

CEE Telecoms Wholesale

Strategies for profitable growth in a multi - operator environment

30th Sept 2008, Metropolitan Hotel, Sofia, Bulgaria



Don't miss the chance to educate yourself and gain leverage in what promises to be the most exciting marketplace in the coming years!
An intensive briefing for the CEE Telecoms Wholesale professionals!



The unsurpassed speaker line up includes:

Mr. Cristian Grigore
President
Prime Telecom



Dr. Karim Taga
Managing Director
Arthur D. Little



Mrs. Nadine Berezak-Lazarus
Managing Director
BMP Telecommunications Consultants GmbH



Mr. Bernd Hoogkamp
Head of Mobile Community
TeliaSonera International Carrier

Mr. Lar Kristian Roland
CTO
Colibria AS



Mr. Darragh Stokes
Managing Partner
Hardiman Telecommunications Ltd.



Mr. Uwe Nickl
Senior Vice President
Level 3 Communications



Mr. Oleh Bobovnikov
General Director
Novatel, Ukraine

Mr. Sasa Kramar
Member of the Management Board
Iskon Internet d.d.

Mr. Levente Csenteri
Executive Director
Combridge Srl

Mr. Frank de Frémery
Vice President
Sales and Business Development
Linxtelecom



Mr. Tomas Strasak
Head of Sales and Member of the Board
Dial Telecom



Mr. Vladan Aleksic
Head of Internet and Data Transmission
Serbia Broadband



Mr. Jassen Paspalev
Managing Director
Novatel Bulgaria

Mr. Zoran Korecic
Head of Carrier Relations Dept.
Iskon Internet d.d.

"The event was good, well organized. I met with several interesting individuals so it was worth the trip to Bucharest"

Comverse

"Thank you for the excellent organization of the event..."

Allot Communications

"...I took the opportunity for networking and meeting interesting people, which actually is the most important."

Max Telecom

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The European telecom market in 2007 flourished owing to the fact that it was stimulated by continuing investments in the mobile and Broadband sectors. In 2008 a greater emphasis will be placed on migrating consumers to 3G services and on developing content to stimulate higher-ARPU use among consumers. The CEE countries have undergone rapid economic development. This has transformed the telecoms markets within this region, as international investment has driven infrastructure deployments and service rollouts. Numerous fixed-line networks in the SEE region are undergoing modernisation at a fortunate time, with NGNs and advanced wireless broadband technologies such as WiMax are widely available.

Our panel of expert speakers will be examining in detail key Telecoms Wholesale market drivers around the CEE region. Featuring international keynotes and leading experts addressing the most topical and strategic issues, the forum will include extensive presentations and in-depth analysis of some of the key issues facing the industry.



Gain insights into the vital issues:

- The rapid growth of the CEE wholesale telecoms market: current challenges and future potential
- The key drivers of the market demand in the region
- Overview of the markets with the greatest opportunities for wholesale providers
- Financial gain from new opportunities to deliver IP services and applications
- Strategies for profitable growth in a multi - operator environment
- Evaluating a wider operator market
- Future expansion in the CEE Region: Extending Coverage and services
- Cost-effective 3G migration
- Adding value to the region's markets with MVNO and MVNE offerings

You will benefit from additional networking opportunities including:

- Extended networking breaks for exhibition viewing
- Gala evening drinks reception

Who will you meet:

- Local, regional and international operators
- Carriers and service providers
- Cable companies
- Content companies
- Mobile operators
- ISPs and analysts
- Consultants and financial companies

Country Focus Presentations:

- Exploring Czech Republic's convergence and media benefits
- Liberalisation in Telecom's sector in Bulgaria
- Determining the impact of EU membership of Romania to the Telecoms wholesale business
- Emerging opportunities in wholesale markets in Croatia, Serbia, Bosnia, Slovenia, Montenegro and Macedonia – How do they compare
- Has the establishment of a competing fibre backbone wholesale carrier in Albania allowed a number of broadband ISPs to flourish?

Media partners:



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Dear Delegates,

It gives me great pleasure to welcome you to the forthcoming EastEuro Link CEE Telecoms Wholesale Conference to be held on 30th September 2008, in the city of Sofia, Bulgaria. The EastEuro Link CEE Telecoms Wholesale Conference 2008 will provide local, regional and international operators, carriers and service providers and cable companies alike with many of the insights and contacts needed to succeed in the Central and Eastern Europe telecoms wholesale marketplace.

This year's event has focus beyond the new EU member states of the CEE region as we will examine the state of the telecoms wholesale industry also in the Balkan countries.

The European telecom market in 2007 flourished owing to the fact that it was stimulated by continuing investments in the mobile and Broadband sectors. While there was little further mobile network construction, most operators have upgraded existing networks to higher-capacity HSDPA to take advantage of mobile data offerings. In conjunction with these investments, in 2008 a greater emphasis will be placed on migrating consumers to 3G services and on developing content to stimulate higher-ARPU use among consumers.

Some of the incumbent operators and cable operators are extending their footprint to offer TV services via Satellite, i.e. using hybrid Set top boxes (satellite via DVB-S and ADSL or FWA). This is a strong innovation driven by incumbent operators (such as TPSA) or cable (e.g. UPC or RDC/RDS) in pushing nationwide triple play in the market.

The CEE countries have undergone rapid economic development. This has transformed the telecoms markets within the region, as international investment has driven infrastructure deployments and service rollouts.

Numerous fixed-line networks in the SEE region are undergoing modernisation at a fortunate time, with NGNs and advanced wireless broadband technologies such as WiMax widely available. Low broadband penetration levels are rising at extraordinary rates, mirroring growth rates recorded in Central Eastern Europe during that region's initial broadband growth period. Future fixed-line broadband growth may be constrained by the falling number of fixed lines in service, given that numerous countries in the region had low fixed-line penetration levels to begin with.


This conference will examine the key issues of the current global structure of the telecoms market and opportunities for CEE Telecoms Wholesale.

*Now in its **5th year in the CEE Telecoms Industry**, the EastEuro Link CEE Telecoms Wholesale forum will equip you to deal with the opportunities of a market that is undoubtedly bound for urgent development in 2008 and future.*

Our panel of expert speakers will be examining in detail key Telecoms Wholesale market drivers around the CEE region. Featuring international keynotes and leading experts addressing the most topical and strategic issues, the forum will include extensive presentations and in-depth analysis of some of the key issues facing the industry.

I look forward to seeing you in Sofia, on 30th September, 2008.

Chairman



Karim Taga, Managing Director, Arthur D. Little



08:30 Registration & Coffee

09:00 Chairman's Welcome Address**Speaker: Karim Taga**

Managing Director

Arthur D. Little

OVERVIEW OF THE CEE TELECOM WHOLESALE MARKET09.10 Profitable routes and growth opportunities in the CEE Telecoms Markets

- Key drivers of growth in the region today
- What opportunities are you addressing ?
- How does development in the CEE market differ from other regions?
- What are the best strategies for market expansion today to meet demand and remain profitable - partnering, outsourcing, M&A, or build?
- How does development in the CEE market differ from other regions?

Speaker: Uwe Nickl

Senior Vice President

Level 3 Communications

09.30 In-depth analysis of the CEE region and its financial potential

- Key players in the CEE market
- Forecasting the strategic direction of the CEE telecoms wholesale market
- How will the technology evolve?
- HSDPA mobile broadband offered in Croatia

Speakers: Sasa Kramar, Member of the Management Board and Zoran Korecic, Head of Carrier Relations, Iskon Internet d.d.09.50 Understanding Cable Providers, Mobile operators and Content Companies

- Determining the capacity and service requirements
- Meeting the needs of Cable Providers, Mobile operators and Content Companies
- How to deal with the differences in customer dimensions?

Speaker: Bernd Hoogkamp

Head of Mobile Community

TeliaSonera International Carrier

10.15 Significance of current trends – are they to be transferred to CEE Markets?

- Value of alternative technologies
- Migration to NGN- FTTx/H infrastructures
- Neutral carriers' carrier networks
- What is happening beyond the Broadband Triple or Quadruple Play?

Speaker: Nadine Berezak-Lazarus

Managing Director

BMP Telecommunications Consultants GmbH

10.40 Defining the Optimal Business Model for Telecoms Wholesale

- Partnering, outsourcing, M&A or building infrastructure. What works best?
- Outsourcing the international voice requirements, reducing capex and opex, value proposition and ROI

Speaker: Cristian Grigore

President

Prime Telecom

11:00 Networking Coffee Break

COUNTRY SPECIFIC CASE STUDIES11.30 Czech Republic – Convergence and media benefits

- Optical networks as a new standard to access end customers
- Czech speciality - high penetration of WiFi services
- IPTV demand and opportunities for alternative operators

Speaker: Tomas Strasak

Head of Sales and Member of the Board

Dial Telecom

11.50 Telecom sector liberalisation in Bulgaria

- Privatisation, Interconnect, Access
- Number portability
- Carrier selection / carrier pre-selection

12.10 Determining the impact of EU membership of Romania to the telecoms wholesale business

- Triple play services launched by the cable operators in Romania: How will this affect the existing providers?
- Determining the popularity of LAN-based broadband services

Speaker: Leonard Lichi

Executive Director

Datek Telecom Srl

12.30 Market trends and business ideas at the Ukrainian market

- Regional development made by Magyar Telekom in:
 - Romania (Combrige)
 - Bulgaria (Novatel-Bulgaria)
- Further expansion to Turkey, Georgia, Belarus, Moldova

Speaker: Oleh Bobovnikov

General Director

Novatel, Ukraine

Speaker: Jassen Paspalev

Managing Director

Novatel, Bulgaria

Speaker: Levente Csenteri

Executive Director

Combridge

13.00 Emerging opportunities in wholesale markets in Croatia, Serbia, Bosnia, Slovenia, Montenegro and Macedonia – How do they compare

- Analysing the internet penetration rate in the Balkans region
- Assessing the availability of ADSL2+, FttH and WiMax services

Speaker: Vladan Aleksic

Head of Internet and Data Transmission

Serbia Broadband

13.20 Has the establishment of a competing fibre backbone wholesale carrier in Albania allowed a number of broadband ISPs to flourish

- Examining the impact on the Countries from the region

13:40 Networking lunch break

OPPORTUNITIES IN THE OPERATOR MARKET

14.40 The best market strategies: how to develop further

- Exploring the way 3G is evolving
- 3G to 4G Standardisation
- How to reach IMS
- Next-generation multimedia convergence across fixed and mobile platforms

Speaker: Darragh Stokes
 Managing Partner
Hardiman Telecommunications Ltd.

15.10 Opportunities in the wider operator market

- Pros and Cons of a Multi-Operator Environment
- Factors of success for Greenfield Operators
- MVNO offerings

Speaker: Frank de Frémery
 Vice President, Sales and Business Development
Linxtelecom

15.40 Potentially disruptive services: investing in WiMax

- Communicating and pricing WiMax Value Proposition
- Business model for WiMax Deployment

Speaker: Lar Kristian Roland
 CTO
Colibria AS

16.40 Strategies for dealing with MVNO's

17:10 Networking Coffee Break

ETHERNET AND IP SERVICES

17.40 How will IP services increase profit

- VoIP, IPTV, video, IP transit, mobile backhaul
- What are the latest pricing structures
- How to incorporate IP with the optimal wholesale business model

18.10 Cost for adoption and Growth Potential of the Ethernet Market

- Ethernet used to optimise local, regional and international connectivity
- Ethernet and the optimal business model

18.40 Chairman's closing remarks

Speaker: Karim Taga
 Managing Director
Arthur D. Little

19.00 Gala Evening Cocktail reception

Some of the companies that have attended our conferences in the past:

- | | |
|---|-----------------------------------|
| Accenture | Lucent Technologies |
| ADC Krone | M SAN Grupa |
| Advent International | Magyar Telekom |
| Akton d.o.o. Network | Martin Dawes Systems |
| Alcatel | Max Telecom |
| Alegro Capital | Merrill Lynch |
| Allot Communications | Microsoft |
| ANRC | Mobilkom Austria |
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| Croatian Telecom | Romtelecom |
| Cullen international | Rundfunk Und Telekom |
| DARS | Regulierungs-GmbH |
| DCM d.o.o. | S&T Systems |
| Deloitte & Touche | SATLYNX |
| Deutsche Telekom AG | Schmid Telecom AG |
| Dlugie Rosmowy | SES Astra S.A. |
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| Ericsson Romania | SINFONIKA d.d. |
| Ernst & Young LLP | Slovak Telekom A.S. |
| Erste Bank | Sonus Network |
| European Commission | Supra Net Projekt d.o.o. |
| Eurotel Praha, spol. s r. o. | Synergy Capital |
| GBL Global Business Link | Telegroup D.O.O. |
| GTS-Datanet Telecom Ltd | Telekom Austria |
| Hewlett-Packard d.o.o. Croatia | Telekom Republic of Srpska |
| HIF-Communications Authority of Hungary | Telekom Serbia |
| HT Mobile Communications LLC | Telenor |
| Hughes Network System | TeliaSonera International Carrier |
| IFC | T-mobile |
| Immorent | TPSA |
| iNES Group s.r.l. | TT Comm s.a. |
| IRITEL | Vodafone |
| Italtel | Voicecom d.o.o. |
| KfW | Westlb Hungaria Bank Rt. |
| KRONE Kommunikationstechnik GmbH | White & Case |
| | Wolf Theiss |



**Dr. Karim Taga**
Arthur D. Little

Karim Taga is Managing Director in the Vienna office of Arthur D. Little's German, Austrian and CEE operations. He specializes in telecommunications and he is a member of the TIME (Telecommunications, Information Technology, Media and Electronics) practice. Besides he is leading the TIME practice in Austria. His interests are primarily focused on three functional areas: Business strategies and marketing concepts; Corporate Finance and business planning; Leading the global ADL competence center of technology economics. Prior to joining Arthur D. Little in May 1997, Dr. Taga worked for several years at Ericsson in the business area Private Networks.

**Mr. Levente Csenteri**
Combridge Srl

Mr. Levente Csenteri is Executive Director at Combridge. He earned his degree in building engineering at the Technical University of Cluj-Napoca in 1993, followed by a degree in economics for engineers at the Budapest University of Economics in 1998, and he completed his studies by an MBA program at the Budapest Technical University in 2000. From 2000 he worked for Novacom as carrier service manager, later as product development and carrier services director. In 2002 he managed the launch of Combridge SRL in Romania. In 2004 he was appointed executive director of Combridge. Under his leadership Combridge developed into one of the most important alternative carriers of Romania's telecom market.

**Mr. Oleh Bobovnikov**
Novatel, Ukraine

Oleh Bobovnikov has deep knowledge of the Ukrainian, the former Soviet Union and CEE markets and the key persons in Telecommunication, IT, Government, Industry, Business. He has made significant contracts with the Ukrtelecom, Kazakhtelecom, Parliament of Ukraine, the Supreme Court, Main State Expectorate, major ISPs, Pension Fund, United Nations office, major banks including Central Bank, Ministry of Energy, UkrGazProm, both Oil PipeLines etc. - to supply IT and Telecommunication solutions. Four contracts larger than \$1million, one \$5.4millions. Co-operation and winning tenders issued by different International Development Agencies: USAID, World Bank, TESIS, Renaissance (Soros) Foundation, USA Library of Congress etc.

**Mr. Vladan Aleksic**
Serbia Broadband

Vladan Aleksic has been active in Serbian IT industry from end of 80's, starting as CAD technology consultant. During mid 90's was Editor-In-Chief of two largest circulation domestic IT magazines ("Racunari" and then "Mikroracunari") and acted as Manager of "Sezam", largest BBS during pre-Internet era in Serbia. Shortly after start of Internet in Serbia in 1996, engaged as Marketing Director and Web development manager at EUnet, largest ISP at that time. Mr. Aleksic has held his current position as Internet & data transmission department manager from November 2003, and has been involved in broadband development in Serbia from the very beginning.

**Mr. Bernd Hoogkamp**
TeliaSonera International Carrier

Bernd Hoogkamp is the Head of Global Mobile Community at Teliasonera International Carrier. He has worked there since 2005. With over 9 years in the Telecommunications industry in various roles within wholesale, interconnection and the regulatory field, he has experience in contract negotiating, major account management, project management and new business development. Prior to joining TeliaSonera International Carrier Bernd held several interconnect, wholesale and sales related positions in various companies in the Netherlands. Bernd studied International Business and languages at the Hogeschool Arnhem en Nijmegen in The Netherlands.

**Mrs. Nadine Berezak-Lazarus**
BMP Telecommunications Consultants GmbH

Mrs. Nadine Berezak-Lazarus, French, graduated at the Grande Ecole Commerciale, ESCP-EAP and studied in Paris, Oxford and Berlin in 1987. From 1993 to 1999, she developed and led the broadband team of a leading German consultancy group. In 1999 she founded bmp Telecommunications Consultants and has held the position of managing director since. She has been involved in international broadband-related strategy projects using mature and innovative last mile technologies including DSL, LLU CATV, PLC, wireless (WiMAX, WiFi-mesh), FTTX, NGN and topics such as triple play, in-home networking, and fixed-mobile convergence.

**Mr. Uwe Nickl**
Level 3 Communications

Uwe Nickl is Senior Vice President responsible for product delivery, offer management, marketing and strategy in Level 3's European Region. Prior to this appointment, Mr Nickl held the position of Managing Director for Level 3 Communications GmbH, responsible for all business operations in Germany, Austria, Switzerland and Central and Eastern Europe. He has been with Level 3 since April 1999, and during his time with the company has also headed up Corporate Development and Marketing in the German region. He is based in London.

**Mr. Jassen Paspalev**
Novatel Bulgaria

Jassen Paspalev is the Executive Director of Novatel Bulgaria in Sofia. His intention is to establish a market oriented, customer centered company, that would play an active role in the forming of the Bulgarian info-communication society. Previously, Mr. Paspalev worked as a Core Network Planning Manager at Vodafone Hungary, Switching Engineer at Pannon GSM and Siemens EWSD System Engineer at Matav. Mr. Paspalev studied Electrical Engineering, Telecommunications at Technical University of Budapest, and holds a Telecommunications MBA from Budapest University of Economics.

**Mr. Tomas Strasak**
Dial Telecom

Tomas Strasak has taken his degree M.A. in Economics of International Trade & European Integration from Staffordshire University, University of Antwerpen, University of Economic Sciences - Prague. His carrier began in 1998-2000 in Internet Securities, Inc. where he worked as Product Director for Czech & Slovak Republic. He became a Team Leader -- International Data Wholesale for Telefonica O2 Czech Republic, 2000-2004. In 2004 he took his current position as Head of Sales and Member of the Board at Dial Telecom and net4net (2004-2007, acquired by Dial Telecom in 2007).

Sponsorship opportunities:

The **CEE Telecoms Wholesale – Strategies for profitable growth in a Multi-operator environment** promises to be a conference packed with the most up to date developments and challenges in this fascinating area, being addressed by the industry's foremost authorities. Specifically designed to facilitate networking, those involved will have the opportunity to meet and influence key company representatives from most senior job functions.

In a competitive market a strong commercial presence is crucial and therefore utilising potential exhibition and sponsorship opportunities will give your company the overall edge on:

- Creating brand awareness
- Having focused discussions with industry leaders
- Generating quality leads
- Establishing long term partnerships

For a creative and results based approach discuss your marketing requirements with our sponsorship team today.

For more details on the full range of promotional packages please contact Kamelija Stefanova on + 44 207 275 8063, email: kamelija.stefanova@easteurolink.co.uk

Not able to attend?

Then why not buy the conference documentation?

Nothing compares to "being there" but you don't have to completely miss out. You can purchase the **CEE Telecoms Wholesale – Strategies for profitable growth in a Multi-operator environment** conference documentation for £195 + UK VAT. Simply tick the box on the booking form, send it with payment and your documentation will be on its way to you after the conference.

