

Mobile Roaming

4th-6th of November 2008, Prague

Day 1: Tuesday 4th November

Registration & Refreshments

Welcoming Address & Speed Networking

Chair's Introduction:

Roaming Market Forecast

MARKET FORECAST Introducing the Changing Face of Roaming – Examining the Shift from Traditional Mobile Roaming to a Multiplatform Approach of the Future

- Assessing the current value chain and how this is changing
- Discussing current traffic levels and the market influencers
- Examining current customer roaming behaviour and forecasting trends
- Outlining the role of future devices and convergence on the market
- Forecasting future roaming revenues and traffic levels

Understanding the Changing Value-Chain and Anticipating the Impact of Convergence on Traditional Players

- Gauging how convergence is changing the roaming game
- Preparing the market for a change in business models
- Assessing the advantages of online players entering the market
- Any device, anytime, anywhere – how long until presence becomes a reality?
- Discussing auto-roaming potential enabled via convergence

Bernd Hoogkamp, Head of Mobile Community, TeliaSonera

Exploring the 'Eurotariff Effect' Post Regulation

Post-Regulation: Analysing the EU Market and Outlining the Impact on European Operators and Consumers

- Assessing whether regulation has created an uplift in roaming usage
- Analysing the unforeseen effects of regulation on the EU market and its customers
- Gauging whether EU roaming costs are now truly transparent in retail pricing
- Determining whether the market has witnessed a reduction in wholesale prices
 - What has been the impact on wholesale roaming agreements?
- Examining how the new EU interconnect regulation will impact the roaming regulation

Ladislav Tebich, Senior Head of Roaming, T-Mobile

Networking Break

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Positive or Negative? Assessing the Wider Impact of EU Regulation on Non-European Operators

- Examining the response of non-EU countries to the regulation
- Charting the negative fallout for incoming roamers following regulation
- Analysing the impact of regulation on IOT's
- Evaluating counter measures to ensure a lower roaming cost to all consumers
- Discussing how other parts of the world are approaching roaming regulation

Öykü Torun, Head of Roaming, Turkcell, Turkey

Creating Competition below the Cap: How can Operators Stimulate the Market and Avoid Further Regulatory Intervention in Pricing?

- Assessing the potential for further regulatory intervention
- How can roaming competition be encouraged to negate future legislation?
- Discussing regulation vs. pricing innovation in retail roaming
- Understanding the data debate for data and SMS roamers
- How can data prices be lowered whilst remaining profitable for operators?
- Gauging the re-introduction of per second billing/peak and off peak/zonal pricing/bolt on offers etc

Jesper Holm Schlichtkrull , International Account Manager, TDC

Examining the Best Strategies for Creating Price Elasticity in Roaming Offerings despite Regulatory Change

- Exploring the impact of regulation on current roaming offers
- Has regulatory change rendered roaming charges inelastic?
- Exploring whether lower roaming costs has stimulated customer demand
- Becoming an innovator: How can operators best approach roaming offers?

Edward van Kuijk, Head of International Services, Vodafone

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Leveraging Open Connectivity and New Business Models

Forming Beneficial Roaming Agreements in Emerging Markets and Ensuring QoS across Global Partnerships

- Assessing the benefits of hubbing in emerging markets for established players and new entrants
- Best practice for facilitating multi-lateral roaming relationships
 - What are the considerations?
- Strategies for ensuring quality of service across partnerships through end-to-end testing
- Measuring QoS – how is this achieved?
- Allowing service management capabilities across hubs

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Life After Hubbing – Exploring the Long-Term Effects of Hubbing on the Global Roaming Market

- Analysing the pros and cons of hubbing agreements
- Assessing whether hubbing will end bilateral roaming agreements
- Exploring the impact of hubbing on operator costs
 - Can these savings be passed to the consumer?
- Discussing the impact of hubbing on global roaming quality
- Can hubbing be achieved between CDMA and GSM technologies?

Atul Madan, VP, HUBS, Bharti Telesoft

Networking Break

PANEL DISCUSSION: Does Hubbing make it Harder to be Competitive?

- Achieving smooth transition from bilateral agreements to a hubbing framework
- Exploring success factors for hubbing in roaming
- How is hubbing beneficial to the established operator?
- Exploring the impact of hubbing on roaming competition
- Discussing how hubbing can bring cost savings to major global organisations

Assessing the Role of Handsets and Devices

Understanding how Handset Manufacturers, SIM Providers and Future Mobile Handset Applications are changing the Face of Roaming

- Assessing whether operator roaming revenues are under threat from future mobile device applications and access technologies
- Examining the impact of handset intelligence on network and SIM steering
- Discussing how to achieve a smooth customer roaming experience on the device
- Firmware, applications, SIM, routing calls
- Understanding the future of smart devices within roaming
 - The iPhone effect

Handsets as Part of the Roaming Solution: Can Telcos and Device Manufacturers Work More Closely Together to Improve the Customer Roaming Experience?

- Debating the role handset manufacturers currently play in the roaming world
- Examining the impact of recent releases of handset applications and technologies that facilitate non GSM roaming
- Assessing the role next generation devices are playing in the customer experience of roaming
- How can operators and manufacturers work closely to enable efficient roaming experiences for the customer – and is this in their best interests?
 - Traffic steering, services support, WiFi enablement, 2G/3G switching etc

End of Day 1

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Day 2: Wednesday 5th November

Registration & Refreshments

Chair's Introduction:

Measuring Technological Change in the Industry

Banishing Roaming as a Monopoly – Do New Access Technologies Spell the End for Roaming as We Know It?

- Assessing the impact of new technology on roaming pricing
Is a drop inevitable?
- How can operators leverage new technologies to their advantage in a complementary rather than competitive method?
- Discussing roaming across multiple access technologies and integrating this into one end user product - WiFi, WiMAX, HSPA

PANEL DISCUSSION: Discussing Technical Solutions for Data Roaming to Decrease Strain on the Operator Pipe to Enhance Consumer Expectation

- Assessing the current dangers of increased data roaming on operator pipes
- Exploring whether the current data roaming experience lives up to expectation
- Analysing current platforms and solutions to decrease the pipe strain
- Strategies for relieving pressure on the radio access network
- Examining the potential of LTE in roaming

Tackling Usability and QoS Concerns over Alternative Roaming Methods to Achieve a Better User Experience

- Creating Differentiation through QoS by its Incorporation into Retail & Wholesale Strategy
- Evaluating current QoS – is it living up to expectation?
- Tackling the challenges posed by increasing QoS
- Discussing user interfaces when accessing alternative roaming solutions
- Providing a seamless experience to the user
- Examining technology options including VoIP and WiFi options

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Exploring WiFi Roaming and Creating a Seamless Roaming Atmosphere for the Consumer

- Assessing the risk of WiFi roaming to operator revenues
- Utilising hotspots as a key portfolio differentiator
- Examining the role of handsets in WiFi roaming and seamless integration
- Solutions to integrate WiFi and GSM roaming
 - Enabling seamless switching and handoff between access technologies to achieve VCC
 - Bundles & Billing for integrated portfolio offerings

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Exploring the Development of Roaming with WiMAX

- WiMAX to WiMAX – WiMAX to Wi-Fi – WiMAX to GSM/3G – which roaming will come first?
- Creating roaming partnerships with WiFi and 3G networks
- Developing unified billing, clearance and interconnection
- Charging strategies for alternative roaming models
- Discussing the possibilities enabled by WiMAX roaming

Creating Innovative Pricing Models to Secure Roaming Revenues

Focusing on Roamers not Revenue: Why Creating Innovative Roaming Solutions Should be a Long-Term Strategy rather Than a Short-Term Revenue Enhancer

- Recognising roamers as high value customers
- Creating competitive advantage through the roaming offer
- Assessing bundled roaming packages
 - Voice and data
- Utilising cross property roaming agreements to enhance bottom line revenue profits
- Building loyalty through innovative service offerings

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Catering for the Data Usage Explosion – Achieving Fairer and Transparent Pricing Models for Consumers Abroad

- Opportunities and risks of data roaming to the operator and consumer
- Exploring pricing models
 - Unlimited vs. capped usage/data bundling/stepped usage pricing
- Realising fair, yet profitable, cost prices to avoid further regulation
- Creating pricing zones to enable block pricing
- Reaching new wholesale agreements/bilateral-agreements pricing
- Assessing new technological solutions which will lower data roaming costs

Tackling the Challenges Faced by Pre-Paid Roaming and Driving Consumer Uptake

- The Prepaid coverage challenges: prepaid any where - is it within operators' reach?
- Making pre-paid roaming more attractive and encouraging use
 - Seamless service vs. call back
 - Operators' business case
 - Live Demonstration of Prepaid usage, CAMEL-free
- Technical challenges posed by CAMEL in pre-paid roaming
- Driving consumer uptake through well positioned marketing campaigns
 - Who is the target market?

Ofer Shahak, Product Marketing Manager, Starhome, Israel

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PANEL DISCUSSION: Developing Strategies for Attracting and Retaining the Inbound Traveller to Grow Roaming Revenue Opportunities

- Traffic steering to guide roamers to cost effective networks
- Making the most of wholesale agreements with strategic roaming partners
- Marketing to inbound roamers
- Utilising location based services
- Providing a Virtual Home Environment for roaming customers
 - Effectively Managing Short Codes

Ofer Shahak, Product Marketing Manager, Starhome, Israel

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Deploying Dynamic Roaming Steering Techniques to Ensure Superior Subscriber Roaming Experiences through the use of the (U)SIM

- Creating Sound and Harmonious Interworking Relationships with the HPLMN and VPLMN while Maximizing PLMN Service availability to Roamers
- Outlining the possibilities for creating VHE for roaming subscribers, using the operator-controlled SIM with methods implemented in the VPLMN

Alf Eriksson, Vice President Business Unit SIM-OTA, SmartTrust

Understanding Mobile Roaming Solutions Offered by MVNO Players

- How big a role do MVNOs play in the global roaming market?
- Exposing the challenges posed by multiple identities involved in MVNO roaming
- Assessing the role of an MVNE in MVNO roaming offerings
- Gauging tariff levels for roaming MVNO customers – are these competitive?
- Setting up an MVNO to handle incoming roamers to a market
- Impact of EU regulation on MVNOs

Partnerships & Suppliers

Bringing Solutions Back in-House – Consolidating Dependences and Taking Back Potential Liabilities that Currently Lie with Outsourced Suppliers

- Dangers of outsourced roaming systems
- Improving data assurance
- Reducing liabilities that lie with external suppliers
- Advantages of bringing roaming in-house and how this can be achieved

Examining Financial Clearing and Assessing Outsourced Solutions

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End of Day 2

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Day 3: Wednesday 6th November

Registration & Refreshments

Chair's Introduction:

Roundtable 1: How can QoS be Improved for Roamer and how can Operators Ensure they can Deliver on their Promise?

With customer expectation of the roaming service they receive increasing, the consistency of experience they receive is paramount. It is important that operators are able to both articulate what a user can expect in terms of service availability when they roam and then, most significantly, provide it. In a network-dependent strategy, how can this expectation be consistently delivered?

Roundtable 2: How can Data Roaming Pricing be Fairly Achieved?

Following the launch of the iPhone and subsequent high-end device spin-offs, consumers are being given a reason to use data abroad like never before. These next generation handsets make email easy and make numerous applications and services possible, including GPS based features with mapping, and are now generating a great deal of data usage. How can operators design an accessible roaming tariff that reduces, or even, eliminates bill-shock without being loss-making?

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Optimising Revenue

Supplementing Roaming Income through Alternative Revenue Streams – What are the Available Options?

- Forecasting the fall in roaming revenues
 - Proportion of operator income
- Discussing the potential level of data income ARPU
- Assessing the monetary benefit of deploying value added services and SMS
- Exploring the growth in mobile advertising
- How can roaming revenues be optimised to increase bottom line productivity?

Enabling Revenue Assurance Based on In-House Data to Ensure Proper Reconciliation with Partners

- Pressures on telecoms revenue assurance
- Challenges faced when assuring roaming revenues
- Assessing leakage of gross roaming revenues
- Improving in-house systems and data to tackle revenue loss
- In-house or outsource revenue assurance systems?

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Examining the Future Concept of Roaming Billing and Exploiting Real-Time Solutions to Aid the Introduction of Advanced Service Offerings

- Discussing whether current billing systems are able to cope with future demand
- Judging the success of NRTRDE implementations
- Assessing the suitability of next generation systems on the rapidly expanding services market
- Examining future solutions to enhance current revenue assurance and fraud detection capabilities
- Discussing the challenges faced when billing in a converged environment

Networking Lunch

Reducing Fraud and Roaming Leakage within Networks and Enabling Accurate Revenue Assurance Data

- Reducing wireless crime in roaming
- Assessing damage of fraud and suggesting counter measures
- Deploying revenue assurance checks
- Reducing cross network delay in roaming activity and implementing NRTRDE
- Detecting and analysing fraudulent roaming usage

Consumer Roaming Expectation

PANEL DISCUSSION: Gauging Consumer Expectations of Mobile Roaming – Are These Currently Being Fulfilled?

- Examining who is the mobile roaming customer
- Examining the myths and truths: What do customers want from their roaming experience?
- Assessing the trade-off between QoS and price
- Strategies for collecting feedback and making the most of customer intelligence
- Improving the customer roaming experience

Exploring Value Added Services to Create Differentiation in a Branded Roaming Experience

- Understanding which services stimulate consumer uptake
- Assessing the value of location based services
- Exploring the costs of value added services
- Gauging the benefit of call back products
- Strategies for driving uptake amongst consumers

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Tactics for Enhancing Marketing Strategy to the Consumer to Grow Roaming Awareness and Drive Usage

- Exploring the challenges faced in unifying the message
- Assessing the multiple methods of consumer communication
- Judging the impact of successful marketing on acquisition and retention
- Creating innovative and understandable packages
- Examining the difficulty in communicating roaming to the consumer
- Utilising Mobile advertising and promotion to drive roaming revenues

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Understanding the Roaming Business Customer in Order to Build Effective Roaming Packages and Offer Loyalty Building Services

- Analysing the current corporate customer roaming solutions available
 - How can these be improved?
- Exploring QoS vs. cost to the business user
- Judging the impact of business FMC on roaming expectations
- Assessing the benefit of presence for the corporate client and other loyalty enhancing services
- Discussing billing strategies for the business consumer and enabling cost-effective strategies for voice and data usage while abroad
- Appealing to the corporate market through hotspot WiFi roaming

Future of Roaming

What's next for Roaming? Discussing the Future of Roaming Strategy and Industry Ecosystem

- Assessing changes in the market and their impact on future roaming strategy
- What effect will 4G and LTE have on roaming?
- Discussing whether roaming will exist in its current form the future
- Analysing the future of global roaming networks
- How will incoming business models affect the current industry ecosystem?

Improving Global Roaming Quality through Multiparty Cooperation for the Benefit of Industry and Overall Customer Satisfaction

- Examining what's wrong with roaming
 - Is roaming bad value for money?
- Assessing the drivers for improving global roaming quality and the risks of not
 - End user demand, costs to the operator, acquisition, retention costs
- Exploring current issues with end-to-end global quality monitoring
- Overview of the GSMA's Global Roaming Quality project
- Gauging the current project status and key future initiatives

End of Day 3
