

Myanmar Telecoms Reform Update

YANGON, 16 OCT 2012



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16 Oct 2012, Tuesday

07:45 Registration & Breakfast Networking

08:45 Welcome Remarks and Introduction
The New Reality of Telecom and ICT Development in Myanmar

Myanmar Demographics

09:00 **Demographics, Economic & National Development**

- ICT Development: National & Socio-economic Benefits
 - Ethnic Region Considerations
 - Corporate Social Responsibility (CSR) & Sustainability
 - Ethical and Responsible Investment
- Ms. Yup Seng Ing, Managing Director
DigiCom*

09:30 **Myanmar Telecom Sector Review**

- Current Status of Telecom Networks and Operators, Telecom Infrastructure (Mobile, Broadband & Fixed Line) and Telecom Services
- Costs and Tariffs (Wholesale and Retail)
- Local Companies involved in Telecom Sector
- On-going Telecom Developments (2012 to 2013)
- HRD Challenges

*U Zaw Min Oo, Secretary General
Myanmar Computer Federation
Director, Barons Tele-Link Services Co., Ltd*

10:15 Coffee Break

Regulatory Status & Guidelines

10:45 **Telecom Regulations in Myanmar**

- Government Policy & Considerations
- Current Regulation Status
- Telecom Reform Process Status
- Future Policies : Mobile, Broadband and Fixed Line Infrastructure and Services

*Mr. Than Htun Aung, Deputy Director
Myanmar Post and Telecommunication*

11:15 **Future Guidelines on Regulations**

- Restrictions or Opportunities
- Learning from the past in order to Implement of 'Smart Regulations'

for the future

- Infrastructure and Services Regulations
- Facilitating Fixed Line developments as well as Wireless. What works?
- Ministry Revenues, Licences, Spectrum Fees to facilitate growth

*Mr. John Stefanac, President SEA/Pacific
Qualcomm International*

11:45 **Technology for Good - how telecoms can support development in Myanmar**

- The path to achieving triple bottom line benefits of ICT - Ericsson's Networked Society index
- Quantified potential economic benefits that telecoms can bring to Myanmar
- Leveraging international experience to fast-track development

*Ms. Stephanie Huf
Head of Communications
Ericsson, South East Asia and Oceania*

12:15 Discussion followed by Lunch

Technical Overview & Future Planning

14:00 **Part 1 – Technology Selection for Future Developments & Services**

- Next Generation Technologies Overview & Recommended Selection
- Infrastructures required for Unified Mobile, Broadband and Fixed Line Convergence
- IPv6 Considerations
- Next Generation Value Added Services
- HR Considerations: Capacity Building

*Mr. Sami Tabbane, CEO
SFM Telecoms*

14:30 **Part 2 – Implementation and Roll-Out Considerations**

- Network Roll-Out and Implementation : Planning & Timescales
- Infrastructure Design, Engineering, Construction & Project Management
- Backbone Network Development and Service Level Considerations
- Mobile & Wireless Broadband Network Optimization & Enhancements
- Fixed Line Network Deployment considerations
- Network Facilities Sharing scenarios

• Site Acquisition Challenges

*U Kyaw Naing, Chief Engineer
Amara Communications (Myanmar)*

Opportunities in Developments, Operations & Services

15:00 **Part 1 - Opportunities in Developments**

- Market Entry Opportunities for Investors
- Local Private Enterprise Involvement
- HRD and Capacity Building
- Network Construction Partnerships
- Backbone Network Partnerships
- Wholesale & Retail Network Opportunities

*Mr. Paul Gerard Crilley, Senior Consultant
Yatanarpon Teleport Co. Ltd*

15:30 **Part 2 – Wholesale & Retail Services**

- Wholesale Network Services (Backbone, Towers, MNO, BNO etc.)
- Virtual Retail & Value Added Services (MVNO / BVNO)
- Services Revenue Growth Strategies
- Collaboration Strategies

*Mr. Charles Ashley, Regional Head
Tune Talk*

16:00 Tea Break

16:30 **Part 3 – The Impact of Mobile Money and Mobile Banking Services on Developing Nations**

- Measurable Impacts on the economy
- Infrastructure Requirements in order to implement effective services, quickly
- Local and International Collaboration Models
- Security

*Mr. John Martinez, Senior Consultant
Detecon Asia-Pacific Ltd. (Thailand)*

Development Financing

17:00 **Financing**

- Financing Strategies that facilitate rapid Mobile, Broadband & Fixed Line Network growth
- Official Development Assistance (ODA) or Foreign Direct Investment (FDI)... or both!
- Operator Business Models : Wholesale (MNO/BNO) and Retail (MVNO/BVNO)

Business Models for Mobile, Broadband & Fixed Line

- Challenges
- Mr. Bertie McCrory, Managing Director
Contatica Asia Ltd.*

17:30 **Telecom Project Finance in Developing Markets**

- RTypical projects
- Sources of finance
- Challenges to successful funding
- Reducing the risk for investors

*Mr. Hugh McGarry, Principal
Garnet Consulting Pty Ltd*

18:00 Close of Briefing

18:05 Networking Reception for All Speakers and Participants

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Program details published herein are confirmed as at 11/10/2012.
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2ND NEW MYANMAR Investment Summit

YANGON / 17-18 Oct 2012
PARKROYAL Yangon



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Day One - 17 Oct, Wednesday

- 08:00 Registration & Coffee
- 09:00 Chairman's Welcome Remarks
Dr. Aung Thura, Chief Executive Officer Thura Swiss Ltd.
- 09:10 **Investment Opportunities and Private Sector Development**
U Aung Naing Oo, Director General Directorate of Investment and Company Administration (DICA)
- 09:40 **Myanmar's Foreign Investment Act – Key Clauses & Significant Issues**
Alessio Polastri, Managing Partner P&A Asia
- 10:10 Networking Coffee
- 10:40 **Myanmar's Population, Wealth & Consumer Opportunities**
 - Consumer wealth the potential to spend
 - Population and the impact on consumerism
 - Three very Burmese lifestyle impacts on consumerism*Ralf Matthaes, Regional Managing Director TNS Indochina*
TNS Asia Pacific Pte Ltd
- 11:10 **Opportunities for Myanmar's Telecom and ICT Sector Developments**
 - Myanmar Telecom Sector Overview
 - Learning from the past. Myanmar's advantage of 'Hindsight' when implementing Sector Reforms and 'Best Practice Development Strategies' for the future
 - A New Reality: 'Smart Regulations' that can; Facilitate countrywide growth; Engage the Local Population; Limit investment risk; Increase services competition
 - Financing Strategies that facilitate rapid network growth
 - Investment Focus on Services & Innovations
 - 'Collaborate to Succeed'*Paul Gerard Crilley, Senior Consultant Yatanarpon Teleport Co. Ltd*
- 11:40 **New Customs Regulations & Reforms**
U Kyaw Win, Director
Soe Soe Lwin, Assistant Director
U Saw Htee Set, Customs Inspector
Myanmar Customs Department
Ministry of Finance and Revenue
- 12:10 Discussion Followed by Lunch

- 14:00 **The Current Situation of Yangon Port and Economic Opportunities in Port Business**
 - Current situation of Yangon Port and projects in the area
 - Economic opportunities in port business: Deep sea port project area, Yangon Port area, Thilawa Port area, River conservancy work area*U. Soe Thein, Deputy Chief Civil Engineer Myanmar Port Authority*
- 14:30 **Sourcing & Structuring Financing for JV and other Business Forms**
Thura Soe-Paing, Managing Director All Myanmar Investment Partner
- 15:00 **Foreign Ownership Restrictions, Tax Structuring and Importation Issues for Investment Projects in Myanmar**
 - Foreign Ownership Restrictions
 - Comparison of Tax Incentives Old v New FIL
 - Which international shareholding structure is most efficient for investment in Myanmar?
 - Which taxes apply when you buy assets or shares in a company in Myanmar?
 - Case study: finance, capitalization and profit extraction of your Myanmar subsidiary
 - Practical primer: how to import goods into Myanmar?*Edwin Vanderbruggen, Partner, VDB Loi*
- 15:30 Discussion followed by Networking Tea
- 16:00 **Outlook for Drinks Manufacturing Industry in Myanmar including Agents & Distributorships**
 - Difficulties & problems that Myanmar manufactures are facing
 - Old model manufacturing (Government sector)
 - Branding/ Marketing are the key decisions in manufacturing industry
 - Outlook for manufacturing in new Myanmar*Dr. Sai Sam Htum, Chairman Loi Hein Co. Ltd*
- 16:30 **Growth Opportunities in Myanmar for Automotive Players**
 - Current Market trends, market size and growth rates
 - Opportunities and Challenges in Automotive Value Chain
 - Broad Strategies and action plan for prospective Automotive players*Vivek Vaidya, Vice President, Frost & Sullivan*
- 17:00 **Environmental Compliance for Doing Business in Myanmar**
U Win Myo Thu, Managing Director Economically Progressive Ecosystem Development Group (EcoDev)

17:30 End of Day 1

17:35 – 18:35 *Networking Reception*
for Speakers and Delegates.
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Day Two - 18 Oct, Thursday

- 09:00 Chairman's Remarks
Ken Tun, President & CEO Parami Energy Group of Companies
- 09:10 **Financial & Banking Reforms in Myanmar**
Daw. Naw Eh Hpaw, Deputy Director General & Head of Foreign Exchange Management Department Central Bank of Myanmar
Ministry of Finance and Revenue
- 09:40 **Demographics, Economic & National Development**
Yup Seng Ing, Managing Director DigiCom
- 10:10 **Power & Electricity Outlook**
 - The current power availability
 - The likelihood of available in near future and demand forecast
 - Plans Ministry is taking
 - What can investors take into consideration while planning or calculating their CAPex*Ei Phyusin Htay, Managing Director Barons Machinery & Engineering Co., Ltd*
- 10:40 Discussion followed by Networking Coffee
- 11:10 **Finding Land in Myanmar**
 - Legal rights leasing & ownership*Wint Thandar Oo, Partner, P&A Asia*
- 11:40 **Real Estate Outlook and Developments**
Tony Picon, Associate Director - Research Colliers International Thailand
- 12:10 Final Wrap-up followed by Closing Lunch
- 13:45 End of Conference

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Separately Bookable Business Contracts in Myanmar 14:00 - 1700 October 18th

For 3 hours you will receive legal advice and practical grounding in business dealings in Myanmar on how to protect and ensure your rights and cover your responsibilities – whether it's for agreements for Agency and Distributorships or for JVs and other dealings.

The intensive clinic is led by Mr Alessio Polastri, who will clarify your concerns and doubts. The workshop leaders will draw on their general experience advising on various types of transactions including the Dawei Deep Sea Port project and others.

Agenda of workshop

- Agency and distribution agreements**
- What is a joint-venture agreement?**
 - Why in Myanmar a joint-venture is so important?
 - When to do a joint-venture in Myanmar.
- Finding the right partner**
 - How to choose the right partner;
 - How to make sure it is the right partner.
- Ordinary and extraordinary clauses in a joint-venture agreement**
 - Duration
 - Directors
 - Management decision
 - Dividend policy
 - Governing law
 - Share capital
 - Voting mechanism
 - Transferability of shares
 - Winding up
- Protection of know-how**
 - Corporate finance
 - Project finance
- Protecting from your local partner**
 - Minimising the risk and protecting the investment from the local partner
- Protecting from your international partner**
 - IPOs

Mr Alessio Polastri, Managing Partner, P&A Asia

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