State of Telecom 2012:

Over the Top:
New Business Models with New International Telecom Rules?

September 24, 2012
301 Uris Hall
Columbia Business School
New York
The State of Telecom – 2012

A Trans-Atlantic Dialog with IDATE

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Over the Top:
New Business Models with New International Telecom Rules?

9:00 Welcome
- Eli Noam, CITI Columbia University
- Yves Gassot, IDATE

9:20 Business Models for Network Operators in an OTT World

Speakers
- Vincent Bonneau, Head of the Internet Department, IDATE (France)
- Jacquelynn (Jackie) Ruff, Vice President, International Public Policy & Regulatory Affairs, Verizon (USA)
- Stephane Dufour, CSO, Swisscom (Switzerland)
- Paul Budde, Managing Director, BuddeCom and Lead Author of “Broadband: A Platform for Progress,” a report by the UN Broadband Commission for Digital Development (Australia)
- Yu-li Liu, Professor, National Chengchi University (Former NCC Commissioner) (Taiwan)
- Simon Wilkie, Prof. and Chair of Economics, USC; Exec Dir, USC Center for Communication Law and Policy, and recent Chief Economist, FCC (USA)

Moderator: Raul Katz, Director of Business Strategic Research, CITI

10:45 Sen. Stephen Conroy, Minister for Broadband,
Communications and the Digital Economy and Member of the UN Broadband Commission for Digital Development (Australia)

BREAK

11:15 The Impact of OTT on Traditional National Networks and Media

Speakers
  • Gabrielle Gauthey, EVP Alcatel Lucent (France)
  • Emmanuel Rochas, Senior Vice President and Head of Group Strategy, Telecom France-Orange (France)
  • Henning Schulzrinne, Chief Technologist, FCC (USA)
  • Richard Whitt, Vice President and Global Head of Public Policy and Government Relations, Motorola Mobility (Google), (USA)
  • Matthias Kurth, former President of the Federal Network Agency 2001-11 (Germany)

Moderator: Judith D. O'Neill, COO, CMAS Holdings, LLC

12:30 LUNCH

1:30 Hon. Lawrence Strickling, Administrator, National Telecommunications & Information Administration (USA)

2:00 Regulation of Over-the-Top Services: Should National Regulation and the ITRs Be Expanded Beyond Networks to Include Applications?

Speakers
  • Roland Doll, Member of the Executive Board of the European Telecommunications Network Operators Association (ETNO) and Vice President International Governmental Affairs, Deutsche Telekom (Germany)
  • Amb. David Gross, Wiley & Rein (former U.S. Coordinator for International Communications and Information Policy, Department of State) (USA)
  • Leonard Cali, Senior Vice President, AT&T (USA)
  • Christopher Libertelli, Head of Global Public Policy, Netflix (USA)
• Carlos Raul Gutierrez, President of the Council - SUTEL (Costa Rica)

Moderator, Robert Pepper, Senior Managing Director of Advanced Technology Policy, Cisco

3:30 Hamadoun Touré, Secretary-General of the International Telecommunication Union (ITU)

4:00 BREAK

4:15 Financial Implications and Investor Reactions

Speakers
• Craig Moffett, Senior Vice President and Senior Analyst, Bernstein Research (USA)
• Lorenzo Pupillo, Executive Director, Public & Regulatory Affairs, Telecom Italia (Italy)
• François Barrault, Chairman, IDATE (France)

Moderator: Robert Atkinson, Director of Public Policy, CITI

5:30 RECEPTION
SPEAKERS

The State of Telecom – 2012

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WELCOME –

Eli Noam, Columbia Business School and Director, CITI

Eli Noam is Professor of Economics and Finance at the Columbia Business School since 1976 and its Garrett Professor of Public Policy and Business Responsibility. He is the founder and Director of the Columbia Institute for Tele-Information, a research center focusing on management and policy issues in communications, internet, and media. He has also taught at Columbia Law School, Princeton University’s Economics Department and Woodrow Wilson School, and the University of St. Gallen, and is active in the development of electronic distance education.

He served for three years as a Commissioner for Public Service Commission of New York State and was appointed by the White House to the President’s IT Advisory Committee. He serves on numerous advisory boards of government and non-profit telecommunications, internet and media organizations.

Prof. Noam has published 28 books and over 300 articles in economics journals, law reviews, and interdisciplinary journals, and is a regular columnist for the Financial Times online edition. He received the degrees of BA, MA, Ph.D (Economics) and JD from Harvard University, and honorary doctorates from the University of Munich (2006) and the University of Marseilles (2008).

Yves Gassot, CEO, IDATE

For more than fifteen years, Yves Gassot has been at the head of IDATE, an institute that has established itself as one of the leading research centres in Europe concerned with the telecommunications, Internet and media industries. In this position, he has taken part in numerous studies of the various markets and the strategies being pursued in the telecommunications sector.

Mr. Gassot is on the panel of several experts committees, including the “Conseil Général de l’Industrie, de l’Energie et des Technologies” (French advisory council for the Finance and Industry ministers), member of the ITS board, and member of the advisory committees of the PTC and Iris Capital Investment committee (VC). He was special adviser of the European Commissioner in charge of the Information Society during the last regulatory framework review (2006-2007).
Mr. Gassot serves as director of the journal *COMMUNICATIONS & STRATEGIES* and is scientific head of the annual DigiWorld Yearbook and DigiWorld Summit. With a background as architect (DPLG, Paris), he is a graduate of the Institute of Political Studies, Paris (3rd Cycle).

**Business Models for Network Operators in an OTT World**

**Vincent Bonneau, Head of the Internet Department, IDATE (France)**

Vincent Bonneau is the director of IDATE’s Internet Business Unit, leading all the assignments and publications related to the Internet industry (fixed and mobile services, Internet network, Internet connected objects) and on emerging technologies. He has led all of the missions and reports related to Net Neutrality, traffic management and new potential business models (including missions for Ofcom, Arcep, French Ministry of Industry and Culture and seminars for a few major operators).

Prior to IDATE, Mr. Bonneau worked for the French Trade Commission (Economic Department of the Embassy of France) in San Francisco, USA as an analyst in charge of the software industry. He has also worked for marketing departments at several telecommunication companies including NOOS (leading French cable operator), WANADOO and FRANCE TELECOM. He graduated from Ecole Polytechnique (1997) and from Ecole Nationale Supérieure des Télécommunications (2002). He was also a visiting student with the class of MS from HEC in IT Management (2002).

**Jacquelynn Ruff, Vice President International Public Policy and Regulatory Affairs, Verizon**

Jacquelynn (Jackie) Ruff is Vice President – International Public Policy and Regulatory Affairs for Verizon Communications. Verizon provides voice, data, and Internet services to customers in more than 150 countries. Ms. Ruff leads the group that is responsible for global public policy development, advocacy, and guidance. She directs activity within U.S. and international forums, such as the International Telecommunication Union, the OECD, APEC, and the Internet Governance Forum. She represents Verizon as a member of federal advisory committees to the U.S. Coordinator for International Communications and Information Policy at the Department of State and to the U.S. Trade Representative. She is also a member of the Boards of the U.S. Telecom Training Institute and the European-American Business Council, and participates in the Chief Regulatory Officers Group of the GSM Association.

Ms. Ruff joined Verizon in March 2004 from the International Bureau of the Federal Communications Commission (FCC), where she was Associate Chief and Chief of Staff for the Bureau. Ms. Ruff practiced with the communications and the Latin America groups of an international law firm. She also served on the staff of a United States Senate Committee. Ms. Ruff holds a JD from the Georgetown University Law Center, a
Master’s degree from Harvard University and a Bachelor’s degree from Radcliffe College/Harvard University.

Stephane Dufour, CSO, Swisscom (Switzerland)

Stephane Dufour joined Swisscom as head of Group Strategy in 2006. In 2008 he joined the executive team of Swisscom and since then has had the responsibility of strategy, innovation and business development. Prior to working at Swisscom, Mr. Dufour did work in strategy consulting for Boston Consulting Group in Europe and in the US in the fields of telecom and media. Before that, he worked across Europe for Deloitte Consulting in industrial goods.

Paul Budde, Managing Director, BuddeCom and Lead Author of “Broadband: A Platform for Progress,” a report by the UN Broadband Commission for Digital Development (Australia)

Paul Budde is the CEO of BuddeComm, an independent research and consultancy company, focusing on the telecommunications market and its role within the digital economy. The research offered by BuddeCom encompasses 190 countries, 500 companies and 200 discrete technologies and applications.

Mr. Budde is a special advisor to the ITU/UNESCO Broadband Commission for Digital Development and is the lead author of the Commission’s report that was presented to UN Secretary General Ban Ki-moon.

Mr. Budde specializes in the strategic planning of government and business innovation and transformation around converging markets, aimed at building smart communities – e-health, e-education, smart grids, e-media and e-entertainment. He has been involved in discussions on this trans-sector concept during meetings in the White House and with the FCC, the United Nations and the governments of the Netherlands, Australia, Britain, Qatar, Ireland and New Zealand. He is also the founder and executive director of Smart Grid Australia and a founding board member of the Global Smart Grid Federation operating out of Washington DC.

Yu-li Liu, Professor, National Chengchi University (Former Commissioner, National Communications Commission) (Taiwan)

Prof. Yu-li Liu is the Director of International Master’s Program in International Communication Studies (IMICS) at National Chengchi University in Taiwan. She served as one of the Commissioners of the National Communications Commission (NCC) from 2006 to 2008.

Prof. Liu earned her Ph.D. degree in telecommunications at Indiana University in 1992. She was a Visiting Professor of George Washington University, Fudan University (China), Renmin University (China), Nanyang Technological University (Singapore),
Keio University (Japan), and City University of Hong Kong. She has received grants from U.S. Fulbright Foundation and Taiwan's National Science Council for research projects in the areas of convergence, broadband networks, and digital TV in Taiwan. Prof. Liu worked for the broadcasting industry from 1983 to 1989. She was often invited by the industry, government, and academia to speak on the current issues of the telecom and broadcasting industry.

Prof. Simon Wilkie, Chair of Economics, USC; Exec Dir, USC Center for Communication Law and Policy, and former Chief Economist, FCC

Prof. Simon Wilkie serves as chair and professor of the University of Southern California (USC) Economics department and also serves as a co-director for the Center in Law, Economics and Organization with the USC Law School. Prior to joining USC, he was an Assistant Professor of Economics at the California Institute of Technology and a Member of Technical Staff at Bell Communications Research. He was also formerly a faculty member of Columbia University and the University of Rochester.

Prof. Wilkie served as Chief Economist at the Federal Communications Commission from July 2002 to December 2003, reporting to Chairman Michael Powell. The major proceedings during his tenure include: the Triennial Review of wireline competition policy; the Biennial Review of media ownership regulations; the regulatory framework for broadband; the creation of secondary markets for spectrum licenses; the EchoStar/Hughes (DirecTV) merger transaction; the ATT Broadband/Comcast merger; and News Corp's acquisition of a controlling interest in Hughes (DirecTV).

Prof. Wilkie's academic research focuses on game theory, its application to business strategy, economic and regulatory policy design, and the economics of the communications industries. His most recent research is on the wholesale telecommunications market and the concept diversity in media markets.

Moderator: Raul Katz, Director of Policy Research, CITI

Raul Katz joined CITI in April, 2007 as the Director of Business Strategy Research. He is currently an Adjunct Professor at Columbia Business School, where he teaches a Seminar in International High Technology Strategy within the MBA program. At CITI, Dr. Katz leads two research programs: “The impact of user-generated content on society and on the media business” and “Development of future industry scenarios for Latin American communications”.

Dr. Katz has been a management consultant in the telecommunications industry for the past 25 years. After twenty years of service, he retired as a Lead Partner and Head of the Telecommunications Practice in the Americas with Booz Allen Hamilton. He then served as CEO of Adventis, an international telecommunications consulting firm, and he
currently serves as President of Telecom Advisory Services, a strategy consulting firm.

Dr. Katz has a Ph.D. in Political Science and Management and an M.S. in Communications Technology and Policy, both from MIT, as well as a Maitrise in Political Science and a Maitrise in Communication Sciences from the Sorbonne.

**Sen. Stephen Conroy, Minister for Broadband, Communications and the Digital Economy and Member of the UN Broadband Commission for Digital Development (Australia)**

Senator the Hon. Stephen Conroy was sworn in as Minister for Broadband, Communications and the Digital Economy in December 2007, and as Minister Assisting the Prime Minister for Digital Productivity in September 2010. He is also Deputy Leader of the Government in the Senate.

Sen. Conroy has a broad range of portfolio responsibilities, including the National Broadband Network, the largest nation-building infrastructure project in Australian history, and the enabling foundation for our digital economy. Other responsibilities include Australia’s digital television switchover, Australia’s national broadcasters, the ABC and SBS, media policy, community broadcasting, e-security and cyber-safety, radiofrequency spectrum and Australia Post, among other things. As part of the Digital Productivity portfolio, Sen. Conroy is responsible for cross-government programs that are pioneering the use of high-speed broadband to improve service delivery in areas including health, education and aged-care.

Sen. Conroy has been actively involved in the communications portfolio for ten years - first as Senate representative for shadow communications spokesman Lindsay Tanner and then as shadow communications minister until the November 2007 federal election. Before his election to the Senate in 1996, he was an industrial officer and superannuation officer for the Transport Workers Union Victorian Branch from 1992 to 1996, a ministerial adviser to Victoria’s Minister for Industry from 1990 to 1992 and an assistant adviser to the Speaker of the House of Representatives from 1988 to 1990. From 1986 to 1987, Sen. Conroy was an electorate officer for the Federal Member for Canberra, consultant to the Minister for Science and Minister assisting the Minister for Industry, Technology and Commerce and electorate officer for the Minister for Home Affairs. He worked for the Metal Trades Industry Association from 1984 to 1986.

**The Impact of OTT on Traditional National Networks and Media**

**Gabrielle Gauthey, EVP Alcatel Lucent (France)**

Gabrielle Gauthey is Executive Vice President, Public Affairs for Alcatel-Lucent. She is graduate of the Ecole Polytechnique and Ecole des Mines. She was General Secretary of the “Invest in France” network in 1992. From 1995 to 1997 she was adviser for telecom and ICT to François Fillon, Minister for Posts, Telecommunications and Space Affairs.
From 1998 to July 2000 she was Deputy Director-General of Sofirad and CEO of “Le SAT”, the first TV satellite-based operator in Africa. Till January 2003, she was Director of the ICT Department at the Caisse des Dépôts et Consignations. From 2003 to 2008 she was Commissioner at the French Regulatory Authority for Electronic Communications and Posts (ARCEP).

**Emmanuel Rochas, Senior Vice President and Head of Group Strategy, France Telecom-Orange (France)**

Emmanuel Rochas has been Head of Group Strategy at France Telecom – Orange since July 2010. He joined the France Telecom – Orange Group in November 2006 and participated to the creation of the Home line of business where he was responsible for business modeling and business performance.

Mr. Rochas began his career in the French Public Administration, including a few years in different Minister’s cabinets with portfolios ranging from social affairs to e-administration and SMEs development.

He is a graduate of Ecole Polytechnique and Telecom ParisTech.

**Henning Schulzrinne, Chief Technology Officer, FCC (USA)**

As the FCC’s Chief Technology Officer, Prof. Henning Schulzrinne guides the FCC’s work on technology and engineering issues together with the FCC’s Office of Engineering and Technology. He advises on technology matters across the agency to ensure that FCC policies are driving technological innovation and he serves as a resource to the FCC Commissioners. He also helps the FCC engage with technology experts outside the agency and promotes technical excellence among agency staff.

Prof. Schulzrinne is Julian Clarence Levi Professor of Mathematical Methods and Computer Science and Professor of Engineering at The Fu Foundation School of Engineering at Columbia University. He is widely known for the development of key protocols that enable voice-over-IP (VoIP) and other multimedia applications that are now Internet standards, including the Session Initiation Protocol (SIP). His research interests include Internet multimedia systems, applied network engineering, wireless networks, security, quality of service, and performance evaluation. He has been an Engineering Fellow at the FCC since 2010 and has published more than 250 journal and conference papers, and more than 70 Internet Requests for Comment (RFCs).

Prof. Schulzrinne received his undergraduate degree in economics and electrical engineering from the Darmstadt University of Technology, Germany, his MSEE degree as a Fulbright scholar from the University of Cincinnati, Ohio and his Ph.D. from the University of Massachusetts in Amherst, Massachusetts. He was a member of technical staff at AT&T Bell Laboratories, Murray Hill and an associate department head at GMD-Fokus (Berlin),...
before joining the Computer Science and Electrical Engineering departments at Columbia University. He is an IEEE Fellow and a former member of the Internet Architecture Board (IAB).

Richard Whitt, Vice President and Global Head of Public Policy and Government Relations, Motorola Mobility Inc. (Google), (USA)

Richard S. Whitt is the new Global Head for Public Policy and Government Relations at Motorola Mobility LLC, a wholly-owned subsidiary of Google Inc. In that capacity he oversees all aspects of MMI’s interactions with government policymakers around the world.

Mr. Whitt moved to MMI after spending five and a half years with Google, covering a variety of public policy issues in its D.C. office. In his most recent stint he served as director and managing counsel for federal policy, overseeing strategic thinking on privacy, cybersecurity, intellectual property, Internet governance, free expression, international trade, and telecom and media issues. From January 2007 to December 2011, he was Google’s chief telecom and media counsel, developing and implementing strategy and advocacy on all wireline, wireless, and media matters before the Federal Communications Commission, other Federal agencies, the U.S. Congress, and international bodies. Prior to joining Google in 2007, Mr. Whitt founded and headed NetsEdge Consulting, a public policy consulting firm that provided legal analysis, regulatory strategy, and advocacy counsel to Google and other web companies.

From 1994 to 2006, Mr. Whitt worked in the legal department at MCI Communications, where he most recently served as vice president for federal law and policy. He previously spent over five years as an associate attorney in the communications practices of two large Washington, D.C.-based law firms.

Mr. Whitt is a 1988 *cum laude* graduate of the Georgetown University Law Center, and a 1984 *magna cum laude* graduate of James Madison University.

Matthais Kurth, Attorney (former President of the Federal Network Agency 2001-11) (Germany)

Matthias Kurth was appointed president of the former Regulatory Authority for Telecommunications and Posts (Reg TP) in 2001. RegTP has since been renamed to Federal Network Agency (BNetzA) and is the sector-specific competition authority for telecommunications, postal, energy and railway markets in Germany, including frequency management and digital signature. Mr. Kurth served as President of BNetzA until 2012.

Mr. Kurth joined BNetzA as Vice President in 2000. Before that, since July 1999 he was a member of the management of Colt Telecom GmbH as Director Business Development, Law and Regulation. From 1994 to 1999 he worked as State Secretary in the Hesse Ministry of Economics, Transport, Technology and European Affairs. He was
member of the Hesse Land Parliament from 1978 to 1994 and worked as lawyer in Hesse.

As member of the Hesse government, Mr. Kurth was the Representative of the State of Hesse in the Regulatory Council for Posts and Telecommunications, cooperating in framing the Telecommunications Act, and the Representative of the State of Hesse in the Committee of the Regions of the European Union, focusing on trans-European networks, information and communications technology, and air transport.

Moderator: Judith D. O’Neill, COO, CMAS Holdings, LLC

Judith O’Neill is the Chief Operating Officer and member of the Board of Managers of CMAS Holdings, LLC which provides location-based alert messages on the SMS platform to all mobile phones in a danger zone. She is trained in legal and strategic advisory and practiced law and provided strategic advice in the United States and internationally for 35 years before joining CMAS, spending much of her time in the developing world, with a concentration on the Caribbean, Latin America, Middle East and Africa. She has worked as well in, Asia, Eastern Europe and Oceana.

Dr. O’Neill’s expertise is in the telecommunications and ICT sector, where she works on all aspects of regulations, joint ventures, privatizations, government policy, corporate transactions and applications of ICT to improve quality of life. Her philanthropic roles include active Board memberships on the Surgeons of Hope (SoH), currently providing pediatric cardiac surgical missions to Nicaragua and Haiti and is working with the Nicaraguan Government to build a state of the art Pediatric Cardiac Surgical Center at the public children’s hospital in Managua, funded in part by the donors of SoH. She also chairs the Energy Committee of the New York Region and is on the Steering Committee of the National Energy Committee of a not-for-profit organization that advocates for sustainable energy policy for the U.S. and for other nations, where she convenes seminars and works with the Consuls General and U.N. Ambassadors of multiple nations on energy policy. Dr. O’Neill has worked, advised and lectured in more than 85 countries.

Hon. Lawrence Strickling, Assistant Secretary for Communications and Information and Administrator, National Telecommunications & Information Administration (USA)

Lawrence E. Strickling was sworn in as Assistant Secretary for Communications and Information at the Department of Commerce in June 2009. In this role, he serves as Administrator of the National Telecommunications and Information Administration (NTIA), the Executive Branch agency that is principally responsible for advising the President on telecommunications and information policy.

Mr. Strickling’s focus at NTIA includes leading initiatives to expand broadband Internet access and adoption in America and to ensure that the Internet remains an engine for continued innovation and economic growth. He also oversaw the development of an
approximately $4 billion Recovery Act broadband grants program and now manages the oversight of these nationwide broadband projects. Additionally, under his leadership, NTIA launched America’s first public, searchable nationwide map of consumer broadband Internet availability and crafted a ten-year plan that the agency is now implementing to nearly double the amount of commercial spectrum available for wireless broadband.

Mr. Strickling oversees NTIA’s efforts on a host of domestic and global Internet policy and administrative issues, including playing a key role in the Commerce Department’s Internet Policy Task Force, advocating the U.S. Government’s policy positions abroad, and promoting the stability and security of the Internet’s domain name system through its participation on behalf of the U.S. government in Internet Corporation for Assigned Names and Numbers (ICANN) activities.

Previously in government, Mr. Strickling served at the Federal Communications Commission as Chief of the Common Carrier Bureau from 1998 to 2000, working to promote competition and protect consumers in the telecommunications sector and implement many of the key provisions of the Telecommunications Act of 1996. Prior to that, he was Associate General Counsel and Chief of the FCC’s Competition Division.

In the private sector, Mr. Strickling was Chief Regulatory and Chief Compliance Officer at telecommunications service provider Broadwing Communications, LLC, from 2004 to 2007. His private sector experience from 2000 to 2004 included serving in senior roles at competitive communications service providers Allegiance Telecom, Inc. and CoreExpress, Inc. and as a member of the Board of Directors of Network Plus. From 1993 to 1997, he was Vice President, Public Policy at Regional Bell Operating Company Ameritech Corp., where he was responsible for developing and implementing Ameritech’s state and federal regulatory and legislative agenda. He was also a litigation partner at the Chicago law firm of Kirkland & Ellis.

Mr. Strickling earned his J.D. from Harvard Law School and is a Phi Beta Kappa graduate of the University of Maryland with a degree in economics.

**Regulation of Over-the-Top Services: Should National Regulation and the ITRs Be Expanded Beyond Networks to Include Applications?**

*Roland Doll, Member of the Executive Board of the European Telecommunications Network Operators Association (ETNO) and Vice President International Governmental Affairs, Deutsche Telekom (Germany)*

Roland Doll is responsible for European and Multinational Affairs of Deutsche Telekom. He studied law at Universities of Frankfurt and Lausanne and is a postgraduate in international commercial law of the University of Aberdeen (UK). Before joining Deutsche Telekom in 1997 he held the positions of assistant professor at
University of Frankfurt and as researcher in telecommunications law and regulation at the Scientific Institute for Communications Services (WIK) in Bad Honnef.

Mr. Doll started his career at Deutsche Telekom as Assistant Director for Government Relations and Regulatory Affairs. In 2000 he was appointed Vice President, International Regulatory Affairs and since 2003 he has been the Vice President, International Government Relations in the Group Headquarters of Deutsche Telekom.

Amb. David Gross, Wiley & Rein (former U.S. Coordinator for International Communications and Information Policy, Department of State) (USA)

Ambassador David Gross is one of the world's foremost experts on international telecommunications, having addressed the United Nations (UN) General Assembly and led more U.S. delegations to major international telecommunication conferences than anyone else in modern history. Drawing on his more than 30 years of experience as a lawyer, global policy maker and corporate executive, he currently assists U.S. companies seeking to enter or expand international businesses, non-U.S. companies and organizations seeking to invest in, monitor and understand the U.S. and international markets, as well as national governments.

Amb. Gross advises companies and others on international and domestic telecoms, Internet and high tech strategy focusing on both specific markets and international organizations such as the International Telecommunication Union (ITU), Organization for Economic Cooperation and Development (OECD), Asia Pacific Economic Cooperative (APEC), as well as many regional organizations.

Leonard Cali, Senior Vice President – Global Public Policy, AT&T (USA)

Leonard J. Cali serves in AT&T’s External and Legislative Affairs organization as Senior Vice President – Global Public Policy. In this role, Mr. Cali is responsible for developing AT&T’s positions on public policy issues and leading AT&T’s international external affairs activities. Mr. Cali is based in Washington, DC, and is active in industry and community organizations including as AT&T’s representative on the executive committee of the United States Council on International Business, on the board of directors of the National Association of Manufacturers, and in the chief regulatory officers group of the GSM Association.

Prior to assuming his current role, Mr. Cali served as AT&T’s Senior Vice President responsible for wireless and international external affairs. Before this, he served as AT&T Corp.’s Vice President – Law & Director of Federal Government Affairs, with responsibility for AT&T’s Washington office including its federal law and antitrust group and its federal regulatory, congressional, and executive branch advocacy teams. Earlier in his career, Mr. Cali served in a variety of positions in the AT&T Law and Public Policy group, where he had responsibility for development and advocacy of AT&T’s policy positions on telecommunications competition and related matters.
Before joining AT&T in 1988, Mr. Cali was associated with the law firm of Cadwalader, Wickersham & Taft in New York City, where he focused on general commercial litigation matters. Mr. Cali received a Juris Doctor degree from the University of Michigan Law School and a Bachelor of Arts degree from Fordham University.

Christopher Libertelli, Head of Global Public Policy, Netflix (USA)

Chris Libertelli leads Netflix's Global Public Policy and Regulatory teams. Netflix is active on a number of public policy issues globally, including Network Neutrality, Copyright, national "Heritage Laws" and just about every other issue which affects the online video industry. Before joining Netflix, Mr. Libertelli worked at Skype where he was Senior Director of Government and Regulatory Affairs in the Americas. Before that, he served as Senior Legal Advisor to FCC Chairman Michael Powell. He also held a number of positions in the FCC's Wireline Competition Bureau and spent three years advising wireless and CLEC clients at the law firm of Dow, Lohnes and Albertson.

Carlos Raul Gutierrez, President of the Council - SUTEL (Costa Rica)

In 2008 Costa Rica signed CAFTA with the US and started deregulating its telecommunications sector. In December 2008 Carlos Raul Gutierrez' appointment to the Board of the new National Regulatory Agency, SUTEL (Superintendencia de Telecomunicaciones), was ratified by the Costa Rican Congress. He became Chairman of SUTEL in January 2012.

Born in Costa Rica, Mr. Gutierrez studied Economics in Bonn and Hamburg and Public Administration at Harvard's John F. Kennedy School of Government. Prior to joining SUTEL, he worked in Europe and Latin America for various corporations and clients.

Moderator: Robert Pepper, Senior Managing Director of Advanced Technology Policy, Cisco

Robert Pepper is Senior Managing Director of Global Advanced Technology Policy at Cisco. He joined Cisco in July 2005 from the Federal Communications Commission where he served as Chief of the Office of Plans and Policy and Chief of Policy Development beginning in 1989. At the FCC, he focused on issues cutting across traditional industry and institutional boundaries as a result of new technologies and convergence, and led teams implementing telecommunications legislation, planning for the transition to digital television, designing and implementing the first U.S. spectrum auctions, and developing policies promoting the development of the Internet.

Before joining the FCC, Dr. Pepper was director of the Annenberg Washington Program in Communications Policy. His government service also included Acting Associate Administrator at the National Telecommunications and Information
Administration (NTIA) and initiating a program on computers, communications and information policy at the National Science Foundation.

Dr. Hamadoun I. Touré, Secretary-General of the International Telecommunication Union (ITU)

Dr. Hamadoun Touré was first elected Secretary-General of the ITU in January 2007 and was re-elected for a second four-year term in October 2010. As Secretary-General, Dr. Touré is committed to the ITU’s mission of connecting the world and to helping achieve the Millennium Development Goals through harnessing the unique potential of Information and Communication Technologies (ICTs).

A long-standing champion of ICTs as a driver of social and economic development, Dr. Touré previously served as Director of ITU’s Telecommunication Development Bureau (BDT) from 1998-2006. In this role he placed considerable emphasis on implementing the outcomes of the World Summit on the Information Society (WSIS), launching projects based on partnerships with international organizations, governments, the private sector and civil society.

Dr. Touré started his professional career in his native Mali in 1979. He built a solid career in the satellite industry, serving as managing engineer in Mali’s first International Earth Station. He joined Intelsat’s Assistance and Development Programme in 1985 and was appointed Intelsat’s Group Director for Africa and the Middle East in 1994 and was involved in various regional connectivity projects such as RASCOM. In 1996 he joined ICO Global Communications as African Regional General Manager, spearheading the companies’ activities across the African region.

Dr. Touré holds a Masters Degree in Electrical Engineering from the Technical Institute of Electronics and Telecommunications of Leningrad, and a PhD from the University of Electronics, Telecommunications and Informatics of Moscow. He is proficient in four official ITU languages: English, French, Russian and Spanish.

Financial Implications and Investor Reactions

Craig Moffett, Senior Vice President and Senior Analyst U.S. Telecommunications and U.S. Cable and Satellite Broadcasting, Sanford C. Bernstein & Co. (USA)

Craig E. Moffett joined Sanford C. Bernstein & Co. as the Senior Analyst for U.S. Cable and Satellite Broadcasting in 2002 and added coverage of the U.S. Telecommunications sector in 2007. He is the #1 ranked analyst in the Telecommunications Services sector according to both the 2011 Institutional Investor All-American-Research poll and the 2012 Bloomberg Markets/Greenwich Associates "America's Best Stock Analysts" survey. He is also the #1 ranked Cable and Satellite analyst.
in America, a position he has held in both the *Institutional Investor* poll and the Greenwich Associates Research Quality Survey for each of the past six consecutive years.

Mr. Moffett spent eleven years at The Boston Consulting Group, where as a Partner and Vice President he led the firm’s global practice in Telecommunications. At BCG, he led client relationships spanning the local exchange, wireless, long distance, and equipment sectors in the U.S., Latin America, and Europe. His consulting relationship with a U.S. RBOC spanned more than a decade. He was the author of more than twenty articles in telecom journals, and published forecasts of the over-capacity and subsequent price collapse of the U.S. inter-exchange, CLEC, and equipment markets as early as 1998.

Most recently, Mr. Moffett was the President of SOTHEBYS.COM, the e-commerce venture of the venerable auction house, where he led a team of 300 people through the company’s technology development phase and launch in early 2000, and he subsequently led SOTHEBYS.COM to the highest first-year sales of any consumer website ever launched. As a member of the Executive Committee of Sotheby’s Holdings, he was an instrumental member of the crisis-response team that steered the company through the challenges arising from anti-trust proceedings related to its pricing activity during the mid-1990s.

Mr. Moffett earned a BA from Brown University in 1984, where he graduated *phi beta kappa* and *Magna cum laude*. He earned an MBA with Honors from the Harvard Business School in 1989.

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**Lorenzo Pupillo, Executive Director - Public Strategies, Public Affairs Telecom Italia (Italy)**

Dr. Lorenzo Maria Pupillo is an Executive Director in the Public and Regulatory Affairs Unit of Telecom Italia and an Affiliated Researcher at Columbia Institute for Tele-Information.

In Telecom Italia, he is working on the analysis of economic impact of Next Generation Networks, on Network Neutrality, Geographic Markets, Functional Separation, and ICT Policy. He is an economist by training and has worked in many areas of telecommunications demand and regulatory analysis, publishing papers in applied econometrics and industrial organization.

Dr. Pupillo has also been Advisor to the Global Information and Communication Technologies Department of the World Bank in Washington and Adjunct Professor of Economics of ICTs at University of Rome, La Sapienza. Before joining Telecom Italia in 1992, he was member of technical staff at AT&T Bell Laboratories in Murray Hill, New Jersey. Dr. Pupillo also serves on numerous committees for international organizations and on scientific and advisory boards around the globe.

Dr. Pupillo earned a Ph.D. and an M.A. from University of Pennsylvania, an MBA from Istituto Adriano Olivetti in Ancona, Italy and a MS in Mathematics from University of Rome.
François Barrault, Chairman, IDATE (France)

François Barrault started his career as a researcher in Robotics and Artificial Intelligence with IBM Corporation and then founded – and sold – several businesses. He then moved to senior positions in large global companies, in particular at Lucent Technologies where he was President and CEO of Lucent EMEA and then International CEO and the corporate officer responsible for all Lucent’s 38 acquisitions in the Internet sector. He is chairman and founder of FDB Partners SPRL, an investment and advisory firm in TMT, renewable energy and publishing.

Mr. Barrault retired at the end of 2008 from the position of CEO of BT Global Services and as a BT Group PLC board member. In BT Global Services, he created a world leader in Networked IT services comprising 37,000 employees and operating in 176 countries, in 4 years acquiring 32 companies around the world. In parallel, he led BT Innovate, the advanced R&D and innovation team of BT Group and in this role chaired and sponsored numerous initiatives with the leading Universities in the world. Mr. Barrault has been very active at the WEF (Davos and regional forums) and created and then chaired the BT Global advisory board (60 world-class leaders from around the world). He is also active in lecturing worldwide, is a member of various boards of public and private companies, advisory boards, private investments funds and foundations around the world.

Moderator: Robert Atkinson, Director of Policy Research, CITI

Bob Atkinson joined CITI in mid-2000 after serving for 18 months as Deputy Chief of the Federal Communications Commission’s Common Carrier Bureau. Beginning in 1985, Mr. Atkinson was responsible for the regulatory, public policy and external affairs activities of Teleport Communications Group (TCG), the first Competitive Access Provider (CAP) and Competitive Local Exchange Carrier (CLEC) in the United States. When AT&T acquired TCG in July 1998 and TCG became AT&T Local Services, Mr. Atkinson became Vice President and Chief Regulatory Officer of AT&T Local Services until he joined the FCC on January 1, 1999. From 2001-2006, Mr. Atkinson served as the Chairman of the North American Numbering Council (NANC), which advises the FCC on matters affecting the availability and utilization of telephone number resources in the U.S.

Mr. Atkinson graduated from the University of Virginia in 1972 with a Bachelor of Art degree in Government and Foreign Affairs. He later received a law degree from Georgetown University Law Center (evening program) in 1979. While at Georgetown, Mr. Atkinson was a member of the Georgetown Law Journal.