mohamed Ibrahim, Executive Deputy and official spokesperson of the Authority, and the attendance of a number of executive leaders in the governorate and faculty members of Hurghada University. The seminars aimed to reach citizens and executive bodies in all the governorate's cities, namely Ras Gharib, Hurghada, Safaga, Quseir, Marsa Alam, and Shalateen. The seminars addressed the pivotal role of the agency in governing the telecommunications market and protecting users' rights, in addition to reviewing the various initiatives offered to users of telecommunications services. They discussed vital topics such as the basics of cybersecurity, methods of protecting personal data and devices, and prevention of cyber threats. The seminars also witnessed several discussion sessions on the field of communications and digital services, with listening

to the most prominent challenges and problems of citizens related to telecommunications services in various cities of the governorate, and emphasizing the need to study them and develop appropriate solutions for them. Dr. Walid Al-Barqi, Governor of the Red Sea, stressed the need to repeat these seminars because of their great impact in introducing and raising awareness of technological and cyber challenges.

(April 23, 2026) tra.gov.eg

Jordan

The Telecommunications Regulatory Commission (TRC), in collaboration with the GSMA, has launched a regional training program focused on artificial intelligence, aimed at building capacity across the telecom sector. The initiative brings together participants from across the region to develop skills in AI applications relevant to telecommunications, including network optimization, data analytics, and automation. The program is designed to equip regulators and industry professionals with the knowledge needed to integrate AI into telecom operations and policymaking. The training reflects growing recognition of AI as a core enabler of next-generation telecom services, supporting efficiency, predictive maintenance, and enhanced customer experience. As networks become more complex, AI-driven tools are increasingly critical to managing performance and scaling operations. Jordan has been actively investing in digital skills development and positioning itself as a regional hub for technology talent. Collaborations with global industry bodies such as the GSMA are playing a key role in accelerating knowledge transfer and aligning local capabilities with global standards. The program also highlights broader efforts across the Middle East to prepare the telecom workforce for AI-driven transformation.

(April 22, 2026) www.meatechwatch.com

The Telecommunications Regulatory Commission (TRC) of Jordan has released its statistical report for the fourth quarter of 2025, highlighting a significant transition in the nation's digital landscape. While traditional fixed voice services experienced a slight decline of 1.8%, falling to 4.772 million subscribers, the data sectors showed robust growth. Notably, 5G mobile subscriptions surged by 184% year-on-year, reaching 320,700 by the end of 2025. This rapid adoption of next-generation connectivity is mirrored in the fixed broadband market, where fiber-optic technology now dominates, accounting for 79% of all fixed internet subscriptions. Mobile broadband usage continues to expand, with total subscriptions rising to 8.5 million and data consumption growing by 23.7% to reach 813.9 million gigabytes. In the fixed broadband segment, the shift toward high-capacity lines is evident; average monthly data usage per subscription rose to 662 gigabytes, a 20% increase from the previous year. Conversely, traditional communication methods are seeing a downturn, as mobile text messages plummeted by 42.5% and fixed-line voice traffic dropped by 30%, reflecting a broader consumer shift toward data-driven applications and internet-based messaging. The report also underscores high levels of mobile penetration, which reached 110% when measured against the population aged over 15. The residential sector remains the primary driver for fixed services, accounting for 67% of subscriptions. As fiber-optic connections reach 652,200 households and 5G infrastructure continues to scale, Jordan's telecommunications infrastructure is increasingly characterized by high-speed data capabilities rather than legacy voice services.

(April 1, 2026) www.meatechwatch.com

Kuwait

Minister of State for Communications and Information Technology and Acting Minister of Information and Culture Omar Al-Omar stressed that the current phase requires achieving the highest levels of readiness and proactiveness in telecommunications services. This came in a statement by Minister Al-Omar to KUNA following his chairing of a coordination meeting with the heads of telecommunications companies, the Chairman of the Communications and Information Technology Regulatory Authority, Dr. Khaled Al-Zamel, the Acting Undersecretary of the Ministry of Communications, Mishal Al-Zaid, and the Acting Director General of the Central Agency for Information Technology, Najat Ibrahim. The minister noted that this is done through the continued updating of emergency plans and raising efficiency of operation centers as well as boosting rapid response to any emergency in a manner that ensures the stability and quality of services. Al-Omar said the meeting was held a continuation of previous meetings and in line with ongoing efforts aiming to activate emergency plans and raise the level of coordination among relevant parties to ensure network stability and handle any potential increase in service demand. He added that the meeting also was an extension of what has been agreed upon in the previous meetings regarding the full activation of operational sectors and raising readiness to the highest levels to ensure uninterrupted telecommunications and internet services at full capacity, within an integrated system operating around the clock to serve citizens and residents. The minister extolled the close cooperation of telecommunications companies and their key role in supporting the stability of the digital system, noting that this integration reflects an advanced national model in crisis management and ensuring the continuity of vital services.

(April 5, 2026) www.citra.gov.kw

Morocco

Morocco is expanding its data protection framework into the agriculture sector through a new "Data-Tika" agreement, marking a step toward integrating data governance into one of the country's key economic industries. The initiative aims to ensure that agricultural data—ranging from farm operations to supply chain information—is collected, processed, and stored in compliance with national data protection standards. By formalizing governance in this sector, authorities are looking to improve transparency, security, and trust in data-driven agricultural systems. As digital tools such as precision farming, IoT sensors, and agri-platforms gain traction, the volume of data generated across the agriculture value chain is increasing rapidly. Extending compliance frameworks helps mitigate risks related to data misuse, privacy breaches, and operational vulnerabilities. The move aligns with Morocco's broader digital strategy, which emphasizes data regulation, digital infrastructure, and sector-specific transformation. Applying data protection standards to agriculture reflects a growing recognition that digital governance must evolve alongside sectoral digitization. Globally, agriculture is becoming more data-intensive, and regulatory frameworks are beginning to adapt to ensure that innovation is balanced with accountability and security. (April 23, 2026) www.meatechwatch.com

Oman

Oman's Telecommunications Regulatory Authority (TRA) has announced plans to conduct 69 field surveys across the country to assess and improve telecom network quality and service performance. The surveys will evaluate key metrics such as network coverage, call quality, data speeds, and overall user experience across different regions. The initiative is aimed at identifying service gaps and ensuring that operators meet regulatory standards for quality of service (QoS). As demand for mobile data and digital services continues to grow in Oman, maintaining consistent network performance has become a critical priority. Field-level assessments provide regulators with real-world insights into how networks perform beyond theoretical coverage maps. The initiative also supports Oman's broader digital transformation strategy, where reliable connectivity is essential for enabling services across sectors such as e-government, fintech, and enterprise technology. Regulatory oversight is playing an increasingly important role in ensuring accountability and driving improvements in telecom infrastructure, particularly as operators expand networks and introduce advanced technologies.

(April 27, 2026) www.meatechwatch.com

Oman's mobile subscriptions have climbed to 8.29 million, reflecting continued growth in connectivity driven by expanding IoT deployments and fiber infrastructure. The increase highlights rising demand for data services and connected devices, as both consumers and enterprises adopt digital solutions at a faster pace. IoT applications are playing a growing role in sectors such as utilities, logistics, and smart city initiatives, contributing to overall subscription growth. At the same time, the expansion of fiber networks is supporting higher data usage and improved service quality, enabling more reliable connectivity for households and businesses. Enhanced fixed infrastructure is also complementing mobile services, strengthening Oman's overall digital ecosystem. The growth in subscriptions underscores the country's ongoing digital transformation, supported by investments in telecom infrastructure and policy initiatives aimed at improving connectivity and adoption. Oman continues to position itself as a competitive digital market within the Gulf, with operators focusing on expanding coverage and enhancing service capabilities to meet evolving demand.

(April 20, 2026) www.meatechwatch.com

The Telecommunications Regulatory Authority has commissioned a preliminary study to assess the sultanate's readiness for sixth-generation network deployment, marking the country's first formal step toward 6G policy planning. The study covers three main areas: core infrastructure requirements to support 6G networks, identification of suitable radio frequency spectrum bands, and potential sector applications across smart cities, healthcare, transportation, and industry. The TRA said the initiative is designed to examine technical, regulatory, and operational considerations simultaneously, with findings intended to shape future national strategies for next-generation connectivity. The authority framed the move as an effort to ensure Oman remains aligned with global 6G development trajectories and to enable early readiness before commercial deployment timelines crystallize internationally. No vendor partnerships, investment figures, or target deployment dates were disclosed at this stage. Globally, 6G standardization is still in early phases, with commercial rollout not widely expected before the early 2030s, making Oman's study broadly consistent with the preparatory timelines of other proactive regulators in the region. (April 7, 2026) www.meatechwatch.com

Pakistan

The Pakistan Telecommunication Authority (PTA), in collaboration with Open-signal, has published the Mobile Network Experience Benchmarking Report for the first quarter of 2026, covering 15 cities across the country. Open-signal is a crowd sourcing platform that measures the Quality of Experience (QoE) of end users based on data samples collected throughout the day, including indoor and outdoor locations, as well as peak and off-peak hours. The platform captures real user experience while streaming videos, making calls, and using mobile applications. According to the PTA, the report is available on its official website and can be accessed at: https://www.pta.gov.pk/category/qos-survey-959959384-2023-05-30. (April 24, 2026) www.app.com.pk

The Pakistan Telecommunication Authority (PTA), in collaboration with Opensignal, has published the Mobile Network Experience Benchmarking Report for Q1 2026 for 15 cities, which is now available on PTA website https://www.pta.gov.pk/category/qos-survey-959959384-2023-05-30. Opensignal is a crowdsourcing platform that measures Quality of Experience (QoE) of end users based on samples collected throughout the day, including indoor/outdoor locations and peak/off-peak hours, capturing actual user experience while streaming videos, making calls, and using apps. (April 23, 2026) www.pta.gov.pk

On the occasion of International Girls in ICT Day, the Pakistan Telecommunication Authority (PTA) signed a Collaboration Agreement with ConnectHear to promote accessibility and digital inclusion for women and girls with hearing impairments. Chairman PTA, Maj. Gen. (R) Hafeez Ur Rehman HI (M), SI, emphasized that accessible telecom services for differently abled citizens are vital to fostering an inclusive and equitable society. ConnectHear's Founding Member, Ms. Zehra Dhanjee, highlighted the importance of embedding inclusivity at the core of digital service design and delivery. To mark the occasion, both organizations jointly released sign language awareness videos focusing on online safety and SIM registration under women's own CNICs. This collaboration reflects a shared commitment to leveraging technology to bridge accessibility gaps and expand equal digital opportunities. PTA remains steadfast in advancing inclusion for all persons with disabilities across the ICT sector. (April 23, 2026) www.pta.gov.pk

Qatar

The Communications Regulatory Authority (CRA) participated in Phase Two of the "Safe Surfing" Initiative under the "My Values Shape My Identity" project, which is implemented by the Ministry of Education and Higher Education, by delivering (13) workshops to (879) middle and high school students across (12) private schools in the State of Qatar. The sessions were conducted both on-site and online. Titled "How to Stay Safe Online?", the workshops aimed to enhance students' understanding of digital risks associated with daily internet use. The sessions addressed key topics including cyberbullying, identity theft, phishing and online fraud, exposure to harmful content, privacy risks, dangerous online challenges, and emerging concerns related to artificial intelligence. CRA experts provided practical guidance on preventive measures such as activating security settings, safeguarding personal information, and seeking support from parents or trusted adults when facing online threats. The sessions emphasized responsible digital behavior and proactive protection strategies, empowering students to navigate the online environment safely and confidently. Commenting on CRA's participation, Amel Salem Al-Hanawi, Director of the Consumer Affairs Department at CRA, stated: "Our participation in the 'Safe Surfing' Initiative reflects CRA's ongoing commitment to protecting young users and promoting a culture of safe and responsible digital engagement. Through our collaboration with the Ministry of Education and Higher Education, we seek to equip students with the knowledge and practical skills needed to identify online risks and respond effectively, contributing to a safer digital environment for all and supporting the goals of Qatar National Vision 2030." The workshops concluded with an interactive segment titled "Online Safety Challenge," designed to assess students' understanding through engaging questions. The segment witnessed strong participation and enthusiasm, reflecting students' enhanced awareness and understanding of online safety practices. Through its participation in this initiative, CRA reaffirms its commitment to protecting consumers and promoting safe digital engagement across the State of Qatar. By equipping young users with knowledge and practical tools, CRA continues to contribute to fostering a digitally aware generation capable of making informed decisions in an increasingly connected world. (April 20, 2026) www.meatechwatch.com

The Ministry of Commerce and Industry has launched five new intellectual property e-services, bringing the total number of digital services in this area to seven. The newly introduced services cover copyright registration and deposit certificate applications, issuance of certificates, amendments, waivers and "To Whom It May Concern" certificates — targeting a broad range of rights holders including authors, composers, software developers, architects, performing artists and broadcasting organizations. In a parallel initiative, MoCI also introduced an electronic process for registering commodity prices for the first time through its platform, aimed at simplifying regulatory compliance for businesses and improving the speed and accuracy of market data submissions. Both initiatives form part of MoCI's stated strategy to reduce paperwork and administrative processing times across its service portfolio. (April 6, 2026) www.meatechwatch.com

Saudi Arabia

Saudi government agencies have surpassed 76% adoption of emerging technologies, reflecting strong progress in digital transformation across the public sector. The adoption spans key technologies such as artificial intelligence, cloud computing, big data analytics, and automation, enabling agencies to enhance service delivery, improve operational efficiency, and support data-driven decision-making. The milestone highlights the Kingdom's commitment to integrating advanced technologies into government operations. Saudi Arabia has been actively driving digital transformation under Vision 2030, with significant investment in infrastructure, regulatory frameworks, and digital platforms. Government entities are increasingly leveraging technology to modernize services, streamline processes, and improve citizen experience. The progress also reflects growing maturity in the public sector's ability to deploy and scale emerging technologies, supported by collaboration with private sector partners and global technology providers. As adoption continues to rise, focus is expected to shift toward optimization, integration, and ensuring cybersecurity and data governance across systems.

(April 24, 2026) www.meatechwatch.com

The Digital Regulatory Academy (DRA), in partnership with the International Telecommunication Union (ITU), hosted a specialized program on the sidelines of the Telecommunication Development Advisory Group (TDAG) meeting held in Geneva, titled: "Agile, Collaborative Regulation for Emerging and Frontier Technologies", discussing ways to develop regulatory frameworks to keep pace with rapid transformations in the global digital economy. The program featured a review of several key topics related to the regulation of modern technologies, including artificial intelligence, cloud infrastructure, and quantum technologies. It also addressed the main challenges faced by global regulatory entities in dealing with these technologies, and showcased international models and experiences on adopted regulatory approaches. The session was attended by regulators, policymakers, international experts, and government representatives. The program also covered the framework for sustainable regulation of future technologies by presenting practical methods that support the development of flexible regulatory frameworks capable of adapting to technical development. In addition, an open discussion was held with participants on opportunities to enhance international collaboration among regulators, aiming to support the development of sustainable digital environments and support the readiness of regulatory systems to keep up with advanced technologies. This program reflects the Kingdom's commitment to advancing development initiatives in developing countries, while strengthening its position as a key strategic partner in international organizations. It also reflects CST's efforts to strengthen the Kingdom's role in supporting international dialogue on the future of digital regulation and exchanging expertise with international organizations and global regulators, contributing to shape a regulatory environment that supports digital transformation goals and enhances the Kingdom's global competitiveness.

(April 17, 2026) www.cst.gov.sa

Syria

Syria is looking to expand collaboration with Jordan in telecom and digital infrastructure projects, as part of broader efforts to rebuild and modernize its technology ecosystem. Recent discussions between officials highlight opportunities for cooperation in areas such as telecommunications networks, digital services, and infrastructure development. Jordan's experience in ICT and regional market integration positions it as a potential partner in supporting Syria's digital recovery and expansion. The engagement reflects growing demand for cross-border collaboration in rebuilding telecom infrastructure, particularly in markets where systems require significant upgrades or redevelopment. Partnerships are expected to focus on knowledge transfer, technical support, and potential investment in network modernization. Jordan's ICT sector has been actively expanding regionally, with initiatives aimed at exporting digital services and expertise to neighboring markets. Supporting Syria's telecom and digital projects aligns with this broader strategy. The move also underscores increasing regional interdependence in digital infrastructure, where collaboration is becoming essential to accelerate deployment and improve connectivity outcomes.

(April 22, 2026) www.meatechwatch.com

REGULATORY ACTIVITIES BEYOND THE SA-ME-NA REGION

Austria

Austria has successfully concluded a new spectrum auction covering the 2300 MHz and 2600 MHz bands, reinforcing mobile network capacity and preparing the ground for future 5G expansion. The auction was conducted by the national regulator, Rundfunk und Telekom Regulierungs-GmbH (RTR), and resulted in a total revenue of approximately €39.4 million. The awarded spectrum includes a mix of Time Division Duplex (TDD) and Frequency Division Duplex (FDD) resources, supporting both high-capacity mobile broadband and continued evolution of 4G and 5G services. The entire available spectrum in the 2300 MHz band was acquired by a single operator, enabling the deployment of wide contiguous channels for high-capacity data services. In the 2600 MHz TDD band, spectrum was awarded to support additional capacity for high-traffic areas and localized data demand. The allocation enhances the operator's ability to deliver higher throughput in urban and high-demand locations. The paired FDD spectrum in the 2600 MHz band was distributed among all three major Austrian mobile operators, ensuring balanced capacity expansion across the market. The auction resulted in the allocation of 60 MHz in the 2300 MHz band, 50 MHz in 2600 MHz TDD, and 2 × 70 MHz in 2600 MHz FDD spectrum, reflecting strong operator demand for mid-band capacity. (April 13, 2026) www.spectrum-tracker.com

Canada

Canada's telecommunications regulator is mandating that service providers notify customers before their contracts, discounts or promotions end. The CRTC says the move is meant to prevent bill shock and allow customers to better understand their options when there's an upcoming change to the amount they pay for cellphone and internet service. The notifications must include a list of other available plans and how to access them. The requirement also applies to situations when a customer is roaming internationally and their data usage reaches a $50 threshold. It's one of a variety of consumer protection measures the CRTC has been considering since late 2024, and it says further measures are on the way to make it easier for consumers to shop for and compare internet and cellphone plans. Last month, the regulator announced it will prevent companies from charging customers a fee when they cancel, change or activate plans, starting June 12.

(April 14, 2026) www.bnnbloomberg.ca

Gabon

Gabon has introduced a sweeping new social media ordinance which eliminates online anonymity and imposes strict identity requirements, among other measures. It comes in the context of a recent wave of social media restrictions in Gabon. The new ordinance, dated February 26 2026 but only published last week, requires any individual seeking access to digital platforms to provide a name, address and Personal Identification Number (PIN). Digital service providers must verify the identity of users residing in Gabon. The ordinance establishes a digital age of majority at 16 years and requires parental consent for users below this age to access social media platforms. Platforms must implement age verification systems and filter sensitive content, while social media group administrators must actively moderate content and report violations within their communities. Authorities hold users fully responsible for the content they publish. The law introduces 'joint liability' for users involved in disseminating or massively sharing illegal content, though the definition of 'illegal' in this context is not clear. Moreover, Ecofin notes, global platforms may struggle to align their standardized operating models with Gabon-specific regulatory requirements within 12 months. While some of these changes – protecting minors and addressing deepfakes for example – are concerns being addressed in many countries, Gabon's new laws are being enacted in the wake of restricted access to social media for nearly two months, and, it could be argued, reflect a desire by the state to have tighter control over the digital space.

(April 15, 2026) www.developingtelecoms.com

Ghana

he National Communications Authority (NCA) has conducted an outreach program in selected communities within the Ada area of the Greater Accra Region. The exercise formed part of efforts to bridge the consumer information gap in rural areas and empower citizens with knowledge on telecommunications services and consumer protection. The outreach covered Ada Foah, Kasseh, Ada Estuary, Azizanya/Kewunor and Tei-Mensahpanya, reaching a diverse audience comprising fisherfolk, traders, market women, drivers, teachers, community leaders, and the general public. Consumers were educated on topics such as the NCA's Mandate, Consumer Rights and Responsibilities, Complaint Procedures, Quality of Service, Mobile Money Fraud Prevention, and the use of the Toll-Free Complaints Line (0800 30 30 30). The exercise, while providing a platform for consumers to also share their concerns, ultimately reinforced the importance of continuous, community-based engagement in promoting informed and protected telecommunications consumers. (April 22, 2026) www.nca.org.gh

India

The Telecom Regulatory Authority of India's move is the latest salvo in a back and forth between itself and the government on the country's satellite market. It is consulting on the regulation of the broader satellite sector, looking at how satellite services are approved and so forth. But as far as the telecom industry is concerned, all eyes are on the direct to device (D2D) area of the market – service have yet to launch in India, but indications are that the demand is there- and the way would-be providers will get their hands on the spectrum they need. Even after three decades since the launch of cellular mobile services in India., the terrestrial coverage of cellular mobile service providers in the rural and remote areas of the country has not yet been able to match expectation, the TRAI wrote on its lengthy consultation document. It blamed techno commercial considerations for the lack of traditional mobile services in such areas. In this context, the two variants of D2D services viz (a) D2D service via satellite by using MSS spectrum, and (b) D2D services via satellite by using IMT Spectrum may potentially act as enablers of ubiquitous connectivity in the country, particularly in such rural and remote areas, "It said.

(April 9, 2026) www.telecoms.com

Kenya

The National Assembly has approved the partial sale of government shares in Safaricom to Vodacom, paving the way for a transaction expected to raise about Sh240 billion for infrastructure development. The House adopted a joint report by the Departmental Committee on Finance and National Planning and the Public Debt and Privatization Committee, allowing the government to offload a 15 per cent stake in the telecommunications firm. The approval sets the stage for the National Treasury to proceed with the transaction from April 1 or later once all regulatory conditions outlined in the share purchase agreement are met. The deal is expected to generate about Sh200 billion from the share sale and an additional Sh40.2 billion in upfront payments in lieu of future dividends. The proceeds will be channeled into the National Infrastructure Fund to support key development projects.

(April 1, 2026) www.the-star.co.ke

Mauritania

In Mauritania, four telecom companies—Mauritel, Mattel, Rimatel, and Chinguitel—proposed a global offer of 1.08 billion ouguiyas ($27 million) to obtain 5G licenses. The Regulatory Authority (ARE) validated this collective offer last week. This decision makes these four operators the provisional successful bidders for 5G licenses in the country. This development followed the opening of financial bids by the ARE after the tender process closed on March 30. Mauritel offered 305 million MRU. Rimatel proposed 265 million MRU. Chinguitel offered 260.5 million MRU. Finally, Mattel submitted a bid of 252.6 million MRU. Furthermore, each operator must pay an annual royalty equivalent to 5% of the revenue generated by 5G services. They now invite these operators to sign their official technical specifications. The firms must complete this signing process within a maximum of 30 days from April 9, 2026. Additionally, the operators must pay their fixed financial contributions to the Public Treasury within 15 days of signing those documents. Consequently, Mauritania continues its progress toward the commercial deployment of 5G. The government originally launched the tender for these licenses on December 2. It is initially planned to end the process on January 15. However, the regulator repeatedly postponed the deadline until the final closing on March 30. The state intends to award up to four licenses in total. The final signature and fee payments will grant the operators effective acquisition of the licenses. These licenses allow the companies to deploy the latest generation of mobile technology. Consumers expect higher speeds, lower latency, and greater network capacity. These improvements meet the growing connectivity needs of individuals, businesses, and government administrations. Simultaneously, the operators create new revenue streams through these advanced services. (April 14, 2026) www.ecofinagency.com

Mozambique

The Communications Regulatory Authority (INCM) has kicked off plans to allocate 5G spectrum after receiving proposals from the country's three main telcos – Tmcel, Vodacom Mozambique and Movitel. In a statement, INCM said its plans to allocate frequencies in the 700 MHz, 2.6 GHz and 3.5 GHz bands, which it considers essential to strike an efficient balance between geographical coverage, network capacity and service quality of 5G networks. The Mozambique government decided in October 2025 to allocate frequencies via administrative consignment rather than hold an auction, as it would better enable the government to impose conditions on telcos to hit coverage and service quality benchmarks. The proposals submitted by Tmcel, Vodacom Mozambique and Movitel outlined how each would meet the conditions attached to the 5G spectrum allocations. INCM said 5G spectrum licensees must maximize the spectrum's social and economic value, and be able to roll out 5G progressively at the national level, with a focus on rural, peri-urban areas and "areas of high economic and social impact". They will also have to adhere to quality of service and network performance standards set by INCM, and create conditions sustainable implementation. With the proposals all submitted, INCM said it will begin technical, economic and regulatory evaluations of the applications. "The introduction of 5G represents a decisive step for the acceleration of the digitization of the economy, promoting the emergence of new services and digital applications, as well as the strengthening of the competitiveness of the communications sector," the INCM statement said. The regulator did not give a timeline for when the applications would be approved or when the spectrum would be allocated. According to Datareportal, citing stats from GSMA Intelligence, there were 19.1 million mobile connections in Mozambique at the end of 2025, which works out to a penetration rate of just over 53%. However, only 19.8% of people are connected to the internet as of October 2025, according to the latest figures from Kepios.

(April 21, 2026) www.developingtelecoms.com

Nigeria

Nigeria's communications regulator has directed mobile network operators to automatically compensate subscribers with airtime credits when network performance falls below prescribed quality standards, marking a structural shift from operator fines to direct consumer restitution in Africa's largest telecom market. The Regulator announced the directive on 29 March in a statement from Head of Public Affairs, effective from April 2026. Under the framework, operators are required to identify affected customers automatically and credit them directly — subscribers do not need to file complaints to receive compensation. Credits will be calculated based on each subscriber's average spending patterns and their physical presence within local government areas where service quality failures are recorded against Quality of Service Key Performance Indicators. The directive applies to both individual and corporate subscribers and is anchored in the NCC's QoS Regulations 2024, which set strict benchmarks for call drop rates, call setup success rates, and network congestion. Penalties under that framework range from ₦5 million per infraction upward, with cumulative fines reaching up to ₦12.4 billion for multiple violations. The NCC simultaneously directed tower companies to reinvest regulatory fines into measurable infrastructure improvements, targeting the entire telecom value chain rather than operators alone. The move follows the NCC's approval of a 50% tariff increase in January 2025, granted on the explicit condition that operators improve service quality. Subscribers have continued to report dropped calls, slow data speeds, and network outages since the hike, generating significant public pressure on the regulator. Nigeria's telecom sector serves over 220 million subscriptions and contributes approximately 14% of GDP, with broadband penetration still lagging national targets and network congestion worsening in Lagos and Abuja. (April 8, 2026) www.meatechwatch.com

The Nigerian Communications Commission (NCC) has directed Mobile Network Operators (MNOs) to provide compensation to subscribers whose network quality of service experience is below specified targets within certain locations. In a statement signed by the NCC Head, Public Affairs Department, the commission noted that its position is that subscribers should not be made to bear the full burden of service disruptions where operators fail to meet prescribed standards of service delivery. The NCC explained that service providers breached the quality of service during network disruption, insisting that poor quality of service recorded within specified time frames must be compensated by the MNOs. "Under this directive, erring operators will compensate affected users directly for breaches of Quality of Service (QoS) Key Performance Indicators (KPIs). Mobile Network Operators (MNOs) shall be required to pay these compensations for instances of poor quality of service recorded within specified time frames. "The compensation will be provided in the form of airtime credits, calculated based on subscribers' average spending patterns and their presence within Local Government Areas where service failures occur," the statement read. According to the NCC, the directive is rooted in the commission's broader regulatory philosophy that places the consumer at the center of Nigeria's telecommunications ecosystem. The commission reiterated the importance of telecommunications services in today's contemporary world, saying it underpins economic activity, social interaction, and access to digital opportunities.

(April 1, 2026) www.premiumtimesng.com

Senegal

Telecoms regulator, the Autorité de Régulation des Télécommunications et des Postes (ARTP), has launched a public consultation on the deployment and sharing of fiber-to-the-x (FTTx) networks in Senegal. There's been rapid growth in fiber connectivity in the country, with nearly 600,000 lines connected by the end of 2025, driven by government aims to boost connectivity, digital sovereignty and the digital economy – but there have also been problems. They include parallel infrastructure deployments, inconsistent technical architectures, and the absence of a structured co-investment framework. As the TechAfrica News website points out, these issues raise concerns about inefficiencies, duplication of infrastructure, and long-term sustainability.

(April 1, 2026) www.developingtelecoms.com

Sierra Leone

The government of Sierra Leone has approved the appointment of private sector operator Africell Sierra Leone as its investment partner for the relaunch of troubled state-owned telecommunications company Sierratel. Africell Sierra Leone will partner with Sierratel under an MVNO model that will allow Sierratel to deliver mobile and telecom services to customers by leveraging existing network infrastructure rather than building and operating its own full-scale network. Previous privatization attempts failed after investors pulled out, citing the high cost of upgrading infrastructure, staff-related liabilities and strong competition in an already saturated market. As news agency Ecofin reports, Technology and Innovation Minister Salima Bah has stressed this should not be seen as a privatization but as a strategic repositioning. Sierratel will keep its brand and leverage its existing recognition. The partnership will apparently target underserved segments, including students and young professionals in the digital and creative sectors, with tailored products. Whether this will help Sierratel to overcome existing challenges is hard to say. As we reported recently, it owes about US$6.3 million in employee-related obligations and carries around US$35 million in external debt to two banks. The MVNO model, which would operate on a revenue-sharing basis with Africell and allows Sierratel to avoid heavy capital expenditure, offers clear benefits for the company, which will presumably now be able to relaunch voice, data and mobile money services, using Africell's network, at a so far unspecified date. The country's regulator says Africell's network covers just over 92% of the population for 2G, 77.48% for 3G and 61.72% for 4G. The most recent available figures indicate that Africell held a 54.51% market share at the end of 2024.

(April 22, 2026) www.developingtelecoms.com

South Africa

South Africa has initiated reforms to its telecommunications regulatory framework to reorganize the sector and improve investment conditions. A draft Electronic Communications Bill currently under review introduces several changes aimed at making networks more efficient and accessible. At the core of the reform is a plan to streamline how telecom infrastructure is deployed and managed. Authorities want tighter oversight of network rollout and operations, as demand for connectivity rises and the number of operators grows. The goal is to reduce inefficiencies and make better use of existing infrastructure. According to a report by the Independent Communications Authority of South Africa (ICASA), network deployment faces three main challenges: a fragmented system for granting rights of way, marked by inconsistent municipal procedures; non-binding fast-track deployment policies that lead to uneven implementation; and limited access to public infrastructure due to high costs and bureaucratic hurdles. These issues result in delays and higher deployment costs. The proposed law also seeks to make the sector more attractive to investors. By clarifying rules and modernizing the legal framework, the government aims to stimulate investment in digital infrastructure, especially broadband and 5G networks.

(April 27, 2026) www.ecofinagency.com

Thailand

The National Broadcasting and Telecommunications Commission (NBTC) will reportedly start regulating over-the-top (OTT) platforms and content as part of a coming revamp of broadcasting regulations. According to a report, the NBTC's upcoming Broadcasting and Television Master Plan (2026–2030) will include a provision giving it the power to regulate OTT platforms after its board reached a consensus that it has the authority to do so. The NBTC's move to govern OTT services is an effort to level the playing field between traditional digital TV operators, who are subject to stringent licensing conditions and compliance costs, and OTT platforms, which have so far operated under a lighter regulatory framework. Existing legal interpretations and previous board resolutions dating back as far as 2017 have classified OTT content as a form of broadcasting, and thus under the NBTC's purview. However, some board members have resisted

the idea, citing the challenges involved in not only defining what counts as an OTT service, but also regulating OTT services that don't originate in Thailand, the report said. NBTC board members overcame those differences to agree that at the very least, the NBTC does have the authority to regulate OTT platforms. They also agreed there is a need to level the playing field for OTT platforms and digital TV broadcasters, who operate under a much stricter regulatory framework, the report added. That said, the NBTC would need to coordinate with other relevant agencies like the Electronic Transactions Development Agency (ETDA), which enforces the Royal Decree on Digital Platform Services (2022) that requires platform operators to notify authorities of their business activities, the report also said. Meanwhile, NBTC commissioner Pirongrong Ramasoota told the Post that OTT regulations would focus more on platforms rather than directly targeting content creators or influencers, adding that the details on criteria will be hammered out after the Broadcasting and Television Master Plan is finalized.

(April 14, 2026) www.developingtelecoms.com

United Kingdom

British authorities say they have closed a loophole that could allow rogue actors to secretly track mobile phone users through the international telecommunications system. In a statement, opens new tab, the U.K. regulator Ofcom said it had banned the leasing of so-called "Global Titles," which are special phone numbers that can be used to transmit signaling messages across the global network. Such titles are typically used by telecom operators to help ensure the smooth operation of the network - for example by helping deliver messages to users who are "roaming" on other networks - but Ofcom said that criminals could use them "to intercept and divert calls and messages, and get their hands-on information held by mobile networks." In some cases, the regulator said the titles "can be exploited by criminals and other harmful actors to track the physical location of individuals anywhere in the world." Cybersecurity professionals are increasingly focused on the vulnerabilities built into the world's telecommunications infrastructure, some of whose messaging protocols date back decades. Ofcom's statement came hours before the Canadian internet watchdog group Citizen Lab issued a report, opens new tab covering how suspected surveillance companies were abusing telecom infrastructure to surveil an unnamed "well-known company executive" and track mobile phone users around the world.

(April 24, 2026) www.reuters.com

United States

The Federal Communication Commission (FCC) has granted permission for AST to launch and operate its constellation of 248nLow Earth Orbit (LEO) satellites, which will deliver broadband connectivity directly to off-the-shelf smartphones using cellular frequencies across the US. The approval marks an important milestone on the company's long, long journey towards competing head on with the likes of SpaceX's Starlink and Amazon Leo. For its US Operator partners, AT&T and Varizon, it puts them a step closer to offering an alternative to T-Mobile's Starlink-based direct-to-cell service, one that works with their sub-1 GHz spectrum. US emergency services network operator FirstNet has also signed up to using AST's satellite when the time finally comes, further improving coverage for first responders.

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