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Exploiting DSL

New Revenue Opportunities Seminars

Courtyard Kopenick, Berlin, 27th to 29th January 2003

Optimising Your DSL Marketing Strategy

A focused DSL marketing campaign could be the difference between success and failure for your broadband services

Monday 27th January 2003

Led By Ovum & Point Topic

a comprehensive, independent briefing for anyone who needs to make DSL marketing work. Focusing upon high-quality, well-prepared content, this workshop will equip you with practical information, figures and ideas, which you can turn to immediate use

Developing The Optimal Network Strategy For Video Over DSL Rollout

A techno-economic analysis of the different options for delivering video over DSL services

Tuesday 28th January 2003

Including Presentations From: Telenor, iMagicTV, Yes Television, Thomson Multimedia, Pace Microsystems, DMD Secure

a fully commercial examination of the video delivery options and market opportunities for network operators. With presentations covering all the key issues from content development, service selection to network architecture

Optimising The Reach And Capacity Of DSL Infrastructure

Making infrastructure decisions based upon reliable ROI and cost data

Wednesday 29th January 2003

Including Presentations From: Net to Net Technologies, LD Com, Axiom, Bulldog Communications, Texas Instruments, Neos Networks, Riverstone Networks

hear service provider case studies focusing on calculating ROI and minimising rollout costs, covering both business and residential markets. Then discuss the issues raised in 3 workshop sessions on accurately calculating ROI, harnessing auto provisioning technologies and assessing least cost approaches for reaching rural customers

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Optimising Your DSL Marketing Strategy

A focused DSL marketing campaign could be the difference between success and failure for your broadband services



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Workshop Objectives:

Ovum and Point Topic's one-day Workshop will provide a comprehensive briefing for anyone who needs to make DSL marketing work. Focusing upon high-quality, well-prepared content, it will equip you with practical information, figures and ideas, which you can turn to immediate use.

Discover:

- current market trends and opportunities - find out how your competitors are responding
- which marketing approaches are succeeding and why
- how to build effective marketing strategies and business models
- new ideas, tactics and approaches for marketing DSL-based services with immediate applications

Who Will Benefit By Attending:

If you are responsible for planning and strategy development for DSL and/or competing broadband products, you need to attend this DSL Marketing Workshop. Marketing, business development, strategic planning and investment functions will all

Workshop Programme

The workshop will include eight short and incisive briefings on different aspects of the DSL market today, structured around four sessions. The briefings are being specially prepared by Ovum and Point Topic and the complete content of the presentations, with supporting material and statistics, will be provided to all participants in a form which they can cut and paste for re-use in their own marketing plans and business cases.

The Workshop is designed for maximum interactivity, giving everyone the opportunity to gather the information, and make the contacts, which are most valuable for them. Participants in the Workshop are encouraged to ask questions at any point, and ample time will be provided for Q&A sessions between briefings. Coffee and lunch breaks will also provide opportunities for networking and further questions. A relaxed one-hour session at the end of the day will give participants another opportunity to mingle and refresh themselves.

The briefings are designed as a whole, together they add up to a complete picture of leading edge developments in DSL and broadband marketing. They are comprehensive without being repetitive.

09.00 Registration

09.30 **Session 1**

Introduction To The Workshop

Tracking DSL Market Growth: Examining how the market for DSL has developed and forecasting areas for future growth in Europe and worldwide. Analysing the drivers and barriers for growth, in particular: pricing issues, DSL reach and roll-out/provisioning issues.

Developing The Retail Model: Examining different marketing channels for DSL. Assessing the success of self-install and "DSL-in-a-box" initiatives. Identifying opportunities for marketing tiered services, bundles, content and new applications.

11.00 Morning Coffee

11.30 **Session 2**

Assessing The Impact Of Competitive Broadband Technologies On DSL Markets:

Assessing the market prospects for DSL versus alternative technologies such as cable modems, gigabit Ethernet, 3G (UMTS), wireless LANs, broadband fixed wireless and Powerline. Analysing each technology's strengths and weaknesses and forecasting where the competition will be strongest.

benefit from this prescient briefing. Operators, service providers, aggregators and content providers will gain valuable insights, while investment companies, regulators and DSL equipment vendors will get the data they need for decision making.

About The Presenters And Researchers

Ovum is the largest European based analyst and consulting firm specialising in telecoms, software and IT services. Its consultants have carried out a series of in-depth studies into DSL futures and strategies while continuous services such as Access@Ovum track new developments in all the competing broadband markets worldwide.

Point Topic specialises in the DSL market, providing comprehensive data on DSL services around the world through its website, www.point-topic.com.

The presenting team will be led by **Tim Johnson**, well known as an international expert on DSL and broadband developments, and the founder of both Ovum and Point Topic. He will be supported by colleagues from both companies, all of whom have carried out in-depth research in DSL markets and marketing.

Developing Broadband Applications And Services For Consumers:

Identifying what consumers want from broadband and what they will pay. Examining current and future applications and assessing how attractive they will be. Analysing case histories of broadband marketing initiatives and identifying the reasons behind successes and failures. Considering how the operator/content provider partnership can be improved. Assessing the potential of different payment mechanisms for increasing operator revenues.

13.00 Lunch

14.20 **Session 3**

Analysing Different Routes Into The DSL Market: Examining wholesaling, reselling and unbundling business models and market positioning. Forecasting how the alternatives will develop and identifying the main revenue opportunities. Assessing the regulatory and commercial risk in their different marketing plans.

Examining The Developing Markets For Video Over DSL:

Determining how and where DSL can support viable video-on-demand services. Distilling the lessons from the operational experiences with VoD to date. Comparing the commercial cases for delivering video over ADSL or VDSL. Analysing the development of different business models and strategies for VoD services and forecasting the commercial future for this market.

15.30 Tea

16.00 **Session 4**

DSL Technologies Update: Tracking the development of DSL standards and technology and examining how they will impact future choices and competition: - extending reach v. increasing bandwidth - positioning ADSL, VDSL, SHDSL, ADSL+ and others

Determining The Opportunities For DSL In The Business Market:

How and where can DSL open up the much sought-after SME market? Can it provide a low-cost platform for IP VPNs and LAN interconnect? What services and strategies will succeed in the broadband business market?

17.00 Close Followed By:

Informal Q&A Session - Cocktail Party

Developing The Optimal Network

A techno-economic analysis of the different DSL services

09.00 Registration

09.30 Chair's Welcoming Address

09.40 **Exploiting Existing Network Resources To Generate Immediate Revenues From Video Over DSL**

- Tackling the question of content:
 - sourcing content - identifying what content is available and determining how the operator can acquire content
 - minimising the risks of content development through outsourcing
 - developing content relationships
- Identifying the products that people want and will pay for:
 - learning from real customer feedback data
- Assessing the potential revenue opportunity of video delivery to the PC via existing broadband links

Steve Garvey, *Director of Communications, Yes Television*

10.20 **Making The Business Case For Investing In VDSL Rollout**

- Comparing VDSL and ADSL in terms of:
 - service capabilities - number of channels and customers supportable
 - QoS capabilities
 - costs of deployment
 - reach/cost per customer to deliver
 - scalability
 - retail model for provisioning
- Identifying markets in which VDSL is the preferred technology and explaining why
- Identifying and scrutinising advances in VDSL technology and implementation strategies that minimise the need for investment in fibre and additional network infrastructure
- Can VDSL deliver an acceptable ROI under current market conditions?
 - where are the best opportunities?
 - what are the risks and benefits of deploying VDSL?
 - should the operator delay deployment and if so when will VDSL become a profitable option for broadband service delivery?

Nils Elnegaard, *Senior Research Scientist, Telenor*

11.00 Morning Coffee

11.30 **Examining Different Approaches To Home Networks And Consumer Devices**

- How does the residential gateway influence the consumer's choice of products and services?
 - comparing services taken up by customers utilising STBs as opposed to PCs
 - comparing customers expectations of a "gateway", and their degree of ownership and control
- What are the operators' choices and to what extent can the operator influence the market for devices?
- Comparing analog distribution of video vs. IP distribution to multiple decoders
- Assessing the potential for multiple services delivery via the home network and developing an operator strategy for maximising the revenue potential of home networks
- Identifying key customer targets and the service requirements for success:
 - QoS
 - number of channels and variety of services - service levels

Steve Betz, *Business Development Manager, IP Gateway Decoders, Thomson Multimedia*

12.10 **Developing Applications And Content That Will Win Customers**

- Developing a profitable service mix:
 - determining attractive service bundling and pricing structures
- Assessing the opportunities and differences between delivering services to the STB and the PC

OPERATOR

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Strategy For Video Over DSL Rollout

Alternative options for delivering video over DSL

- Apportioning costs and revenues between service providers, operators and content providers:
 - comparing the open service architecture versus walled garden approach
- Robert Begg, Director, Marketing And Corporate Development, iMagicTV**

12.50 Lunch

14.20 Profiting From The Wide Scale Deployment Of IP Home Gateway Television Services

- Examining the development of the multimedia value chain:
 - who is in control of the gateway market?
 - what standards are available now, what is missing, and when/will these standards be agreed
 - will the computer be the hub for home network and multimedia services?
 - Microsoft vs Opensource/others
 - Assessing the opportunities from the use of low bit rate compression technologies:
 - easing the deployment of services
 - What needs to be done to meet major content provider's DRM requirements?
 - When will the market for video and multimedia services to the home reach maturity
- Steve Farmer, Head of Marketing, IPTV Division, Pace Microsystems**

15.00 Securing Content - Digital Rights Management And Conditional Access

- Identifying the key issues in DRM and assessing to what extent the operator is responsible for protecting copyright
 - Is network security enough to protect the operator from rights infringement suits?
 - Key points to consider when developing a DRM strategy
 - Examining the strengths and weaknesses of different DRM agreements
 - Taking steps to gain the trust of content delivery partners – what can service providers do to get the best and newest content?
 - developing a realistic picture of the opportunities for service providers in the content delivery business
- Rist Brouwer, CEO, DMD Secure**

15.40 Panel Session: Developing A Profitable Triple-Play Strategy

- Selecting the appropriate technology for video/multimedia services in different markets:
 - is there a commercial future for VDSL and upon what factors will this depend?
- Service development:
 - which services and service mixes will attract customers?
 - how much will they pay and will this result in a profitable business for the operator?
- Market development and timescales for deployment:
 - when and will video over DSL become a profitable service option?
- Investment scheduling and deployment strategies:
 - comparing network wide versus pilot scale/hotspot deployment strategies
- Who is making money and how are they achieving this?
- Identifying key customer targets and the service requirements for success:
 - GoS
 - number of channels and variety of service – service levels
 - customer support and provisioning
- Working with content providers – developing a win/win relationship:
 - revenue share
 - achieving customer critical mass
 - DRM and copyright protection

16.20 Chair's Closing Remarks

16.30 End Of Seminar

Optimising The Reach and Capacity Of DSL Infrastructure

Examining strategies and technology options for maximising the reach and capacity of DSL broadband access networks

09.00 Registration

09.30 Chair's Opening Remarks

09.40 Developments In DSL Technology To Extend The Reach And Capacity Of Existing Access Infrastructure

- How do existing DSL technologies match up with current and projected market needs
- Determining the status of DSL technologies such as ADSL2, ADSL2+, LDSL and VDSL
- Projecting the reach and capacity of new DSL technologies
- Forecasting the network evolution paths available with new DSL technologies
- Examining how regulatory factors are affecting the deployment of new DSL technologies

Neil Quarmby, Broadband Applications Manager, Texas Instruments

10.20 Extending The Reach Of LDCOM's DSL Network

- Examining how LDCOM have identified opportunities for increasing profit through incremental DSL expansion:
 - predicting ROI for incremental DSL provisioning
- Identifying the technologies/techniques currently being used by LDCOM to increase the DSL customer base:
 - how well are these technologies performing?
- Forecasting the changing patterns of demand in the French DSL market:
 - how will changing demand impact profitability, technology mix and service mix?
 - when will the VDSL market mature?

Bruce Bowden, VP, Strategy & Development, LDCOM

11.00 Morning Coffee

11.40 Developing A Deployment Strategy To Increase Revenues From DSL

- Making the business case for incremental deployment of DSL
- Identifying real and hidden costs
- Identifying high ROI opportunities in different European marketplaces:
 - deciding where to invest in DSL
- Developing and testing the performance of an ROI predictive tool for DSL roll out

David Rivington, Director Of Strategy, Bulldog Communications

12.20 Delivering Optical Ethernet Services Over SDSL To The Business Market

- Examining the Neos business model and assessing demand for Ethernet services in the business marketplace in the UK
- How do Neos select the delivery technology to use, comparing the costs of different options:
 - when is fibre the preferred choice and what are the practical limitations of SDSL/SHDSL?
 - under what circumstances would Neos consider deploying VDSL?
- Minimising the costs of reaching the business customer:
 - utilising GIS to locate the optimum POP based upon customer reach
 - working with 3rd party suppliers
- Examining how Neos see the key issues in competitive telecoms regulation:
 - pricing for partial privatised circuits, (PPS)
 - assessing the importance of regulation for the future profitability of Neos

Neil Fairbrother, Marketing & Communications Director, Neos Integration

13.00 Lunch

WORKSHOP SESSIONS

14.10 SESSION 1

A Practical Guide To Auto provisioning Including Extensive Case Study Material

- Examining the technology options
 - identifying customer requirements
 - assessing the successes of field installations
- Led By Axiom With A Leading Service Provider Client**

14.50 SESSION 2

Deploying DSL To Remote Rural Sites

- Achieving cost effective deployments to remote rural sites
 - examining different operator's approaching and assessing their success
 - analysing the topographical and customer demand conditions
 - assessing the potential and suitability of Ethernet in the last mile as a low cost option
- Led By Net to Net Technologies**

15.30 Afternoon Tea

16.00 SESSION 3

Deploying Ethernet In The Access Network As An Aggregation Technology And Delivery Platform For VAS

- Using Ethernet instead of ATM as an aggregation technology

- Examining the operational impacts of deploying Ethernet instead of ATM
 - Enabling new revenue streams from value-added DSL services
 - Comparing Capex and Opex for Ethernet and ATM as DSL aggregation technologies
 - Maximising ROI by using Ethernet to deliver value-added DSL services
- Gary Holland, Director, Technical Marketing, Riverstone Networks**

16.40 OPEN DISCUSSION/PANEL SESSION Examining The Key Factors For Success And Tracking The Important Trends In The DSL Markets Of Europe:

- Identifying which markets and services are likely to produce the highest profits
 - Examining DSL technology developments and identifying their most profitable applications
 - Analysing the determining factors behind the decision to focus on increasing bandwidth or reach, and analysing how these differ across a number of European markets
 - Forecasting future market trends
- Axiom/Net to Net/Riverstone Networks**

Plus Speakers from morning case study presentations

17.20 End of Workshops & Close of Seminar

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Optimising Your DSL Marketing Strategy

27th January 2003

G2063M

Developing The Optimal Network Strategy For Video Over DSL Rollout

28th January 2003

G2063N

Increasing The Reach And Capacity Of DSL To Access New Customers At A Profit

29th January 2003

G2063W

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