



27-28 April 2010
The Kenyatta International
Conference Centre
Nairobi, Kenya

Adapting to Accelerate Progress, Increase Connectivity & Maximise Growth

Agenda at a Glance:

Day 1 – Tuesday 27 th April 2010	
Keynote Session: Adapting Strategies to Maximise Growth in the Next Economic Phase Effective Broadband Strategies for a Connected East Africa	
Stream A – Mobile & Fixed/Wireless Broadband in East Africa	Stream B – Monetizing Appropriate Value Added Services
Day 2 – Wednesday 28 th April 2010	
Keynote Session: Convergence in East Africa's Most Competitive Markets: Gaining the Edge	
Improving Efficiency for East African Operators	
Telecoms for All: Serving Rural Communities in East Africa	
Tactical Round-Up Session – The Future of Telecoms in East Africa	

Day 1 – Tuesday 27th April 2010

08.00 Registration

9.00 Welcome Address by Informa Telecoms & Media - Speed Networking (*Speed Networking symbol*)

9.10 Opening Remarks by Chair: **Michele Scanlon**, Principal Analyst, **Green Giraffe**

Keynote Session: Adapting Strategies to Maximise Growth in the Next Economic Phase

9.15 Introductory Informa Market Overview: Trends and Forecasts for East Africa's Telecoms Market

- Examining the East African market; subscription growth in the region, which are the largest markets, and operation performance indicators
- Key trends for the data market; current and forecasted 3G trends, data usage in East Africa, and the growth of Mobile Broadband
- Mobile banking; potential, obstacles, support and future outlook
- The submarine cabling systems; the effect of SEACOMS, TEAMS and EASSy on the region

Mai Barakat, Analyst – East Africa, **Informa Telecoms & Media**

For more information about the agenda and speaking opportunities please contact emily.cottam@informa.com

9.35 Operator Group Keynote: Strategies to Maintain an Operator's Position against Challenging New Economic Conditions in East Africa

- How the competitive landscape is changing
- How will this economic phase affect service providers in East Africa going forward?
- Which business models will work for scale & efficiency?
- How can collaboration with regulators and government ensure that East African markets continue to attract funding & investment?

Bashar Arafah, Chief Operating Officer, East Africa Region, **Zain Group**



10.00 Minister's Address: Official Welcome from the Kenyan Ministry of Information & Communication

Hon. Samuel Poghio, Minister, Ministry of Information & Communications, Kenya

10.15 Regulatory Keynote: Measures to Sustain the Development & Growth of East African Telecoms

- An overview of current regulatory projects & initiatives
- How regulation can allow the market to innovate while preventing problems and obstacles
- A connected East Africa: Examining regulatory targets for connecting the underserved
- Regulating convergence: Recommendations for operators in East Africa

Mr Charles J. K. Njoroge, Director General, Communications Commission of Kenya (CCK)

10.30 Regulatory Recommendations Session: What will a Changing Economic Landscape Mean for Competition?

The Regulatory Recommendations Session will involve a 5 minute overview from the GSMA Africa, followed by a 15 minute interactive session. The session's Chair will open the discussion to the floor so that delegates can pose questions to the participants.

Vitalis Olunga, Chairman, **GSMA Africa**

Mr Charles JK Njoroge, Director General, **Communications Commission of Kenya (CCK)**

Prof. John S Nkoma, Director General, **Tanzanian Communication Regulatory Authority (TCRA)**

Brahima Sanou, Head of Regional Office, Africa, **ITU, Ethiopia**

11.00 Coffee & Exhibition Visit

Effective Broadband Strategies for a Connected East Africa

Chair: **Guy Zibi**, Managing Director, **AfricaNext**

12.00 New Entrant: Business Models to Successfully Enter Competitive East African Markets

- Orange Uganda's beginnings: taking over HiTs Tel & entering Uganda's hyper-competitive market
- Extending a brand: how being a part of Orange helped launch new services
- Attracting consumers with attractive offerings, but ensuring longevity
- Challenges vs opportunities: Orange Uganda's long-term strategy

Edouard Blondeau, Project Management Officer, **Orange Uganda**

12.20 Broadband in East Africa; Realising Potential and Visualising Wireless Networks in the Future towards LTE

Alfred Ngeno, Solutions Architect, Solutions & Marketing Team East Africa, **Alcatel-Lucent**

12.40. Ensuring a Better Broadband Experience for all East Africans

Senior Representative, **Ericsson**

13.00 International Connectivity Roundtable: What Can Be Done to Deliver Reliable Internet Access in East Africa after the Arrival of Submarine Cables?

- What are the current standards of international connectivity in East African markets?
- What do the submarine cables really mean for East African connectivity?
- Is quality of service the key success factor?
- How can co-operation improve international connectivity for East Africans?

Jayant Khosla, CEO, Africa, **Essar Group**

Jean-Pierre Bienaime, Chairman, **UMTS Forum**

Other panellist tbc

13.30 Lunch & Networking

Stream A –Mobile & Fixed/Wireless Broadband in East Africa

Chair: **Matt Reed**, Editor, **MEAW**

14.30 Operator Case Study: An Effective Broadband Deployment in East Africa

- The case for upgrading from 2G to 3G
- Assessing the necessary investment needed to provide broadband coverage
- How can deployments be made cheaper for operators?
- What are the best technologies for providing broadband to East Africa?

Hans Paulsen, Chief Commercial Officer, **Uganda Telecom**

14.50 Panel Discussion: Debating which Technologies Will Serve East African Operators Best

- What are the network challenges when deploying broadband in East Africa?
- What are the cases for WiMAX and CDMA broadband solutions?
- What technology choices should fixed-line players make to offer fixed/wireless Internet?
- What role will satellite play now that submarine cables have landed?

Shiletsi Makhofane, CEO, **Africa Online**, **Kenya**

Mohamed Bouhelal, Chief Corporate Affairs Officer, **Canartel**, **Sudan**

Other panellists tbc

15.20 Networking Coffee & Exhibition Visit

16.20 Corporate and SME customers from an ISP perspective

Loren Bosch, Sales Director, **Internet Solutions**, **East Africa**

16.40. Analysing the Effect that Wholesale International Bandwidth Pricing will have on Retail Broadband Prices in East Africa

- Analysing the number of broadband players in East Africa
- Assessing bandwidth pricing over the past 12 months and how it has affected subscriber numbers
- Forecasting bandwidth prices over the next 2 years in the light of TEAMS and improved access to broadband bandwidth

Kalyan Medapati, Research Analyst, Global Markets, **Informa Telecoms & Media**

17.00 Chair's Summary & End of Day 1: Networking Drinks & Entertainment

Stream B –Value Added Services

Chair: **Thecla Mbongue**, Analyst, **Informa Telecoms & Media**

14.30 Corporate Service Offerings in Increasingly Competitive Markets

- A break down of the ICT market in Kenya; how this translates into a high-value revenue stream for operators offering corporate services
- How to build a relationship and trust with the corporate sector
- Assessing the different service and quality needs of a corporate client
- Critical success factors: what you need to get right when serving the corporate sector

Julius Kinyua, CEO, **Flashcom**, **Kenya**

14.50 Implementing new revenue generating applications to capture new customers and improve the overall subscriber experience

- Service Quality Management: driving revenue by optimizing your system for the customer experience
- Capturing new revenue generation opportunities and increasing customer loyalty with new innovative applications: Mobile Commerce,
- Mobile Advertisement, Location Based Services

Mehdi Kanouni, Business Development Professional Services – EMEA, **Motorola**

15.10 Successful Services Think Tank: What Makes a Winning Service in East Africa?

- Focus on low-cost services: how to balance ROI with making services affordable?
- Examining the services available for operators to monetise 3G
- Debating mobile money services in East Africa, how can more operators harness this popular service?
- Which will be the money-making service for operators in 2010?

Geoff Goss, CEO, **Celsys**, **Zimbabwe**

Junaid Munshi, CCO, **Vodacom Mozambique**

Other panellists tbc

15.30 Networking Coffee & Exhibition Visit

16.20 Offering Services that Attract and Retain Customers: Operator Strategy

- Examining the current status of services in the Tanzanian market
- How services are boosting Zantel's revenue
- Examining which segments are best suited to which services
- Understanding technology choices & solutions for Zantel

Noel Herrity, CEO, **Zantel**, **Tanzania**

16.40 Examining Successful Content for East Africa: Goal.com's Mobile Strategy

- What content is out in the East African markets so far?
- How successful have content offerings been for East African operators?
- Focus on what works: an East African mobile content case study
- Get ready for the Football World Cup – opportunities for East African operators

Gianluigi Longinotti Buitoni, CEO, **Goal.com**

17.00 Chair's Summary & End of Day 1: Networking Drinks & Entertainment

Day 2 – Wednesday 28th April 2010

08.30 Registration

9.10 Opening Remarks by Chair: **Matt Reed**, Editor, **Middle East & Africa Wireless Analyst****Convergence in East Africa's Most Competitive Markets: Gaining the Edge****9.20 Operator Case Study: Why Converged Service Offerings is the Next Big Thing for East Africa**

- Examining converged services and defining the term as it applies to East African markets
- Why convergence is an advantage for operators in East Africa's increasingly competitive markets
- How submarine cables and greater access to international bandwidth is driving the progress of converged offerings
- What changes will occur in a converged ecosystem, and how will they impact current players?

Michael Joseph, CEO, **Safaricom**, **Kenya****9.45 Transforming a Public Telco into to a Converged, Customer Responsive Commercial Entity: The Case of Orange Telkom Kenya**

- Converting an established incumbent with the Orange brand
- How the fixed-line sector has evolved to compete with mobile broadband
- Outlining what Orange Telkom Kenya considered to be the key customer needs to focus on during its transition
- The results: examining the current status of Orange Telkom Kenya after only one year of operation under the new brand

Mickael Ghossein, CEO, **Orange Telkom Kenya****10.10 Keynote Executive Interviews: Protecting and Encouraging Growth – Convergence Business Models to Drive Success during Economic Downturn**

- Examining the key factors affecting East African operators so far: funding, ARPU and costs
- Analysing M&A activity in the region
- Why do converged services offer a strong business model in the face of economic change?
- How can East African operators continue to attract new customers and drive penetration rates?

Hans Paulsen, Chief Commercial Officer, **Uganda Telecom****Noel Herrity**, CEO, **Zantel**, **Tanzania****Evans Nyagah**, Head of Enterprise Sales, **Orange Telkom Kenya**

10.40 Networking Coffee & Exhibition Visit

Improving Efficiency for East African OperatorsChair: **Thecla Mbongue**, Analyst, **Informa Telecoms & Media****12.00 Focusing on Revenues & Margins when Improving Efficiency: Strategies for Serving Low-ARPU Segments**

- Assessing the importance of OPEX costs and levels of ARPU
- Realising the benefits of outsourcing and network sharing for East African operators
- ARPU strategies: stop ARPU falling or increase subscriber base, know your customer and innovate
- Catching the next wave of growth: Low-end customers are key, so reduce costs, build partnerships, and focus on the bottom-end services

Jayant Khosla, CEO, **East Africa**, **Essar Group**

12.20 Case Study: Low Cost Urban and Township Experiences

- Sustainable operator strategies: Energy saving initiatives and cost-effective infrastructure maintenance
- Current power challenges and solutions: what's working now and what are the realistic long-term energy sources?
- How can the telecoms industry lead the drive to a greener society for other parts of East African society?

Rael Lissoos, Founder & CEO, **Dabba**, South Africa

12.40 Redefining the Operator-Vendor relationship: How Much & What Will be Shared through Managed Services?

- Assessing how much East African operators can learn from the Indian business model: outsourcing, low-costs, and customer call centres
- Which outsourcing strategies will really improve margins in the long-term?
- How much to outsource? Where to start and when to stop?
- In the future will operators outsource most functions & concentrate more on customer service?

Bayan Monadjem, Technical Director, **Zain East Africa Network**, Kenya

Themba Khumalo, CEO, **MTN Uganda**

Mohamed Bouhelal, Chief Corporate Affairs Officer, **Canartel**, Sudan

13.10 Lunch & Networking

Telecoms for All: Serving Rural Communities in East Africa

Chair: **Guy Zibi**, Managing Director, **AfricaNext**

14.10 How to Provide Affordable Mobile Services to Off-Grid Rural Populations - and Still Make a Profit

Suraj Chaudhury Head of Business Development, **VNL**

14.30 Case Study: Connecting the Un-Connected & Changing Lives in East Africa

- Outlining the rural connectivity project
- Who benefitted, and how long-term were the benefits?
- What were the costs, and how were they regained? Can rural projects be anything but CSR?
- What's next: how to reach other rural communities and meet universal service requirements

Themba Khumalo, CEO, **MTN Uganda**

14.50 Sustainable Solutions to Help Operators Reach the Next Million

- Assessing cheaper network solutions to extend operators' reach to more areas
- Solutions for power: how to solve operator power requirements in remote regions
- Examining access to services: the issue of affordable handsets, and solutions for illiteracy
- How to provide affordable mobile services to rural populations and still make a profit

Ali Bin Jarsh, CEO, **Canartel**, Sudan

15.10 Expert Focus Session: Overcoming the Challenges of Improving Telecoms Services in Rural Areas with Cost-Efficiency Strategies & Solutions

- Assessing current coverage and network quality for rural areas in East Africa
- Low-cost networks to reach the underserved; examining WiMAX solutions for green field sites
- Pricing for services to rural and underserved customers: How can operators still get a good ROI?
- Setting realistic targets and deadlines for operators: What's the right balance?

Michele Scanlon, Principal Analyst, **Green Giraffe**

Other panellists tbc

15.40 Networking Coffee & Exhibition Visit

Tactical Round-Up Session – The Future of Telecoms in East Africa**16.40 Assessing the Progress of the Global Financial Crisis and a forecast for 2010-11 in East African Telecoms Markets**

- Examining the financial forecast for the East African telecommunications going forward
- Identifying trends in the East African markets
- Assessing which financial developments will impact the region in the near future

Olivier Nour Noel, Sector Lead, ICT, Sub-Saharan Africa Department, **IFC**

17.00 Analysts Roundtable: A Summary of East Africa Com 2010 – What is yet to come?

A panel of experienced industry analysts will address the main points that have been discussed over the last two days and debate what operators should focus on to address customers' needs and increase profits going forwards.

Matt Reed, Editor, **Middle East & Africa Wireless Analyst**

Thecla Mbongue, Analyst, **Informa Telecoms & Media**

Muriuki Mureithi, Chief Executive Officer, **Summit Strategies**, Kenya

17.30 Chair's Summary & Close of Conference – Until the Next Com Event in Africa!