



Mobile services within the reach of small carriers, cablecos and ISPs

A seminar and consulting services from Lemay-Yates Associates Inc.

The competitive landscape for mobile services has been turned upside down by the licensing of AWS and other spectrum to new entrants in 2008 as well as by the new license conditions affecting national roaming and tower sharing.

This new reality brings opportunities that were up to now much more difficult to realize for regional or smaller telecom service providers across Canada, whether one owns or not spectrum licenses for mobile services.

LEMAY-YATES ASSOCIATES INC. (LYA) has developed a one day in-house strategy and training seminar specifically tailored to help you assess and address these new opportunities as well as a complete suite of consulting services covering the launch of new mobile service offerings.

Note that as part of this Seminar, LYA will also share with yourself and your colleagues insights from its primary research into the usage of mobile broadband applications by Canadian consumers according to where they reside and their key socio-economic characteristics.

Please also note that the Seminar can be provided conjointly for one or more service organization if you are interested in sharing its cost.

Past clients of LYA Spectrum and mobile opportunities seminars do not hesitate to recommend it to others as per the following testimonial.

"It is a very self-contained, updateable presentation that captures in one day a very complex subject and provides decision-makers with the right foundation to discuss available options, identify further areas of inquiry and ultimately, make solid business decisions about their wireless future"

*Leonard D. Eichel
Director, Telecommunications Services, Cogeco Cable*

LYA regularly advises mobile industry leaders, notably on the development of resale agreements and spectrum acquisition. LYA has participated in every major consultation and spectrum licensing process held in Canada for the past 16 years. Thanks to that solid experience, we can advise you on how to make the most of the opportunities offered by the new competitive landscape reshaping the Canadian mobile industry.

The proposed agenda for the seminar is presented on the next page.
Note that the agenda can be adapted to your specific needs



Agenda for in-house LYA seminar on Mobile Opportunities

The opportunities offered by mobile services to small carriers, cablecos and ISPs

Section 1 – Historical evolution of the mobile industry: key dates and milestones

Section 2 – Recent status and key metrics of the mobile phone industry

- Current subscriber penetration and forecasts
- Differences in penetration across the different regions of Canada
- The key frequency bands used for mobile and their characteristics
- Overview of technologies deployed or considered for deployment in Canada: HSPA, WiMax, EVDO, LTE , 3G to 4G evolution
- Comparison of key operational metrics between Canadian mobile carriers
- Trends in voice vs data ARPU and usage
- Is your regional market different than the overall Canadian average? If so, how?

Section 3 – Overview of strategies and positioning of the players: market share, target customers

- The big 3: Bell, Rogers and Telus and their flanker brands: Fido, Koodo and Solo
- The market share of each provider by region and in Canada among key demographics
- The new AWS entrants and others: Globalive, Shaw, DAVE, Public Mobile, Videotron, Bragg and others

Section 4 – How can small telecom service providers profit from the growth of mobile services?

- Discussion of the various approaches to enter the market: resale vs MVNO vs future spectrum acquisition vs subordinate license
- Potential future spectrum awards in the 2.5-2.690 GHz and 700 MHz bands
- Revenue and cost profiles for each business model
- Potential partners to launch a mobile service: host carriers, back office partners, handsets
- The opportunities arising from the new mobile license conditions for regional operators who own mobile spectrum licenses

Section 5 – How to target and develop your mobile service offerings?

- Who are your target clients?
- The importance of handset line-up and other devices for users: smartphones versus low-end handsets
- A comparative analysis of mobile service offerings in your area (e.g. Videotron vs Rogers in Quebec)
- Discussion of results of LYA Primary research among Canadian mobile consumers regarding mobile broadband applications from penetration for 20 different applications to pricing

Section 6 – Conclusion and discussion

- Steps to get started



In addition to our Seminar to get help get you started, LYA can answer your specifics needs by offering customized consulting services to fulfill the following objectives:

- **Develop or validate your business plan** based on our expertise covering all elements of your business plan, from revenue sources and costs to technologies and competitive mobile offerings as well as our in-depth knowledge of the Canadian mobile market,
- Review and discuss with your investors and lenders the opportunities offered to your enterprise by expanding into mobile to better serve your customers,
- Assess the value of existing spectrum licenses or future spectrum licenses,
- **Better negotiate resale agreements or MVNO deals with the support of LYA,**
- **Target your existing or future mobiles service packages based on existing competitive offerings in your market,**
- Increase your knowledge of the mobile market building on the quantitative analyses and recognized forecasts of LYA, as well as
- Answer any other question you may have, or solve any difficulties you encounter related to mobiles services.

Do not hesitate to contact Ms. Johanne Lemay at 514-288-6475 or by email at lya@lya.com for any additional information concerning our Seminar on mobile opportunities, including price as well as terms and conditions, or for other services from which you could benefit.

Please visit our website at www.lya.com for more information on LYA and its activities. We look forward to hear from you.

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