

The world's largest and best meeting place
for telecoms pricing professionals -

Competitive Telecoms Pricing 2004

"An excellent forum for
the interchange of ideas,
methods and experiences"
Delegate at our last Pricing event

*Mastering innovative price strategies for new products and data
services to acquire and retain customers*

Key case studies
include:

- Vonage
- 3 Scandinavia
- Beeline
- BT Mobile Sense
- Telefonica De
Argentinas
- Elisa
- Boingo
- Mobilkom Austria
- Bulldog
- Turkcell
- Og Vodafone
- Polska Telefonía
- Fastmobile

27th – 30th September 2004 • Radisson SAS Hotel, Nice

Learn from the real-life experiences of operators:

- Developing competitively priced bundles to offer attractive and profitable services
- Pricing data services to drive uptake and usage
- Building loyalty and ARPU among prepaid customers
- Using price as a CRM tool to build up your consumer base
- Creating simple and practical pricing strategies for Push-To-Talk
- Encouraging consumer adoption of premium priced services
- Driving broadband usage and avoiding data commoditisation

PLUS

Interactive one-day workshop Thursday 30th September

Optimising Your Pricing Strategy

Perfecting your pricing strategy and
communicating it to maximum effect

Led by: Talk2Me and Route 30

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Mobile Communications

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COMPETITIVE TELECOMS

Conference Day One Monday 27th September 2004

09.00 Registration and Refreshments

09.25 Welcome address
Alex Lawrence
Confence Producer
IIR

09.30 Opening remarks from the Chair

- 09.40 **Determining The Profitability And Competitive Positioning Of Your Bundles**
- Measuring the demand for bundles in voice and other services
 - What patterns and usage trends are there?
 - How are voice, SMS and data content used?
 - Pricing bundles against competitive offerings
 - How effectively are target groups reached?
 - What proportion of total value in a bundle goes unused?
 - How much are the bundles worth?
 - Assessing the total cost to the operator of incorporating different services within a bundle
 - Setting the price levels of your bundles by modelling uptake against significant price points
 - Complications involved in offering a variety of services within a bundled offering

Mark Spracklen
Director
Consumer Value Analytics

10.20 **Measuring And Evaluating The Effectiveness Of Your Telecoms Pricing Strategy**

- Determining what is involved in your telecoms pricing strategy
 - Price structure
 - Price level
 - Number of tariffs
 - Price editing
- Determining the most appropriate KPIs for measuring your pricing strategies
- Establishing timelines for measuring the effectiveness of your pricing strategies
- Applying econometric analysis to evaluate your strategy
 - Before it is deployed
 - After it is deployed

Maciej Görzynski
Pricing Strategy Unit Manager
Polska Telefonia Cyfrowa

11.00 Morning Refreshments

11.20 **Restructuring Prices To Enable You To Reposition Your Brand**

- Analysing the role of pricing in brand repositioning
 - The market drivers for brand repositioning
 - The part that price played in the brand's original market position
- Using pricing strategy as a repositioning tool
- Deciding a new pricing strategy
 - Modelling the uptake and profitability

OPERATOR CASE STUDY

- of new strategies
- Determining the cost of doing nothing versus the cost of change
- Reasons for rejecting possible strategies
- Overcoming the difficulties of price restructuring
- Examining how well the price restructuring supports the overall brand repositioning

Reinhard Zuba
Head of Voice Product Marketing
Mobilkom Austria

12.00 **Developing Attractive Price Plans To Build Market Share And Revenue In A Saturated Telecoms Market**

- Examining how operators are leveraging bundled tariffs
 - leveraging bundled tariffs in fixed, mobile and ISP
- Introducing fixed line pricing into the mobile market
- Pricing to build loyalty and revenue in the mobile market
 - Analysing the growth in customer loyalty from offering top-up subscriptions
 - Reducing the price gap between postpaid and prepaid customers
 - Increasing customer value using friends and family tariffs
- Establishing prices for value-added services involving revenue-sharing agreements
- Examining how billing system functionality restricts price flexibility in a fast-changing industry environment

Oskar B. Hauksson
IT Director
Og Vodafone

12.40 Lunch

14.00 **VoIP: Examining How Fixed Line Operators Can Price VoIP Competitively In Order To Minimise Cannibalisation**

- Examining trends in the commercial development of VoIP
 - Contrasting uptake and usage among businesses and individuals
 - Current limitations of VoIP
- Drivers for fixed line operators to offer VoIP and how it can fit into your wider business model
- Options for integrating VoIP into a fixed-line operator's product portfolio to retain customers
 - Bundled as part of a consumer broadband package
 - Operating in conjunction with WLAN services
 - As a 'second' phone in the house model
- Developing VoIP value-added services to stimulate additional revenue

Speaker to be confirmed
For updates see
www.iir-conferences.com/pricing

14.40 **Vonage: Leveraging Advantages In Cost Structures To Roll Out Competitively Priced VoIP Services In Europe**

- Outlining current VoIP cost and pricing structures in the USA
- Analysing likely pricing models for

OPERATOR CASE STUDY

- Vonage's competitors in Europe
 - Incumbents – ISPs
 - Other new-entrant VoIP service providers
- Assessing the principal factors in determining prices for VoIP in Europe
 - Customer mobility within Europe
 - Researching acceptable price points in different countries
- Forecasting the extent of price competition on initial VoIP price levels
- Can Vonage apply US pricing models in the European market?
- How will public perceptions of VoIP in Europe affect these pricing models?

John Rego
Chief Financial Officer
Vonage

15.20 Afternoon Refreshments

15.40 **Assessing How O2 Germany Encouraged Mobile Data Service Uptake By Educating Consumers About Data Pricing**

- Identifying the barriers to uptake of O2 data products
 - Low levels of price transparency
 - Consumer impressions of O2's value for money
- Developing a simplified price offering
 - Identifying what price strategy to adopt
 - Establishing basic flat-rate price levels
- Evaluating initial patterns of consumer response: uptake, usage and ARPU
- Adding new services to create more complex pricing structures
- Examining the change in consumer responses to price complexity and improvements in brand loyalty

Bjorn Flormann
Head of data Products & Services
O2 Germany

16.20 **Formulating An Integrated Mobile Data Pricing Strategy**

- Integrating different access technologies into the tariff portfolio
- Considerations for choosing the appropriate price model for each customer segment
 - Customer perception of price components
 - Communicating price models
 - Segmentation and differentiation
 - Limiting offers or tariffs
- Optimising price levels
 - Possible data sources
 - Choosing appropriate research methods
 - Building decision support models
 - Optimising price levels over time
- Modelling customer migration and cannibalisation

Andre Weber
Director
Simon-Kucher & Partners, London

17.00 Closing remarks from the Chair

17.10 End of day one

Drinks Reception

IIR would like to invite you to join the speakers at a drinks reception where you can discuss the day's issues in a relaxed environment.



Conference Day Two Tuesday 28th September 2004

09.00 Registration and refreshments

09.30 Opening remarks from the Chair

09.40 Developing Innovative Fixed-Line Pricing Techniques To Encourage Customer Acquisition

- Using innovative pricing techniques to achieve marketing cut-through and drive uptake
- Setting price levels to maximise customer acquisition
 - Balancing the demands of customer acquisition and profitability
 - Setting high price differentials across calls to fixed-line, mobile and international recipients
 - Considering the difficulty of price rises in some key areas
- Modelling a customer acquisition-oriented pricing strategy
 - To manage levels of churn
 - To establish a break-even point in time or customer numbers
 - To forecast usage of profit-generating services
- Evaluating results so far and identifying considerations for future developments

Matts Johansen
Principal Consultant
Talk2Me

10.20 Increasing Fixed Line Customer Retention By Exploiting Mobile Pricing Techniques

- What were the drivers for Telefonica De Argentinas to adopt mobile pricing techniques?
 - Other fixed line operators
 - Mobile operators
 - VoIP operators
- Determining the role of pricing in customer retention
 - Evaluating how far price was a factor in fixed-mobile substitution
- Modelling the costs of a new price strategy against forecast substitution
 - Which pricing strategies were considered and which were adopted?
- Evaluating the effectiveness of transferring mobile pricing techniques to a fixed line operator

German Spataro
Pricing Manager
Telefonica De Argentinas

11.00 Morning Refreshments

11.20 Examining How Operators Are Using Price Incentives To Drive New Product Usage And Revenues

- Creating price incentives for users to try new services
- Examining how operators can vary pricing incentives in order to
 - Strengthen customer loyalty
 - Attract new users

- Assessing the effect of time-limited promotions to stimulate usage and increase revenues
 - Price reductions
 - Bonus offerings
- Determining customer perceptions of good value to optimise price levels for new product incentives
- Evaluating the role of price incentives in successful launches of non-voice services

Niclas Melin
Strategic Product Marketing Manager
Ericsson

12.00 Quantifying The Effectiveness And Long Term Value Of Introductory Price Offers For Targeted Customer Acquisition

- Segmenting customers by price responsiveness to create targeted price offers
- Types of introductory offers and their impact
- Examining the effect of introductory offers upon
 - Revenue
 - Customer acquisition
- Assessing what happens when an introductory offer ends
 - Migration to other price plans
 - Churn to other operators
- How to encourage migration when introductory offers end

Andrey Eremichev
Marketing Manager
Beeline

12.40 Lunch

14.00 Analysing The Effect On ARPU And Product Uptake Of Offering Bolt-On Package Options

- Defining bolt-on packages
- Analysing the bolt-on consumption and revenue of
 - Prepaid customers
 - Contract customers
- Increasing data trial and usage through simple data bolt-on packages
- Encouraging bolt-on uptake by
 - Charging high per-unit costs outside of bolt-on packages
 - Offering flat-rate or effectively flat-rate monthly costs through bolt-ons
- Determining the additional effects of bolt-on packages on loyalty and brand strength

Speaker to be confirmed
For updates see
www.iir-conferences.com/pricing

14.40 Building Loyalty In The Prepaid Market By Developing Offers That Are Exchangeable Across Different Functions

- The difficulty of creating competitive differentiation in a mature prepaid market
- Examining how operators create an offering of 'free units'
 - Determining basic units for voice, SMS and data

OPERATOR CASE STUDY

- Establishing their relative value
- Assessing how the free units have been used by prepaid subscribers
 - Data usage when accessing free units and normally
 - Effects on normal prepaid usage and ARPU
- Learning lessons for the future development of a free units strategy
 - How new services can be added
 - What relative values units should have
 - 'Trading' free units

Stella Penso
Head of Pricing
Turkcell

15.20 Afternoon Refreshments

15.40 BT Mobile Sense: Allowing Consumers To Custom-build Their Own Price Bundles

- Building a business case for giving customers more choice
 - Consumer trust and loyalty
 - Long term revenue and profit
- Determining the price per unit for voice, SMS and MMS messaging
- Making the concept of a customised bundle attractive
- Learning more about your customer needs and developing the product
 - How much choice do customers want?
 - Did people create the right bundles for their needs?
 - How can you educate people to customise their bundles?
- Evaluating the success of the Mobile Sense experiment for ARPU, retention and uptake

Roger Vigilance
Vice President of Narrowband
BT Openworld.

16.20 Pricing 3G Games And Entertainment Services To Drive Uptake

- Developing a pricing model which balances uptake and revenue
- What price strategy was adopted?
- Key factors in setting pricing levels for 3G products
 - Consumer appreciation of how 3G differs from existing mobile services
 - How much 3G needs to compete on price against existing services
 - Overcoming difficulties in creating data price transparency
- Maximising revenue from prepaid and contract tariffs
- Promoting uptake through the Mobile portal
- New ways of bundling and packaging

Rikard Ljungman
Commercial Manager, Media Services
3 Scandinavia

17.00 Closing remarks from the Chair

17.10 End of conference day 2

OPERATOR CASE STUDY

OPERATOR CASE STUDY

OPERATOR CASE STUDY

OPERATOR CASE STUDY

OPERATOR CASE STUDY

Conference Day Three Wednesday 29th September 2004

09.00 Registration and refreshments

09.30 Opening remarks from the Chair

09.40 Developing Pricing Strategies To Enable ISPs To Differentiate Themselves And Increase ARPU

- determining the prime considerations for ISPs on pricing strategy differentiation
 - More scope for brand development based on price strategy
 - Reduced price transparency
 - Increased reach to some consumer segments
- Developing robust models for uptake of new pricing strategies based upon
 - The forecast rate of uptake and usage of new services
 - Broadband demand in different consumer segments
- Assessing the pricing options open to ISPs
- Educating the consumer in broadband charges other than flat-rate provision
 - To reduce resistance to change
 - To overcome distrust of price complexity

David Rivington

Director of Planning & Finance
Bulldog

10.20 Analysing The Impact Of Cross-Border Regulation On ISP Pricing

- Assessing the price impact of the existing international regulatory environment for ISPs
 - Ensuring network access for ISPs
 - Local loop unbundling
 - Harmonisation of DSL interconnection
- Examining the ability of competition regulation to establish comparable price levels for ISP services across national boundaries
- Learning from OFCOM's review of the UK Telecoms Market - is it possible to create a coherent international regulatory environment?
- Alternatives to cross-border regulation
 - Self-regulated codes of practice
 - Developing agreed industry standards within national laws

EuroISPA

11.00 Morning Refreshments

11.20 Examining The Business Case For Metered Broadband Pricing To Encourage Customer Migration From Dial-Up Services

- Assessing metered tariffs as part of an overall broadband pricing strategy
 - Positioning a metered tariff within your product portfolio
 - Avoiding price competition with flat-rate tariffs
 - Achieving product differentiation
- Modelling uptake and revenue from metered pricing strategies based upon
 - Duration
 - Data volume
- Examining the demand from users of dial-up internet access

OPERATOR CASE STUDY

- Examining the effects of capping monthly charges
 - Setting monthly price caps
 - Consumer reactions to monthly price capping
- How metered pricing can drive consumers towards monthly contract broadband services
 - How do flat-rate and metered broadband compare on price?
 - Assessing what proportion of customers migrate to other ISPs?

Aldo Calleja

Managing Director
Waldonet

12.00 Increasing Differentiation And Revenue By Offering SMEs Bandwidth On Demand (BoD)

- The drivers for offering BoD
 - SME demand
 - Market competition
- Developing the BoD price strategy
 - Parallels between Bandwidth on Demand and other forms of data pricing
- Identifying key factors when determining the price level for the service
 - The BoD target consumer segment
 - The costs of offering BoD
 - Competitive price levels
- Evaluating the effect of offering BoD
 - Increasing ARPU
 - Customer migration to high bandwidth services
- Reactions from competitors

Justin Fielder

Head of Group Business Development
Easynet

12.40 Lunch

14.00 Evaluating The Challenges Of Pricing Public WLAN Services

- Who should pay for PWLAN access?
 - The end user
 - The hotspot owner
 - The service providers
- Analysing the repercussions of different pricing models on uptake and spread of PWLAN services
- Examining how the revenue chain impacts the viability of different pricing strategies
- How does PWLAN integrate with current business models?
 - For mobile operators
 - For VoIP
 - For fixed line operators

Tracy Allard

Director of European Carrier Sales
Boingo

14.40 Developing Consumer Oriented Push-To-Talk Pricing Strategies

- Identifying key factors in pricing basic Push-To-Talk (PTT) functionality
 - Price sensitivity of most susceptible market segments
 - Consumer perceptions of PTT
- Examining the most appropriate pricing models for charging PTT services
 - Voice traffic
 - SMS
 - Data

CASE STUDY

CASE STUDY

- Determining the most profitable PTT pricing structure
 - Per conversation
 - Monthly flat rate
 - Per minute
 - By volume
- Analysing the business case for offering a basic free service as an introduction to paid-for extra services
 - Counting the costs of offering basic PTT
 - Determining the risk of voice traffic cannibalisation
 - Understanding the scope for PTT services: push-to-flirt, games, group talk, push-to-see, etc.

James Tagg

Managing Director
Fastmobile

15.20 Afternoon Refreshments

15.40 Evolving Push-To-Talk Pricing To Maximise Uptake And Revenue

- Examining the importance of price in developing a compelling PTT product
 - What is the target market?
 - What are the key factors influencing pricing in Finland?
 - How can lessons from Finland be applied to the rest of Europe?
- What lessons can be learnt from SMS pricing?
- What response has there been to PTT? How price elastic has it been?
- What price strategies are Elisa considering for commercial rollout?
- What can we learn from Elisa's/Radiolinja's PTT trials?

Sari Pekkarinen

Specialist - Network Technologies
Elisa

16.20 Panel Discussion: Exploring The Pricing Implications Of Competitive Convergence Between ISP And Mobile Data Providers

- How is competition between ISPs and mobile providers manifesting itself?
- How far can we expect competition for data users to be based on price rather than services?
- What pricing lessons can operators and ISPs learn from the other's business model?

17.00 Closing remarks by the Chair

17.10 End of conference

"The success of both fixed and mobile operators will hinge on the extent to which their tariffs are tuned to the competitive and market context"

Bertrand Gau, Analysys

COMPETITIVE TELECOMS PRICING 2004

Make sure you attend if you want to:

- Learn how **O₂ Germany** is pricing data products to drive uptake and usage
- Hear how **Telefonica De Argentinas** is pricing to resist fixed-mobile substitution
- Understand how **3 Scandinavia** and **Og Vodafone** are developing their data pricing strategies
- Establish how **Polska Telefonica** evaluates its pricing strategies
- Take the opportunity to see how **Turkcell** uses pricing to retain its prepaid customers
- Gain expert advice from **Vonage** on how consumer VoIP will impact European telecoms pricing
- Learn from **Bulldog** what ISPs are doing to differentiate their services and retain premium prices

What Our Delegates Say

"To share experience it is always better to show successful strategies and to discuss those"

"Speakers came up with real examples of pricing and business models"

"Very well organised"

"Contacts, ideas, experiences"

Sponsorship & Exhibition Opportunities

Competitive Telecoms Pricing 2004 is the latest in a long line of successful Telecoms Pricing events run by IIR for top telecoms professionals worldwide. Delegates include managers and directors from across marketing, product management, pricing and business strategy.

Why not join them to achieve the exposure your company needs to tap the genuine new business opportunities on offer? Whatever your needs, we can develop a tailored solution that will fulfil both your business objectives and your budgetary needs.

Contact **Graham Wood** on +44 (0) 20 7915 5170 or by email at gwood@iir-conferences.com

Thursday 30th September – Post-Conference Workshop: Optimising your Pricing Strategy

A one-day interactive workshop with leading telecoms pricing experts.

Perfecting your pricing strategy and communicating it to maximum effect

Registration and refreshments will begin at 09.00. The workshop will run from 09.30 to 16.00 with appropriate breaks for refreshments and lunch

Because of the many adjustments needed when reacting to their competitors, many organisations find their pricing strategy could be revitalised for improved market effect. After this workshop, you will have a number of tools your company can apply to help make your pricing strategy a source of competitive advantage.

The morning session will examine:

Pricing Strategy Development

- Reviewing Your Pricing Activity: How Strategic Is It?
- Pricing Strategy As Part Of Your Overall Business Strategy
- Pricing Within The Marketing Mix
- Understanding Price Perceptions vs. Pricing Realities
- Calculating and Using Pricing Elasticities
- Different Pricing Models (by use, flat rate, etc.)
- Pricing Bundles

We will examine the elements involved in creating your pricing strategy to help you review and refine how you set your prices. Using real examples from fixed line and mobile operators, we will also draw on our unique Loyalty and CRM Benchmarking Study conducted during the summer of 2003, which investigated how pricing is used as a key retention mechanism.

Session led by:

Jon Collinson and Simon Burckhardt, *Directors*, Route 30

The afternoon session will focus on:

Marketing Your Pricing Strategy

- Communicating Your Price Strategy Or Your Prices?
- Overcoming Barriers To Effective Communication
- Leveraging Your Pricing Strategy For Customer Acquisition
- Understanding How Price Affects Customer Loyalty Across Different Consumer Segments
- How To Respond To Competitors Price Changes

We will investigate the key elements for making your pricing strategy actively work to promote brand strength and increase revenues. Using real-life examples we will examine the means by which a specific price is assessed to be good value and the psychological effects of that marketing can have. Matts will also share the results of Talk2me's studies of the impact of creative pricing on churn and telemarketing response rates.

Session led by:

Matts Johansen, *Senior Consultant*, Talk2me

Route 30 is a Marketing Consultancy for the Telecoms sector, specialising in the practical use of pricing, loyalty and CRM tools for competitive advantage. Route 30 has helped Telecoms companies to attract, retain and grow customers. The founders, Jon and Simon, have both worked extensively in the sector and have practical hands-on experience of the strategic aspects of pricing as part of the overall business strategy.

Talk2me is one of the leading Norwegian CRM and marketing consultancies. Their clients include governments, institutions, NPOs and leading companies across every major industry. Matts has considerable experience working with Norwegian and international companies' marketing and CRM on strategic, tactical and operational levels. Among other awards, Matts has won The Peppers & Rogers Group 1to1 Innovator Award two years in a row. He has worked closely with Tele2 Norway on their recent pricing strategies.

Media Partner

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Web: www.iir-conferences.com/pricing-vip12345

Competitive Telecoms Pricing 2004

Conference Day One - Monday 27th September 2004

Conference Day Two - Tuesday 28th September 2004

Conference Day Three - Wednesday 29th September 2004

Post-Conference Workshop - Thursday 30th September 2004

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Venue and Accommodation Details

Radisson SAS Hotel, Promenade Des Anglais, Nice 06200, France
Tel: +33 49 337 1717 Fax: 0033 (0) 4 93 83 30 62

Delegates are responsible for the arrangement and payment of their own travel and accommodation. However, IIR has arranged a special room rate at the Radisson SAS Nice. Please contact the hotel directly stating that you are an IIR delegate, or complete the hotel booking form that you will receive upon registration.

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Step 1 Decide what you want to attend for more than one delegate please photocopy this form.

Tick	Date	Title	Code
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<input type="checkbox"/>	Tuesday 28th September 2004	Competitive Telecoms Pricing Day Two	CG2192M
<input type="checkbox"/>	Wednesday 29th September 2004	Competitive Telecoms Pricing Day Three	CG2192N
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Step 2 Work out the price

Remember, if two or more delegates would like to attend, please call Anthony Bennett on +44 (0) 20 7915 6667 or email abennett@iir-conferences.com for details of our multiple bookings discounts.

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(The conference fee includes 3 course lunch, refreshments and full course documentation. The fee does not include travel or hotel accommodation. Please photocopy this form for multiple bookings.)

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Email - registration@iir-conferences.com Please include the code printed on your address label in email correspondence, it will help us to process your order quickly.

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What Happens If I Have to Cancel? - Confirm your CANCELLATION in writing before 13th September 2004 and receive a refund less a 10% + VAT service charge. Should you cancel between this date and 20th September 2004 then you will receive a refund less a 50% + VAT service charge. Regrettably, no refunds can be made for cancellations received less than one week prior to the conference.

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