

5th Annual

Next Generation Telecoms Wholesale Forum 2009

Examining Innovative and Profitable Telecom Wholesale Strategies and Recent Regulatory Developments by Key Market Players in the Transition to NGN

Berlin, Germany

12th–14th January 2009

Operators wholesale revenue is growing faster than retail revenue

Including a Half-Day Pre-Conference Workshop:

Managing Regulation in a NGT Wholesale World

Workshop Leader:

Marco Lorenzo Gatti

Director

SVP Advisors Ltd

Conference Highlights:

- **Telenor** on Managing the Network to Provide Efficient Mobile Broadband Access
- **TDC** on Developing a Comprehensive IP Based Service Provider Strategy Through Wholesale Agreements
- **Teliasonera** on Accelerating Migration of Service Providers and Enterprises to VoIP Peering Platforms
- **Telecom Italia** on wholesale Applications and Services
- **Orange** on its Newly Launched Home Max Broadband Package

Key Benefits of Attending:

- **Discover** successful strategies and opportunities in the Telecoms wholesales sector
- **Discover** the evolution of Wholesale through case studies and presentations from the key players
- **Examine** innovative and profitable telecom wholesale approaches by key market players in the transition to NGN
- **Prepare** your business according to the new guidelines to deal with high-speed fibre networks

To book online go to

www.metelecoms.com

In the Chair:

Andrew White

Founding Partner

Piran Partners

Your Expert Speaker Panel:

Jacques Boniafay

CEO

Transatel

Ola Korsmo

Market Director

Telenor Global Services AS

Jukka Pekka Joensuu

Director and General Counsel

Legal and Strategy

Td coy

Paul Everett

Partner

Piran Partners

Amaury De Gromard

Business Development Manager

Swisscom

Wilfred Rottier

Executive Vice President Sales

Marketing and Business

Development

Ortel Mobile

Norbert Grolmus

Head of Voice Interconnect
department

Slovak Telekom

Competition in wholesale telecommunication is unlikely to be effective without appropriate regulation.


marcusevans

Daniel Sjoberg

Head of Strategy

Teliasonera

Antonio Maria Magenta *

Wholesale Manager

Telecom Italia

Dido Blankenburg

Executive Vice President

Deutsche Telekom

Asif Aziz

Broadband and Home

Segment Director

Orange

Annegret Groebel

MD and Head of

International Coordination

Bnetza

Stefan Albertsson

CEO

Zitius

Innocenzo Genna

Chairman

Ecta

Karl-Heinz Neumann

General Manager and Director

Wik

* subject to final confirmation

Day 1

12th January, 2009

HALF-DAY INTERACTIVE WORKSHOP

Managing Regulation in a NGT Wholesale World

Led by:

Marco Lorenzo Gatti

Director

SVP Advisors Ltd

13:30 Registration and Coffee

13:50 Workshop Leader's Opening Remarks

14:00 **The Bottom Line of Regulation: Producing Innovative Regulatory Practices:**

- Discussing current and future challenges in regulation
- Inspecting the current regulatory toolbox and its usefulness for NGT
- Analysing how the current framework can develop
- Introducing the new regulatory practices
- Developing a regulatory strategy that can adapt to a changing environment

15:20 Coffee Break

15:40 **How to Succeed in Turbulent Waters: Regulatory Strategy in Practice**

- Proposing models to exploit opportunities and avoid risks in regulation
- Analyzing how strategic games are played by operators and regulators
- Introducing innovative practical techniques to take advantages from regulatory gaps
- Presenting most likely future scenarios and their regulatory implications

17:00 Workshop Leaders' Closing Remarks

End of Workshop

Business development opportunities

Does your company have services, solutions or technologies that the conference delegates would benefit from knowing about? If so, you can find out more about the exhibiting, networking and branding opportunities available by contacting our sponsorship division.

James Driscoll on +46 8 678 6040,
email: JamesD@marcusevansse.com

13th January, 2009

08:30 Coffee and Registration

09:00 Chairs Opening Remarks

Andrew White
Funding Partner
Piran Partners

WHOLESALE MARKET UPDATE

09:10 **Wholesale Regulation Update 2009**

- Local loop unbundling update
- Reviewing the draft recommendation on next generation access network and regulatory treatment
- Discussing the role of fibre getting closer to customer physical premises
- Finding the Right Balance for Competition, Investment and Consumer benefits
- Finding opportunity for sustainable infrastructure-based competition for most of the EU population

Annegret Groebel
MD and Head of International Coordination
Bnetza

09:50 **Consultant Perspective**

An Independent Review of the Wholesale Data Market

- Assessing a fast-changing market environment
- Exploring new opportunities and business models
- Financial reward and pitfalls
- Future regulation and the role of third parties

Paul Everett
Partner
Piran Partners

10:30 Morning Coffee and Networking

VOIP PEERING AND THE FUTURE OF TELECOM NETWORK INTERCONNECTION

10:50 **Operator Case Study**

Accelerating migration of service providers and enterprises to VoIP peering platforms

- Analysing the industry trend underway toward VoIP peering and the effect it is having on the voice settlements process
- New interconnection infrastructures to provide advanced VoIP services and features across networks.
- Role change of wholesale service providers in the interconnection process
- Maximising traditional interconnection revenues while migrating to an IP environment

Daniel Sjöberg
Head of Strategy
Teliasonera

11:30 **Operator Case Study**

International Hub Business and Platform Implementation from Slovak Telekom

- One day cycle – daily business process
- Centralised business and billing system for international voice business
- NGN platform – TDM and VoIP – together alive
- Platform interfaces – billing, business support, reporting

Norbert Grolmus
Head of Voice Interconnect Department
Slovak Telekom

12:10 Lunch

13:10 Coffee and Networking

Booking Line

Tel: +44 (0) 20 3002 3277

Fax: +44 (0) 20 3002 3016

www.metelecoms.com

WHOLESALE APPLICATION AND SERVICES

13:40 **Business Provider Perspective**

Developing a Comprehensive IP Based Service Provider Strategy through Wholesale Agreements

- Transition to IP next generation networks
- Forming wholesale business relations
- Implementing an effective migration strategy
- Service provision in the IP environment
- Impact of fixed-mobile convergence in the next generation service delivery
- Applications and services customer examples

Jukka Pekka Joensuu
Director and General Counsel Legal and Strategy
TDC OY

14:20 **Operator Case Study**

Wholesale Applications and Services from Telecom Italia Perspective

- Discussing sensitive data such as the location information as one of the main assets
- How to transfer client identity information and client identification to a third party
- Interworking for location based services - models and business solutions wholesale on this information and value

Antonio Maria Magenta
Wholesale manager
Telecom Italia

subject to final confirmation

15:00 Afternoon Tea and Networking

REGULATORY FRAMEWORK FOR WHOLESALE TELECOM SERVICES

15:20 **Panel Discussion**

Regulation and Competition in Next Generation Wholesale

- Wholesale international roaming updates
- Deregulating wholesale broadband markets
- Regulatory impact of telecoms convergence
- Local loop unbundling issues

The panel will be joined by key speakers from both days

BUSINESS MODELS IN THE WHOLESALE ENVIRONMENT

16:00 **Operator Case Study**

The New MVNO/MVNE Business Model

- Going beyond MVNO to MVNO Enabler activities with different business models – technology provider or aggregator
- Examining different market dynamics and business models and their advantages and drawbacks
- Exploring the collaboration between MVNEs and mobile operators and which segments are considered. Examples from Belgium, France, UK.

Jacques Bonifay
CEO
Transatel

16:40 **Operator Case Study**

What are the challenges that MNO's are facing, when Entering the Wholesale Market – An MVNO's Perspective

- What's the need for MNO's to go into wholesale?
- A niche market; a different (wholesale) ball game for MNO's
- Saturation in the mobile market; why are there still new MVNO's entering the market?

Wilfred Rottier
Executive Vice President Sales. Marketing and Business Development
Ortel Mobile

17:20 Chair's Closing Remarks

17:20 End of Day Two

Day 3

14th January, 2009

08:30 Registration and Coffee

09:00 Chair's Opening Remarks

Andrew White
Funding Partner
Piran Partners

ACCESS TECHNOLOGIES FOR WHOLESALERS

09:10 **Next Generation Access Networks Deployment and Regulation**

- current EU framework on NGA
- national experiences
- impact on investments
- the debate within the European Parliament and the Council

Innocenzo Genna
Chairman
ECTA

09:50 **Operator case Study**

Fibre Network – FTTX – Upgrading the Network to Higher Standards

- Promoting investment in fibre and access networks, and upgrading to fast broadband
- Debating how to achieve government cooperation to increase economic growth
- Providing incentive to ensure investment in fibre
- Maintaining competition by unbundling the local loop

Maury De Gromard
Business Development Manager
Swisscom

10:50 **Operator Case Study**

Open Access Networks – the Zitius Perspective

- Providing an open access network for service providers to market services
- Pricing, bundling and QoS issues
- Delivering Triple Play Services through FTTH
- Evolving business models to reach market quicker with next generation services

Stefan Albertsson
CEO
Zitius

11:30 **Understanding the Business Dynamics of Next Generation Access Roll-outs and Wholesale Service Implications**

- Considering different scenarios of business models for NGA roll-outs in a variety of countries
- Analysing the results related to the profitability of NGA roll-out
- Replicability of a roll-out by several operators
- Drawing regulatory conclusions on infrastructure sharing and wholesale related services

Karl-Heinz Neumann
General Manager and Director
WIK

12:10 Lunch

13:10 Coffee and Networking

Complimentary accommodation booking service

Should you require accommodation whilst attending a **marcus evans** conference, please do not hesitate to contact our accommodation agent Travelocity who will be more than happy to make a reservation for you. Please quote the name of the **marcus evans** conference you are attending.

Tel: +44 (0) 161 601 4038,

Fax: +44 (0) 161 968 9310

Email: marcusevans@travelocity-business.co.uk

<http://www.travelocity-business.co.uk/marcusevans>

Booking Line

Tel: +44 (0) 20 3002 3277

Fax: +44 (0) 20 3002 3016

www.metelecoms.com

IP WHOLESALERS STRATEGIES

13:40 **Heading Europe's Unbundled IP market – Case Study Deutsche Telekom**

- An introduction to wholesale IP Bitstream Access – a new offer on top of the existing DT wholesale portfolio.
- Making it possible for providers without subscriber and access networks of their own to offer end customers broadband services
- Major impact on wholesale future competition in Germany's broadband market
- Exploring wholesale architecture while building powerful, state-of-the-art telecommunications networks in Germany

Dido Blankenburg
Executive Vice President
Deutsche Telekom

WHOLESALERS BROADBAND STRATEGIES

14:20 **Operator Case Study**

Managing the Network to Provide Efficient Mobile Broadband Access

- Operators' evolution from a mobile voice to mobile broadband
- Estimating business growth and broadband share
- SMS transit services versus roaming

Ola Korsmo
Market Director
Telenor Global Services AS

15:00 Afternoon Tea and Networking

15:20 **Operator Case Study**

Orange Newly Launched Home Max Broadband Package:

- Why Orange has entered the fixed line market through telecom wholesale arrangements
- Exploring Orange's strategy to offer mobile, broadband, fixed and entertainment services from one supplier
- Partnering with BT Wholesale around a managed network solution
- Delivering service, back-office systems and customer support facilities with no need to build, support and maintain own fixed line network
- Entering the market for fixed line and bundled services faster, at lower cost and without the risks associated with building out a fixed line network

Asif Aziz
Broadband and Home Segment Director
Orange

IMS AND WHOLESALERS

16:00 **Operator Case Study**

IMS in the Wholesale Environment

- Standardisation IMS: vision for evolving telecom networks
- Expectations for these new platforms and plans for the future
- Analysing the efforts of fixed and mobile carriers to step up competition and meet the requirements of next generation service delivery
- How does IMS impact wholesale?

PRICING WHOLESALERS SERVICES

16:40 **Interactive Panel Discussion**

The Impact of Regulation on Pricing and Competition of Wholesale Services

- Decreasing prices and setting minimum and maximum prices for roaming
- Encouraging competition between operators and compliance with regulation requirements
- Maintaining profitable operations
- Assessing EU roaming tariff regulation

The panel will be joined by key speakers from both days.

17:20 Chair's Closing Remarks

17:30 End of the Conference

Next Generation Telecoms Wholesale Forum 2009

Booking line

Tel: +44 (0)20 3002 3277

Fax: +44 (0)20 3002 3016

www.metelecoms.com

Berlin, Germany

12th–14th January 2009

Venue confirmation will be forwarded to you one month prior to the conference

IMPORTANT – Please do not remove or obscure the above label. It contains vital information

Code: A B C D F X UK-AM2749

Name

Position

Organisation

Address

Postcode Tel

Fax Email

AUTHORISATION

Signatory must be authorised to sign on behalf of contracting organisation

Name Position

Signature Date

This booking is invalid without a signature

TO BOOK ONLINE GO TO WWW.METELECOMS.COM

Pay in UK Sterling

- CONFERENCE + WORKSHOP @ £2895
- CONFERENCE @ £2295
- EARLY BIRD CONFERENCE + WORKSHOP @ £2605.50
- EARLY BIRD CONFERENCE @ £2065.50

Pay in Euro

- CONFERENCE + WORKSHOP @ €3745
- CONFERENCE @ €2895
- EARLY BIRD CONFERENCE + WORKSHOP @ €3370.50
- EARLY BIRD CONFERENCE @ €2605.50

A 24% service charge has been added to all conference fees prior to the event and is inclusive of programme materials, luncheon and refreshments.

METHODS OF PAYMENTS

Cheque – made payable to **marcus evans** Conferences Ltd – VAT NO. DE812969676

Bank Transfer – **marcus evans**, Barclays Bank plc, 1 Churchill Place, London, E14 5HP

Account No: 72260588 Sort Code: 20-00-00 SWIFT CODE/BIC: BARCGB22

IBAN Number: GB66BARC2000072260588, quoting delegate name(s) / invoice number and UK-AM2749 as reference.

Credit Card – Please debit my MASTERCARD / VISA / EUROCARD / AMEX / DINERS CARD

Payment is required within 5 working days.

Card Holder's Name

Card No

Signature Valid From / Expiry date / CVV code

TWO WAYS TO REGISTER

1. Book online at www.marcusevans.com

2. Fax bookings direct on +44(0)20 3002 3016

Terms and Conditions:

1. Fees are inclusive of programme materials and refreshments.

2. Payment Terms: Following completion and return of the registration form, full payment is required within 5 days from receipt of invoice. PLEASE NOTE: payment must be received prior to the conference date. A receipt will be issued on payment. Due to limited conference space, we advise early registration to avoid disappointment. A 50% cancellation fee will be charged under the terms outlined below. We reserve the right to refuse admission if payment is not received on time. Unless otherwise stated on the booking form, payment must be made in pounds sterling.

3. Cancellation/Substitution: Provided the total fee has been paid, substitutions at no extra charge up to 14 days before the event are allowed. Substitutions between 14 days and the date of the event will be allowed subject to an administration fee of equal to 10% of the total fee that is to be transferred. Otherwise all bookings carry a 50% cancellation liability immediately after a signed sales contract has been received by **marcus evans** (as defined above) Cancellations must be received in writing by mail or fax six (6) weeks before the conference is to be held in order to obtain a full credit for any future **marcus evans** conference. Thereafter, the full conference fee is payable and is non-refundable. The service charge is completely non-refundable and non-creditable. Payment terms are five days and payment must be made prior to the start of the conference. Non-payment or non-attendance does not constitute cancellation. By signing this contract, the client agrees that in case of dispute or cancellation of this contract that **marcus evans** will not be able to mitigate its losses for any less than 50% of the total contract value. If, for any reason, **marcus evans** decides to cancel or postpone this conference, **marcus evans** is not responsible for covering airfare, hotel, or other travel costs incurred by clients. The conference fee will not be refunded, but can be credited to a future conference. Event programme content is subject to change without notice.

4. Copyright etc: All intellectual property rights in all materials produced or distributed by **marcus evans** in connection with this event is expressly reserved and any unauthorised duplication, publication or distribution is prohibited.

5. Data Protection: Client confirms that it has requested and consented to **marcus evans** retaining client information on **marcus evans** group companies database to be used by **marcus evans** groups companies and passed to selected third parties, to assist in communicating products and services which may be of interest to the client. If the client wishes to stop receiving such information please inform **marcus evans** local office or email gleavep@marcusevansuk.com. For training and security purposes telephone calls may be recorded.

6. Important note: While every reasonable effort will be made to adhere to the advertised package, **marcus evans** reserves the right to change event dates, sites or location or omit event features, or merge the event with another event, as it deems necessary without penalty and in such situations no refunds, part refunds or alternative offers shall be made. In the event that **marcus evans** permanently cancels the event for any reason whatsoever, (including, but not limited to any force majeure occurrence) and provided that the event is not postponed to a later date nor is merged with another event, the Client shall receive a credit note for the amount that the Client has paid to such permanently cancelled event, valid for up to one year to be used at another **marcus evans** event. No refunds, part refunds or alternative offers shall be made.

7. Governing law: This Agreement shall be governed and construed in accordance with the law of England and the parties submit to the exclusive jurisdiction of the English Courts in London. However **marcus evans** only is entitled to waive this right and submit to the jurisdiction of the courts in which the Client's office is located.

For further information on this conference and special discounts please contact **Sumreen Rizvi** on +44 (0) 20 3002 3277 or email SumreenR@marcusevansuk.com

Who Should Attend?

Mobile operators, wireless service providers, fixed-wireless telecom operators with the following job titles:

- Senior Product Manager
- VP IP & Carrier Solutions
- Director of Wholesale
- Carrier Relations Director
- Head of Interconnect
- Director Product Operations
- Head of Strategy
- Regulatory Director
- Compliance Manager
- Business Development Director
- Operation Director
- Head of Commercial Development
- Roaming Manager
- Head of IP Planning
- Wholesale And Channels
- Head of Corporate Strategy
- Head of Strategic Alliances
- Head of Pricing
- Head of 3rd Party Alliances
- MVNO, Strategy & Business Development

Device manufacturers

Technology solution providers

Media companies, content providers, social networks, search engines, application providers
Consultants, associations