BUSINESS DAY

LATTICE 2022

TECHNOLOGIES AND TRENDS IN TELECOMS

CONFERENCE & TRADE SHOW

Theme:

On the verge: Prepping for Nigeria's 2nd Telecom Revolution

Thursday, July 28, 2022

Four Points By Sheraton Lagos, Nigeria

ABOUT BUSINESSDAY

BusinessDay, West Africa's leading provider of business news, economic intelligence and leadership exchanges, is acclaimed for its authority, accuracy, balance, and integrity.

The quality of commentary, data, and analysis published in BusinessDay are unrivalled.

BusinessDay's editorial content is accessed by more than more than 150,000 readers daily across mobile, print, video, and social media.

In addition to the main paper, BusinessDay publishes The Weekender, BD Sunday, CEO Magazine, MatchCentre, The Spark, and Legal Business.

Its stable of email newsletters include Morning Rundown, BusinessDay Market Close, Publisher's Diary, BD Hek, BD Politics, Building Notes, The Columnist, and Weekend Briefing.

BusinessDay's advertising reach extends across display, email, mobile, mobile video, native, social, print, and locations. Advertisers are assured of access to a prime audience quality.

Launched as a weekly paper in 2001 impact journalism has always characterised the work that BusinessDay does.

Since then, the company has expanded to operate a diversified business model that spans publishing, events, research, digital marketing, and consulting.

Recognising early the shifts in content consumption patterns and advertiser wallet allocations, BusinessDay is the only title in West Africa to have successfully implemented and scaled a digital subscription model.

Ahead of the rest of the industry, it pursued a rebalance of revenues from a heavy reliance on advertising towards reader-supported income streams.

BusinessDay maintains syndication partnerships with the Financial Times, The Economist, and Harvard Business Review (HBR).

As a new media landscape emerges, BusinessDay is poised to retain its position as the most trusted source for business.

BACKGROUND

It is safe to say that a lot is going on in the telecom industry.The onset of the COVID pandemic brought into sharp relief the systemic importance of network infrastructure to businesses and communities.

On the face of it, operators and network owners should be basking in the glow of resilient revenues through a tough economic period. In reality, what they got was a respite from trends that pose major risks to the foundations of their runaway success since the hey-day of unfettered subscriber growth.

The decline in demand for traditional phone calls and SMS has quickened, while instant messaging on apps like Telegram and WhatsApp as well as Internet-enabled voice and video calls are on a steady rise. Side-by-side, they must grapple with the consequences of their omnipresent power: privacy, influence, trust, and regulation.

Future growth now faces the risk of rising competition, worsening economic conditions, regulatory meddling, higher taxes, disruptive new technologies and shifting demand. It is not far-fetched to describe the paradox position that leading companies in the sector find themselves in as "both the best and worst of possible worlds."

There is something else at play: how should the sector approach change?

In the last 20 years, the telecom sector in Nigeria has had an impressive run. Since the auction of Global System of Mobile Telecommunications (GSM) licenses in March 2001, the sector has wrought a wholesale revolution in every facet of life.

Perhaps, it is fitting that the two-decade mark of the auction fell in the same month when the ravages of COVID begun to surge in Nigeria.

Amidst talk of the dawning of a New Normal as Nigerians settled to the lockdown, people turned to their phones for news, entertainment, comfort and most vitally, health updates more than ever before.

DISCUSSIONS

"When COVID struck it unleashed a raft of behavioural changes among customers that are still unfolding. At the same time that the first wave of the pandemic was unfurling its morbid masts, the early rumblings of a coming telecoms revolution could be heard."

In hindsight, coming from a very low base, it came as no surprise that the First Telecom Revolution (2001-2021), dominated by 2G, and 3G and to a degree, 4G, had the thorough-going impact that it did. The markets and profits came relatively easy.

In fact, the glass remains more than half empty. More than 60 per cent of Nigerians do not have access to broadband.

The impending Second Telecom Revolution, will be a different ball game. The easy pickings have been had.

A 2021 report by GSMA projected that the telcos will add 31 million new lines by 2025. Registering these new customers and upselling their base to more lucrative subscription packages will be a lot tougher. On the enterprise side, it is still not clear if telcos will dominate the market as new business models are still in flux.

Transition and disruption are the two words most often used to describe what is happening in the sector.

In conversations with BusinessDay, executives admit that their sector is at an inflexion point characterized by profound shifts in external factors, industry challenges, and organisational priorities.

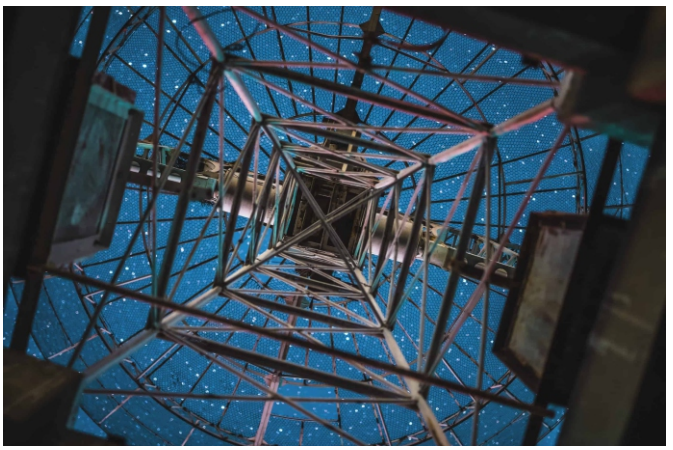
Their traditional value pools have eroded and new growth projections are yet to materialize, driving return on investment capital (ROIC) closer-and-closer to the weighted average cost of capital (WACC).

According to EY, an advisory services consultancy, the way forward for telcos and other structural players is "to maximize their addressable market is by developing innovative business

models, and seizing opportunities for inorganic growth, service innovation and diversification through M&A and strategic alliances."

In other words, change management should be at the top of their agenda. But all changes are not created equal.

At Lattice, experts and executives will converge to share their views on the most important parts of the revolution that companies should be preparing for right now and reasons why.



Panel 1: Leaders in Conversation: Driving Nigeria's digital economy

Main session panel

The future is smart. The smart future will be built on telco infrastructure and it will run on networks.

It is undeniable that Nigeria, like the rest of the continent, a massive digital transformation is taking place.

On this panel, senior leaders from government and industry will speak to progress being made on

- Nigeria's readiness for the Fourth Industrial Revolution
- Development of local talent to support digital transformation
- Inclusion and diversity
- Solving the Bandwidth & Last Mile Connectivity challenge
- The policy recommendations and proposed actions contained in the African Union's Digital Transformation Strategy for Africa (2020-2030)
- Regulation, taxation, and th ease of doing business.

Subject to speaker confirmations, the following main and breakout sessions are scheduled for discussion

Session type	Title
Presentation	2G to 5G: NCC and Telecoms Regulation in Nigeria (1992-2022)
Main Session	Leaders in Conversation: Driving Nigeria's digital economy
Main Session	Not so fast: The long road to 5G in Nigeria Main session panel
Main Session	Yotta is the new bride: The emerging competitive dynamics of Africa's data centre landscape
Breakout Session	Playing hard to get: The state of customer engagement, and loyalty programs
Breakout Session	Show your Green ID: Telco infrastructure, networks and sustainability
Breakout Session	Collabo rules: The role of Hyperscale Cloud Providers, System Integrators, and Operations Technology (OT) in the edge computing ecosystem
Breakout Session	Q.E.D.: Optimal Solutions for the Last Mile Conundrum

Panel 2: Not so fast: The long road to 5G in Nigeria

Main session panel

The vast potential of fifth-generation wireless technology, otherwise known as 5G, is mind-boggling. It is more than a step improvement on existing connectivity speeds. To achieve it would require major investments in the upgrade of network infrastructure.

5G is unique in two ways. Its ability to leverage across the radio-

frequency spectrum (low-, mid-, and high-band) to dramatically increase throughput capacity in support of a broad range of end-user applications and use cases. For instance, while 4G supports 6,500 devices per square mile, 5G can support up to a million devices in the same perimeter.

With so much potential, there are great expectations for 5G.

In developing economies like Nigeria and the rest of Africa, there is still a long way to go before these are realized. Despite the payment of US$273.6 million each by MTN and Mafab Communications to the Nigerian Communications Commission (NCC) for the purchase of 3.5GHz 5G spectrum it will be years before 5G is deployed across the country.

Some of these hurdles to be scaled include the modernization of legacy technologies, overhaul of regulations, and deeper collaboration among telecom operators.
Among the topics to be examined will be:

- Presenting the business case for 5G by telcos in Nigeria: comparing the scale of the investment required vs projected ROI
- Waiting-and-seeing: X-raying Airtel and Glo's decision on 5G spectrum sale participation
- Maverick game-changer or money-miss-road? Unravelling Mafab's intentions
- What impact will 5G investment have on telco CAPEX/OPEX
- Fibre vs. 5G: Contextualizing the case for and against in terms of capacity, reliability, latency, bandwidth and efficiency
- Bringing fiber to the 5G network economically: from the tower to the small cell
- Will 5G deepen the digital divide gorge or bridge it?
- 5G, Open RAN, and geopolitical competition

Panel 3: Yotta is the new bride: The emerging competitive dynamics of Africa's data centre landscape

Main session panel

It is estimated that around 70 per cent of government ministries, departments, and agencies (MDAs) in Nigeria continue to host their data overseas despite data localisation guidelines by the National Information Technology Development Agency (NITDA). Over all, more than 90 per cent of the country's data is hosted outside its borders. Galaxy Backbone, Nigeria's only Uptime Institute Certified Tier 3 data centre in the public sector currently enjoys only 38 per cent capacity utilisation of its 2.5MW capacity.

Notwithstanding these abysmal figures, there has been an uptick in investment flows into data sovereignty infrastructure. These fund flows are being driven by factors like post-COVID digitalization initiatives as organisations migrate from on-premise data centres, advanced technologies penetration, the presence of major operators, internet penetration, remote working, and government initiatives.

A report by US-based Arizton Advisory and Intelligence projects that demand for data centres will grow at a compound annual growth rate (CAGR) of more than 17 per cent over the period 2020 to 2026.

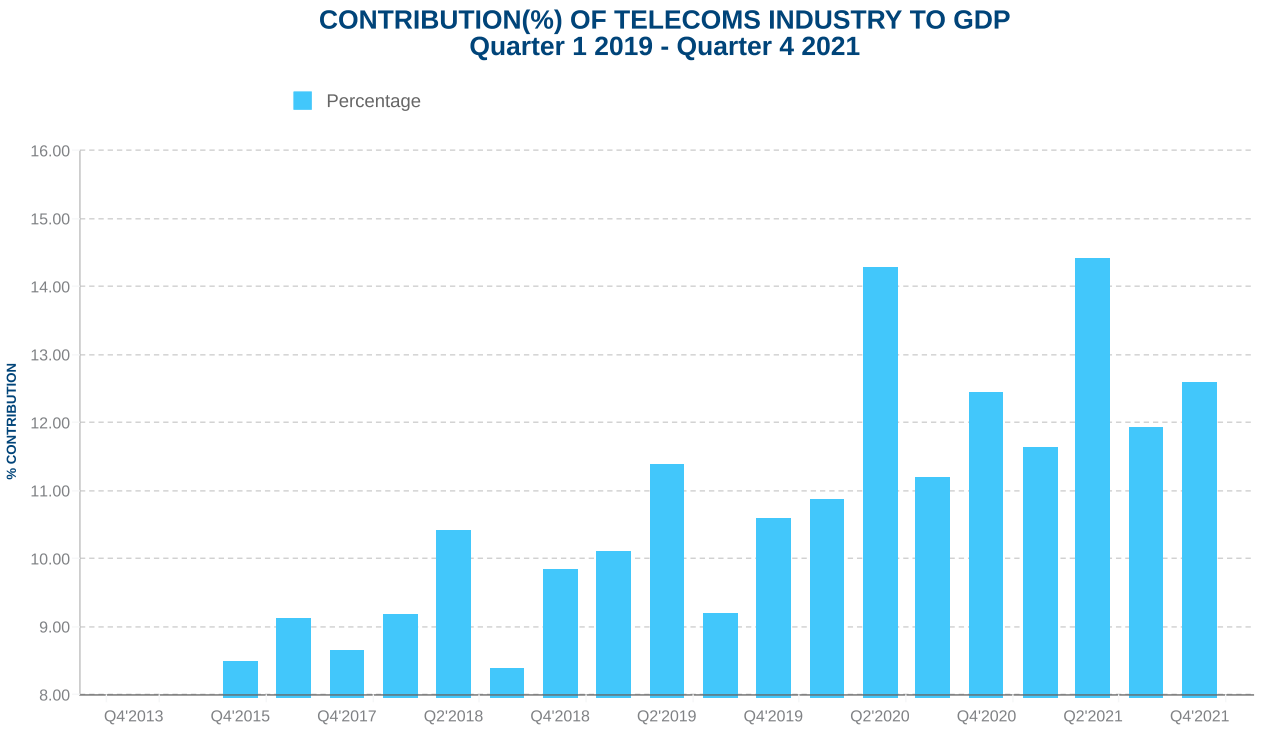
In December, Equinix, a US company, announced that it had reached an agreement to acquire MainOne, a West African data center and connectivity solutions provider for US$320 million.

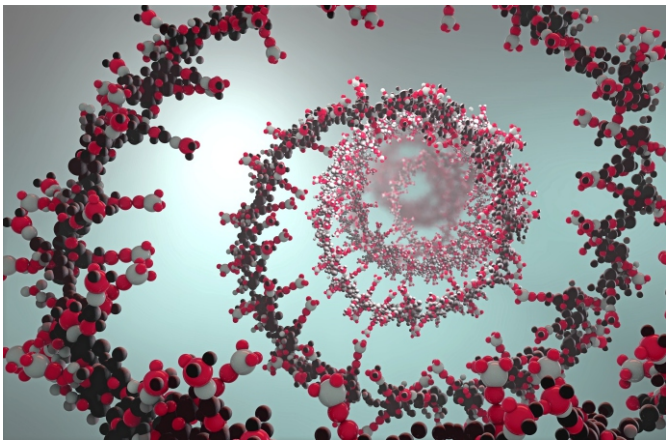
MainOne has a presence in Nigeria, Ghana and the Ivory Coast, for $320 million. It is one of 11 data centres operating in the country, which has Nigeria has 47 Internet users per 100.

Currently, the domestic connectivity ecosystem comprises of five co-location data centres, 50 cloud service providers and one network fabric.

On this panel, experts will unpack:

- Where are we on the build-out and demand curves?
- The risks of overcapacity
- Meeting the energy demand of data centres
- Data centres as an asset class
- Delivery models
- Cloud governance ground rules
- Data security
- Navigating the solutions thicket: IaaS, SaaS, PaaS, FaaS, DaaS
- Subsea cable operators and data centers





Panel 4: Playing hard to get: The state of customer engagement, and loyalty programs

Breakout session panel

Panelists will unpack the customer engagement strategies they have evaluated and implemented to meet changing consumer preferences and lower support costs.

Delegates will listen to experience-based case studies of what the leaders are doing to boost customer retention, cut churn, drive customer experience with agile principles, understand the customer journey better, then predict it with greater accuracy, inspire customer loyalty, and much more.

They will also hear expert views on

- The state of the customer loyalty market in 2022 and predictions
- Actual performance and usage feedback of AI, machine learning and modern loyalty platforms as accurate indicators and predictors of consumer behavior
- Segmentation
- The uptake of offers and rewards.

Panel 5: Show your Green ID: Telco infrastructure, networks and sustainability

Breakout session panel

For companies to have long-lasting appeal, they need to show that their infrastructure is energy efficient and sustainable because a growing number of investors want to put their money into sustainable assets. There is also a growing public demand for more responsibility towards environmental protection goals.

This panel will discuss new developments in renewable energy, from solar-powered cell sites to wind-powered backup generators and will look at the costs of transitioning to a more energy efficient model.

According to a BCG report, **Putting Sustainability at the Top of the Telco Agenda,** telco CEOs until recently were not keen to make sustainability a top priority. This was because they perceived it as a cost.

Telcos generate few so-called Scope 1 emissions. These are emissions generated from directly burning fossil fuels.

Scope 2 emissions result from purchasing energy and heat. These would count as Scope 2 emissions for the telcos, but Scope 1 emissions for the energy suppliers. Finally, Scope 3 emissions are caused by downstream and upstream activities, such as the energy consumption of suppliers. This is, by far the biggest impact area, typically making up between 70 to 90 per cent of a telco's total carbon emissions.

This panel is timely is because not enough attention has been paid to the business implications of implementing sustainable principles in the sector.

It will bring together telcos, suppliers and vendors across the value chain to also discuss their individual roles in reducing the three "scopes" of emissions, the progress made so far, as well as projected costs, and the business case for sustainability.

Panel 6: 2G to 5G: NCC and Telecoms Regulation in Nigeria (1992-2022)

Main session presentation and Fireside Chat

The Nigerian Communications Commission traces its origins back to Decree no. 75 of the Federal Military Government of Nigeria. Its enabling law was later to be modified in the Nigerian Communications Act 2003 (NCA 2003).
To a large extent, NCC has met the expectations set out for it in a rapidly evolving technological, market, and social environment.

Taking a 30-year span, this presentation will cover how the Commission has evolved to reflect changing realities and increasing competition in the Nigerian telecom space. It will also address topics around how the Commission is preparing for the next phase of development in the sector amidst the dominant role of telecommunications in private communications, business transactions, and national security.

Panel 7: Collabo rules: The role of Hyperscale Cloud Providers, System Integrators, and Operations Technology (OT) in the edge computing ecosystem

Breakout session

Edge computing processes, analyzes, and stores application data and services at a network's edge, which minimizes the distance to end users and IoT endpoints.

This improves performance by reducing latency and the network bandwidth required to transmit data, delivers significant cost savings, since the design of the general network does not need to satisfy the requirements of the most demanding applications, and improves the reliability of applications and services.
With such a broad definition, it is clear that edge computing manifests itself across a spectrum of implementation options. It is also more amorphous because the edge means different properties, benefits, and requirements for different companies in the value chain. For a chipset manufacturer, the edge is the device itself. For a hyperscaler, however, the edge is a data centre deployed in a metropolitan area.

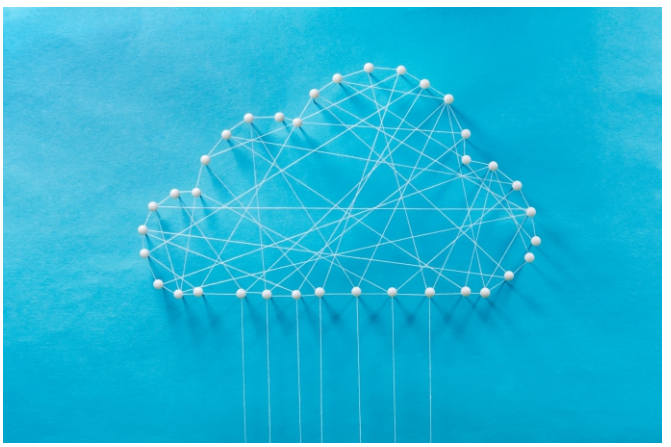
Between these two opposites lies the domain of the telecom operator, who has been deploying a distributed connected computing platform to power their 4G, 5G, DSL and FTTx networks for more than a decade.

Whereas traditional cloud computing occurs on remote servers that are situated far from the user and device, Multi-access Edge Computing (MEC) allows processes to take place in base stations, central offices, and other aggregation points on the network.

In principle, telcos are well positioned to capitalize on edge because of their existing strong position in network infrastructure and physical proximity to customers.

However, operators will be faced with tough competition from other market players such as cloud providers, who are moving rapidly to define and own the biggest share of the edge market.
Most experts are of the opinion that telcos cannot fully tap the edge business opportunity by themselves, and will need to go into partnerships to do so.

STL Partners, a UK-based telecoms consultancy, identifies 5 viable business models in this regard.



I. **Dedicated edge hosting:** In this case, the telco delivers and manages edge-located compute/storage resources, which are pre-installed and connected to the telco network. The customer/partner runs its software, which

could be for example a virtual content delivery network (CDN) or a distributed cloud stack, on top of the telco's edge-enabled dedicated hardware resources.

II. **Edge IaaS/PaaS/NaaS:** Here the telco in this business model operates in a similar manner to a cloud provider, providing customers distributed compute and storage capabilities, a platform for developing applications on the edge infrastructure and network services, as well as APIs and virtual network functions (VNFs) in an 'as-a-service' manner through a cloud portal as the customer interface.

III. **Systems integration:** In this scenario, the telco builds upon an existing SI business, offering custom turn-key solutions for enterprise customers with specific requirements, which are (partially) met by MEC functionality.

IV. **B2B2x solutions:** In the fourth option, the telco offers edge-enabled solutions to enterprise customers. As with existing B2B solutions, these may be for the customer's internal purposes, such as to improve existing processes, or may contribute to an end-customer offering (B2B2X). In general, these solutions will be closer to an 'off-the-shelf' product than a totally bespoke offering, thus requiring significantly less integration work than SI projects.

V. **End-to-end consumer retail applications:** In this final scenario, the telco plays high up the value chain, acting as a digital service provider for consumer applications. MEC-enabled services in this category will leverage the benefits of MEC, namely low latency, high throughput and context awareness, to provide consumers with innovative applications.

How feasible are these models in the Nigerian context?

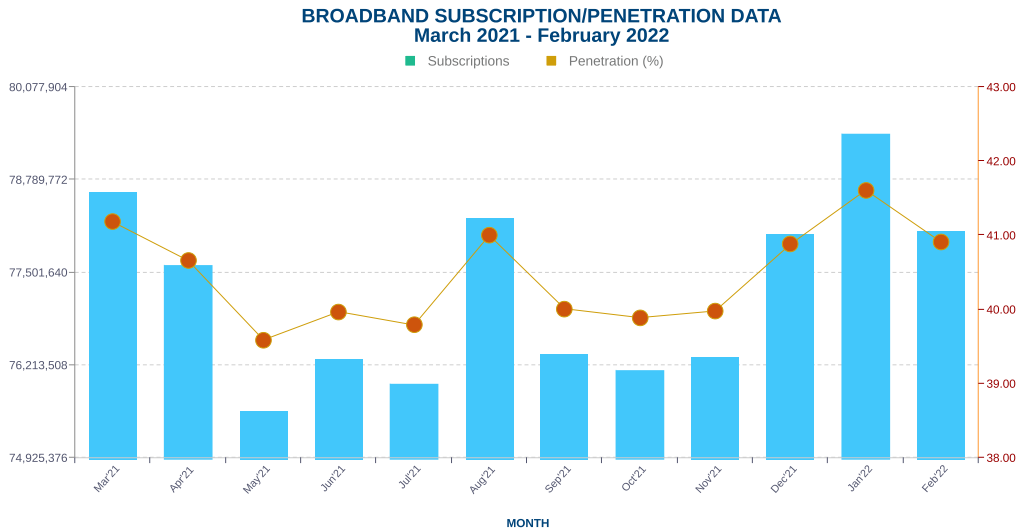
The edge computing ecosystem attracts several players with various backgrounds. The list shows a breakdown of the market segments

I. **Facilities players** deal with the physical site or the location inclosing the edge cloud infrastructure. This includes the data centre buildings, the service providers that maintain and operate the sites, and other services such as the power supply and the cooling systems.

II. **Hardware players** handle the operation and maintenance of the computing hardware inside the data centre such as the racks, servers and processors as well as end-devices.

III. **Network players** provide connectivity infrastructure linking the device to the edge location to the Internet and other edges/clouds. This also includes traffic routing and edge gateways in addition to content and application delivery and optimisation.

IV. **Cloud infrastructure players** provide the virtualised infrastructure supporting the edge workloads and applications including the operating system, the compute and storage layer which can be based on virtual machines or containers. In addition, they offer edge and cloud aggregation and orchestration services and the application enablement platforms that allow developers to access and manage resources and applications.



V. **Application and software providers** create applications that run on the edge on top of the virtualised infrastructure. This includes network functions and platform services such as analytics and APIs products

VI. **Systems Integration (OT) services players** offer services that help the customer deploy and integrate edge computing at any stage of the value chain – including design and engineering services to create platforms for edge computing applications, or more traditional integration into existing enterprise systems.

With so much going on, speakers on this panel will elaborate on:

- Opportunities at the edge
- Ways in which their services fit into any of the alternative business models for telcos chasing the edge opportunity
- Their specific strengths in different verticals
- Why telcos cannot go it alone.
- Pros and cons of the various business models
- The state of demand for edge computing in the region.

Panel 8: Q.E.D.: Optimal Solutions for the Last Mile Conundrum

Breakout session

The Last Mile challenge can be described reasonably simply. It refers to the final hurdle of delivering telecommunications services to end users, and the challenges of ensuring connectivity from core network to the end user.

Historically, for a number of reasons, it has been extremely difficult logistically, and prohibitively expensive to deliver the bandwidth available at a landing site intact to the end user's location without compromise. In such conditions, it made no sense to invest in remote locations where the populations and average revenue per user were dismal.

Last Mile seeks to resolve this challenge. Recent improvements in technology are giving the business case for it a new lease of life.

The challenges facing telcos in Last Mile network planning are both technical and financial. Put simply, it is about how to balance the ever-increasing demand for data and the attendant pressure on the transmission network with an ARPU that supports additional investment.

The traditional fix has been a hybrid deployment of fibre optic and wireless backhaul technology to achieve an optimal total cost of ownership (TCO).

In Nigeria, access of fibre networks within 5 kilometres of population centres is estimated at 39 per cent reach. This spans a high of 85 per cent in Lagos, the commercial capital, and 12 per cent in Jigawa, situated in the northeastern part of the country.

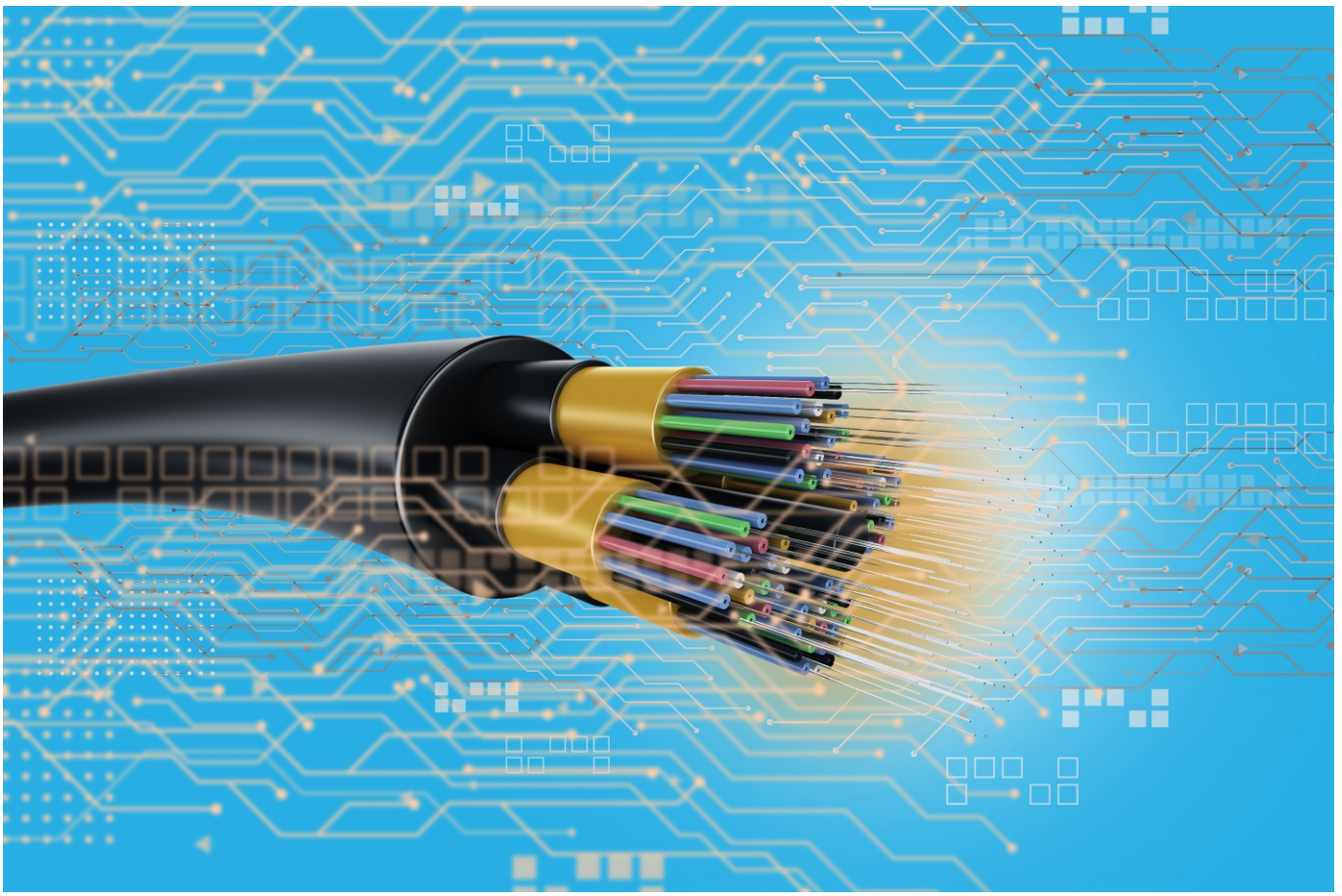
The data shows that outside Lagos, there is a sharp drop-off in the rest of the country.

Compared to other African countries, Last Mile FTTx (Fibre to the x) and FTTT (Fibre to the Tower) connections are low.

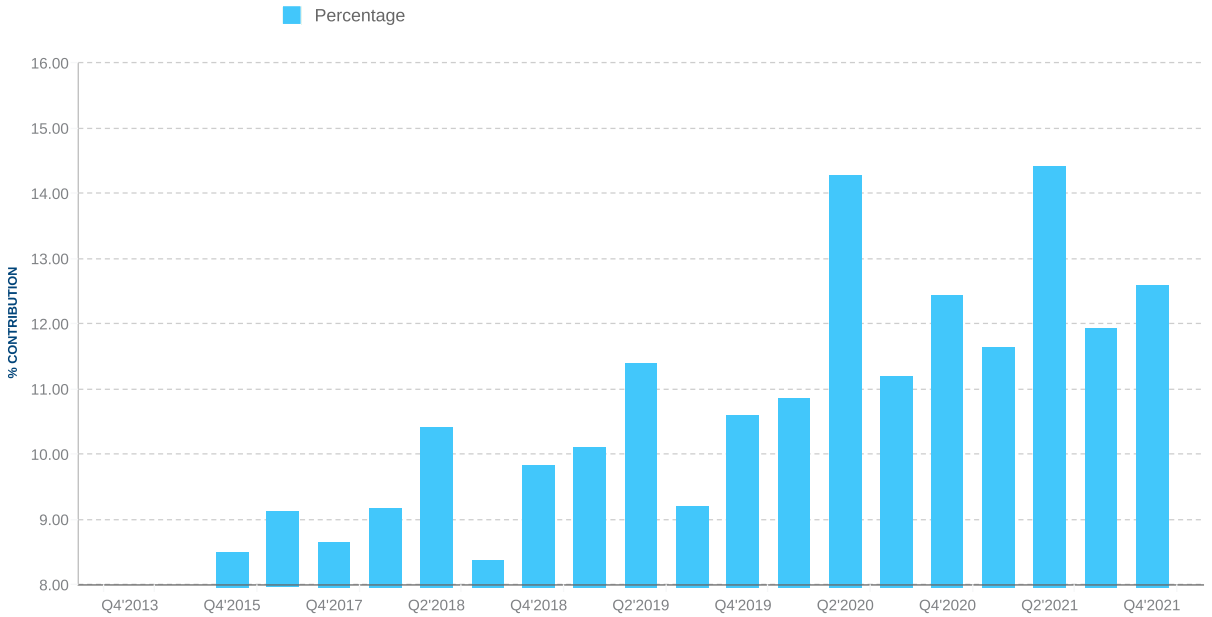
This is not surprising considering the thicket of permits to be approved and other difficulties involved in digging up city streets as well as covering the long distances in remote areas.

This panel will explore

- The case for government incentives
- The technologies rewriting the business case for Last Mile investment
- Sitrep on NCC's Broadband Road Map (2020-25)
- How should fibre deployments be future-proofed?
- What are the funding and financing options to extend fibre deployments beyond
- How promise versus the performance of commercial satellite space licensees approved by NCC in solving the Last Mile challenge
- The sustainability and energy efficiency credentials of competing Last Mile solutions
- Why Open and Disaggregated Technology could be a game-changer for the Last Mile challenge
- Why closing the Digital Divide depends on the Last Mile.



CONTRIBUTION(%) OF TELECOMS INDUSTRY TO GDP
Quarter 1 2019 - Quarter 4 2021



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WHY ATTEND

- **Connect with a global community**
  Built with a vision to help players in the telecom sector see the next bounce of the ball, and to empower them with the information to prepare for it, Lattice will bring participants from all the key segments in the industry.

- **Garner actionable insights & tap thought-leadership straight from the source**
  Hear from over 25 C-level experts delivering insights and announcements and contribute to the conversations around how your organisation will play a crucial part in the development of the industry. Lattice's agenda will help your organization to identify all the investment opportunities in your sector, understand new business models and put you one step forward into the future.

- **Capitalise on new opportunities**
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Deliver panel framer to set the tone for the discussion of your choice	✔	3 mins			
Speaking slot on a panel of choice	✔				
Submit a 1,500-word piece for publication in BusinessDay on a subject related to the event	✔	✔	✔		
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Venue branding	Custom ✔	Custom ✔	✔	✔	✔
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Email blast to BusinessDay's exclusive database announcing sponsorship with highlights of your organisation	✔	✔	✔	✔	✔
Panel session branding: On-screen recognition and mention as panel sponsor on screen fixed panel discussions. (This Panel is sponsored or brought to you by …)	✔	✔			
Video of the organization to be shown as interludes at plenary	✔	✔	✔	✔	✔
Opportunity to create and drive an immersive brand engagement campaign or activity (BusinessDay team will work with your team to co-create the campaign)	✔	✔			
Your company branding featured prominently on the event website	✔	✔			
Acknowledgement/Mention of organization in welcome speech & closing remarks	✔	✔	✔	✔	✔
Delegate access to the conference	7	6	5	4	3

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Entrance and registration point co-branding	✔	✔			
Media booth branding					
Company logo included on post-event thank-you mail sent to all registered delegates					
Company profile on the event website and in the official event brochure	✔	✔	✔	✔	✔
Email blast to BusinessDay's exclusive database announcing sponsorship with highlights of your organisation	2 pages (text and photos in brochure)	1 page with photo	1 page	1 page	1 page
Dedicated pre-event email to all registered delegates	✔	✔	✔	✔	✔
Full page advert in the event brochure	✔	✔	✔		
Full page advert in the post-event report	✔	✔			
Branded lanyard	Yes				
Executive Connections					
Opportunity to invite up to 10 VIP guests (BusinessDay will work with your team to actualise targets wherever possible	✔				
Post Event PR					
Front page photo in BusinessDay on day after the event	✔				
Double-page post-event exclusive on company: includes company profile, CEO interview	Yes	Yes			
Full-page Post Event Interview in The Conference report (print and online editions)	✔				
Half-page Post Event Interview in The Conference report (print and online editions)	✔	✔	✔		
Feature story in BusinessDay print & online editions	✔	✔	✔	✔	
Content syndication across partner media platforms (Print)	✔	✔			
Content syndication across partner media platforms (Digital)	✔	✔	✔		
Exhibition					
Lounge set up inside the conference	2 Million				
Experience Centre set up in the foyer	4 Million				
Access to registration area for data collation	1 Million				
Large exhibition booth (3X6)	4 Million				
Medium Exhibition booth	3 Million				
Exhibition Stand	1.5 Million				

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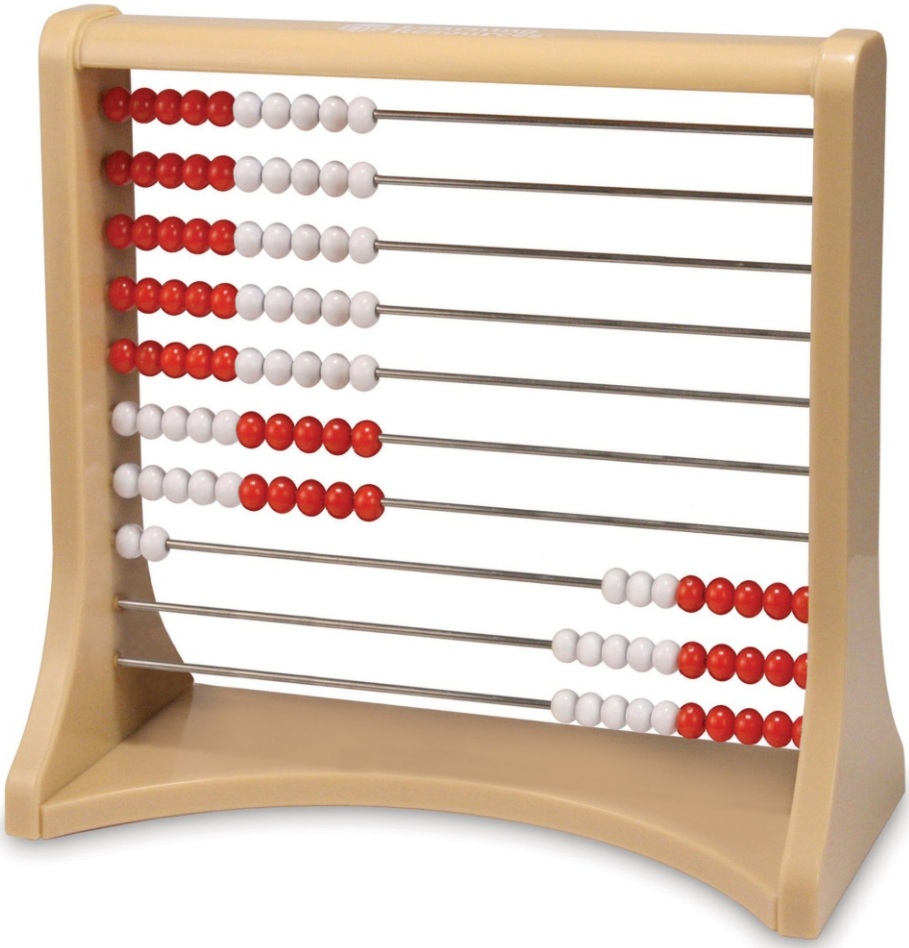

Business counts
Businesses count on Businessday

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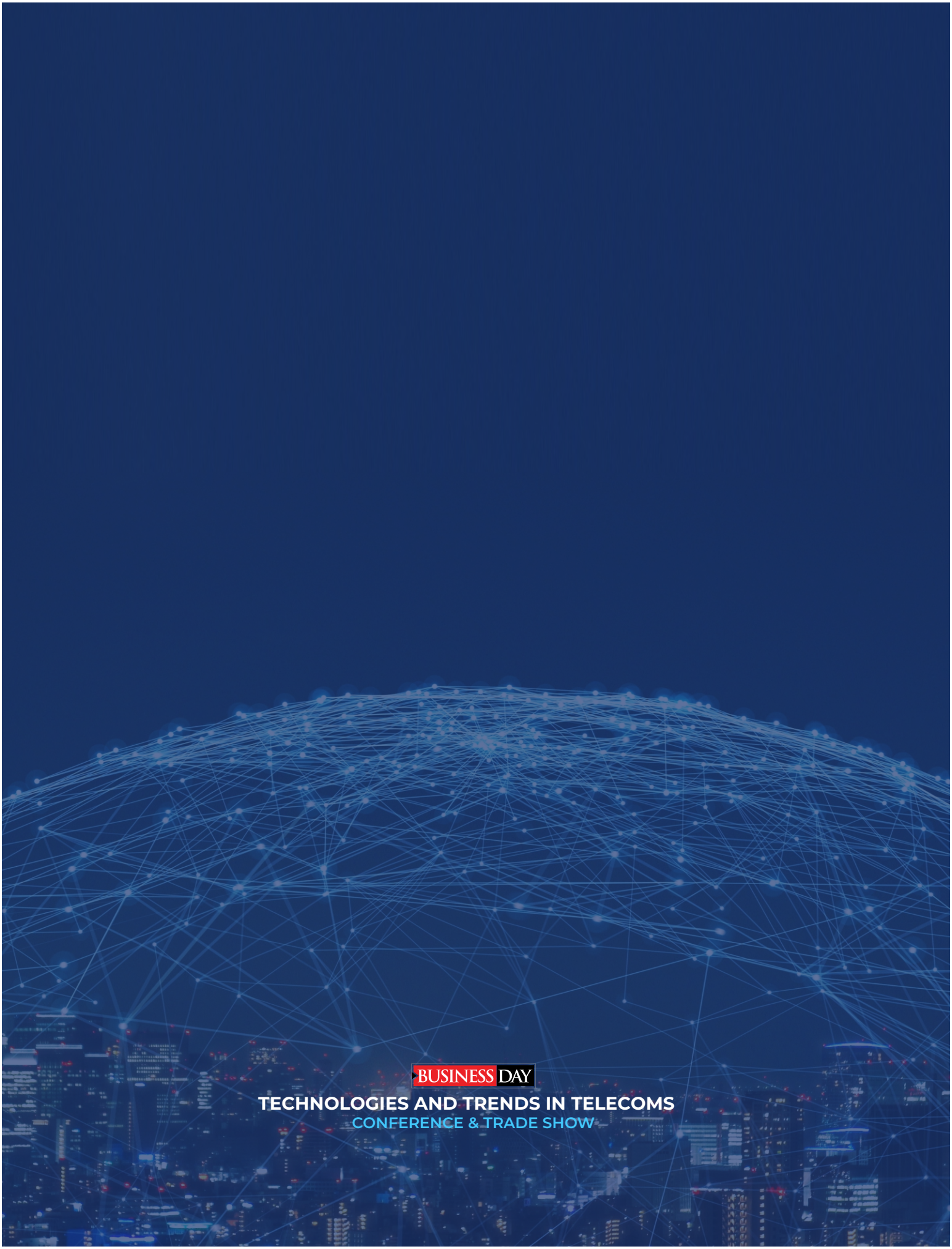
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