

# salience

## consulting

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company profile



# We transform countries and communities by unleashing the power of digital connectivity



## Practical advice provided by world class experts

We are senior executives and industry veterans from international operators and management consultancies.



## Regional industry knowledge

We have experience across the Middle East, Africa, Europe, Asia and Americas with some of our consultants spent more than 30+ years within the regions - we understand our clients' culture, challenges, and opportunities.



## Strong delivery record

We have launched new operators, established regulatory bodies and directed infrastructure investment for our clients.



## Beyond advisory

We go beyond giving advice by working with our clients to turn our strategies implementation plans and we work into hands-on to supervise procurement, build-out, and revenue capture.

We work with our clients to deliver sound strategies, effective regulation, and optimal infrastructure planning and rollout

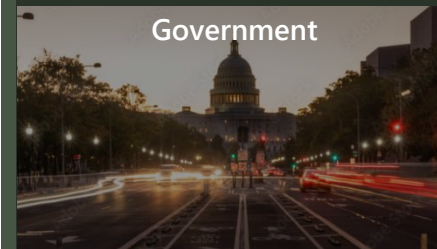
Development Banks



Telecom Operators



Government



ICT Regulators





# Salience has a **strong regional presence**

**5** OFFICES  
WORLDWIDE

Three regional MENA offices and one European office.

## Middle East

**Riyadh,**  
Kingdom of Saudi Arabia



**Dubai,**  
United Arab Emirates

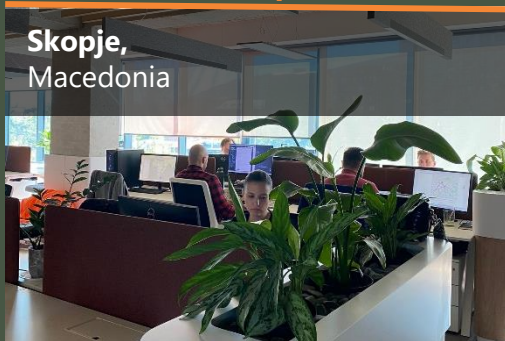


**Manama,**  
Kingdom of Bahrain



## Europe

**Skopje,**  
Macedonia



## Africa

**Nairobi,**  
Kenya



**14** YEARS IN THE  
MAKING

Salience was established as a specialist telecom advisory in 2010.

**80+** PROJECTS  
IN VARIOUS  
REGIONS

We deliver projects across MENA, Europe, Africa, Central Asia and the US.

## Our core services

We enable digital transformation for countries and communities through digital strategy consulting

Salience

### 1. Technical advisory

- Critical infrastructure advisory –subsea cable, fixed and mobile networks, LEO and HAPS
- Smart cities infrastructure
- Data centres and internet exchanges
- National broadband planning
- Rural connectivity optimisation

### 2. Finance and investment advice

- Implementation of new digital ventures
- Seeking and securing investors
- Exploiting revenue opportunities
- Operational cost optimization
- Private capital mobilization support
- M&A support and digital investments due diligence

### 3. Regulation, economics and governance

- Regulatory analysis, strategy definition and implementation
- Design and implementation of public-private partnerships
- Economic and statistical analysis
- Cost and pricing studies
- Organisation, procurement and auction design
- Training and Capacity building

# Delivery of client work by country

10 projects in Europe



7 projects in Asia



43 projects in Middle East



20 projects in Africa



# AFRICA PROJECT IMPLEMENTATION MAP

## Geographical project implementation

20 Projects in Africa



**Client: The World Bank:**

1. Angola Telecom Strategic Options Study
2. Study on telecommunications sector reform and advancing universal broadband access in Namibia
3. Study on telecommunications sector reform and advancing universal broadband access in Botswana
4. Technical Assistance to Strengthen the Telecom Regulator in Madagascar - Support on Licensing Framework and Spectrum Broadband Missing Links and Regional Market Enabling Environment for the Southern Africa Region
5. Broadband Missing Links and Regional Market Enabling Environment for the Central Africa Region
6. Technical and Operational Review of the National Backbone Infrastructure (NBI) in Uganda
7. Kenya Public Digital Infrastructure Options Assessment and Pre-Feasibility Study
8. Rwanda Options Study for Broadband Market Development
9. Assessment Of Radio Access As A Service (Raas) Deployment In East Africa



**Client: The World Bank/ Government of Sao Tome and Principe:**

1. Transactional Advisory Services for Telecommunications Infrastructure Investment Transaction



**Client: EBRD:**

1. Country Regulatory Framework and Investment Target



**Client: The Smart Africa Secretariat:**

1. Data Center and Cloud Regulatory Framework
2. One Africa Network
3. The long-term bulk purchase of submarine and satellite Internet/ broadband bandwidth



**Client: COMESA:**

1. Consultancy for Policy and Regulatory framework for roaming and interconnections
2. Consultancy for a study and development of policy and regulatory frameworks on optical fibre infrastructure



**Client: ECOWAS:**

1. Feasibility study for Amilcar Cabral submarine cable



**Client: Telkom Kenya:**

1. Consultancy Digital



**Client: Africa50:**

1. Technical and Commercial Advisor for pan African terrestrial fiber investment Technical and Commercial Due Diligence





# MIDDLE EAST PROJECT IMPLEMENTATION MAP

## Geographical project implementation

**43** Projects in Middle East

	<p><b>Client: Telecommunications Regulatory Authority of the Kingdom of Bahrain:</b></p> <ol style="list-style-type: none"> <li>1. Tower Rationalization and Permitting in Bahrain</li> <li>2. Highlights towers permitting system</li> </ol>
	<p><b>Client: Communication and Information Technology Regulatory Authority (CITRA):</b></p> <ol style="list-style-type: none"> <li>1. Negotiating effective ICT regulation Highlights towers permitting system</li> </ol>
	<p><b>Client: Oman Broadband Company (OBC):</b></p> <ol style="list-style-type: none"> <li>1. National Broadband Network launch in Oman</li> </ol>
	<p><b>Client: Ministry of Interior, Kingdom of Saudi Arabia:</b></p> <ol style="list-style-type: none"> <li>1. Private national fiber network and TETRA strategic &amp; technical analysis</li> </ol>
	<p><b>Client: NEOM and Tonomus:</b></p> <ol style="list-style-type: none"> <li>1. Provision of experts to NEOM Tonomus</li> </ol>
	<p><b>Client: Rua Al Medina Holding Company (RAM-H):</b></p> <ol style="list-style-type: none"> <li>1. Rua Al Medina infrastructure design</li> </ol>
	<p><b>Client: Qiddiya Investment Company (QiC):</b></p> <ol style="list-style-type: none"> <li>1. Al Qiddiya infrastructure design</li> </ol>
	<p><b>Client: Qatar National Broadband Network Company (Qnbn):</b></p> <ol style="list-style-type: none"> <li>1. Strategic and technical resources for Qatar National Broadband Network Company</li> </ol>
	<p><b>Client: Awasr, Oman (4 projects), One of them:</b></p> <ol style="list-style-type: none"> <li>1. End to end fibre broadband operator launch in Oman</li> </ol>
	<p><b>Client: STC Specialized (previously Bravo), Kingdom of Saudi Arabia:</b></p> <ol style="list-style-type: none"> <li>1. TETRA Implementation, Go to Market and Mission Critical Growth Enablement</li> </ol>
	<p><b>Client: Al-Babtain LeBlanc Telecommunications Systems Ltd. Subcontract Services for Telecommunication Towers Co. Limited:</b></p> <ol style="list-style-type: none"> <li>1. Execution of comprehensive due diligence for TAWAI's assets</li> </ol>
	<p><b>Client: International Finance Corporation:</b></p> <ol style="list-style-type: none"> <li>1. West Bank and Gaza Digital Assessment</li> </ol>
	<p><b>Client: CST – Communications, Space &amp; Technology Commission:</b></p> <ol style="list-style-type: none"> <li>1. CST Enterprise services benchmarking</li> </ol>



Salience's projects and In-country project delivery

# EUROPE AND CENTRAL ASIA PROJECT IMPLEMENTATION MAP

## Geographical project implementation



WORLD BANK GROUP

### Client: The World Bank:

1. Comprehensive Assessment of the Digital Market in **Croatia**
2. **Balkan** Digital Highway
3. Assessment of the impacts of investments and policy reforms in the digital sector in **Tajikistan**



European Bank  
for Reconstruction and Development

### Client: EBRD:

1. Rural Broadband Access in **Serbia** – Independent Observer for the Selection Process
2. Fixed Broadband Universal Service Obligation
3. EBRD - Regional: Privatisation of State-Owned Incumbent operators



Tcell

### Client: Tcell:

1. New entrant market feasibility and GPON business case
2. **Tajikistan** - Assessment report for mobile network



**17** Projects in Europe and Central Asia



# Our impact

## NEW DIGITAL VENTURES IMPLEMENTATION

### INTERNET SERVICE PROVIDER

created the **1<sup>st</sup>** and the **fastest** all fibre broadband internet service provider in the MENA region



### SUBSEA CABLE IMPLEMENTATION

launched the **1<sup>st</sup>** successful national broadband network provider in the MENA region

## CAPACITY BUILDING AND REGULATORY REFORMS

Support for legal, policy and regulatory reforms or enabling environment for stronger competition in the market



### TOWERS PERMITTING

delivering the **1<sup>st</sup>** one-stop function for mast permitting and planning in the MENA region



### WHOLESALE OPERATOR

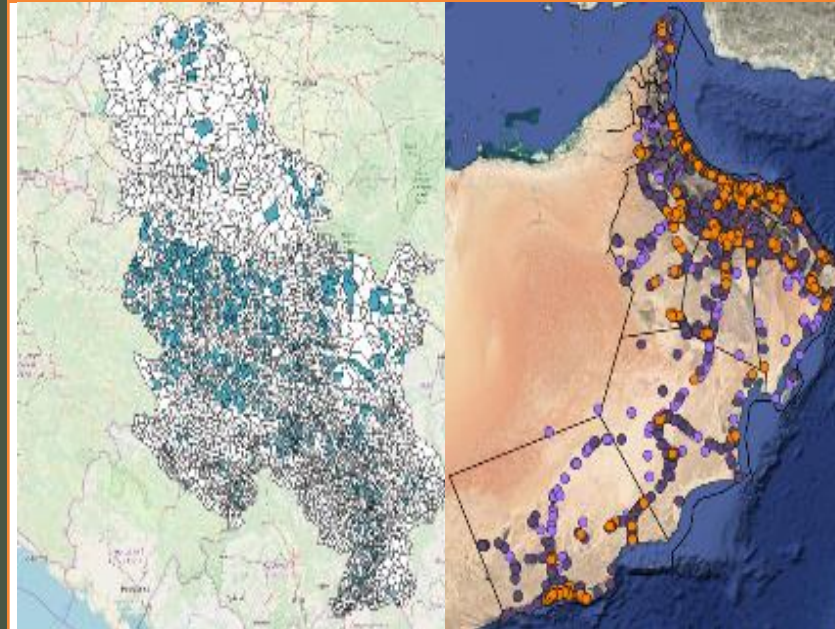
supported the creation of the **1<sup>st</sup>** private regional subsea wholesale operator

## GEOGRAPHIC INFRASTRUCTURE VISUALISATION

Salience's customized application for the World Bank provides detailed visualization of communications infrastructure across the African continent. Users have access to analytics that highlight rural coverage gaps, and show infrastructure routes and inventory. Designed to allow governments and operators to optimise network deployment, this is the only visual database of pan-African telecom infrastructure.

**220,000 KM**  
BACKBONE NETWORK  
MAPPED ACROSS AFRICA

## 14,000+ TOWERS AUDITED AND CATALOGUED



## FALCON – TOWERS MANAGEMENT SYSTEM

Salience created a towers management system for the TRA in Bahrain. Our MIMS system provides full built-in mapping of all tower sites including equipment inventory.



**2,400+**  
Towers under  
our supervision

# CLIENT TESTIMONIALS

Full letters are available in the  
appendix of this document

**salience**  
consulting



Date: 30/05/2018

Salience Consulting  
Mazaya Business Avenue AA1, unit 2407  
JLT, Dubai

**Subject:** Awasr Oman projects reference letter

The Salience team showed great deal of leadership, commitment, professionalism during the execution of the projects. Awasr is grateful for their involvement in this pioneer project in Oman.

Salience also provides ongoing support in the further development of Awasr.

[CLICK TO  
READ MORE](#)



Date: 17 May 2023

**Salience Bahrain W.L.L.**  
Office 131, Ewan Tower 923,  
Road 362, Block 436, Seef district,  
Manama, Bahrain

**Subject:** Reference Letter for Salience Consulting

**Project title:** Bnet Information System and Information Technology System Deployment Audit – LAC/C/0821/042

Salience successfully engaged with the audit targets and concluded the above-mentioned work in accordance with its contractual obligations and to the satisfaction of the Telecommunications Regulatory Authority (TRA).

[CLICK TO  
READ MORE](#)



Date: 17 May 2023

**Salience Bahrain W.L.L.**  
Office 131, Ewan Tower 923,  
Road 362, Block 436, Seef district,  
Manama, Bahrain

**Subject:** Reference Letter for Salience Consulting

**Project title:** Review of Security Issues related to Emerging Technologies

Salience was very engaging and concluded the above-mentioned work in accordance with its contractual obligations and to the satisfaction of the Telecommunications Regulatory Authority (TRA).

[CLICK TO  
READ MORE](#)



Ref: OBC/CEO/160/2016  
Date: 26<sup>th</sup> June 2016

MR. Ivan Skenderoski  
Salience Consulting DMCC

**Subject:** Oman MOTC project reference letter

Salience consultants were very engaging and provided excellent support to our team members in successfully launching our operations. They were able to establish the strategic, commercial and operational basis within the first six months which was exceptional.

My team and the ministry stakeholders have high appreciation for Salience's flexibility and ongoing support in designing the structure and devising the strategy to expand and implement wholesale national broadband network. Their integrity and expertise are the key to their success and I would highly recommend them forward to working with them again.

[CLICK TO  
READ MORE](#)



Kigali, 20th October 2020  
Ref: 691/SA/DG/10/2020

Salience Consulting,  
Dubai, United Arab Emirates.

**Reference Letter for Salience Consulting**

**Project title:** The long-term bulk purchase of submarine and terrestrial broadband bandwidth

Salience was very engaging and successfully executed the project for the Smart Africa Secretariat team.

[CLICK TO  
READ MORE](#)



**Salience Consulting DMCC**  
2407, Mazaya Business Avenue AA1,  
JLT, Dubai  
UNITED ARAB EMIRATES

3<sup>rd</sup> February 2023

**Reference Letter for Salience Consulting**

The Salience team acquitted themselves with professionalism, commitment and integrity throughout project implementation.

[CLICK TO  
READ MORE](#)



## OUR SOCIAL CONTRIBUTION

### DIGITAL ENABLEMENT

Provide schools and universities in lower income countries with IT equipment and network facilities to help them navigate the digital future. (laptops, wireless donations)

### GREEN DIGITAL INFRASTRUCTURE

Our advice has resulted in deployment of future proof sustainable infrastructure that is lowering the ICT industry carbon footprint.

### COMMUNITIES SUPPORT

Activities and donations to help underprivileged communities achieve their basic needs.

### LEADING BY EXAMPLE

Minimum paper and plastic usage and recycling practices in Salience offices.

## OUR PAST ACTIVITIES

### Donation of laptops for remote school in Namibia, Africa



### Free Wi-Fi for the student dormitory in Skopje, Macedonia



## OUR PLAN FOR THE FUTURE



**Provide connectivity** to schools or hospitals: one-year subscription



**Connect villages** to the internet



**Send laptops** to schools



**Partnership with a telecom provider** to connect schools/hospitals to internet (provide gives the equipment and we give the project & delivery)





Transforming countries and communities by unleashing the power of digital connectivity



# Be Salience Stand out from the rest ●

OFFICES WORLDWIDE

UNITED ARAB EMIRATES | SAUDI ARABIA | BAHRAIN | NORTH MACEDONIA | KENYA

[www.salience.consulting](http://www.salience.consulting)





# WHAT OUR CLIENTS ARE **SAYING ABOUT US**



# Client testimonials



Date: 30/05/2018

Saliency Consulting  
Mazaya Business Avenue AA1, unit 2407  
JLT, Dubai

**Subject: Awasr Oman projects reference letter**

Saliency Consulting has been engaged in supporting Awasr's development from the company establishment until present date. They have successfully delivered on the below projects:

**Project name:** Development of a new Fixed Line Operator in Oman, Phase A: Feasibility (January 2015 – March 2015). Description of the services provided by Saliency staff within this project assignment:

- Market assessment and development of a forecast model using different scenarios for market evolution.
- Based on benchmarking analysis of products in Oman and the region revenues were calculated and then compared with the costs of developing the operation (both CAPEX and OPEX).
- The outcome was feasibility study and business case stating the potential ROI under clear assumptions. Based on the study Awasr decided to go ahead and implement the new operation

**Project name:** Awasr Oman launch project (May 2015 – May 2017)

Outsourced management of the launch and operation of the new company based with specific milestones for launch of the new company within the first year and successful achievement of KPIs for the second year. The work involved:

- Setting up and staffing project launch office
- Recruitment of Awasr staff
- Setting up the target network and the other supporting IT/system elements
- Setting up the call center and operations
- Financial management of the operator including fundraising and relations with banks
- Go to market implementation including marketing, products, pricing and dealing with the regulator
- Setting up the Awasr office and sales points

The Saliency team showed great deal of leadership, commitment, professionalism and passion to deliver during the execution of the projects. Awasr is grateful for their involvement and support in developing this pioneer project in Oman.

Saliency also provides ongoing support in the further development of Awasr.

Regards,

Abdulmonem Al Futaisi  
Chief Operating Officer



awasr.om  
info@awasr.com

4<sup>th</sup> floor / Facilities Building / KOM / Muscat / Oman | الطابق الرابع | المبنى الخامس | واحة المورج | ص.ب. 128 | عمان | C.R Number: 1214161



Ref: OBC/CEO/160/2016  
Date: 26<sup>th</sup> June 2016

MR. Ivan Skenderoski  
Saliency Consulting DMCC

**Subject: Oman MOTC project reference letter**

We have selected Saliency Consulting as our strategic and implementation advisor to help us accomplish the vision of Oman's Ministry of Telecommunications and Transport in establishing a government start-up company, Oman Broadband Company (OBC).

Over the period of nine months (Jan to Sep 2014) extended Saliency team provided advice in the following areas:

- Stakeholder engagement and management support
- Development of the company strategy
- Strategy implementation planning
- Business and financial planning
- Technical implementation planning
- Regulatory interfacing and development of regulatory cost and pricing models for the intended products
- Financial evaluation of assets to be acquired – including city wide FTTH fibre asset and Mobile Tower assets. This includes creation process and negotiation of the accounting aspects of the asset transfer.
- Support the HR processes development
- Recruitment support

Saliency consultants were very engaging and provided excellent support to our team members in successfully launching our operations. They were able to establish the strategic, commercial and operational basis within the first six months which was exceptional.

My team and the ministry stakeholders have high appreciation of the Saliency Consulting flexibility and ongoing support in designing the structure and devising the foundation for OBC to expand and implement wholesale national broadband network. I believe their professionalism, integrity and expertise are the key to their success and I would highly recommend them and look forward to working with them again.

Yours Sincerely,

  
Said Al-Mandhari  
Chief Executive Officer



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Salience Consulting DMCC  
2407, Mazaya Business Avenue AA1,  
JLT, Dubai  
UNITED ARAB EMIRATES

3<sup>rd</sup> February 2023

## Reference Letter for Salience Consulting

Project title: Serbia: National Broadband Implementation Programme - Analysis, Costing, Feasibility Study, and Implementation Planning

European Bank for Reconstruction and Development (the "EBRD") confirms that Salience Consulting served as the lead consultant to support the Ministry of Trade, Tourism and Telecommunications ("MTT") in the preparation of detailed and fully substantiated options, recommendations and implementation material.

The project was executed from 25 October 2016 to 31 July 2020.

Ivan Skenderoski served as the Engagement Lead for the above-mentioned project.

Salience was selected with its partner, Ventura, for the implementation of the National Broadband Plan, including the network design (core and access), Public-Private Partnership (PPP) governance and financing model, demand analysis and recommendations that will address specific and detailed changes in the policy, regulatory, legal or other institutional framework that will attract investment into broadband deployment.

As part of the project, Salience performed analysis for Next-generation broadband connectivity for rural households in white zones, proposing 600 settlements and creating 600 high-level financial feasibility cases. The objectives were to implement next-generation infrastructure and offer competitive high-speed broadband services in a number of the specifically identified rural area initially for 100 settlements shortlisted and proposed by Salience.

The engagement price for the provided services as part of the project was EUR 395,602.

The Salience team acquitted themselves with professionalism, commitment and diligence throughout project implementation.

Yours sincerely

**Paul Moffatt**  
Senior Counsel



Kigali, 20th October 2020  
Ref :691/S.A/DG/10/2020

Salience Consulting,  
Dubai, United Arab Emirates.

## Reference Letter for Salience Consulting

Project title: The long-term bulk purchase of submarine and satellite internet/  
broadband bandwidth

Smart Africa hereby certifies that Salience Consulting served as Main consultant for the provision of consultancy services for the development of a framework document for long-term bulk purchase of submarine and satellite internet/broadband bandwidth for all Smart Africa Member States. The project was executed from December 2019 to September 2020.

The ultimate aim of this project was to encourage competitive pricing for internet and broadband through bulk purchases. Salience was asked to recommend a better option when choosing between the administrative efficiency of long-term purchase (IRUs etc.) in the African context, vs. the benefits of negotiating leased capacity pricing over shorter periods. The main focus for this project was to establish a framework for collaboration between Smart Africa member countries on the approach to bulk capacity purchase. Salience Consulting successfully developed the following deliverables:

- Market Intelligence and Background Analysis
- Strategy and Operational Plan
- COVID-19 Potential Impact for the Smart Africa Initiative
- Terms of Reference for Purchase of Wholesale Broadband
- Draft Agreement to use with the Broadband Providers
- Draft Agreement to use with Member States or Organizations who sign up for bulk purchase
- Business Case for a new Smart Africa SPV

Salience was very engaging and successfully executed the project to the satisfaction of the Smart Africa Secretariat team.

Yours sincerely,

**Laciina Koué**  
Director General

Date: 17 May 2023

Saliency Bahrain W.L.L.  
Office 131, Ewan Tower 923,  
Road 362, Block 436, Seef district,  
Manama, Bahrain

**Subject: Reference Letter for Saliency Consulting**

**Project title: Review of Security Issues related to Emerging Technologies – LAD/C/0222/035**

The Telecommunications Regulatory Authority (TRA) of Bahrain confirms that Saliency Consulting successfully delivered the project to identify relevant emerging technologies and global trends in terms of deployment, analyse the key regulatory issue areas and generate recommendations for TRA and other relevant Bahraini regulatory agencies to pursue to maximize the benefits and manage the risks associated with each identified emerging technology. Special focus was given to cybersecurity impact from the emerging technologies analysed.

The emerging technologies analysed were:

- Connectivity technologies - mobile deployments 5G/6G, LEO Satellites, Earth Stations in Motion, Quantum communications
- Platform technologies - Artificial Intelligence, DLT, Big Data, VR and links to Metaverse, Quantum Computing
- Service technologies - Fintech, Internet of Things and Intelligence Transport Systems

Under the project, Saliency delivered benchmarking of the relevant emerging technologies and the associated technical, commercial, and policy trends that may be of regulatory and policy concern for the TRA in the next few years. Saliency assessed and highlighted the policy actions needed in relation to the respective Emerging Technologies and identified specific initiatives to be undertaken in the next three years (2023-2025). The defined implementation roadmap considers the relationships between relevant agencies, the types of resources, and the activities for implementing the recommendation.

The project was executed from 12 June 2022 to 26 December 2022.

Saliency was very engaging and concluded the above-mentioned work in accordance with its contractual obligations and to the satisfaction of the Telecommunications Regulatory Authority (TRA) of Bahrain.

Yours sincerely,

Mohamed abdulla Ramzan Alnoaimi  
Director of Cyber Security and Technical Affairs  
Telecommunications Regulatory Authority (TRA) of Bahrain  
malnoaimi@tra.org.bh

Date: 17 May 2023

Saliency Bahrain W.L.L.  
Office 131, Ewan Tower 923,  
Road 362, Block 436, Seef district,  
Manama, Bahrain

**Subject: Reference Letter for Saliency Consulting**

**Project title: Bnet Information System and Information Technology System Separation and Deployment Audit – LAC/C/0821/042**

The TRA hereby confirms that Saliency Consulting successfully delivered the regulatory compliance project to audit the system separation of the Batelco's systems between Batelco itself and the new formed entity BNET. As part of the project two on-site audits were performed to verify whether the current state of the BNET systems is meeting the claimed level of separation, as defined by the TRA separation criteria. Audit first provided combined administrative, logical and physical separation assessment of all the current and ready systems. The second audit was focused on auditing the resolved non-conformities identified during the first audit and full audit of the newly migrated L3 systems (GIS, SWAT and LPAM).

Under the project, Saliency delivered an independent expert opinion on the final run of compliance testing of the level of separation and regulatory requirements of the BNET systems. The planned activities and the outcomes of the project were presented and discussed with the Equivalence Compliance and Technical Committee (ECTC). A set of recommendations for periodical audits by TRA and BNET process improvements regarding user management and network and systems monitoring were provided to ensure consistent adherence to the levels of separation by BNET's systems. The consideration and implementation of the recommendations will contribute valuable progress to the fulfillment of the relevant actions related to BNET separation defined in the National Telecommunications Plan 5.

The project was executed from 30th August 2021 to 14th July 2022.

Saliency successfully engaged with the audit targets and concluded the above-mentioned work in accordance with its contractual obligations and to the satisfaction of the Telecommunications Regulatory Authority.

Yours sincerely,

Mohamed abdulla Ramzan Alnoaimi  
Director of Cyber Security and Technical Affairs  
Telecommunications Regulatory Authority (TRA) of Bahrain  
malnoaimi@tra.org.bh