

A SUMMARY OF MY PERSONAL EXPERIENCE

Keeping with a newsletter style that I enjoy reading every week, referring here to the Angus TeleManagement Telecom Update, I have summarized in the tables below my interpretation of the key messages the network operators and manufacturers shared with us during the 2007 Canadian Telecom Summit.

This was my second year attending the Canadian Telecom Summit. The outcome of the 2006 event impressed me enough to warrant another visit to this unique and prestigious Canadian experience. And it didn't fail to impress me again. The organizers, Mark Goldberg and Michael Sone, keep doing it year after year. The quality of the keynote addresses, breakout sessions and sponsorship events are what one might call "classy" and clearly in a league of their own.

We heard from the Canadian network operators, leading manufacturers and also enjoyed the presence of the regulators: Industry Canada, CRTC, Competition Bureau and Telecommunication Policy Review (TPR). Everyone had interesting, well-prepared and inspiring presentations, which focused on their vision with a small segment on their respective products and services evolution. The famous Regulatory Blockbuster session and the debate on Competition in Mobile Wireless Services were a definite entertainment winner.

It looks like both sides of the equation seem to be in sync with each other. This means that the operators are listening to the end-users and that the manufacturers are listening to the operators. And with the regulators now reviewing the rules of the game this makes for an interesting year ahead.

I believe that it is together as a team that we can make progress on innovation and improve Canada's productivity. Collaboration is key to our success!

Network Operator
It is about the customer experience and the drivers are personalization, mobility and ease. The customers are looking for free content, uninterrupted viewing and want to own the experience.
The new business model is moving from Search to Discovery again relating to the personalization of website search engine.
The mobile content evolution points to business transformation (process), music distribution (and making it legal), mobile television and smart phones.
Consumer market developments: network investment, movement, medium for entertainment, bundling of services. Brand is an important element in attracting the youth market.
Enterprise market future: collaboration, home energy saving, presence services, FMC and moving towards an outsourcing model.
In conclusion: this is a time of opportunity and the focus is on customer value.

Manufacturer
We currently enjoy the use of three screens: TV, Computer, Mobile device and are moving towards an integrated 4 th screen: communicating "in the moment".
The industry is in a transition phase - lower barriers to entry, network operators changing their business models, cost pressures, traffic increase - usage growth and new service types requiring higher data rates.
Technology is driving the change where ROI confidence and perceived complexity are inhibitors of progress - simplicity is key. We should bridge the gap between maturity and complexity
Social networking is the new wave - exploiting the value of the IP platform investment is the way forward. We are in an era of intelligent communications driven by service integration.
Some view the market in the following three segments: digital native (youth), digital immigrant (our generation), digital challenged (our parents).
In conclusion: this is a dynamic industry where everything needs to connect (hyperconnectivity) creating a true broadband experience.