

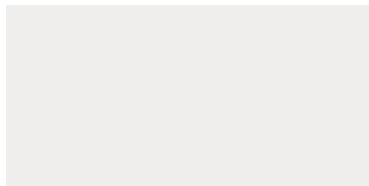


Building Towards a Digital Future

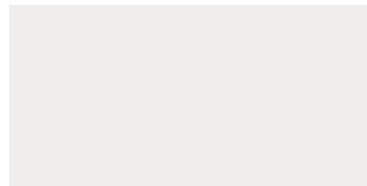
BEYOND Connectivity 2011

25th, 26th & 27th April 2011, The Yas Hotel, Abu Dhabi

Sponsorship Available



Sponsorship Available



#304, Alfa Building, Knowledge Village, PO. Box: 502544, Dubai, UAE

Tel: +971-4-364-2700 | Fax: +971-4-369-7513

www.samenacouncil.org



Introduction

This year, the Beyond Connectivity annual conference theme is "Building towards a digital future." The inevitable evolution of telecommunications industry in the SAMENA region has lead to a vital increase in convergence and hence been extremely beneficial with respect to the burgeoning of the innovative strategies in the evolving telecommunication landscape.

Due to the higher spectrum efficiency of digital technology, the switchover from analogue to digital broadcasting will free some spectrum. The released spectrum is called "Digital dividend" and is considered to introduce increasingly important amount of spectrum. The spectrum being made available as digital dividend is of great value for telecom sector because this can be used to efficiently provide wireless broadband service, predominantly in rural areas. By and large, the telecoms landscape in SAMENA region substantiate that digital technology provides one of the few opportunities for telcos to obtain additional spectrum to tape into the market more effectively. Digital technology utilizes the spectrum more efficiently as compared to analogue, thus after switchover there will be more spectrum available for new services such as wireless broadband and High Definition Television (HDTV). The ITU goal for the switch from analogue to digital broadcasting has been set at mid 2015. Growth in the mobile sector is especially corroborated in the Middle East showing a strong demand for convergence and introducing challenges that the operators community must address in the shape of novel strategies and more attractive business models to accomplish comprehensive triumph in this demanding region. Today, in the world of telecommunications, the struggle for survival is adhered to, the time to market, regulatory landscape, spectrum availability, business models, the market potential and above all optimized OPEX as well as CAPEX.

This year "Beyond Connectivity" will be held on April 25th, 26th & 27th in Abu Dhabi and will highlight industry's shift towards digital future. The event will discuss some of the predominantly significant issues of spectrum strategies, digital dividend, digital content, and net neutrality among others.





Day 1

25th April

Content Day

Sponsored by:



08:30am - 09:00am

Networking Breakfast

09:00am - 09:15am

Welcome Note

Mr. Osman Sultan

Chief Executive Officer - dU
Chairman, Content Committee

09:15am - 09:45am

"Threat of the OTTP"

Karim Daoud

CEO - Integral

09:45am - 10:00am

Coffee Break

10:00am - 10:30am

Monetization

Andre Popov

Head of Strategy and Business Development
Anayou

10:30am - 11:00am

"Stimulating the Digital Content Ecosystem"

Presented by Accenture

11:00am - 12:00pm

Work Group 1

OTTP Opportunities & Challenges

Discussion

12:00pm - 01:00pm

Work Group 2

Monetization of the Content

Discussion

01:00pm - 01:15pm

Arab Internet users content consumption patterns: Survey - based findings

Jawad Abbassi

Arab Advisors

01:15pm - 02:00pm

Work Group 3

Digital Content Ecosystem

Discussion

02:00pm - 03:30pm

Lunch Break

06:00pm - 08:00pm

Cocktail Reception



Day 2

26th April

08:30am - 09:00am

Welcome Coffee

09:00am - 10:00am

Opening Session

10:00am - 11:15am

Panel 1

Evolution of the technology and Next Generation Networks

Many markets in the SAMENA region are looking for a future-proof technology supporting mobile and fixed broadband access technologies such as FTTX and 4G/LTE. While these technologies still in its infancy in the region, it indeed allows the development of new revenue streams, which are increasingly being driven by content delivery ranging from streaming video to other data intensive value added services through the Triple Play and Quad Play services. However at the same time this also shifts the pivotal balance towards the infrastructure owners, such as the telecom operators and entails them to follow through to constantly improve their networks. Several governments within the SAMENA region have shown proclivity to fund both basic telephony and broadband services using national service funds; and some markets have been fairly successful in doing so. It is important that an inter-market dialogue be initiated to help with experience-sharing among regulatory bodies and operators, so that greater broadband proliferation may be realized. Industry stakeholders should progressively work towards understanding the dynamics of today's lifestyle and understand what is desired by the demanding consumer and what path does the industry needs to take further by addressing issues such as:

- Is there an economic case for telcos to invest in LTE?
- How can telcos transform their architecture to accommodate the ever more demanding consumer (Vertical vs. modular)?
- Whose responsibility is it to drive national broadband networks (NBN)?
- Public private partnership (PPP) work for NBN?

11:15am - 11:45am

Coffee Break

11:45am - 01:00pm

Panel 2

Digitization of the Economy

SAMENA region broadband market needs a coordinated effort by industry stakeholders to drive the broadband market up to the next level. There are certain micro drivers of the broadband industry mainly driven by regulators, operators, vendors, and content providers and aggregators.

Future applications , devices , speed or Mobility , would all stimulate the consumers demands that industry and decision makers have committed to deliver and supply.

- Digitization of many industries is gaining momentum as consumers and enterprises expect to be served in real time and on the go
- Telecom industry is becoming an enabler for other industries
- What are the roles of the various stakeholders in expediting the digitization of the economy

01:00pm - 02:15pm

Lunch Break



02:15pm - 03:30pm

Panel 3

The Digital Dividend: Socio-Economic benefits via Spectrum Reshaping

The socio-economic impact of the digital dividend can be realized from different perspectives.

The Digital Dividend enhance available broadcasting and mobile services and help the introduction of new services. The community shall sense the impacts of this introduction of the digital dividend from different levels such as: job creation, developing education, and enhancing individual skills. For example, the total value of the provisioned digital dividend in Europe ranges between 150 and 700 billion Euros. This balance is huge enough to stimulate business investments and trigger development in different industries.

In the SAMENA region, the introduction of digital dividend to the market shall present a chance to stimulate economies and encourage deployment of mobile and broadcasting services within a pre-allocated portion of the harmonized digital dividend for everyone especially in rural areas, with all its enveloped social benefits.

In the same time a strategy to reshape the frequency spectrum is a must. This is an important issue in SAMENA region's regulatory arena and has been one of the major challenges for regulatory bodies. Some countries in the region have shown their commitment towards LTE deployment in the near future. Frequency spectrums are considered to be extremely valuable and viewed as a national asset. The ongoing liberalization and the possible re-farming of spectrum resource in the region will allow the new technologies to flourish, and will open significant long-term benefits for operators

03:30pm - 04:00pm

Coffee Break

04:00pm - 05:15pm

Panel 4

Mergers & Acquisitions: Rise for Technologies or Global Competition ?

M&A activities were shaking up the ranking order lately. Last year have seen aggressive M&A activities in the world. Some telcos were buying for rising technology while others are buying for rising in the global ranking.

Pessimistic of optimistic financial impacts ? Today, carriers are in the quest for innovative business model that helps them to triumph over the challenges posed by the rising Opex and Capex. Adjusting their current business model to optimize the Opex and Capex, carriers need to understand the emerging areas and trends thus highlighting potential opportunities that will result in increased revenues and profits.

However with M&A, the potential markets can be effectively presented with the ICTs which in turn, may substantially facilitate optimal utilization of capital resources and would help to set up new, more advanced passive infrastructure.

- 2009-2010 saw a very cautious approach to M&A
- 2011 is expected to see a revival of M&A
- Will we see a replication of pre-crisis growth strategies?
- Is the industry heading to consolidation through mega deals?
- Will M&A be leveraged to fulfill capability gaps and augment the competitive posture of Telecoms?

08:00pm - 11:30pm

Gala Dinner



Day 3

27th April

08:00am - 09:00am

Welcome Coffee with Morning Pastries

09:00am - 10:15am

Panel 5

Mobile Content Innovation

Content industry is the most promising industry as it has been the Holy Grail for innovation and creativity. The future of content industry in SAMENA region is so dynamic and potentially demanding especially with the emerging technologies of mobile and fixed broadband. With the increasing demand of users for wider content there won't be time to undertake major upgrades and reconfigurations of the network. Network operators need to have a more innovative business intelligence approach. It appears that in SAMENA region VAS industry will definitely rise up in 2011-2012 so operators need to think more innovatively.

SAMENA region's content industry continues its remarkable progression; broadband is progressively becoming the nexus of content and other value added services. Growth in the mobile content space which is especially evidenced in the Middle East shows a strong demand for content and introduces challenges that the industry stakeholders must address to accomplish widespread success in this demanding region.

- Telcos have yet to monetizing content
- OTT are reshaping the industry and accelerating its development
- Should operators compete or partner with OTT players
- How do telco create the eco-system to monetize mobile content

10:15am - 11:30am

Panel 6

Innovation in the Home

IPTV provides a supreme value by offering a wide diversity of quality content and a great command over that content, with many great features such as Electronic Program Guide (EPG) and time shifting that adds on the personalization experience. "Triple Play" when bundled by a single provider enhances the effectiveness by supporting the service upgrades, repairs and billing quite efficiently which is also economical. IPTV facilitates operators to further improve average revenue per user (ARPU) that also helps in boosting internet penetration. IPTV also encourages operators to become media corporations and to visualize the market as a retail media aggregator.

This encourages the region to be more open to the new TV technologies as High Definition and 3D and make the operators confident for the advancements on this ground. Some of the operators have initiated IPTV ventures and some of them are in pipeline which is certainly a good indication of progression as organizations that have launched IPTV in MENA region have seen a significant improvement in their ARPU.

- Potential for multi-media application
- IPTV: from analogue to digital
- Telcos right to win in this space
- What is the eco system needed and how do you create it

11:30am - 12:00pm

Coffee Break

12:00pm - 01:15pm

Panel 7

Satellite Broadband

In the SAMENA region, where satellite broadband is growing, the demand for applications such as digital content is expected to further fuel the growth of satellite broadband. Satellite broadband appears to gain significant growth over the next few years with services such as video-on-demand, Internet TV, data, VoIP and cellular backhaul. The region is expected to experience considerable growth and that is why many international players are looking into the SAMENA region's markets for satellite broadband services.

- Is there an opportunity in satellite broadband?
- Is the technology supplementary or complementary to the existing mobile broadband technologies?
- Will the technology be able to keep up with the pace of innovation?

01:15pm - 02:15pm

CEO Live Session

- Competition is arising from OTT and neighboring industries
- Massive investments are required to build the next generation of high-speed networks
- How can telcos re-invent themselves to compete effectively

02:15pm - 03:30pm

Lunch Break