

SESSIONS

GLOBAL CARRIER BILLING SUMMIT DAY 1 - 27/09/2022

Global Carrier Billing Summit

27th – 28th September, 2022
AMERON Hotel ABION, Berlin

REGISTRATION AND WELCOME REFRESHMENTS

08:00 - 09:00

OPENING REMARKS FROM THE CHAIR

09:00 - 09:05

Participants

Chair of the Summit: James Williams - Director of Programmes, Mobile Ecosystem Forum

Analyst Intro: what is changing and what will it mean for the market?

09:05 - 09:15

Global Carrier Billing Summit Conference Sessions

- App-store billing regulatory changes: threats, opportunities, or much ado about nothing?
- New opportunities and business models
- Market drivers and inhibitors
- Market sizing and growth projections

Participants

Presenter: Guillermo Escofet - Principal Analyst, Consumer Platforms and AI, Omdia

Pushing market boundaries: what more can be done with carrier billing?

09:15 - 09:35

Global Carrier Billing Summit Conference Sessions

Carrier billing is a growing market, but it has not grown as expected in many regions. Which unexploited opportunities remain in digital services and how can direct carrier billing evolve? How much of what Japanese and Korean carriers have achieved with carrier billing is replicable elsewhere? This presentation will assess the opportunities for growth, roadblocks and constraints.

- What opportunities remain untapped?
- How can carrier billing improve the monetization of 5G services?
- What steps need to be taken to expand carrier billing's reach?
- What success stories can we learn from?

Participants

Presenter: Jonathan Kriegel - CEO, DOCOMO DIGITAL

Maximisation of customer satisfaction via DCB

09:35 - 09:55

Global Carrier Billing Summit Conference Sessions

DCB has attracted some negative attention in the past with regulators in certain countries going as far as to shut down services due to customer complaints. Merchant requirements for a frictionless flow can be diametrically opposed to end customers' needs. So how can operators square the circle and keep both business and end customers happy? Orange France will share the lessons learnt over the past few years.

- Customer care: why the monitoring of customer complaint rates and a generous reimbursement policy are key to ensuring that customers have confidence in DCB?
- Diversifying into new markets: offering DCB as a payment solution for major brands, ticketing and charitable donations will attract new customers and help retain existing ones
- Customer journey: the customer journey doesn't start and end on the payment screen. Operators needs to address all touch points and give customers greater control

Participants

Presenter: Amelia Newsom-Davis - Director Payment, Messaging and Identity, Orange France

How can DCB win the payment privacy battle?

09:55 - 10:15

Global Carrier Billing Summit Conference Sessions

Privacy is a real concern that has overtaken the security debate in mobile commerce and private payments and therefore becomes a revolution driven by users themselves. DCB will always be the most anonymous payment technology for online shopping. Will we be able to lead this change and seize the opportunity as an industry?

- The digital privacy debate reaches the global payments industry: what should we learn from it?
- How DCB is endorsing this change and what its potential?
- Improvements that the industry must implement to consolidate DCB as the best alternative for the user

Participants

Presenter: Roberto Monge - Chief Operations Officer, Telecoming

E-wallets: from confrontation to collaboration

10:15 - 10:35

Global Carrier Billing Summit Conference Sessions

E-wallets are proliferating from among the unbanked in various parts of the world. Many carrier billing aggregators are hedging their bets and hooking up-to e-wallets, alongside the DCB and PSMS. This session will assess whether e-wallets can peacefully co-exist with DCB or are they still a potential existential threat?

- Will e-wallet overrun DCB, or do they complement each other?
- Carrier Wallets: should carriers invest in creating their own mobile wallets?
- Challenges and success stories

MORNING BREAK AND NETWORKING

10:35 - 11:20

Joint Carrier Presentation. DCB and the agent mode: a new high growth opportunity for developed markets

11:20 - 11:55

Global Carrier Billing Summit Conference Sessions

Since DCB seeks to reaffirm its value within the industry, how can opportunities be leveraged to expedite growth of the model? As DCB market is growing constantly and brining great competition to the market, some of telcos have elaborated a collaborative approach to face the central roadblocks and turn them into great opportunities. This session will explore how carrier's joint actions has driven the change in DCB environment both for business and end consumers.

- How does a highly developed market such as Germany, for direct carrier billing looks like and what challenges do MNOs face?
- Rivals vs Friends: why do competitive telcos collaborate to a certain and allowed extent in carrier billing and what change did this bring into DCB market development?
- How did carrier billing changed the end consumer's lives, whilst being embedded in their daily routines?
- Analysis of the domestic market: what are the key challenges and opportunities in using DCB in the agent model?
- Assessment of the potential opportunities for partnerships between the DCB providers and retail physical goods marketplaces

Participants

Presenter: Martin Schurig - Head of Financial and Enabling Services, Telefonica Germany

Presenter: Stefan Eulgem - VP Payment and Enabling Services, Deutsche Telekom

Presenter: Claudio Di Padova - Group Head API Monetization, Vodafone Germany

Spotlight Panel Discussion. Beyond app stores, should physical goods be the main focus?

11:55 - 12:40

Global Carrier Billing Summit Conference Sessions

- If app-store revenue starts migrating off-store, will carrier billing be able to capture some of it?
- How much more can DCB squeeze out of the digital services market beyond the app stores?
- Or should efforts be focused on expanding DCB's reach in the physical goods and services space?
- Why are some countries making a go of physical goods DCB, but most other countries not?

Participants

Moderator: Guillermo Escofet - Principal Analyst, Consumer Platforms and AI, Omdia

Presenter: Jonathan Kriegel - CEO, DOCOMO DIGITAL

Claudio Di Padova - Group Head API Monetization, Vodafone Germany

Sponsor Solo

12:40 - 13:00

Global Carrier Billing Summit Conference Sessions

Participants

David Lofti - CEO, Evina

LUNCH BREAK AND NETWORKING

13:00 - 14:00

Carrier Solo Presentation

14:00 - 14:20

Global Carrier Billing Summit Conference Sessions

Participants

Yevgen Barbarchuk - Senior Business Development Manager, lifecell, Ukraine

Straight talk in combatting fraud in mobile payments

14:20 - 14:40

Global Carrier Billing Summit Conference Sessions

Given the universality of direct carrier billing operations, one of the most concerning questions relies in the fact of how secure client's money is when it is in route. This joint presentation will provide an deep industry insight into the steps mobile carriers are taking in partnership with anti-fraud solution providers to prevent fraud in the industry infrastructure to secure clients payments.

- Stay globally tuned: overview of mobile payments fraud and required security threat trends in various geographical regions over the globe
- How are carriers currently combat fraud and prevent security treats for direct carrier billing end users by partnering with solutions providers?
- Future Vision: implementation of new risk management strategies and measuring their effectiveness with new partners

Participants

Louise Ford - Managing Director, Empello

How to unlock the potential of emerging markets?

14:40 - 15:00

Global Carrier Billing Summit Conference Sessions

Emerging markets have the strongest use case for DCB, but also biggest roadblocks. Emerging markets have been sometimes particularly difficult for carrier billing providers and merchants to set up DCB service. Nevertheless, some inroads are already being made. This session will look at the efforts that are experienced in various regions worldwide and the mechanisms to combat the potential constraints.

- Exploring the DCB expansion potential in the emerging markets
- Challenges in transferring DCB practices from mature to emerging markets: what might and will not work?
- Maximisation of organic growth and development: what are the key areas to focus on?
- Assessment of mechanisms to actively combat potential constraints: how can the new models be tailored, implemented, and continually developed within new markets?

Participants

Presenter: Fabio Sorte - Head of Business Development, Claro Brasil

Building an expanding company in DCB: Trust & Growth

15:00 - 15:20

Global Carrier Billing Summit Conference Sessions

Growing in the DCB proposition is not easy and the scope for expansion is made more difficult by the constantly shifting market. What are the key drivers for relationships with merchants? After identifying some of the challenges that have inhibited DCB growth in recent years, it's clear that trust and control are imperative parts of long-lasting and beneficial partnerships, but those are quite often overlooked. This session will explore some of the issues that are holding the industry back and how to move to the successful growth strategies, which are leading to better value products and bigger brands.

- The impact of transparency shortage as one of the key challenges in contemporary DCB market
- What solutions are required to implemented in order to gain trust?
- Growing the product offering – eSports, Mobile Gaming and Cloud Gaming

Participants

Presenter: Gaby Bosch - CEO, Content For Mobile

AFTERNOON BREAK AND NETWORKING

15:20 - 15:50

Anticipating PSD3: How carriers can reap the opportunities from a changing payments landscape?

15:50 - 16:10

The revised payment services directive (PSD2) aimed to increase competition, innovation and consumer protection. It bootstrapped the payments landscape by regulating open banking and introducing new payment methods to the market. However, PSD2 has come with many challenges and it is currently under review by the European Commission. During this session, Jan van Vonno, Tink's Head of Industry Strategy, examines the current state of PSD2 and what we can expect from a PSD3, and how carriers will benefit from the new payment technologies coming to market.

- The good, the bad and the ugly of PSD2
- Predictions for PSD3 and the Open Finance Framework
- Understanding the opportunities for invoices and billing

Participants

Presenter: Jan Van Vonno - Head of Industry Strategy, Tink

Sponsor Presentation

16:10 - 16:30

Roundtable: What is the strategic importance of carrier billing to telcos?

16:30 - 17:10

Roundtable

The roundtable will be moderated by the Principal Analyst in consumer Platforms and AI from Omdia – Guillermo Escofet. He will commence the discussion with a brief from his side of the topic of the roundtable discussion, which will be extended to the invited carriers and evolve into a conversation.

Carrier billing's margins are getting smaller the more it penetrates the digital mainstream, and its scope is often severely limited by structural, regulatory and mindset barriers. So, what are carriers getting out of carrier billing?

Is it just about the slice of revenue they can capture from transacting purchases for third-party goods and services? Or is there greater value in the role carrier billing plays in strategic partnerships between telcos and OTT service providers?

- Assessment of benefits, from both MNO and OTT SP perspectives
- Technical and commercial roadblocks and possible mechanisms to overcome them
- What help do carriers most need from aggregators, technology vendors and other providers?

Participants

Moderator: Guillermo Escofet - Principal Analyst, Consumer Platforms and AI, Omdia

Spotlight Panel Discussion. DCB: the hidden payments giant

16:30 - 17:15

Global Carrier Billing Summit Conference Sessions

Today the opportunities in the carrier billing market are prominent, but the imperative question is still how well they are known for the end consumers. The issue of DCB promotion as a 'premium offering' becomes ever more challenging the recent years, given the roadblocks to its expansion. This panel discussion will bring together the industry stakeholders to reassess what should be done to bring consumer education for DCB onto the new level and foster the promotion of DCB within the end consumers.

- Evaluation of key roadblocks to consumer awareness
- Assessment of marketing opportunities for carrier billing profit maximisation
- Collaborative approach between stakeholders to make DCB as a 'premium offering' for end consumers

Participants

Presenter: Amelia Newsom-Davis - Director Payment, Messaging and Identity, Orange France

Presenter: David Umoh - Consumer Business Director, Vodafone Ghana

Presenter: Sam Barker - Head of Analytics and Forecasting, Juniper Research

Moderator: Ali Karaosman - Operations Director MEA, Telecoming

CLOSING REMARKS FROM THE CHAIR

17:15 - 17:20

Participants

Chair of the Summit: James Williams - Director of Programmes, Mobile Ecosystem Forum

NETWORKING DRINKS AND EXHIBITION

17:20 - 18:20

AWARDS CEREMONY AND WORLD CAFE

18:20 - 21:20

SCHEDULE

GLOBAL CARRIER BILLING SUMMIT DAY 1 - 27/09/2022

Global Carrier Billing Summit

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WELCOME REFRESHMENTS

08:00 - 09:00

Opening Remarks from the Chair

09:00 - 09:05

Participants

James Williams - Director of Programmes, Mobile Ecosystem Forum

The role of carriers as local routes to market for global digital brands

09:05 - 09:25

Global Carrier Billing Summit Conference Sessions

Digital merchants seeking to maximise their total addressable market worldwide often find that carrier partnerships are the cheapest and swiftest way of conquering new markets. This case study looks at the emerging markets, where most consumers access digital services via mobile only and, in most cases, don't have the means to make online payments. Yet DCB and telco-OTT partnership must contend with numerous structural roadblocks.

- How can DCB support and encourage global digital brands entering new markets?
- Assessing the rising perspectives for new digital merchants
- Analysis of key regulatory challenges

Secure offerings for users in the digital service environment

09:25 - 09:45

Global Carrier Billing Summit Conference Sessions

As we are entering the ever more digitalised world and the gaming industry moved to mobile, there have been a similar transformation in eSports. Today, electronic sport is becoming one of the most favourite ways of digital entertainment for users, making it imperative to provide a secure digital environment. This session will examine various trends of how eSport will tend to develop in the near future as well as identify what is needed for a secure eSport ecosystem.

- Assessing the potential of eSport compared to streaming and gaming: future trends
- Ways of monetisation and the opportunities for DCB
- Professional offerings for end-consumers: how suggestions from professional gamers can enhance customer experience?
- Who would be key partners for carriers: tournament organisers or game developers?
- What are the key drivers for a secure eSports environment within DCB?

Spotlight Panel Discussion. Gaming as a driver for DCB: mobile gaming, cloud gaming and eSports perspective

09:45 - 10:30

Global Carrier Billing Summit Conference Sessions

The vital pieces are coming together to make gaming available for serious and casual gamers; this includes rapidly expanding fast internet connectivity, global 5G rollout, growing availability of appealing content, shift in consumer preferences to subscriptions and instantly accessible entertainment. Mobile gaming, cloud gaming and esports are set to make an impact in the video games industry, but how far can this boost carrier billing? Key industry stakeholders and leading specialists provide their perspectives in this panel discussion.

- As gaming industry is continually growing, how can the DCB model be effectively implemented and used to foster consumer retention and recurring revenues?
- The future of carrier billing and game developing partnerships: can it drive the revenues up for both parties?
- How can DCB be seamlessly embedded within cloud gaming platforms and what advantages it can offer over other forms of payment models?

Participants

Presenter: Kieran Clare - Commercial Director, Content For Mobile

Presenter: Anthony Cliquot - Chief Executive Officer, AirConsole

Moderator: Renato Andrade Reis - Founder, Acqua Telecom

Sponsor Presentation

10:30 - 10:50

Global Carrier Billing Summit Conference Sessions

MORNING BREAK AND NETWORKING

10:50 - 11:30

Accelerating Smartphone adoption in Sub-Saharan Africa using DCB

11:30 - 11:50

Global Carrier Billing Summit Conference Sessions

Mobile handset devices are now the acceptable platform for digital and financial inclusion in Sub-Saharan Africa. With different business models for driving smartphone adoption deployed in Sub-Saharan Africa in the past two decades by telecom operators, new business models have evolved through DCB to accelerate this objective. This solo presentation will explore whether the new DCB Business model is an acceptable solution for smartphone adoption in Sub-Saharan Africa.

- The journey of smartphone adoption business models – Challenges and Success Stories
- DCB Business Model 1.0: What financial models were complicated to run from carrier operating device perspective?
- DCB Business Model 2.0: Success stories of carrier's device outsourcing to a third party fintech companies

Participants

Presenter: David Umoh - Consumer Business Director, Vodafone Ghana

Spotlight Panel Discussion. Bundling and DCB: what can we expect in the near future?

11:50 - 12:35

Global Carrier Billing Summit Conference Sessions

Bundling of OTT services enables telcos to better monetize their investments in 5G infrastructure and spectrum while driving higher customer engagement and lifetime value. For OTT service providers or merchants, subscription bundling partnerships with telcos enable them to access new customer segments especially as they expand internationally beyond their home markets without the usual investments in marketing. They can bank on the trusted customer relationships telcos have with their subscribers to test and offer innovative services and pricing tiers. This session will assess what are the current opportunities for carriers provided by bundling and how the scene will be shaped in the near future.

- How much of a boost is 5G providing to the telco-OTT bundling scene?
- What is strategically more important to carriers: plain DCB or bundling?
- Best practice and use cases: what are the benefits for carriers and digital merchants?
- What are some new opportunities for bundling beyond music and video streaming?

Participants

Moderator: James Williams - Director of Programmes, Mobile Ecosystem Forum

Presenter: Jonathan Bennett - Chief Commercial Officer, Docomo Digital

SESSIONS

GLOBAL CARRIER BILLING SUMMIT DAY 2 - 28/09/2022

Global Carrier Billing Summit

27th – 28th September, 2022
AMERON Hotel ABION, Berlin

Sponsor Presentation

12:35 - 12:55

Global Carrier Billing Summit Conference Sessions

Spotlight Panel Discussion. What should DCB optimise to understand its client offering?

12:55 - 13:40

Global Carrier Billing Summit Conference Sessions

In the era of digital transformation, businesses within the service provider infrastructure strive to meet the demand of their clients as never before. This spotlight panel discussion will bring together industry stakeholders to examine and discuss the core elements advancing the industry and what changes will they implement in the coming years to meet the demands of DCB clients.

- Collection and evaluation of data from DCB transactions to understand clients' needs and behavior
- How is such data used in other industries and what are the challenges and benefits?
- Enhancement of user experience based on the user expectations

Participants

Presenter: Anzelle Robertson - Director Business Development SSA, Sam Media

Presenter: Camille Cerf - Carrier Billing Product Manager, Bouygues Telecom

Presenter: David Lofti - CEO, Evina

Moderator: James Williams - Director of Programmes, Mobile Ecosystem Forum

LUNCH BREAK AND NETWORKING

13:40 - 14:40

Funtalks: The first DCB podcast service

14:40 - 15:00

Global Carrier Billing Summit Conference Sessions

"Funtalks" is the first direct carrier billing podcast service, which includes content for all tastes. The service has a competitive offering with an exclusive production. Given its success story in podcasting in France this opens up the 'window of opportunity' for modern telcos.

- How a DCB player has joined the podcast phenomenon

- First successful example of a podcast DCB service in France

- New great business development opportunity for modern telcos

Participants

Presenter: Mohamed Benhamadi - Managing Director & Business Development, Telecoming

Spotlight Panel Discussion. The future of global carrier billing: key trends by 2026

15:00 - 15:45

Global Carrier Billing Summit Conference Sessions

Global direct carrier billing platform market is expected to grow at a CAGR of 9.34% by 2030. The key drivers of the DCB significant industry expansion are outlined in the forms of the rise of digital content platforms as well as more transparency and user satisfaction. Despite the major benefits of this model, there are well-known obstruction for its development.

Join this panel discussion with the key industry leaders and mobile carrier representatives within the market to explore how the DCB will be developing and what imperative challenges need to be resolved in years to come.

- Which markets will be key focus areas in the next decade and how extensively will they evolve?
- What technology innovations will accelerate DCB?
- What transformation should be implemented to tackle future challenges?

Participants

Moderator: James Williams - Director of Programmes, Mobile Ecosystem Forum

Closing Remarks from the Chair

15:45 - 15:55

Participants

Chair of the Summit: James Williams - Director of Programmes, Mobile Ecosystem Forum

COFFEE BREAK AND NETWORKING

15:55 - 16:35

Networking Sessions

END OF SUMMIT DAY TWO

16:35 - 16:40

SCHEDULE

GLOBAL CARRIER BILLING SUMMIT DAY 2 - 28/09/2022

Global Carrier Billing Summit

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16:00	16:35 - END OF SUMMIT DAY TWO	16:35 - END OF SUMMIT DAY TWO