SAMENA TELECOMMUNICATIONS COUNCIL

Shifting Gears

Innovative Strategies for a New Era

BEYOND CONNECTIVITY 2010

28th & 29th April

Movenpick Hotel & Resort, Beirut, Lebanon

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Dear Delegates,

This year, the Beyond Connectivity annual conference will focus on the current growth prospects and future opportunities as well as challenges that exist in our industry. The aim is to review markets around the world and analyze the pattern of growth, evolution, and innovation.

While some argue that innovation is not happening in the industry at a desired pace, all consider it to be the name of the game. Innovation needs to happen not only in creating and deploying the most advanced transmission or access technologies but also in proactively creating new services using both the existing and the new infrastructure and resources; serving growth customer bases by keeping balance between costs, customer demands and service quality; making broadband access real, widespread and cost-effective; investing in efficient optical networks; creating and distributing content; and inducing greater collaboration within the industry.

This year, SAMENA would like to convene its members and prospects in Lebanon, to discuss how gears need to be shifted in this new era that demands innovation.

Welcome to Beirut!

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Day 1: 28th April, 2010

08:30 - 09:00 Welcome Breakfast

09:00 - 09:05	Opening conference by: Mr. Bocar A. BA. - President, SAMENA Telecommunications Council
09:05 - 09:10	Welcome speech by: Mr. Thomas Wilson - CEO & Executive Managing Director, SAMENA Telecommunications Council
09:10 - 09:20	Speech by Chairman of the Board of SAMENA: Eng. Saud Al Daweesh - CEO, STC Group
09:20 - 09:30	Dr. Kamal Shaehadi - Chairman, TRA Lebanon
09:30 - 09:40	Guest of honor: H.E. Dr. Charbel Nahas - Minister of Telecommunications, Lebanon
09:40 - 09:50	Diamond sponsor speech: Mr. Ghassan Hasbani - CEO International, Saudi Telecom Company
09:50 - 10:00	Setting the scene:" Imperative for innovative strategies in the middle east SP market, What are the key challenges for innovation?" By: Mr. Ghazi Atallah - Senior Advisor, Nexgen Lebanon

10:00 - 11:00 Panel 1 - Setting the Scene: Growth Prospects and Future Bets

While the industry experts are predicting what comes next for the telecoms & ICT industry, and still while many predictions continue to be made about the mechanics, dynamics and the challenges that would dominate the year 2010-2011, it appears that some things would be too obvious to ignore.

Growth prospects exist in a myriad of solutions and services; business models and strategies, all of which are primarily driven by broadband, content production and proliferation, innovative VAS, and due to improving environs. What appears to be obvious is that technologies, technology providers and manufacturers, and new contractual policies at the service provider/operator end are going to be the main market transformers. This, in essence, could also mean that unforeseen growth prospects may appear, or those apparent could even become stronger. Placing future bets would, ultimately, depend on our understanding of the current market, emerging trends, market transformation factors, and what the industry, including the regulatory bodies, have learned from the financial challenges that are gradually being overcome now. Key points to explore include:

- Global markets overview: growth shifts and emerging opportunities.
- Re-shaping the industry: operators new strategies and business models.
- Sector policy and regulation post liberalization and recession.

Questions & Answers Session

Moderator	Speakers		
Bahjat Al Darwiche Vice President Booz&Co	Mr. Osama Ghoul Managing Partner Devoteam - UAE	Patrick Farajian CEO Sodetel	Marc Veelenturf Head of Business Solution MENA NSN
	Khalid Al Twergi Director of Technical Reg. Studies STC		

11:00: 12:00 Panel 2 - Demand shifts and resulting opportunities and challenges

Businesses spend a considerable amount of time and resources to understand the consumer demand and what products and services would more tangibly, and quickly, contribute to ROI. In the current situation in telecom, it is fairly obvious what the consumer demands high, high-bandwidth applications, including mobile content and other advanced value-added services, all offered at highly competitive tariffs.
Similarly, the enterprise sector (and the enterprise content distribution sector) has its own set of demands, particularly with respect to advanced computing needs, cost-effectiveness, and meeting specialized business demands. Experts consider "cloud computing" to be the next trend in Enterprise IT, where services will be at the front-end while data Pipes and networking and data storage equipment will occupy a much lower level. Services, upon which applications will be based and built, will drive forward the business case for the Cloud.
Key focal points include:

- Uptake of consumers demand for bandwidth hungry applications.
- Uptake of enterprises demand for Cloud computing.
- New demand from a new segment: Application and content providers.

Questions & Answers Session

12:00 - 12:10 Coffee Break

Moderator	Speakers	
Jawad Abassi Founder & General Manager Arab Advisor	Mr. Stefan McKenzie Director Cordys - UK	Mr. Mujdat Ayoguz Director Peppers and Rogers

12:10 - 13:10 Panel 3 - Innovation: the new name of the market facing game

Can it still be argued that there is no real innovation in telecom, as some would have argued a few years ago? Is there real innovation happening in telecom right now or the focus is just on "creative" optimization of cost and resources, only termed as "innovation"?

Operators in this region have facilitated telecom service commoditization and service differentiation, for instance, has now taken a major space in the minds of many operators that are running ltiple networks throughout the region and beyond. For these operators, effectively competing in high-potential but low-return markets, while still following the right strategies to offer content and other in-demand multi-media applications, requires innovation. We need to delve into the new norms of becoming innovative in this very challenging telecommunications environment, and address issues such as:

- Effectively competing in low-income markets.
- Playing it right in the applications and content space.
- Mobile applications, Mobile Payment and Mobile TV.
- New enterprise business model.
- Serving the government and public sector segment.

Questions & Answers Session

Moderator	Speakers		
Santino Saguto Managing Director Value Partners	Mr. Ivan Verbesselt Senior Vice President NAGRA - Switzerland	Nasser Bin Obood Acting CEO Etisalat	Abdullah Al Kanhal Service Development Director STC
	Mikkel Vinter CEO Friendi	Mr. Samer Hallawi CSO GADM	

13:10 - 14:30 Lunch Sponsored by STC

14:30 - 15:30 Panel 4 - Broadband technology models

Competition among a myriad of readily available broadband technologies primarily lies in their ability to provide a best last-mile solution. However, there are no simple and direct answers, asinve ament in any given technology is directly dependent on the business model adopted by each operator. The ultimate goal is to provide "triple-play" or "quad-play", and a growing number of companies have become well-positioned to be able to offer such services. Some though even fewer in the SAMENA region have also invested in FTTH as a key enabler of future services. The optical market will go through electronic and silicon integration and it is crucial for optical manufacturers to see and wind this trend.

For companies already investing or planning to invest in broadband given manufacturers are in accommodating their deadlines or in tapping the opportunities related to migrating from 2G to 3G or from 3G to LTE. Operators need to look at the following areas of infrastructure business strategies and set their own priorities: technologies, it may help to learn from a discussion (or to contribute insights to it) on the following key topics and help unearth the realities and the misconceptions about both mobile and fixed broadband access from multiple perspectives:

- Next generation access strategies
- Mobile broadband: myths and realities
- Fixed broadband: business potential vs. national imperatives
- FTTH as a national sustainability and competitiveness imperative
- Building the networks of the future: enablers and inhibitors
- New infrastructure business model: operators' perspective

Questions & Answers Session

Moderator	Speakers	
Carl Lewin Intel Capital	Mr. Philippe Berard Group Director of Business Development Wi-Tribe	Yusuf Kırac Group Manager Next Generation Systems Turk Telekom
	Noel Kirkaldi Director of Solutions Marketing Motorola	Dr. Khalid Kalil Vice President Strategy & Business Development Telcordia

20:00 - 23:00 Gala dinner

Venue: Le Pavillon

Sponsored by etisalat

Day 2: 29th April, 2010

08:30 - 09:00 Welcome Coffee

09:00 - 10:10 Panel 5 Regulatory Panel - Next Generation Networks Regulatory and policy drivers

The telecom industry is highly responsive to governmental policy and regulation of the sector. As such, telecom policy and regulations matter a great deal in shaping the future direction of investment in networks and technology by operators. Incredible new advances in technology exist now that have the potential to deliver services, speeds and quality that our industry and our customers could only have dreamed of a few years ago. It is imperative that updated regulations and regulatory approaches also reflect the tremendous advances in technology, with respect to fiber, wireless broadband, etc. Regulatory bodies must have the vision to support the development of broadband infrastructure; however, not just in broadband infrastructure, but in infrastructure that would aid competition among different platforms. The approach of promoting service-based competition over one platform may need to change drastically in some markets, where development of multiple platforms has been limited.

The age of convergence of services, of technologies, of industries demands new approaches and enabling policies that can help the industry to move ahead and manage change. Furthermore, among other issues, highly competitive pricing has already destroying profit margins, and thus new positioning strategies by operators, which may directly be dependent on regulators' policies and regulatory designs, have to emerge. The availability of technology and even the most sound business models may not do well if regulatory approaches are transformed to meet the new era's needs. A new regulatory agenda is needed and important regulatory areas must be addressed, including:

- What are the required shifts in regulatory policy drive forward the deployment of broadband networks?
- What is the proper balance for regulators in incentivizing wireless versus wireline broadband deployment?
- How should operators' business models affected by ongoing telecom-media convergence?
- Do regulatory bodies need additional resources and/or competencies to effectively regulate in this new era?
- Should regulatory bodies work together and cooperate in harmonizing regional regulation?
- Are regulators effectively regulating international roaming rates? What is the perspective of operators?
- Do operators/investors need further incentives in order to build out additional connectivity, and if so, what are they?

Questions & Answers Session

Moderator	Speakers		
Dr. Imad Hoballah Commissioner TRA Lebanon	Mr. Matthew Glynn Head of the Telecommunications Practice DLA Piper - UAE	Wassim Chourbaji Sr Mgr Gov't Affairs Qualcomm	Imad Taraby Chairman & CEO Cedarcom
	Mr. Munif AL Mutairi Director of Roaming & Interconnection Personal Service Unit Mobily	Mohammed El-Nawawy CSO Telecom Egypt	Ms. Hande Bayrak International and NGO Relations Supervisor Avea

10:00 - 1100 CEO Live Session

Operators are constantly searching for greater revenue channels for their companies. The classic argument is whether or not the last mile has any long term lasting value versus controlling access to the customer. The choices are many, now with myriad of operators on the landscape now, given market liberalization has generally visited most markets globally. The cost is the carriers and operators, but the content providers are receiving the advertising revenues. Something should change and quickly. The content providers are riding the back of the new wave of IMS capabilities and not the costs associated with it.

IPTV and internet broadband services permit the fixed line carriers to build brand recognition with customers while in the mobile world, mobile broadband and the future of Mobile TV hold promise to the consumers hungry for information and entertainment on the latest smart phones available on the market today. Today's CEO must find ways to leverage his asset base, while addressing growth requirements of the market via heavy investments in infrastructure and to what avail. Should not the operators, who have the conduit to the eyeballs reviewing the data and entertainment be compensated for this new wave of revenue that is driving media companies into the new century.

The CEOs of today's service providers and operators are faced with absolutely awesome challenges that are figuratively impacting on how people live and work today as well as how they perform and transact business in today's society. The Operator CEOs are the movers and shakers of our society today. Their investment base is demanding return on equity, whilst the users are concurrently demanding the best and most feature rich services, as well as reliability that are extremely expensive to incorporate into large and expansive networks. The quandary exists, how to make this all happen at the same time. Indeed, a tough task.

The CEO Live Session Panel is a “live” unscripted format by which the CEO's will interact with the moderator (Booz and Co, Mr. Karim Sabbagh) and the audience in a manner that allows for a better understanding of their thoughts and mindsets toward their leadership of the leading Operators in the region, in a new and interesting format. At the end of the Moderator's Question & Answer program, there is time allowed for questions from the audience to the CEO's. The Moderator will facilitate the questions from the audience.

Questions & Answers Session

Moderator	Speakers			
Karim Sabbagh Booz & Co	Eng. Saud Bin Majid Al Daweesh CEO STC	Mrs. Nayla Khawam CEO Orange - Jordan Telecom Group	Ismail Jaroudi MTN Syria	Mikkel Vinter CEO Friendi
	Nasser Bin Obood Acting CEO Etisalat	Dr. Nizar Dalloul Chairman Comium	Dr. Amer Awadh Al-Rawas CEO Omantel	Dr. Osman Sultan CEO du

11:15 - 12:15 Panel 6 - Infrastructure business strategies

At a time when the industry is focusing strongly on broadband, mobile TV, content and other areas of business importance, it is imperative for operators to set and execute infrastructure time lines, including those pertaining to the establishment of advanced optical or 3G/4G networks. Furthermore, it is critical for operators to review their business relationship with their vendor/manufacturer partners, depending on how well-positioned given manufacturers are in accommodating their deadlines or in tapping the opportunities related to migrating from 2G to 3G or from 3G to LTE. Operators need to look at the following areas of infrastructure business strategies and set their own priorities:

- FTTH as a national sustain ability and competitiveness imperative
- Building the networks of the future: enables and inhibitors
- New infrastructure business model: operators' perspective

Questions & Answers Session

Moderator	Speakers		
Imad Taraby Chairman & CEO Cedarcom	Dr. Ejder Varol CEO Gantek	Wilson Varghese CEO Kalimat	Tony Huang Director, CTO, MENA Region Huawei
	Mrs. Samiah Bahsoun Vice President Davis Ross Group - USA		Walid Al Fudaili GM Planning & Performance Network STC

12:15 - 01:15 Panel 7 - Mobile applications and services strategies maximizing data ARPU opportunities and challenges

In deploying mobile applications, what business models are to be followed? Do we use mobile handsets and equip them with a rich application environment to store content, with in-built networking and communications capabilities, etc. Or, do we use a "cloud model" where the services are Web-based. However, one thing is certain: setting strategies for mobile applications deployment is complicated. The Web is now gradually becoming a medium that the e-health and e-education sectors are experimenting with. The creation of content revolving around education and healthcare has caught speed in many developing countries, and the trend is prone to be followed in this part of the world. To be effective, however, mobile applications revolving around these two sectors would require much work, aside from technological infrastructure, among other components integral to the potential success of these mobile applications. technological infrastructure, among other components integral to the potential success of these mobile applications.

We need to start from the basics and address all facets and challenges associate with the launch of success mobile applications linked to:

- E - Health
- E - Education
- Mobile Broadband Internet
- Mobile Media
- Mobile Health and Mobile Education

Question & Answer Session

Moderator	Speakers			
Jay Srage Vice President - Business Development Qualcomm	Karim Taga Managing Director - Viena Office Arthur D. Little	Mr. Wilson Varghese CEO Kalimat - Kuwait	Dr. Imad Hoballah Commissioner TRA Lebanon	Alex Hoffmann CEO IPTEGO

13:15 - 14:15 Panel 8 - Content

Content is in the air. However, in the SAMENA region, content creation has been comparatively slow, given the nascence of the idea in these markets. Although SMS-based content has been proliferating for some years now, creative content has been hard to come by. What perspectives do operators need to gain in order to make content creation and delivery work out well for them? We are in an age where sensitivity toward "ownership" has risen and focus on intellectual property protection has increased. How could operators address the need to protect their content-related ideas and create value, during times when, increasingly, content may be becoming free o "open"? It would help to approach Content with a regional perspective on:

- Content Creation and Distribution in SAMENA
- The impact of "revenue-less" content
- Realizing challenges in content ownership
- Value creation in an "open content" era

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Questions & Answers Session

Moderator	Speakers			
Mr. Ghazi Atallah Senior Advisor Nexgen - UAE	Khalifa Al Shamsi Etisalat	Hatem Bamatraf Senior Vice President Du	Clifford John Nelson SVP OSN	Tony Kelly CEO On-Demand Group

14:15 - 16:00 Lunch

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