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# Roaming
## WORLDCONGRESS

**13-15 May 2013** • Le Chatelain Hotel, Brussels, Belgium

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Featuring visionary thought leaders & exclusive global case studies!

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**Cable & Wireless**

**NEW**
**ANNA BULOCHKA**
Head of Commercial Roaming
**MegaFon**
OPERATOR

**NEW**
**SHAHEED SALIM**
International Carrier Voice Marketing Manager
**Du**
OPERATOR

**NEW**
**IVAN ROGELIO RAMOS DE ARCO**
VP Product Development & Roaming
**Cable & Wireless Panama**
OPERATOR

**NEW**
**PANKAJ JAIN**
Service Operations Manager
**Vodafone**
OPERATOR

**NEW**
**MARIANA NUNES**
Senior Manager Roaming
**Vivo**
OPERATOR

**NEW**
**KIM JUCHEM**
VP Commercial Roaming
**Deutsche Telekom**
OPERATOR

**NEW**
**CEDRIC GONIN**
WiFi Director
**Orange France**
(& Co-chair, **Wireless Broadband Alliance)**
OPERATOR & ASSOCIATION

**NEW**
**CHRIS BRUCE**
Director, **BT Advise** (& Co-chair, **Wireless Broadband Alliance)**
OPERATOR & ASSOCIATION

**NEW**
**LASZLO TOTH**
Policy Director
**GSM Association**
ASSOCIATION

**NEW**
## FOR 2013
## GLOBAL CASE STUDIES:

○ **The Road to Rio:** Vivo's Roaming Strategy for Brazil's 2014 World Cup & 2016 Olympic Games

○ What can European operators can learn from **Du's single preferential roaming rate**?

○ Enabling **Roaming Transparency** at **Mobistar** Belgium

○ How **MegaFon** are preparing Russia for the 2014 Sochi Winter Olympic Games

**NEW**
**ROBERTO VIOLA**
Deputy Director General
**European Commission**
REGULATOR

**NEW**
**ÁLVARO PRIETO**
Head of Business Development and Strategy
**Fon**
WIFI OPERATOR

**NEW**
**PANOS LOUKOS**
Principal Analyst
**Informa Telecoms & Media**
ANALYST

**IIR TELECOMS & TECHNOLOGY**
www.iir-telecoms.com

# Roaming
## WORLD CONGRESS

## Welcome

2012 saw the introduction of roaming **regulation** enforced by the European Commission; a strategy which has seen telecom operators in the region come under increasing pressure to minimise the cost of voice based services for end-users.

Whilst this comes as good news to users throughout the region; CSPs are facing a pivotal moment in the industry, and must devise new strategies which will **guarantee revenue generation** as we move in to an age of ever-increasing data consumption brought on by data-heavy applications and services.

As **customer experience** and **loyalty** remains an increasing focus for operators, the challenge in place today is to somehow encourage data usage abroad, whilst ensuring users feel comfortable roaming and can place a high level of **trust** in their operator; without returning home to a **"bill shock"** scenario.

The long awaited arrival of **LTE 4G** services will also see operators wrestle with the challenge of ensuring seamless **connectivity** to the network and the efficient provisioning of applications and services.

Finding the right place for the potentially revenue disrupting **Wi-Fi**, and devising strategies for **monetising Machine-to-Machine** roaming; the industry is in a state of transition and must work in unison to traverse this new landscape. The potential emergence of **OTT** players into the roaming market, meanwhile, presents a threat of disruptive capabilities not yet fully understood.
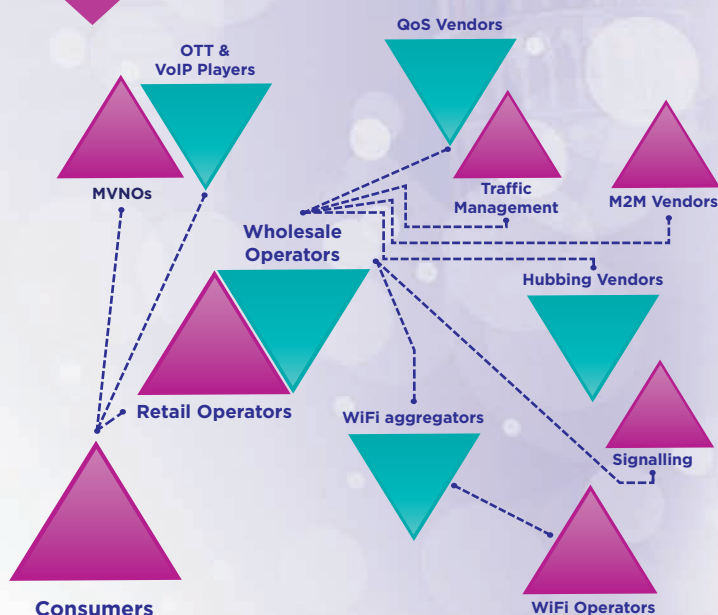
In this unique, timely and unmissable conference; **IIR's 7th Annual Roaming World Congress 2013** will encompass and provide real-world operator & regulator led solutions to address the entirety of the challenges facing the roaming industry today, and will provide you with the tools to navigate your way across evolving roaming landscape.

I look forward to meeting you in the regulatory hub of Brussels, Belgium in May 2013.

**Tim Skinner**
Conference Producer
IIR Telecoms

## Roaming Ecosystem Representation

QoS Vendors

OTT & VoIP Players

MVNOs

Traffic Management

M2M Vendors

Wholesale Operators

Hubbing Vendors

Retail Operators

WiFi aggregators

Signalling

Consumers

WiFi Operators

## OVUM

### A COMMITMENT TO EXTEND AND LOWER PRICE CAPS...

The EU's roaming rules will progressively lower current retail price caps on voice and SMS services, and introduce a new retail price cap for mobile data services. These caps will operate as a safeguard until June 30, 2017.

Consumers will now pay no more than 29 cents per minute to make a call, 8 cents per minute to receive a call, 9 cents to send a text message, and 70 cents per MB of data (charged per KB used). These regulated price caps will progressively go down so that by July 1, 2014 roaming consumers will be paying no more than 19 cents per minute to make a call, 5 cents per minute to receive a call, 6 cents to send a text message, and 20 cents per MB of data.

The evidence so far suggests that operators have gravitated towards the price caps, but have not offered prices below them, thus rendering them blunt regulatory instruments. With this in mind, the EC has rightly acknowledged that the only long-term solution to the lack of competition is structural, which should result in prices below the caps.

**www.ovum.com**

## Get a head-start!
### Pre-conference workshop: Monday 13th May 2013

**bics** *a belgacom company*

Hosted by BICS, the RWC 2013 Pre-Conference workshop will ensure all participants receive the tools to look towards the future and maximise revenue generating opportunities presented by LTE Roaming.

Across the day, BICS will help you in maximising your LTE network efficiency, enable LTE roaming and optimise & guarantee new revevnue streams!

For further information, please visit: www.roamingworldcongress.com

## NOT TO BE MISSED!

**The European Commission's DDG** on the EC's stance on Roaming III & telco structural solutions going beyond 2013

**Deutsche Telekom enlighten us** on their worry free data roaming plans and how to enable confident roaming and drive outstanding user experience

**Orange's WiFi Director on the monetisation opportunities** associated with WiFi roaming and how operators can generate new revenue streams in our NEW WiFi session endorsed by the WBA!

**WORLD EXCLUSIVE!**
**Official telecoms partner** of the 2014 Winter Olympic Games, **MegaFon**, discuss the challenges they face with ensuring superior QoS for Roamers in Sochi!

**WORLD EXCLUSIVE!**
One of the world's largest operators **Etisalat** give us a timely update on the roaming regulatory landscape throughout the GCC states, and the impact this has on operator profit margins.

**WORLD EXCLUSIVE!**
**Telefonica Vivo Brasil explain** the challenges of optimising cellular & roaming coverage in preparation for the two biggest shows on Earth: the 2014 World Cup & 2016 Olympics. Another first for any European roaming conference!

🐦 Be part of the live-tweet updates for all the latest news and quotes from the conference!
**#RoamingCongress**

# DAY ONE: TUESDAY 14TH MAY 2013

**08:20** Registration & Coffee ☕

**08:45** Conference Welcome & Speed Networking

**08:50** **Chairman's Opening Remarks**
Paul Merry, *Principal Analyst,* **Informa Telecoms & Media**

## ROAMING III & REGULATORY REVIEWS OF THE EU, GCC & LATAM REGIONS

**09:00** **The European Commission's view on the Roaming III regulatory update: how has it affected operators?**
• How effective have the new regulations been so far?
• Implementing the new regulations
• Structural solutions for operators becoming compliant with Roaming III
• What is the main objective regarding regulation in Europe?
• How will the European market change as a result?
• Clarifying regulatory demands and requirements of operators
Roberto Viola, *Deputy Director General,* **European Commission**

**09:30** **An outlook on regulation in the GCC area: Identifying regulation's role in retail rates**
• Regulation roaming rates at a regional level- Introducing retail & IOT caps across GCC
• Offering substantial reduction on pre-regulation rates
• Is there a need to regulate data-roaming services?
• What are the regulatory effects on roaming revenues & overall financial performance?
Faizan Khan, *Group Vice President of Roaming,* **Etisalat**

**09:55** **Market Analysis: A regional overview of roaming regulation in LATAM**
• Assessing market conditions & regulatory challenges in South America
Ivan Rogelio Ramos De Arco, *VP Product Development & Roaming,* **Cable & Wireless Panama**

**10:20** **Session Summary Interactive Panel Discussion: Roaming III & The next steps**
• Regulating data and internet usage price capping in the future as higher volumes of data are consumed
• Assessing the challenges to future regulation of data usage
• How could future price capping of data affect operator roaming strategies and availability of data heavy services?
• Has competition and service innovation been boosted by the regulatory impact?
Laszlo Toth, *Policy Director,* **GSM Association**
Jacques Bonifay, *Chairman,* **European Association of Full MVNOs**
Verena Stopp, *Head of Roaming and International Services,* **Telefónica Germany**

**11:05** **How to appropriately optimise & monetise LTE roaming**
• Maximising efficiency of new LTE networks to prepare for the future of roaming
• Overcoming compatibility inconsistencies
• What does the long-term view of VoLTE look like?
• Enabling and optimising LTE roaming to monetise services & generate new revenue streams
Luc Vidal-Madjar, *Strategy & Business Development Manager,* **BICS**

**11:30** Morning refreshments, networking & exhibition breakout ☕

**12:10** **Capitalising on the opportunities presented by the EU Regulations**
• What opportunities can Operators seize upon as a result of the Roaming III regulatory impact?
Shahid Saleem, *International Carrier Voice Marketing Manager – Commercial,* **Du**

**12:35** **Decoupling of Roaming: impacts and expectations**
• What is stated in the EU regulation articles for roaming decoupling?
• What are the technical scenarios to offer decoupling solutions, and which scenarios have been chosen?
• What is the impact for implementation of these scenarios?
• What is the economic and commercial feasibility for the roaming decoupling services?
• And what are risks for the existing roaming providers?
• Is roaming decoupling a feasible service also outside of the European Union?
Raymond Bouwman, *Managing Director,* **Rabion Consulting**

**12:55** Lunch & exhibition visit 🍴

## WI-FI ROAMING IN 2013 AND BEYOND – OFFICIAL SESSION OF THE WIRELESS BROADBAND ALLIANCE

**13:55** **Wi-Fi roaming & Next generation hotspots (NGH)**
• Interoperability challenges
 - Enabling access to multi-operator Wi-Fi networks whilst roaming
 - Creating a constantly connected experience for consumers
Chris Bruce, *Director,* **BT Advise** & Co-chair, **Wireless Broadband Alliance**

**14:20** **How to appropriately monetise Wi-Fi**
• Where is Wi-Fi positioned as a roaming option: a threat to revenues or a facilitator of customer satisfaction?
• What is the cost to operators of a nearly free access platform for roamers?
Cedric Gonin, *Wi-Fi Director,* **Orange France** & Co-chair, **Wireless Broadband Alliance**

**14:45** **Wi-Fi sharing: a disruption to operator income?**
• Do Wi-Fi sharing companies effectively "decouple" roamers from their network?
Álvaro Prieto, *Head of Business Development and Strategy,* **Fon**

## EMERGING ALTERNATIVE ROAMING FACILITATORS

**15.10** **New retail business models that will arise from recent European roaming regulations**
• Conforming to and overcoming challenges associated with network regulatory compliance
• Enhancing future business opportunities that have arisen from changes in market conditions
• Strategic positioning of MVNOs and MVNEs into the European Roaming landscape
Alain Bureau, *CEO & Founder,* **Sisteer**

**15:35** Afternoon refreshments, networking & exhibition breakout ☕

**16:05** **Interactive Panel Discussion: The threat of alternative roaming players on operators' international revenues**
• How will regulatory measures on de-coupling affect the roaming ecosystem and facilitate the entrance of new market players? Ie. MVNOs?
• VoIP application service and product developers
• How can operators manage the further proliferation, popularisation and penetration of OTT-communication services?
• Analysing the threat of handset manufacturers and OTT companies disrupting the Roaming industry
*For speaker updates, please visit: www.roamingworldcongress.com*

**16:45** **MVNO case study: Opportunities for MVNOs in the Roaming Market**
• The impact of MVNOs on the roaming market
• Assessing the regulatory impact on MVNOs
• Decoupling: moving away from operator "lock-in" when roaming
Nico Van Wouwe, *Business Development Director,* **Mondial Telecom**

## IN-DEPTH REGIONAL ROAMING

**17:10** **Regional Case Study: From South Africa 2010 & London 2012 to Brazil 2014 & Rio de Janeiro 2016: learning from global events to optimise future cellular coverage**
• Developing markets & cellular coverage in emerging countries; national inconsistencies in data usage & spectrum frequency for LTE, accidental roaming by near-boarder citizens and alternative roaming players (ie. Sim Swapping)
• Overcoming region-wide low quality of service
• How will operators guarantee service quality between Latin America and other global continents (ie. roamers from EU, MENA or APAC), and position reasonably priced tariffs accordingly
• To over or under-estimate? Has traffic at previous major global events been underwhelming compared to expectations?
• Understanding the lessons learned from major global events and the impact on incumbent operator networks
• Preparing for the two largest global sporting events and understanding the infrastructural requirements resultant of a tourism boom and demand for superior roaming services
Mariana Vieira Rangel Nunes, *Senior Manager - Roaming,* **Telefonica Vivo Brasil**

**17:40** Chairman's closing remarks

**17:50** Drinks reception & post conference activities 🏆

WORLD EXCLUSIVE!

### Our Roaming Gurus:
Roaming World Congress 2013 was researched in collaboration with leading industry organisations, guaranteeing content addressing the most relevant and important topic facing the roaming industry today.

Our thanks go to:
**Deutsche Telekom**
**EDCH**

Visit **www.roamingworldcongress.com**     Email **registrations@iir-telecoms.com**

# DAY TWO: WEDNESDAY 15TH MAY 2013

**08:20** Registration & Coffee ☕

**08:50** **Chairman's Opening Remarks**
Scott Marcus, *Director and Head of Department,* **WIK**

## OPERATOR STRATEGIES FOR OPTIMISING THE CUSTOMER EXPERIENCE & REVENUE STREAMS

**09:00** **Boosting customer trust through data usage monitoring; putting the tools into the consumers' hands**
- Monitoring consumed data whilst roaming:
  - Downloadable 3rd party applications
  - SMS & on-screen notifications at the start and end of a data session
  - Personal pages on a carrier website to monitor usage
- Enhancing transparency before promoting data roaming on high usage smart phones & mobile devices
- Initiatives to encourage consumer data usage abroad
Francois Verzele, *Manager – Interconnection & Roaming,* **Mobistar**

*OPERATOR*

**09:25** **Worry free data roaming: a retail & wholesale case study - Deutsche Telekom**
- Enablement of worry free data roaming at T-Mobile / Deutsche Telekom
- Utilizing app support to drive outstanding user experience
- Underlying wholesale models support retail push
Kim Juchem, *VP Roaming,* **Deutsche Telekom**

*OPERATOR*

**09:50** **Interactive Panel Discussion: The Mexican Stand-Off: Understanding and removing the inhibitors to driving down roaming costs**
- Current precedent of generating lucrative profits from roaming services
- Are current roaming pricing models sustainable in terms of future revenue generation?
- Who will move to lower data charging first and will this have a knock-on effect for the rest of the industry?
- What about video? Can users be allowed to access video whilst roaming, considering the cost per MB of data?
*Representative,* **EAFM**
Mubarak Almazroa, *International Roaming Support & Quality Manager,* **Saudi Telecom Company**
Torbjorn Pettersson, *Technical Sales Manager – Mobile Services,* **Telenor**
*For speaker updates, please visit: www.roamingworldcongress.com*

**10:30** **Regional Operator Case Study: Sochi 2014 Winter Olympic Games, Russia**
- Providing next generation cellular coverage and superior roaming Quality of Service during the 2014 Winter Olympic Games
- Lessons learned from London 2012 in providing international connectivity & optimal QoS during major global events
- Opportunistically monetising new revenue streams presented by enhanced tourism during the Games
- Rolling out 4G roaming for the Games: the challenges & considerations.
Anna Bulochka, *Head of Commercial Roaming,* **MegaFon**

*WORLD EXCLUSIVE!*
*OPERATOR*

**11:05** Morning refreshments, networking & exhibition breakout ☕

## ASSESSING MARKET COMPETITION AND CHALLENGES IN MONETISATION

**11:45** **Acting now to generate the roaming revenue streams of the future**
- Monetising roaming data whilst avoiding the degradation of customer trust:
  - Transparency in costs of service
- Incentivising packages, promotional offers, free roaming?
Panos Loukos, *Principal Analyst,* **Informa Telecoms & Media**

**12:10** **Roaming Revenue Maximization using End2End based solutions**
- The importance of risk management in prioritizing controlling efforts
- How to cover the End2End revenue chain in roaming
- Success story of implementing Revenue Assurance End2End monitoring
- Optimise roaming strategies and boosting transparency and CE
Mohammed Achraf El Jazzar, *Senior Manager - Revenue Assurance Operations & Data,* **Meditel**

*OPERATOR*

**12:35** **The growth of M2M roaming**
- How are operators providing M2M roaming services for customers?
- How to appropriately monetise M2M roaming connectivity
- How will services and rates vary for connected consumers and critical services? (ie. Emergency services/security/medical transport etc)
Pankaj Jain, *Service Operations Manager,* **Vodafone**

*OPERATOR*

**13:00** Lunch & exhibition visit 🍴

## UNDERSTANDING THE CAPABILITIES OF EMERGENT NETWORKING TECHNOLOGY

**14:00** **In-air roaming: taking GSM to the skies**
- Facilitating in-flight roaming
- Understanding the revenue generation potential to operators
- Citing the case study of an OnAir partner
Francois Rodriguez, *Director of Marketing,* **OnAir**

**14:25** **The impact of 4G, LTE & Next Generation Networks**
- Combining 3G, 4G/LTE & Wi-fi for a seamless roaming experience
- Leveraging legacy networks to optimise service coverage
- Ensuring roaming continuity in new networks
Jose Antonio Aranda, *Director of IREG and IWG,* **GSM Association**

**14:50** **Interactive Panel Discussion: The evolution of mobile data roaming: identifying & accessing the right network whilst abroad**
- How has, or will, the roll out of 4G affected:
  - Quality of Service
  - Customer expectation
  - Roaming revenue
  - How has 4G spectrum fragmentation affected roaming connectivity?
Mohammed Al-Aamri, *Roaming Service Development Manager,* **Saudi Telecom Company**
Torbjorn Pettersson, *Technical Sales Manager – Mobile Services,* **Telenor**
*For speaker updates, please visit: www.roamingworldcongress.com*

**15:30** **Big Data: Leveraging emerging technologies to maximise revenue generation**
- Analysing traffic usage for foreign customers to optimise service
- How big data analytics can play a role in the monetisation of roaming services
- Identifying missed revenue opportunities through intelligent customer analytics
- Evaluating customer wants & needs whilst roaming
*In discussion, leading Singapore operator. For further information, please visit: www.roamingworldcongress.com*

*OPERATOR*

**15:55** Afternoon refreshments, networking & exhibition breakout ☕

**16:25** **Roaming for today's smartphone generation**
- Retail data caps & appropriate charging for application & data service usage
- Preventing bill shock
- Allowing access of videos whilst roaming
- Clarifying charging for smartphone applications & services of varying data consumption
- Clarifying charging structures and simplifying the structure for consumers: what rate of charging is applicable for services of varying data consumption? Ie. e-mail, social media access, pictures & video
Mohammed Al-Aamri, *Roaming Service Development Manager,* **Saudi Telecom Company**
Mubarak Almazroa, *International Roaming Support & Quality Manager,* **Saudi Telecom Company**

*OPERATOR*

## HIGH PROFILE REGIONAL CASE STUDY

**16:50** **Regional Operator Case Study: Providing customers with local rates for international use across the Zain network**
- Presenting Zain's international "One Network" scheme; the benefits afforded to customers and the alternative monetisation opportunities presented
- Citing the case study of the annual Hajj pilgrimage
- Regional challenges:
  - Roaming coverage inconsistency based on the military prioritisation of LTE spectrum frequencies in Saudi Arabia
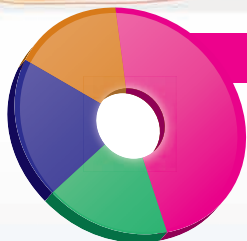  - Countering emerging alternative roaming services
Ammar Hamadien, *Director of Mobile Financial Services,* **Zain**

*WORLD EXCLUSIVE!*
*OPERATOR*

**17:20** Chairman's closing remarks

**17:30** End of Conference

## WHO ROAMS WITH US?

### GEOGRAPHICAL BREAKDOWN

- Europe **47%**
- Africa **20%**
- Asia **17%**
- Americas **16%**

Source: Roaming World Congress 2012

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More than 270 mobile network operators and other players in the telecommunications industry across all continents are using Keynote SIGOS solutions. GlobalRoamer, the largest worldwide test system hosted by Keynote SIGOS, provides access to more than 640 telecommunication networks in over 180 countries around the globe.

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## WE'RE HERE FOR YOU!

If you are interested in speaking opportunities available please contact **Timothy Skinner,**
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For further details on sponsorship and exhibition opportunities, please contact **James Bull,**
Email: **jbull@iir-telecoms.com,** Tel: **+44 (0) 20 7017 5609**

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Our acclaimed 'meet and greet' boutique-style meeting service, offered to exhibitors and VIP delegates, has forged business relations for the last 7 years. The online networking tool additionally sets the scene for meeting and interacting with your peers from the moment you register until three months after the event! We are more than willing to facilitate introductions with your potential partners and business leads prior to the event; and we'll even help you arrange those last minute meetings on-site!

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## THE ROAMERS THAT STOOD OUT IN 2012:

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### WHICH JOB FUNCTIONS WILL BENEFIT MOST?

SVP Roaming • VP Group Roaming & Interconnect • Roaming Manager • Head of Business Innovation • VP Product Development • Head of Mobile Data Marketing • Director of International M2M Roaming • Head of Roaming, M2M & Interconnect • International Roaming Manager • Interworking Roaming Expert Group Director • Head of Roaming • Prepaid Roaming Manager • Postpaid Roaming Manager • Commercial Roaming Manager • Head of Carrier Services • Regulatory Director • Commercial Service Manager • Retail Roaming Marketing Manager • Mobile Data Project Manager • VP Revenue Development & Assurance • Interconnection Senior Manager

Source: Roaming World Congress 2012

## A structural solution
### TO DEAL WITH THE UNDERLYING PROBLEM...

**OVUM**

The agreement reached by the EU is for two structural initiatives. From July 1, 2012, MVNOs and resellers that do not have their own networks will gain the right to access other operators' networks at regulated wholesale prices in order to provide national and roaming services to their customers. Then, from July 2014, mobile operators in visited countries will have the possibility to directly offer data roaming services on their own networks. This will allow customers to separate roaming services from their contract, and will give them the option to either pre-select a cheaper roaming contract or to do so on the spot.

In both cases the EC is hoping to see the emergence of pan-European roaming operators competing on price. While the rules require approval from the European Council and Parliament, they are unlikely to face any significant hurdles. The cost of using mobile phones abroad is an issue that is very close to the key decision makers, and reducing that cost is a politically attractive initiative to get behind. Operators have tried and failed to legally challenge the current regulation; it is not yet clear whether they will try again.

**www.ovum.com**

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# Roaming WORLDCONGRESS

## BIENVENUE À BRUXELLES!

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As home to the European Commission, the Parliament, NATO, and 1,700 other international institutions and associations, Brussels is an influential place where decisions are taken and history is made.

It is said that the region's stormy history is the reason for its open-mindedness, warmth and friendliness: Brussels adapts to its visitors, so everyone feels at home here. People like Brussels for its impressive landmarks and little side streets; getting lost in them is a real pleasure because the different city districts are full of surprises.

We wish you a fruitful conference and hope that you will have some time beyond your schedule to discover Brussels...

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visitbrussels.be

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**FREE** Brussels guide book for every delegate!

## Our 2012 testimonials:

*"Good event with great insight of roaming business"* **EDCH**

*"Very informative and excellent experience sharing opportunities"* **MegaFon**

*"Very good & interesting topics and very knowledgeable presenters"* **Keynote Sigos**

*"Great insight on retail & wholesale roaming"* **Zain**

*"On the whole, a lot of good insights!"* **BICS**

*"A strong event!"* **BH Telecom**

*"Overall, a very good event!"* **Orange FT**

*"Thought provoking two days covering the KEY issues in the roaming market"* **CSMG**

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# Roaming WORLDCONGRESS

**13-15 May 2013**
Le Chatelain Hotel, Brussels, Belgium

www.**roamingworldcongress**.com

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|---|---|---|---|
| Full event & Pre-conference workshop | €2,295 + 21% IVA = €2776.95 | €2,695 +21% IVA = €3260.95 | €2,895 + 21% = €3502.95 |
| Two Day Congress | €1,595 + 21% IVA = €1929.95 | €1,795 +21% IVA = €2171.95 | €1,895 + 21% = €2292.95 |

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