The Canadian Institute

6th National Congress

Competition and Access in the Local Loop

Formerly "Competition in Local Services"

Surviving and Thriving in a Changing Telecom Market

Get up-to-the-minute intelligence on the state of the Canadian telecom sector, including:

- How the telecom market shakeup will affect Canadian competition
- A case study presentation on how one CLEC survived market instability and the cash crunch
- A special presentation on a leading ILEC's strategy in the new market landscape
- A players' panel on how non-telco companies such as cablecos, utilities and governments are making inroads into providing local services
- An update on crucial CRTC decisions of the past year, including an experts' discussion of the price cap review
- A look at telco TV and how close video-on-demand technology is to reality

HEAR FROM KEY INDUSTRY PLAYERS, INCLUDING:

Bell Canada
Nortel Networks
Group Telecom
Mark H. Goldberg & Associates
NBI/Michael Sone Associates
Decima Publishing Inc.

TELUS
CIBC World Markets
CallNet Enterprises
Lemay-Yates Associates
iMagic TV
Stream Intelligent Networks
Primal Technologies

Vidéotron Communications Inc.
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Wireless

NETWORKLETTER

Thursday and Friday, January 24 and 25, 2002
Sutton Place Hotel, 955 Bay Street, Toronto

To Register Call Toll-free 1-877-927-7936 or in Toronto Call 416-927-7936 or Register Online at www.CanadianInstitute.com

LOCAL COMPETITION IS NOT GONE — IT'S RECONFIGURING. DO YOU HAVE THE INFORMATION YOU NEED TO SURVIVE?

The market has crashed, the stocks are down, and players in the local telecom sector are disappearing every day. Who will survive and how will they do it? What will happen to customers and consumers under these conditions? Who is proving the validity of their business models and plans now that the market is testing all would-be local service providers?

In a completely reconfigured Canadian playing field, the ILECs and a few CLECs are still standing, while many are gone. Meanwhile, a new wave of players from the cable, utility and government sectors are moving in and becoming involved in the provision of local services. What does this mean for the future of the market?

This **6th Annual *Canadian Institute*** event has been designed to bring together top executives, strategists and policymakers in the Canadian telecom sector to provide you with a thoughtful review of the past year's events, along with vital advice and information for your decision-making during the next year.

Don't miss this opportunity to hear from:

- **Group Telecom** on how they've come out as a winner in the CLEC survival stakes
- **Bell Canada** on how its strategy will be formulated in the new market conditions
- **Network Letter, TELUS and Group Telecom** on understanding the telecom market shakeup and its effects on competition in Canada
- **CIBC World Markets** on what investors are looking for before loosening the cash flow into the telecom sector again
- **Bell Canada, Lemay-Yates Associates** and **CallNet Enterprises** on the CRTC's price cap review
- **Nortel Networks, Stream Intelligent Networks** and **Primal Technologies** on which access technologies are proving themselves in slower market conditions
- **iMagic TV** on telco TV and the progress of video-on-demand technology

Be where your customers and competitors will be on January 24 and 25, 2002. Register now by calling toll-free **1-877-927-7936** (or **416-927-7936** in Toronto) or register on-line at www.CanadianInstitute.com

HEAR FROM THESE INDUSTRY LEADERS AND EXPERTS

Co-Chairs

Mark H. Goldberg
Principal
Mark H. Goldberg & Associates

Michael Sone
President
NBI/Michael Sone Associates

Paul Park
Editor of Network Letter
Decima Publishing Inc.

James Levy
Leader, Strategy & Corporate Development, TELUS Global Trade & Partner Solutions

Blake Corbet
Executive Director
CIBC World Markets

Willie Grieve
Vice President, Government and Regulatory Affairs, TELUS

Don Bowles
Vice President, Regulatory Affairs
CallNet Enterprises

Robert Farmer
Vice President, Regulatory Matters
Bell Canada

Leonard Eichel
Vice President
Lemay-Yates Associates

Gerry Verner
Vice President Marketing
iMagic TV

Douglas W. Michaelides
Vice President - Canadian Region, Service Provider & Carrier Solutions
Nortel Networks

Bob MacCallum
Vice President & Chief Technology Officer, Stream Intelligent Networks

Michael Conway
Vice President of Product Development, Primal Technologies

Bernard Courtois
Chief Strategy Officer, Bell Canada

Steven Koles
Senior Vice President
Marketing and Sales, Group Telecom

Frans Luc Vandendries
Director of Regulatory Affairs
Vidéotron Communications Inc.

Desmond Lorente
President, Simcoe Community Access Network

Grant Chaney
Chief Technology Officer
Ministry of Innovation and Science
Government Of Alberta

Victor Viola
Vice President, Sales and Marketing
HydroOne Telecom

William Crosbie
President and CEO
FibreTech Telecommunications

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Thursday, January 24, 2002

8:00 **Registration Opens**
Continental Breakfast Served

9:00 Co-Chairs' Opening Remarks

Mark H. Goldberg
Principal, Mark H. Goldberg & Associates

Michael Sone
President, NBI/Michael Sone Associates

9:15 What Went Wrong: Understanding the Telecom Market Shakeup and Its Implications for the Future of Canadian Competition

Paul Park
Editor of Network Letter
Decima Publishing Inc.

***James Levy,* Leader,**
Strategy & Corporate Development
TELUS Global Trade & Partner Solutions

Steven Koles
Senior Vice President, Marketing and Sales
Group Telecom

- Was it inevitable? What could have been avoided and what couldn't
- Is it over? What the telecom market will look like after the next year
- Skyrocketing stock: Why was the valuation of stocks out of sync with the viability of telecom businesses for so long?
- The capital gap: When will investors come back to the telecommunications sector?
- Is there a viable CLEC business model in the current regulatory climate? What has distinguished the survivors from the rest?
- Is the CRTC responsible for an environment of shrinking competition? What role should the CRTC be playing in today's telecom sector?
- Will telcos be outpaced by non-regulated players such as cablecos and power utilities?
- Assets for sale: Who is picking up the pieces of the fibre infrastructure built by defunct players?
- Is the current demand for bandwidth increasing as rapidly as predicted or is there still an excess of capacity?
- Which players will still be standing when the market recovers?
- Will the extent of the layoffs in the telecom equipment sector delay its recovery? What will this mean for LECs?
- Will there be any new entrants to the marketplace in the next year?

10:30 Networking Coffee Break

10:45 View From the Markets: What Investors Want to See Before Bringing Capital Back into the Telecommunications Sector

Blake Corbet
Executive Director, CIBC World Markets

- How have the market conditions changed the criteria used to assess potential telecom investments?
- What can LECs do to attract investment during a slump period?
- What are investors' views on fibre builds and other infrastructure development to meet future demand?
- What changes are required to the CLEC business model to make it a more viable investment?
  - reseller
  - facilities-based
- Is regulation hurting Canadian telecom players?
- Can smaller-sized players survive a capital drought or is bigger better in the new telecom market?
- What would be the risks and benefits of opening up the Canadian market to foreign ownership from an investment perspective? Would this change the current investment climate?
- Has the financing picture improved for the telecom equipment providers?

11:30 CRTC Update: The Impact of the Latest Decisions and Emerging Regulatory Issues

***Willie Grieve,* Vice President,**
Government and Regulatory Affairs, TELUS

***Don Bowles,* Vice President, Regulatory Affairs**
CallNet Enterprises

The CRTC has enacted decisions on various issues that have the power to change the direction of Canadian telecom, and has decisions pending on several more. This presentation will summarize the latest impacts on the market of rulings on:

- Building access: Are property managers making a permanent move in the direction of managing in-building wire and charging access fees to telcos?
- Municipal charges: The impact of the Ledcor decision appeal on telco access in the metro market and outstanding municipal license fees
- Creating a new formula to determine when local calling areas should be expanded
- Enforcing contribution: Is the new mechanism viable?
- The results of rebanding: What has been the impact of the new costing structure on local loop activity? Has it eased CLEC woes?
- New territory: What will be the opportunities for existing CLECs to expand their reach if local competition is opened up in Quebec?
- Non-Canadian competition: Will the market be opened to greater levels of foreign ownership? Would this mean greater consolidation or better competition in the long term?

12:30 Networking Luncheon for Delegates and Speakers

Panel Discussion

2:00 The Price Cap Review: Can the Canadian Telecom Market Still Operate Effectively Under Regulated Rates?

Robert Farmer
Vice President, Regulatory Matters
Bell Canada

Don Bowles
Vice President, Regulatory Affairs
CallNet Enterprises

Leonard Eichel
Vice President
Lemay-Yates Associates

- Did the 1998 price cap regime achieve its objectives of:
  - improving urban and rural access to service?
  - furthering competition?
  - increasing ILEC efficiencies?
  - streamlining regulation?
- Is price regulation still appropriate in the current market environment? Should price caps continue to stand in competitive markets?
- Will the new contribution regime and rebanded loop rates be affected by changes in pricing regulations? Should they be?
- What would be the effect on consumers of de-linking residential and business rates?
- How can competitors effectively distinguish themselves through pricing strategies under a regulated regime?
- Should optional local services be included in the regulated service basket structure or would this have a detrimental effect on competitor margins?
- What is the likelihood of re-entrants appearing in the market under a revamped pricing regime?

3:30 Networking Refreshment Break

3:45 Turning the Tables: Bringing TelcoTV to the Canadian Market and Beyond

Gerry Verner
Vice President Marketing
iMagic TV

In this informative session, discover how iMagicTV is working to provide software products and services that enable telephone companies to deliver multi-channel digital television and interactive media services to their subscribers over a broadband network infrastructure.

- Building the multi-media phone company
- Service provider revenue opportunities
- Broadening a telco's customer connections
- Deploying broadband television — what iMagicTV enables
- Vision of the future: what will be the market impact of this new competitive player?

4:30 Co-Chairs' Recap
Conference Adjourns

Friday, January 25, 2002

9:00 Co-Chairs' Opening Remarks

9:15 The Best Bet: How are Competing Access Technologies Evolving in a Slower Market?

Douglas W. Michaelides
Vice-President - Canadian Region,
Service Provider & Carrier Solutions
Nortel Networks

Bob MacCallum
Vice President & Chief Technology Officer
Stream Intelligent Networks

Michael Conway
Vice President of Product Development
Primal Technologies

- Has the downturn increased the viability of DSL and cable solutions?
- How has turmoil among financiers and builders of fibre networks affected the optical market?
- How long will it take to bridge the "last mile" in metropolitan area networks across Canada at the current rate of development?
- Does the slowdown mean that wireless will continue to play a supporting role? Or will wireless solutions prove a cheaper alternative for local services in the medium-to-short term?
- Understanding the fadeout of equipment provider support for fixed wireless technologies
- Will the telecom equipment providers be ready to turn out new products when the market picks up?
- Will VoIP remain a marginal technology or is it set for full-scale implementation once the MPLS standard is in place?
- The 3G rollout: Will converged next generation mobile services be taken up by consumers in the current climate?
- The wireless loop: Using wireless to provide local telecom services overseas

10:45 Networking Coffee Break

11:00 Still Going Strong: ILEC Strategy in a Reconfigured Market

Bernard Courtois
Chief Strategy Officer, Bell Canada

- What pressures are on ILECs to further competition when CLECs are facing low-margin conditions?
- Are the expectations that regulators and surviving CLEC competitors have of ILECs realistic in the current economy?
- Will the ILECs increase or reduce the focus on improving customer service and efficiency in the absence of heavy competitive incentives?
- Are ILECs pulling out of involvement in building infrastructure wiring in the face of access fees?

- How high can rates for residential service be expected to rise in the next year?
- What opportunities will ILECs be focusing on in the business market now that the field is clearer?
- How many customers are seeking out ILEC services to protect themselves from market instability?
- How rapidly will the expansion into underserved localities be proceeding during the economic slowdown?
- How much of the National Broadband Task Force projections can ILECs meet with their planned provision of wired and wireless Internet access?

11:45 **A CLEC Success Story: Keeping Customer Trust in an Unstable Telecom Environment**

Case Study

Steven Koles
Senior Vice President Marketing, Group Telecom

- How to prevent an exodus of customers towards the ILECs in an uncertain market
- How are your pricing and bundling strategies affected by a low cash-flow situation?
- Niche marketing: Should a CLEC go broad or narrow in tough times?
- The data-driven business model: What service offerings can a CLEC reliably provide at this stage of market development?
- Why facilities-based CLECs are faring better than resellers of loop services
- Ramping up customer service levels at a critical time
- How to attract "burned" customers from former competitors and keep them

12:30 **Networking Luncheon for Delegates and Speakers**

2:00 **The Outsiders: How Non-Telco Players Such as Cablecos, Power Utilities and Municipalities Are Changing the Provision of Local Services**

Frans Luc Vandendries
Director of Regulatory Affairs
Vidéotron Communications Inc.

Desmond Lorente
President, Simcoe Community Access Network

Grant Chaney
Chief Technology Officer
Ministry of Innovation and Science
Government Of Alberta

Victor Viola
Vice President, Sales and Marketing
HydroOne Telecom

William Crosbie
President and CEO
FibreTech Telecommunications

- Is the National Broadband Task Force goal of internet access in every Canadian community by 2004 attainable?
- It's mine: Sorting out fibre ownership issues amongst competing players

Cablecos

- When will cablecos be moving from Internet service to providing telephone over cable?
- Is packet cable the most cost-effective method for providing cable telephone services?
- The next generation: How the cableco rollout of interactive TV and other high-bandwidth services is expected to drive voice-video-data convergence in the telecom market

Power Utilities

- Why power utilities are getting involved in the provision of B2B Internet services
- Building partnerships with CLECs and municipalities to leverage existing fibre resources
- What is a viable business model for a hydro telecom player?

Municipalities and Government

- Do-It-Yourself Internet Access: Why rural municipalities are banding together to provide high-speed services for their business communities
- What possibilities will be opened up for municipal players by the new federal community aggregation funds for broadband?
- Will other provincial governments follow Alberta's lead in bidding to construct infrastructure? How will this affect the playing field?

4:00 **Co-Chairs' Recap**
Conference Concludes

WHO SHOULD ATTEND

- **Incumbent Local Exchange Carriers (ILECs)**
- **Competitive Local Exchange Carriers (CLECs)**
- **Cable Companies**
- **Utility Telecom Companies**
- **Building-centric Local Exchange Carriers**
- **Internet Service Providers (ISPs)**
- **Application Service Providers (ASPs)**
- **Metropolitan Network (MAN) Providers**
- **Wireless Communications Service Providers**
- **Telecom Equipment Manufacturers and Suppliers**
- **Investors, Advisors and Analysts in the Telecom Sector**
- **Property Developers, Owners and Managers**
- **Municipalities**
- **Telecom Service Customers**

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