

IDATE's 2005 International Conference

**Content Industries & Broadband Economics
When content meets broadband**

**IDATE's 27th Annual International Conference
22, 23 and 24 November 2005 (Le Corum – Montpellier – France)**

For 27 years now, this European Forum has been consolidating its reputation as a singular opportunity to take stock of the changes at work in the DigiWorld (Telecoms, Internet Media). Every year, this three-day event attracts top-level industry spokespeople (Presidents, CEO, experts...) and close to 1,000 delegates from over 30 countries to discuss and debate their viewpoints with public policy-makers and market analysts.

23 & 24 November 2005: two days of plenary sessions with industry leaders and reputed experts.

One year ago, IDATE's International Conference – conducted under the banner: Internet Act II – drew the conclusion that the momentum of the market created by ubiquitous IP and mobiles was marked by growing uncertainties over telecom and media players' business models. The goal this year is to further discussion on this topic, and to home in on the crux of the matter by taking a look at the issues created by the swift rise in the bitrates being offered to users.

Will the corollary of these technological performances be new value placed on certain uses (which services? For what? At what price?...), and so ensuring customers' lasting loyalty and a return on the capital invested? What impact will this have on future relations between network industries, applications industries, service and distribution industries? Who will be chief beneficiaries of the changes taking place in the value chain?

Having introduced the notion of Guest Country for the first time this year, and having selected Japan for that honour, we hope to benefit from the experience of one of the world's most innovative markets, and to further strengthen the international scope of both our Conference and our Institute.

This Conference will offer a chance to take part in debate and discussion with the following personalities:

- **Kanichiro ARITOMI**, Vice-Minister of Internal Affairs & Communications (MIC), Japan
- **Andrew BURKE**, CEO, BT entertainment, BT Retail
- **Pascal CAGNI**, General Manager & Vice President, APPLE EMEA
- **Jean-François CECILLON**, Chairman & CEO, EMI Continental Europe
- **Paul CHAMPSAUR**, Chairman, ARCEP
- **Frank E. DANGEARD**, Chairman & CEO, THOMSON
- **Pierre DANON**, COO, CAPGEMINI
- **Jean-Bernard LEVY**, CEO, VIVENDI UNIVERSAL
- **Didier LOMBARD**, Chairman & CEO, FRANCE TELECOM
- **Gilles PELISSON**, CEO, BOUYGUES TELECOM
- **Serge TCHURUK**, Chairman & CEO, ALCATEL

And with a host of top-flight keynote speakers, including:

- **Carlo D'ASARO BIONDO**, CEO, AOL France
- **James BRITTON**, Director, Telecoms Equity Research, LEHMAN BROTHERS
- **Alain FIOCCO**, Technology Director EMEA, CISCO SYSTEMS
- **Peter GLOBOKAR**, Director, Global Technology Corporate Finance, NOMURA INTERNATIONAL
- **Hiroshi HIRABAYASHI**, Ambassador from Japan in Paris, Japanese Embassy
- **Pertti JOHANSSON**, President, QUALCOMM Europe
- **Lee JOSEPH**, VP EMEA Systems, REALNETWORKS

- **Simon KENNY**, EVP & Managing Director, WARNER BROS International Television Distribution Europe
- **Guillaume LACROIX**, Director of Innovation, GROUPE NEUF CEGETEL
- **Patricia LANGRAND**, Executive Vice President Content Division, FRANCE TELECOM
- **Duncan LEWIS**, Senior Advisor, Telecommunications, Media and Technology, THE CARLYLE GROUP
- **Francis LORENTZ**, Chairman IDATE
- **Jean-Hervé LORENZI**, Member of the Board & Senior Banker, Cie Fin. Ed. De ROTHSCHILD BANQUE
- **Bertrand MABILLE**, Director of Strategy and Regulation, GROUPE SFR
- **Mivhel MAFFESOLI**, Director of the Centre for Study of the Current & the Everyday, LA SORBONNE
- **René-Philippe MANTRAND**, General Manager, Communications Sector, MICROSOFT EMEA
- **Bruno MARZLOFF**, Sociologist & Director, GROUPE CHRONOS
- **Eli M. NOAM**, Director, Columbia Institute for Tele-Information (CITI) & Professor, Columbia Business School
- **Shane O'NEILL**, Senior Vice President, Chief Strategy Officer LIBERTY GLOBAL & President CHELLOMEDIA
- **Philip PLAISANCE**, Chairman, WONDERPHONE
- **Richard SHARP**, Vice President, Rich Media, NOKIA Multimedia
- **Brian SULLIVAN**, Director, Customer Products & Services, BskyB
- **Agnès TOURAINE**, Managing Director, ACT III
- **Christian VANDERBORGHT**, Business Director, PLATEFORMETV
- **Dominique VIDAL**, Regional VP & Managing Director, YAHOO! Europe
- **Dennis WELLER**, Chief Economist, VERIZON
- **Masaki YOSHIKAWA**, Managing Director, Global Coordination Department, NTT DoCoMo
- ...

22 November 2005: an outstanding one-day event devoted to special seminars.

To kick off the International Conference, IDATE and its partners are organising a day dedicated entirely to targeted seminars, focusing on the key issues and challenges that will mark the coming years.

• The very high-speed challenge

At a time when broadband is becoming increasingly ubiquitous, particularly through the deployment of ADSL, carriers and some regional governments are now turning to very high-speed and wireless technologies, in a bid to anticipate users' future needs, and to distinguish themselves by increasing the appeal of their region. With the help of telcos and industry players, the goal of this half day of debate is to gain a perspective on the most promising technological platforms, and to take a look at the projects in this area being carried out by regional governments.

In partnership with FTTH Council Europe

• Broadband for all: emerging services

As "Broadband for all" is gradually becoming a reality, thanks to the steady expansion of the area covered by operators, and as growing competition enables a broad array of increasingly appealing offers for users, in addition to deploying broadband infrastructures, regional governments are now encouraging the development of new services for citizens and businesses, and implementing e-government procedures. The goal of this half day of discussion and debate is to illustrate the range of experiments taking place around Europe, and to draw concrete lessons from the various approaches presented through a close-up look at the most promising innovative options.

In partnership with the CDC

• 4th International Video Game Forum: The New Deal

IDATE's International Video Game Forum plays host to representatives of the interactive entertainment sector, and spokespeople from related industries, to debate the outstanding events of the previous year, and to discuss what will be making headlines in the months to come. This 4th edition of the International Forum comes at a time of deep-seated changes: the launch of new consoles (handheld and home), the development of new mobile gaming services, confirmation of the potential of online gaming... All of these developments are steering the gaming sector to maturity, but will necessarily give way to both technological and industrial shifts.

In partnership with Montpellier Agglomération, LyonGame, IFSE, SELL, APOM, TIGA

• Television 2015: The 1st International TV Forum

A great many factors of change are now at work in the TV sector, including the multiplication of TV distribution platforms, the fragmentation of the TV audience, individualisation of video consumption, growing competition from the internet, the steady rise of rich media and interactive TV programmes, etc. In the long run, the combination of these various factors will undoubtedly lead to new rules and a new environment to which all of the sector's players will need to adapt. This day of discussion and debate will be geared to taking stock of the leading long term challenges that Europe's TV industry will be facing. It will also provide an opportunity to examine several long-term growth scenarios for the sector. Involved in the discussions will be representatives from TV channels, along with players from the world of TV production, advertising, consumer electronics, IT and TV broadcasting (cable, satellite, DTT, ADSL...).

In partnership with the MediaClub

• Mobile services: Business Models & Strategies

3G services have now entered a lively marketing phase in Europe. How is the transition from 2G to 3G being handled? What solutions are being employed to hem in the expected decline in voice ARPU? Are new services like streaming video, videophony and TV likely to have a significant impact on data revenues? The mobile sector is having to contend with major challenges, at a time of increasing competition, the arrival of new MVNOs and wireline telcos who are taking advantage of the convergence of new technologies. Business models for 3G networks are still only fledgling, and a host of questions still need to be answered.

In partnership with the UMTS Forum

• **1st Transatlantic Telecom Forum: Market trends, Industry metamorphosis & Regulation**

The goal of the Transatlantic Telecom Forum will be to analyse the changes taking place in the telecom sector on either side of the Atlantic. It will provide an opportunity to go beyond conventional analyses of the US market and Euro-centric debates. Despite differences in market structure and regulatory models, the telecom sector in Europe and North America is undergoing the same shift in momentum, fuelled by the rise of broadband and mobile usage, and the extraordinary diversity of technologies and applications: FTTx, 3G, WiMax, VoIP, IPTV, etc. What implications does this have for regulation? How to reconcile the sometimes contradictory policies that govern the platforms, the services and the technologies?

In partnership with Columbia University

• **Lessons from Tunis: technological & regulatory convergence**

The seminar is organized on the initiative and with the financial support of InfoDev, which is keen to share its views on the outcome of the latest World Summit on the Information Society (WSIS). The target public includes telecommunications manufacturers, national regulators and international organisations.

In partnership with InfoDev

• **The FING's Crossroads of possibility**

The Languedoc-Roussillon network, devoted to technological innovation, invites Information and Communication Technologies players to take part in the Languedoc Roussillon region's first ever "Crossroads of Possibility." Over the course of an hour, 10 innovative projects will be presented by start-ups and established labs, associations and public services, students and designers, etc.

About IDATE

IDATE is one of Europe's foremost market analysis and consultancy centres, specialised in analysis of information and communication technologies and industries, offering the following services:

- **Consulting:** an operational consultancy: reports and expert missions.
- **DigiWorld:** Digital World Observatory. A singular tool for understanding and monitoring the telecom, internet and media sectors, the markets and the players' strategies: market reports, databases, strategic monitoring services.
- **Forum:** a prominent centre for debate: IDATE's annual International Conference, the COMMUNICATIONS & STRATEGIES review, the IDATE corporate Foundation, the ENCIP European research network...

Founded in 1977, IDATE is based in France (Montpellier). Under the guidance of our President, Mr. Francis Lorentz, and General Manager, Mr. Yves Gassot, our centre employees a staff of over 60 people specialised in telecommunications, networks, the internet and the audiovisual industry. For over 25 years now, IDATE's International Conference has been a benchmark event for industry professionals working in information and communications technologies. It is one of Europe's largest conferences devoted to analysis, debate and forecasting.

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For more information on IDATE's 27th Annual International Conference, market reports and press releases, visit us online:
<http://conference.idate.org>