

**Dalberg**


# ITU Telecom events – *Strategic and financial assessment*

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PRESENTATION TO THE COUNCIL

JUNE 2020

# Context, purpose and envisioned impact of the assessment

<p><b>CONTEXT OF THE PROJECT</b></p>	<ul style="list-style-type: none"> <li>ITU Plenipotentiary Conference's 2018 resolution called for a <b>comprehensive strategic and financial assessment and review of ITU Telecom events, along with recommendations/strategies</b> to be submitted in time for the 2020 Council session</li> <li>The Plenipotentiary Conference instructed the Secretary-General to ensure its implementation, through an independent external management consultancy</li> </ul>
<p><b>PURPOSE OF THE PROJECT</b></p>	<ul style="list-style-type: none"> <li><b>Conduct an independent, transparent and fact-based review and assessment of the status of ITU Telecom events</b> and the current business model, including an assessment of financial sustainability, and <b>suggest alternatives for the way forward</b></li> </ul>
<p><b>ENVISIONED IMPACT</b></p>	<ul style="list-style-type: none"> <li><b>Better position ITU</b> in the crowded and competitive space of telecom events with a view to maximize impact, value addition, and sustainability</li> <li><b>Enhance the impact of telecom tech and innovations</b> across sectors and geographies</li> </ul>
<p><b>PHASE I FOCUS AND APPROACH</b></p>	<ul style="list-style-type: none"> <li><b>Phase I focus:</b> « <i>Determine ITU Telecom events' viability and ensure that they support the strategic goals of the Union, meet ITU membership's needs, and remain financially self-sustaining without impacting on ITU's general budget (A second phase may be launched to develop a redesigned program in accordance with the decisions of the Council)</i>»</li> <li><b>Phase I approach:</b>  <ol style="list-style-type: none"> <li><b>1. Landscape analysis &amp; review of the events' strategic foundation</b></li> <li><b>2. Impact, value proposition and financial assessment of the events (in their current form)</b></li> <li><b>3. Option evaluation and recommendation</b></li> </ol> </li> </ul>



Note: (\*) In the following pages, this symbol is used as a link to a more detailed view.

Once on the detail page, it is possible to return to the original page by clicking on this symbol:



# Key findings: I. Landscape analysis and review of ITU Telecom events' strategic foundation



## LANDSCAPE ANALYSIS OF ICT EVENTS GLOBALLY

- **The ICT event landscape is crowded and rapidly changing** as new events appear and grow while some established events fail to keep up with the pace of change. **It is also increasingly competitive** as more events target the same stakeholders with similar offerings.
- In addition, the trends in the events industry and the ICT sector suggest that **ICT events will have to continuously innovate to adapt** to remain relevant and attract their target audience.
- **There is also internal competition within ITU's event portfolio** as many events are organized by the General Secretariat and the Bureaus, many of which targeting similar participants
- **Therefore, ITU Telecom events need a strong, distinctive value proposition with tangible results and impact potential** to attract and secure the target audience over time and achieve ITU objectives



## ITU TELECOM EVENTS' STRATEGIC FOUNDATION

- **The strategic positioning of ITU Telecom events suffers from several weaknesses** that have affected performance:
  - 1) A lack of clarity** (Written sources do not offer a coherent view of the strategic objectives) ;
  - 2) A lack of internal alignment** (Interviews with staff and CWG members reveal diverse views on the objectives, not always aligned with the objectives present in the documentation) ;
  - 3) A lack of stability**, with priority variations over time (strengthened by host country rotation)
- As a result, **the events are pursuing multiple objectives** (e.g., showcasing innovation, networking, knowledge sharing, influencing), which dilutes the value proposition and confuse participants.
- This also means that, across objectives, **ITU Telecom events overlap with the positioning of better placed events** (up to 20 times larger – e.g., MWC, VivaTech, Web Summit – or more focused) and while Telecom World presents itself as a “global generalist event”, analysis shows that it is no longer truly global and **does not match the associated expectations.**



# Key findings: II. Impact, value proposition & financial assessment of the events in their current form (1/2)



## IMPACT ASSESSMENT OF ITU TELECOM EVENTS (against their strategic objectives)

- This impact assessment aimed to evaluate to what extent ITU Telecom events meet the **4 objectives** most consistently referred to in official documents (e.g., Resolution 11 and ITU Strategic plan) : **(1) promoting innovation for social impact, (2) supporting the SME sector, (3) addressing major trends in the ICT industry, and (4) fostering public-private collaboration.** It was carried out by component (exhibition, forum, SME program, networking) and overall (incl. synergies between components).
- The content and format of the events' key activities show intention to make progress against these objectives. However in practice, **each activity shows weaknesses preventing the materialization of intended impact at the envisioned scale**, across the following dimensions:
  - i. Program relevance (e.g., lack of innovative forum sessions, low attendance of the exhibition)
  - ii. Presence of change actors (e.g., lack of private sector, declining seniority, geographic imbalance)
  - iii. Sustained commitment following the event (e.g., lack of trackable commitments)
- **As a result of these weaknesses, ITU Telecom events in their current design and delivery are not well-suited to achieving impact against the 4 objectives defined in the Strategic Foundation .**



## VALUE PROPOSITION ASSESSMENT OF ITU TELECOM EVENTS

- For 15 years, ITU Telecom events have faced declining participation, especially from corporates, partly due to new private-sector organized competing events. The event adapted its format and expanded its scope, but **attendance has not picked up and value proposition is poorly perceived:**
  - **Past participants' Net Promoter Score** (ratio of promoters vs detractors) **is low vs. comparable events** (between "perceived negatively" and "seen as a mixed experience with large room for improvement".
  - More precisely, **corporates are particularly dissatisfied** (negative *Net Promoter Score*, equivalent to a "very negative" impression on participants), while **government officials are relatively more positive.**
  - **SMEs gain some value from the event, but still believe there is significant room for improvement.**
- Finally, there is a shared perception that **two separate tracks with little to no synergies co-exist:** a senior track with high-level participants focus on the forum and exclusive networking vs. a lower-level track with SMEs and lower-level corporates attending the exhibition and the SME program.



# Key findings: II. Impact, value proposition & financial assessment of the events in their current form (2/2)



## FINANCIAL SUSTAINABILITY ASSESSMENT OF ITU TELECOM EVENTS

- **Value proposition weaknesses and ITU Telecom's internal constraints have affected its financial sustainability.** Profits are low and declining (from 0.8m to -0.3m CHF in 2014-18) and revenues (other than host country contributions) have severely declined (from 15m to 3m CHF in 2009-18).
- **The event's (limited) ability to generate profits entirely depends on host country contributions.** Without these, ITU Telecom events would make more 2.5m CHF in losses annually on average.
- **Value proposition weaknesses affecting financial sustainability:** reduction of the exhibition revenues is the single most important factor of the event's deteriorating financial performance.
  - **Exhibition revenues declined from 14m to 3m CHF in 2009-18 (equivalent to 84% of total revenues drop)** ; mostly due to a decline in space rental – reflecting declining appeal/relevance of the exhibition's value proposition.
  - Forum admission revenues also dropped from 1.4m to 0.3m CHF – reflecting the forum's falling value proposition.
- **ITU Telecom faces internal constraints that limit its ability to be financially sustainable:**
  - **Programmatic constraints** (e.g. focus on SMEs, requirements to ensure affordability to developing countries);
  - **Operational constraints** (e.g. country rotation, Member States free pass requests, UN cost levels & processes)
  - **Financial constraints** such as the systematic transfers to the Exhibition Working Capital Fund (EWCF) and the requirement for Telecom's Secretariat to run balanced biennial budgets, which prevents long-term investments.
- **Telecom's poor financial performance undermines the requirement of "financial viability and "no negative impact on the ITU Budget" as required by Resolution 11.** For example, EWCF which holds all accumulated profits of the event, has *de facto* moved from being an important financing source for ICT development projects through the ICT Development Fund (ICTDF) to being a cash reserve to address ITU Telecom's potential liabilities in case of termination or event cancellation.
- **Moreover, there is potential under-reporting of the true cost of ITU services to Telecom.** While there is no clear mechanism to quantify the services provided by ITU to ITU Telecom, the decision-making process for setting the cost recovery amount (set by the General Secretariat) and the amount evolution over the past years suggest that it might be calibrated to support the event to break-even.

# Key findings: III. Option evaluation and recommendation



## Key learnings guiding the option generation and evaluation

- Four main learnings emerged from ITU Telecom events assessment:
  1. **Need for strategic alignment on mission and objectives:** Future events should have a well-articulated strategic foundation, highlighting their role to achieve ITU's strategic goals. It should be communicated internally and externally so that organizers and participants strive to achieve common goals;
  2. **Need for a distinctive event identity with strong value proposition.** Future events should focus on target stakeholders' needs, combining event components coherently, to build a distinctive identity. Given the competition, it must be additive to the market and built on ITU's comparative advantage;
  3. **Need for coordination with other ITU events, ensured by adequate governance.** Future events should not seek to add to the crowded ITU event agenda, potentially leading to cannibalization. Where possible, the future event should seek to build synergies and potentially partner with other ITU events. A Union-wide governance body (incl. Bureaus and Secretariat) would help to ensure this coordination.
  4. **Need for trade-offs between impact and commercial sustainability.** Depending on the objectives pursued, some event concepts might not be commercially sustainable and requiring subsidization, potentially from ITU's budget. It is important to be aware of these areas of tension between impact and commercial sustainability and make the necessary trade-offs, rather than expect commercial profits from all events, regardless of their nature and mission.

## Rigorous generation and evaluation methodology

- Given these learnings, **we have taken a rigorous and sequential approach to guide the decision-making process** on potential future options for ITU Telecom:
  1. **Define the strategic positioning** of potential options by identifying unaddressed needs in the ICT sector that ITU Telecom could potentially address ;
  2. **Define the business and delivery model** to make sure that event concepts are coherent and have a strong identity, and to assess their financial profile (e.g., Can they can be self-sustained financially?)
  3. **Assess options for the governance and tactical positioning** of the event, particularly opportunities for partnership with other ITU events that share similar objectives or target similar participants
  4. **Look at operational choices** that can enhance the appeal and impact of the event's components. These options were further assessed again their impact, value proposition and financial sustainability.



# Recommendations

Three prioritized and qualified options

- **Option 1: 3 to 4 small scale “Regional Forum Sessions” on ICT development in emerging and developing markets per year, organized alongside Regional Development Forums in developing regions.** These events would support developing countries strengthen their local ICT sectors by learning about the trends and innovations, about the ICT development journeys of peer countries, and communicating emerging needs/risks to drive coordinated action, incl. through regulation.  
→ *These events would require subsidization: each regional edition is expected to make ~2m CHF in losses annually*
- **Option 2: A yearly developing country focused “Digital for Development forum”, combined OR merged with WSIS** (WSIS describing itself as the “world’s largest annual gathering of the ICT for development community”): This event would drive innovation, adoption and use of ICT solutions in support of development objectives of developing countries. It would allow stakeholders to (i) learn about the latest trends in technology, policy, and regulation; (ii) display technological innovations, programs, initiatives, or policies; and (iii) network to build partnerships. It would take place in a fixed global location.  
→ *This event would require subsidization: each edition is expected to make ~4m CHF in losses annually.*
- **Option 3: Develop and organize exhibition and forum sessions dedicated to “Digital for Good” as part of a yearly Global Union-level event, also integrating WSIS and/or AI for Good Global Summit.** This landmark event would drive innovation, adoption and use of ICT solutions for the common global good in support of the SDGs. The event would offer to (i) improve collective knowledge of digital innovations for the common good, and (ii) enable exchanges among D4Good stakeholders to support adoption and scale and address potential risks. This would take place annually in a fixed global location.  
→ *Depending on the ability to attract corporates, this event could be profitable. On a base case, it could make ~1m CHF in profits. Smaller or larger number of exhibitors could lead to losses of ~1.5m CHF or profits of ~5.5.m CHF.*

One final recommendation

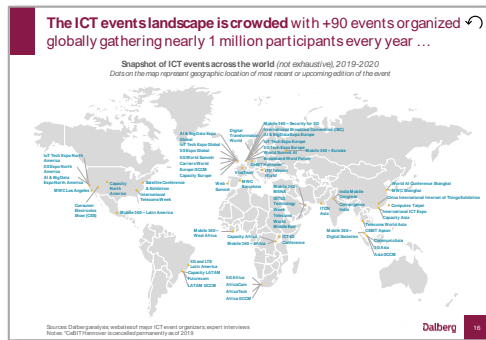
- **The first two options present the risk of reducing the scope of action of ITU Telecom events** from global and relevant to all, to only relevant for developing countries. On the contrary, **the global Digital for Good event** could allow to maintain a global reach. It also presents the dual-opportunity to fully redesign the event while keeping its distinctive Exhibition component, and to leverage ITU’s unique mixed membership to better address the ICT sector needs and eventually fulfill ITU’s mission of “broadening access to ICT to achieve sustainable development”.
- **Conclusion: We recommend to the Council to consider the opportunity of investigating further this 3<sup>rd</sup> option, through the Phase II already considered to design a global, major Digital-for-Good event.** This phase should include, among other, two decisive workstreams: i) An internal alignment exercise involving the 3 Bureaus and the Secretariat, to agree on a strategic event portfolio and on its operating model (including event governance); ii) A co-creation exercise with a subset of ITU’s Sector Members to clearly define their needs and what will make them participate and contribute to the future event.

# Complete presentation and appendix available in English

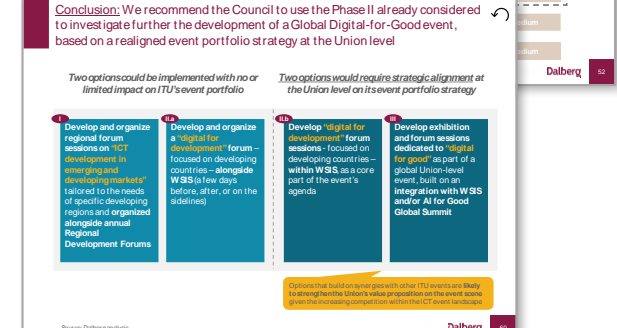
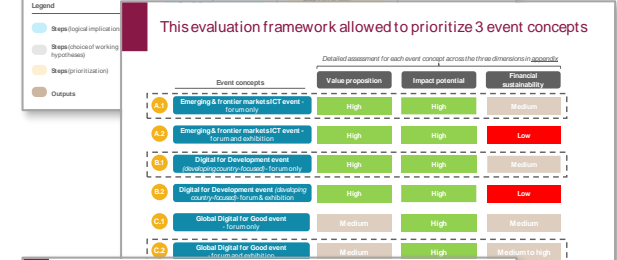
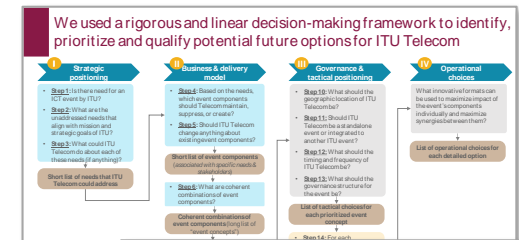
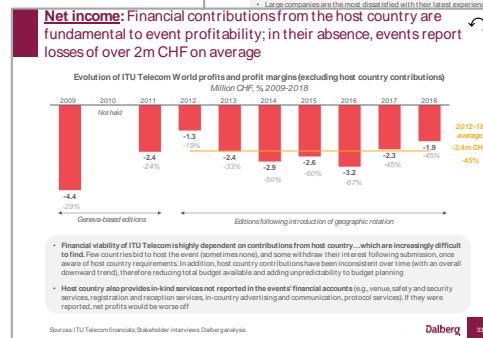
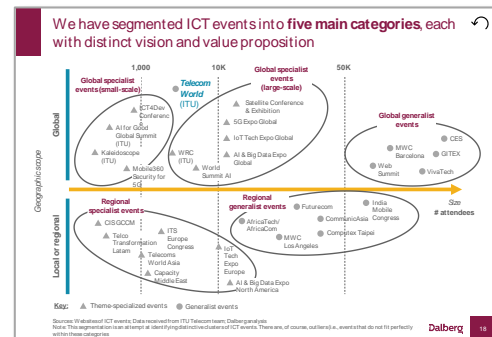
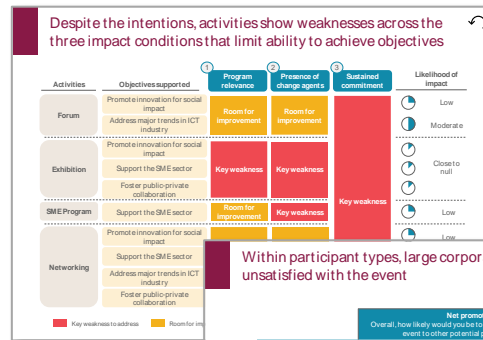
**Link:** <https://www.itu.int/en/council/2020/Documents/Dalberg-presentation-ITU-Telecom-events.pdf>

## Select examples of analyses and deliverables:

### 1. Landscape analysis and strategic foundation review



### 2. Impact, value proposition and financial assessment of the events



# Appendix

## **Reminder on project context, guiding principles and approach (5 min)**

Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)

Summary findings from the strategic and financial review (10 min)

Approach for identifying future options (5 min)

Recommended options (20 min)

Q&A (10 min)

Annex

# Reminder: Project context

## CONTEXT OF THE PROJECT

- The Plenipotentiary Conference of ITU passed a resolution late 2018 calling for a **comprehensive strategic and financial assessment and review of ITU Telecom events, along with recommendations and strategies** to be submitted in time for the 2020 session of the Council
- The Plenipotentiary Conference instructed the Secretary-General to ensure implementation of the comprehensive assessment and review, through an independent external management consultancy

## PURPOSE OF THE PROJECT

- **Conduct a review and assessment of the status of ITU Telecom events** and the current business model, including an assessment of financial sustainability, and **suggest alternatives for the way forward**

## ENVISIONED IMPACT

- **Better position ITU** in the crowded and competitive space of telecom events with a view to maximize impact, value addition, and sustainability
- **Enhance the impact of telecom tech and innovations** across sectors and geographies

# Reminder: Project guiding principles

## *Independent*

Our review of the current model of ITU Telecom in terms of value proposition, potential impact, and financial sustainability **reflects our own conclusions** based on the methodologies and approaches that we have developed for the assessment. Our recommendations for future options for ITU Telecom are also based on a logical decision-making guide and an evaluation framework. While we have been in constant communication with the ITU Telecom team throughout our engagement, and consulted various ITU stakeholders, **we used their inputs and feedback to develop a fact base only, with no influence on our evaluation and recommendations.**

## *Transparent*

We have maintained a **regular communication channel with the ITU Telecom team** through (i) fortnightly meetings to update on overall project progress, and (ii) end-of-phase meetings to share findings from the various phases of our work. We documented all our findings in PPT presentations that we shared with the ITU Telecom team, which were further circulated to CWG-FHR members and Elected Officials. As part of our work, we have also provided updates to IMAC on emerging findings from our work

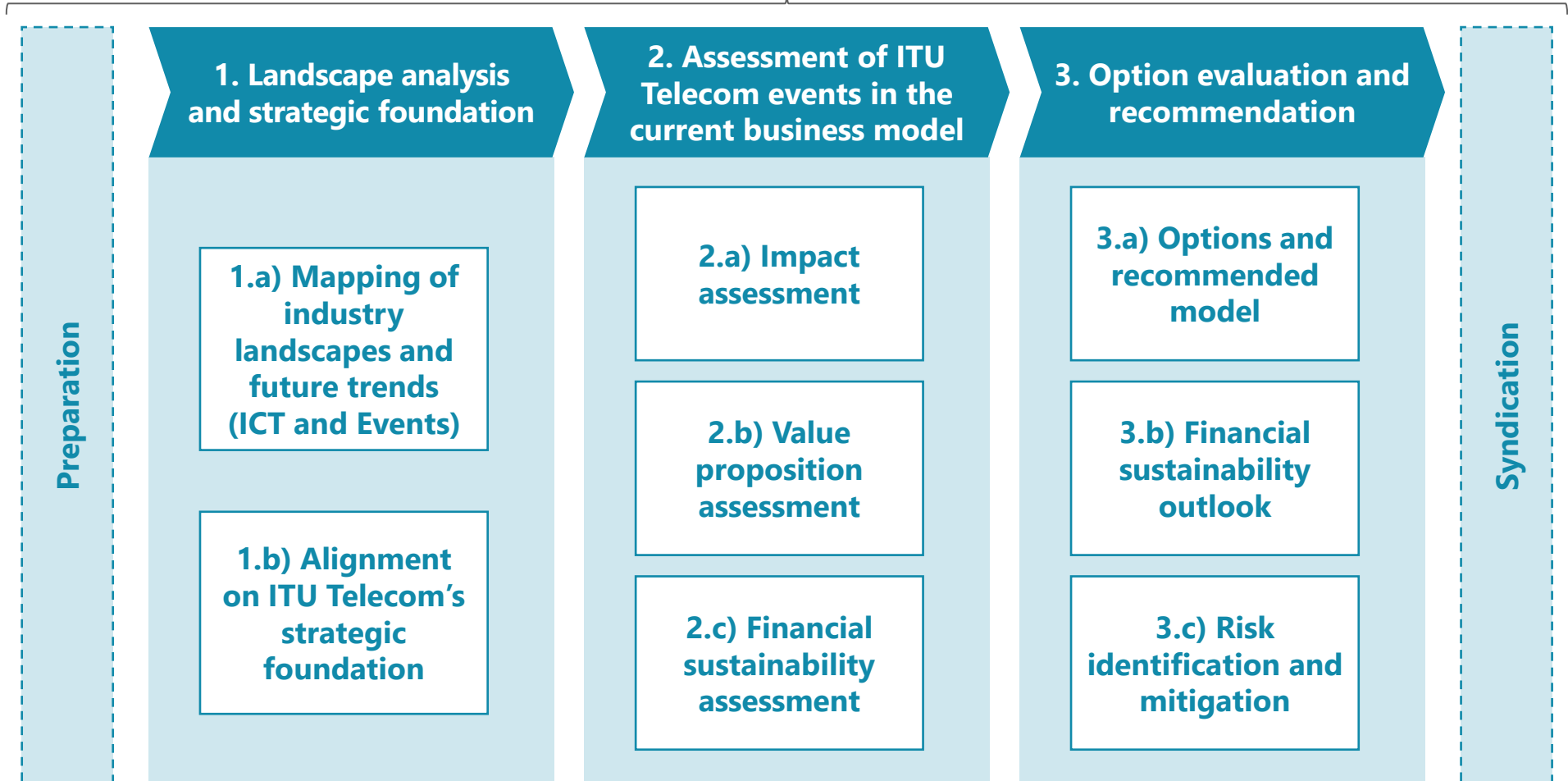
## *Fact-based*

We based our evaluation and subsequently our recommendations on both qualitative and quantitative information collected through: **(i) interviews with ITU Telecom World participants** and stakeholders (exhibitors, speakers, sponsors, visitors) both on-site during the 2019 Budapest edition and through phone calls afterwards, **(ii) survey** of +23,000 ITU Telecom World participants from the past 5 editions (+700 responses collected, 3% response rate), **(iii) financial data** shared by the FRMD team, **(iv) KPIs, outcome reports**, and other event evaluations produced on previous editions, **(v) CRM database** and event participant list, **(vi) interviews with select ITU stakeholders** within ITU Telecom and outside

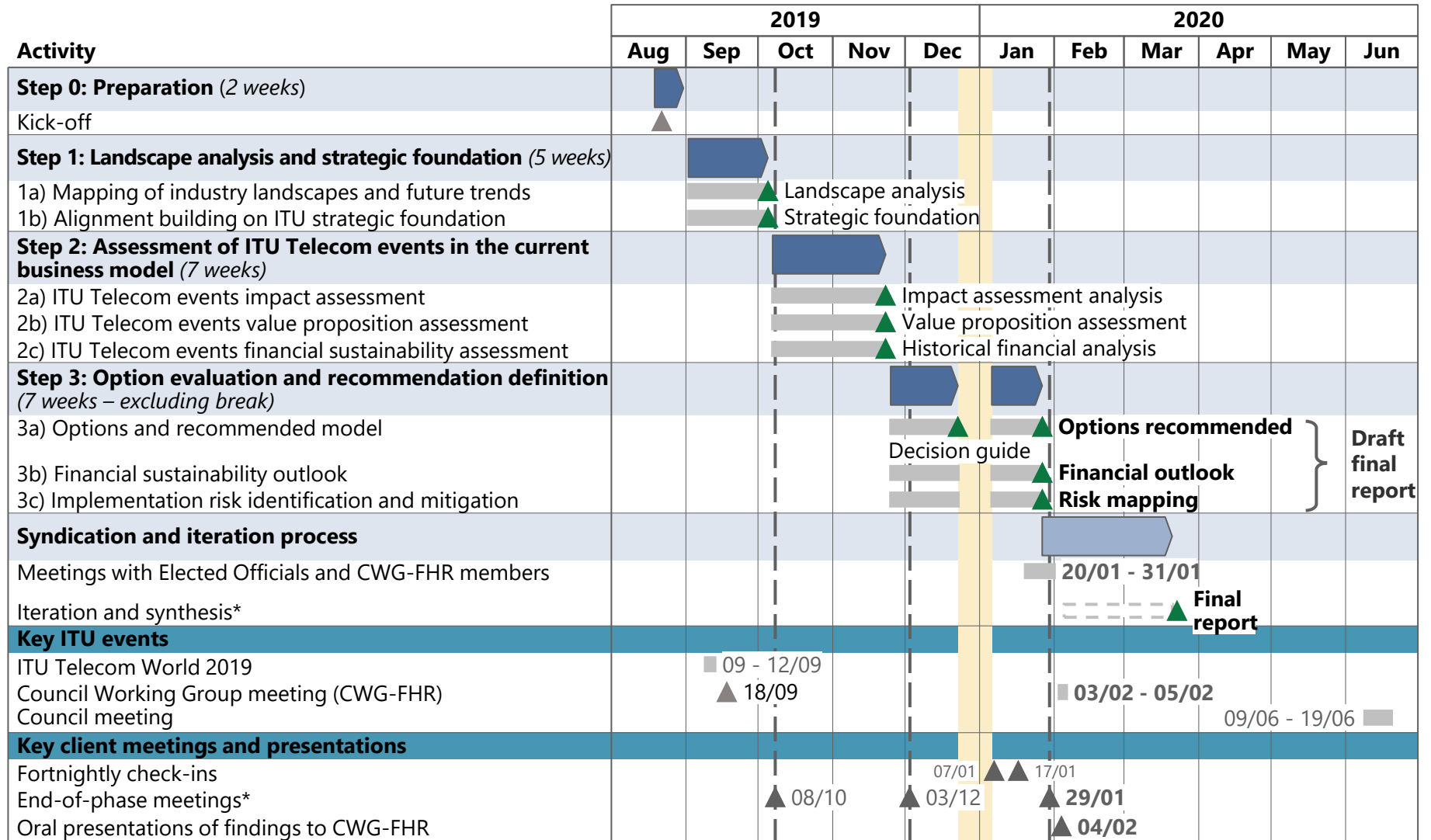


# Reminder: High level project approach

**Phase I goal:** « "Allow the Union to determine the viability of ITU Telecom events and ensure that they support the strategic goals of the Union, meet the needs of the ITU membership, and remain financially self-sustaining without impacting on the general budget of ITU."  
(A second phase may be launched to develop a redesigned program in accordance with the decisions of the 2020 session of ITU Council)



# Project update: The conclusions presented to the Council follow a 6-month core phase followed by a syndication and iteration process



**Legend:** ▲ Deliverables    ▲ Key Meetings

Note: (\*) After the core syndication sequence in January, and the February 4<sup>th</sup> oral presentation to CWG-FHR marking the end of the project core phase, the ITU team will still be able to use February and March to gather and share questions on the description and positioning of the recommended options;

# Appendix

Reminder on project context, guiding principles and approach (5 min)

**Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)**

**Global ICT event landscape analysis and trends**

ITU Telecom Strategic Foundation's review

Summary findings from the strategic and financial review (10 min)

Approach for identifying future options (5 min)

Recommended options (20 min)

Q&A (10 min)

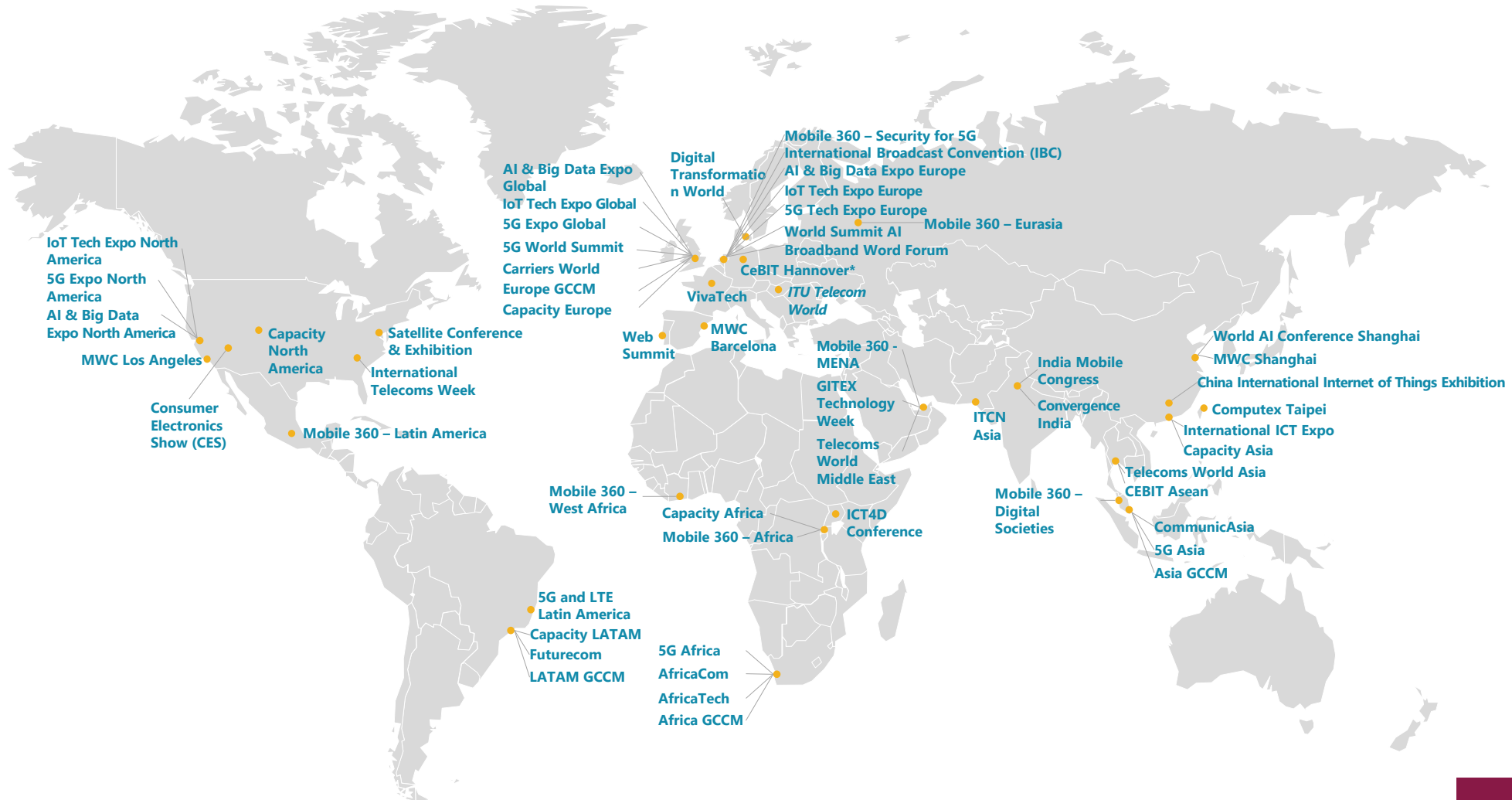
Annex

# The ICT events landscape is crowded with +90 events organized globally gathering nearly 1 million participants every year ...



## Snapshot of ICT events across the world (not exhaustive), 2019-2020

Dots on the map represent geographic location of most recent or upcoming edition of the event



Sources: Dalberg analysis; websites of major ICT event organizers; expert interviews  
Notes: \*CeBIT Hannover is cancelled permanently as of 2019

# There is a large number of ICT events organized by ITU across the world...



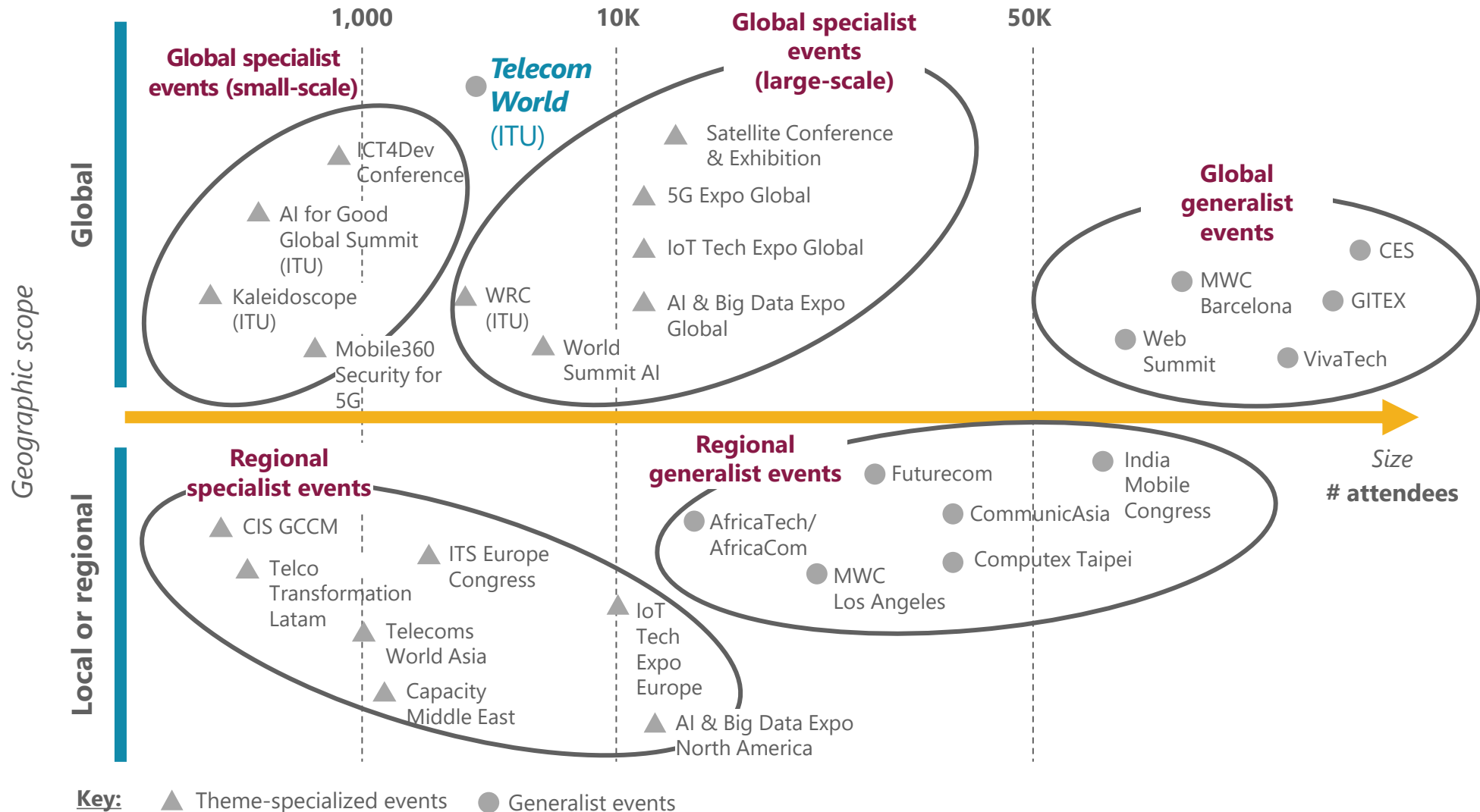
## Snapshot of ITU events across the world (not exhaustive), 2019-2020

Dots on the map represent geographic location of most recent or upcoming edition of the event

- ITU organizes events of different nature, scopes, and objectives. These include **forums, conferences, symposiums, workshops, and seminars**
- These events are **organized by different ITU bodies** (e.g., the Bureaus, the General Secretariat), **sometimes in partnership with other UN organizations** or partners (e.g., for the AI Summit)
- **Some events are “constitutional”** as ITU bodies are mandated to run specific events at a specific frequency for a specific objective
- **Some events focus on internal operations and processes** of ITU and restrict access to ITU stakeholders. *We did not include these events in our landscape*
- It is worth noting **that ITU Bureaus run a series of small-scale theme-specialized workshops** (global or regional) throughout the year, often strategically organized alongside other events (rather than being standalone events)



# We have segmented ICT events into **five main categories**, each with distinct vision and value proposition



Sources: Websites of ICT events; Data received from ITU Telecom team; Dalberg analysis

Note: This segmentation is an attempt at identifying distinctive clusters of ICT events. There are, of course, outliers (i.e., events that do not fit perfectly within these categories)

# Appendix

Reminder on project context, guiding principles and approach (5 min)

## **Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)**

Global ICT event landscape analysis and trends

### **ITU Telecom Strategic Foundation's review**

Summary findings from the strategic and financial review (10 min)

Approach for identifying future options (5 min)

Recommended options (20 min)

Q&A (10 min)

Annex

# In Phase I, we “reconstructed” a high-level Strategic Foundation for ITU Telecom



## Reconstruction of ITU Telecom Strategic Foundation based on document review and interviews



We chose to retain only the objectives that were referred to in official documents (e.g., Resolution 11, ITU Strategic plan, etc.)

# Appendix

Reminder on project context, guiding principles and approach (5 min)

Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)

## **Summary findings from the strategic and financial review (10 min)**

### **Value Proposition Assessment**

Impact Assessment

Financial Sustainability Assessment

Approach for identifying future options (5 min)

Recommended options (20 min)

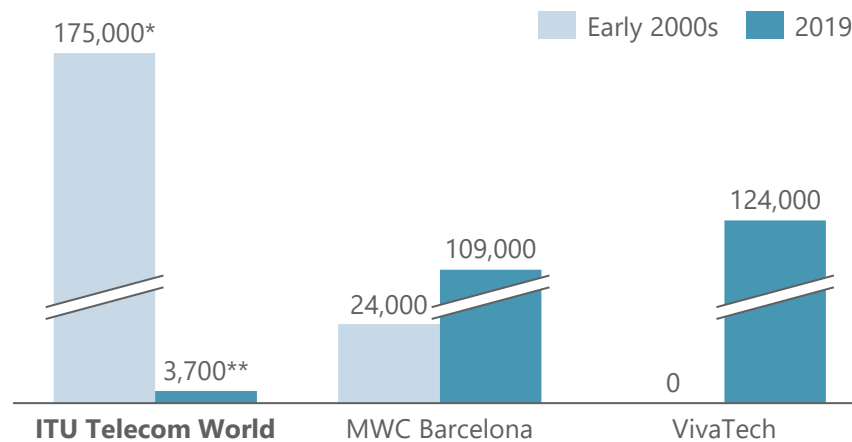
Q&A (10 min)

Annex

# ITU Telecom faced declining participation starting the early 2000s, driven by private sector competition, despite efforts to adapt

## Attendance at key global ICT events

(# of visitors, early 2000s vs. 2019)



## Interview quotes

*Telecom World used to be huge. Gradually, they lost their way and were taken over by other events*

- Industry association

*Telecom World used to be a massive event where the whole industry would gather. Today, other events like MWC play this role for the industry*

- International organization

- **ITU Telecom's core value proposition used to be to provide senior government officials and ICT corporates an opportunity to learn from each other** about the latest trends in the industry and network for business and to influence policy
- **Starting in the early 2000s, the event began to face declining participation**, especially from the corporate sector. This decline was largely driven by competition from new global ICT events organized by the private sector (e.g., MWC), reflecting structural changes in the ICT sector (including privatizations)
- **The event undertook changes to its format and expanded the scope of the value proposition** (geographic location and frequency, revised program focus and activities...) without stopping the declining attendance

Sources: Les Mobiles; Le Monde Informatique; ITU News; Datanews; Dalberg analysis

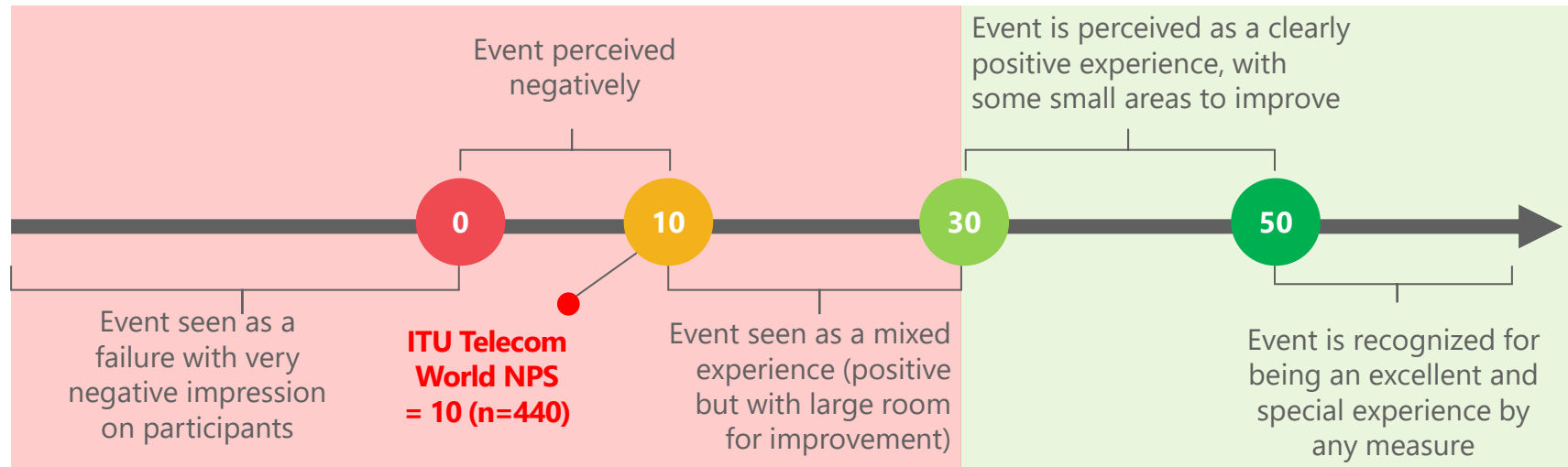
Notes: (\*) Telecom 99; (\*\*) 2018 edition

# Today, the event's net promoter score is significantly lower than benchmark scores for B2B events across industries



## Net promoter score (%)

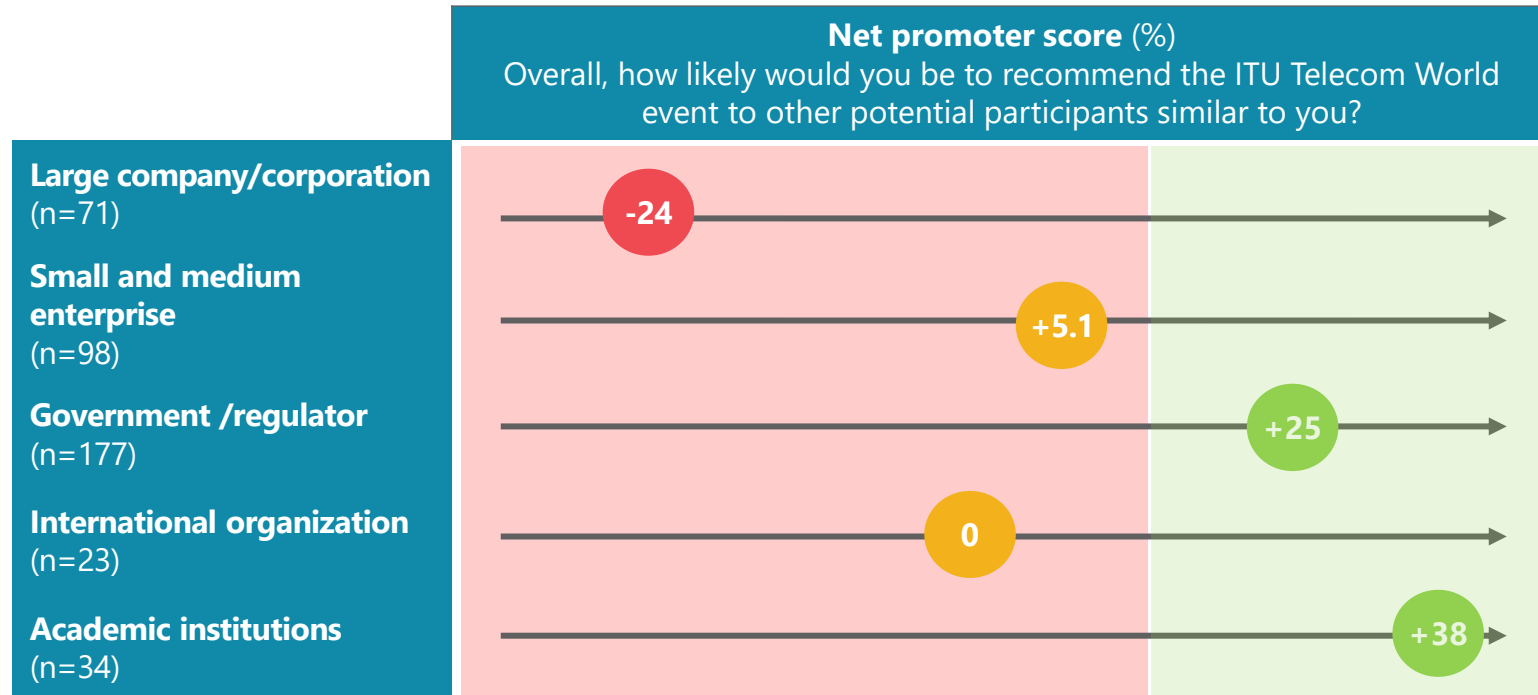
How likely would you be to recommend the ITU Telecom World event to other potential participants similar to you?



Sources: Survey results; Upright Brand

Notes: (\*) The Net Promoter Score (NPS) is an index ranging from -100 to 100 that measures the willingness of event participants to recommend the event to others. It is used as a proxy for gauging participant's overall satisfaction with an event and their loyalty to its brand; (\*\*) NPS score = (Promoters – Detractors) / Total Respondents, where promoters chose 9 or 10 on 1-10 scale of how likely they would recommend the event; while detractors chose a number between 0 and 6, inclusive.

# Within participant types, large corporates are particularly unsatisfied with the event



- Large companies are the most dissatisfied with their latest experiences at the event.
- Government officials/regulators and academic institutions are most likely to recommend the event to their peers
- SMEs and international organizations gain some value from the event, but still believe there is significant room for improvement

# Satisfaction levels reflect the extent to which each participant is able to achieve their core objectives in attending the event

Type of participant	Top priorities	Relevant activities	Value proposition strength
Large companies / corporates	Network for business	Exhibition, Forum, networking	Weak
	Network to influence policy	Forum, networking	Moderate
SMEs	Network for business and funding	SME prog., Forum, Exhibition, networking	Moderate
	Network for partnerships	Forum, Exhibition, networking	Weak
	Gain brand visibility	Exhibition	Moderate
Government officials/regulators	Learn about trends in policy	Forum	Strong
	Develop inter-governmental policies	Forum, networking	Strong
	Network to attract investment	Forum, networking, Exhibition	Moderate
Academics	Share research and knowledge	Forum, networking	Strong
	Network for partnerships	Forum, networking, Exhibition	Strong
International organizations	Learn about trends in policy	Forum, networking	Strong
	Network for partnerships	Forum, networking, Exhibition	Moderate

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Reminder on project context, guiding principles and approach (5 min)

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## Summary findings from the strategic and financial review (10 min)

Value Proposition Assessment

### Impact Assessment

Financial Sustainability Assessment

Approach for identifying future options (5 min)

Recommended options (20 min)

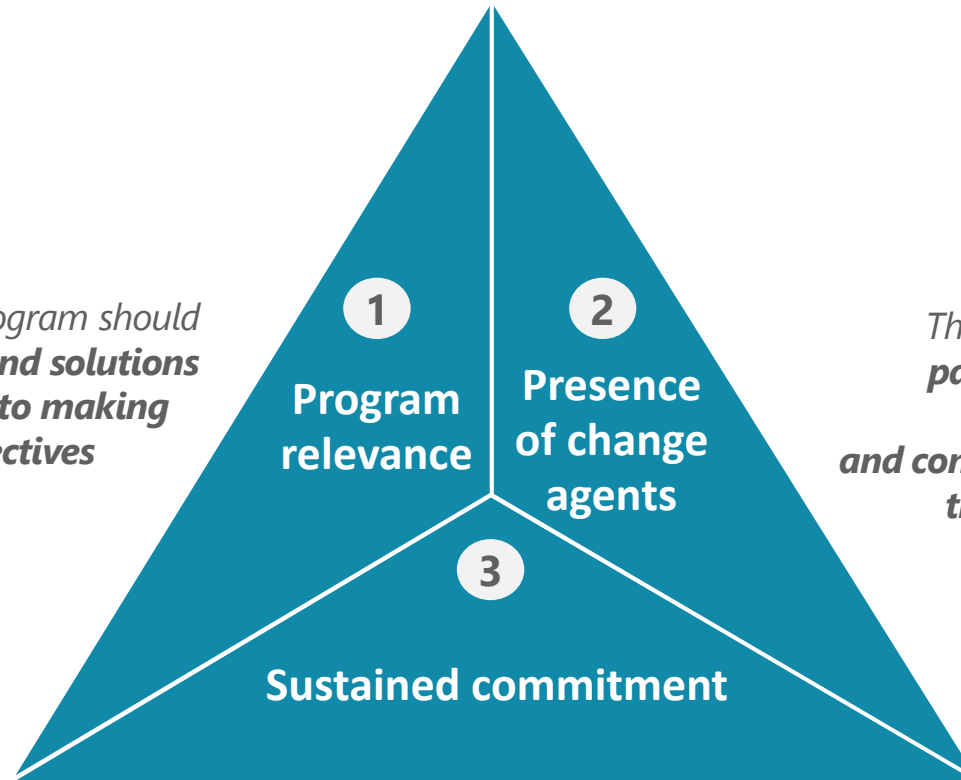
Q&A (10 min)

Annex

# Three conditions are key to achieve tangible impact at an event like ITU Telecom



*The content of the program should disseminate ideas and solutions that can contribute to making progress on the objectives*



*The event should **attract the participants best placed to leverage the learnings and connections made to realize the impact** after the events*

*The event should actively **encourage change agents to make trackable commitments and support them in bringing them to fruition** beyond the confines of the event itself*

# Despite the intentions, activities show weaknesses across the three impact conditions that limit ability to achieve objectives



Activities	Objectives supported	1 Program relevance	2 Presence of change agents	3 Sustained commitment	Likelihood of impact
Forum	Promote innovation for social impact	Room for improvement	Room for improvement	Key weakness	Low
	Address major trends in ICT industry	Room for improvement	Room for improvement		Moderate
Exhibition	Promote innovation for social impact	Key weakness	Key weakness		Close to null
	Support the SME sector	Key weakness	Key weakness		
	Foster public-private collaboration	Key weakness	Key weakness		
SME Program	Support the SME sector	Room for improvement	Key weakness		Low
Networking	Promote innovation for social impact	Room for improvement	Room for improvement		Low
	Support the SME sector				Low
	Address major trends in ICT industry				Low
	Foster public-private collaboration				Moderate

■ Key weakness to address    
 ■ Room for improvement    
 ■ No need for improvement

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Value Proposition Assessment

Impact Assessment

### Financial Sustainability Assessment

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Recommended options (20 min)

Q&A (10 min)

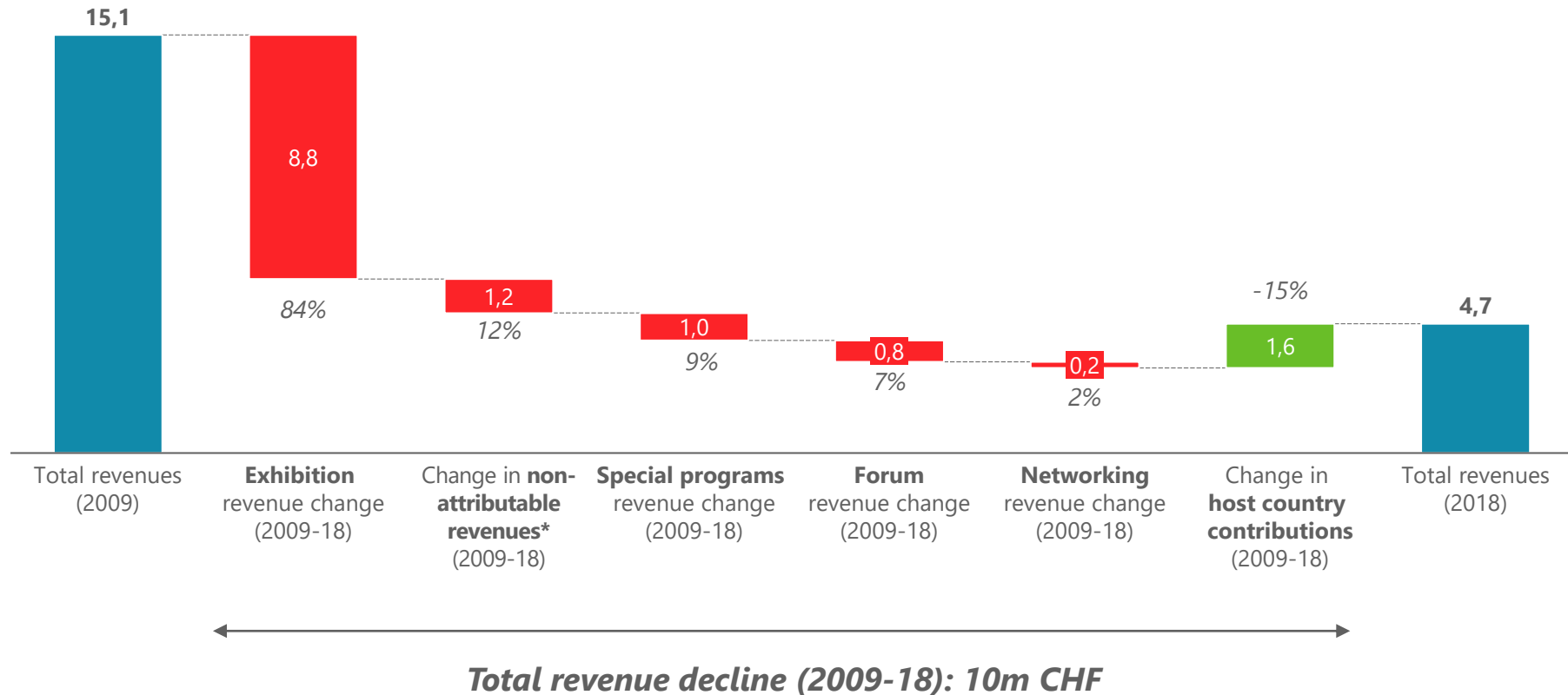
Annex

# Revenues: Revenues have more than halved over the past 10 years, mostly due to the decline in exhibition revenues



## Breakdown of revenue decline between 2009 and 2018, by revenue category

Million CHF, Share (%) in total decline, 2009-2018

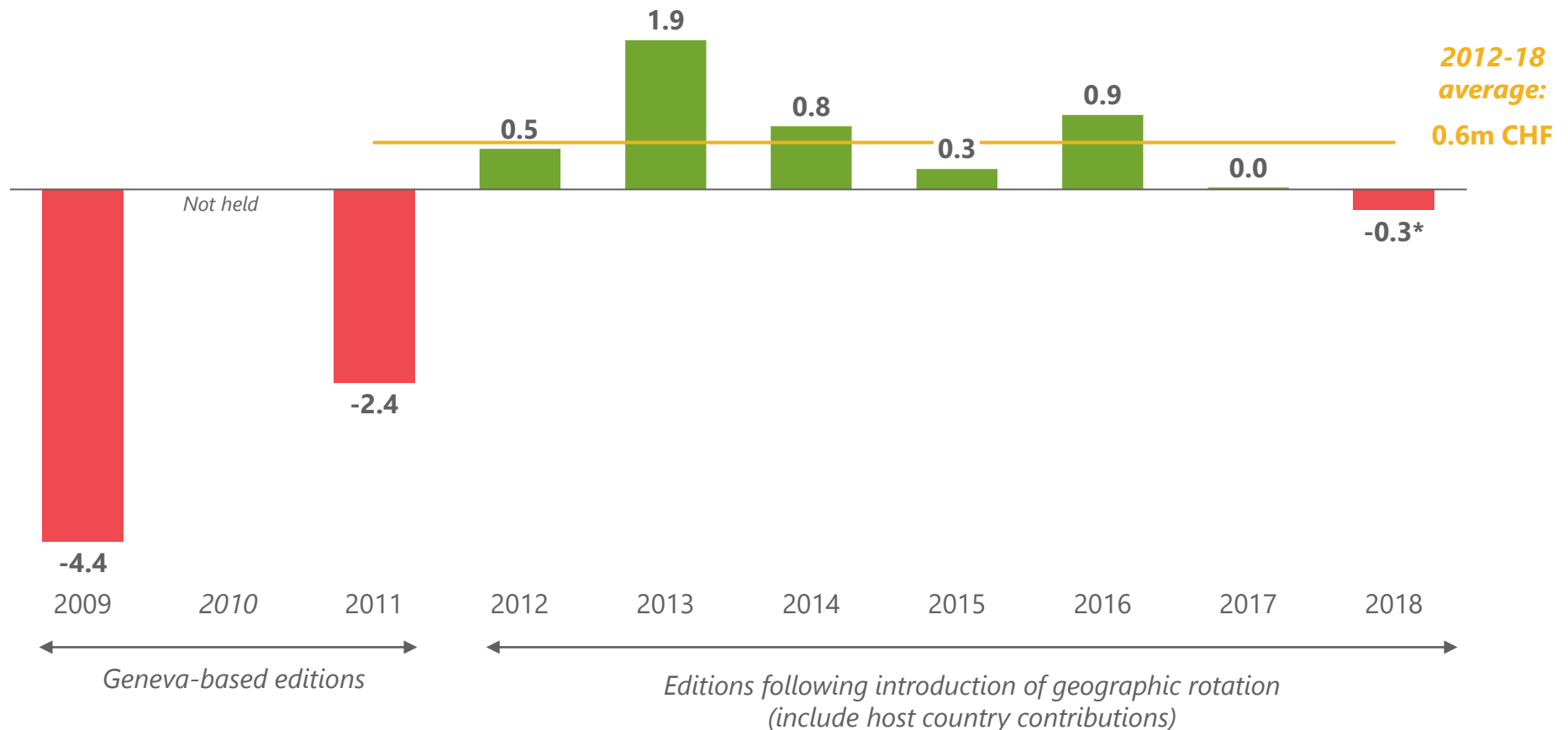


Source: Dalberg analysis

Note: (\*) Revenues that cannot be directly attributed to a specific event component or activity (excluding host country contributions). For example, administrative sponsorships, marketing revenues, financial income

**Operating income:** Since the introduction of host country rotation and contributions, profits have been positive (except in 2018) ↻

**Evolution of ITU Telecom World profits**  
*Million CHF, 2009-2018*



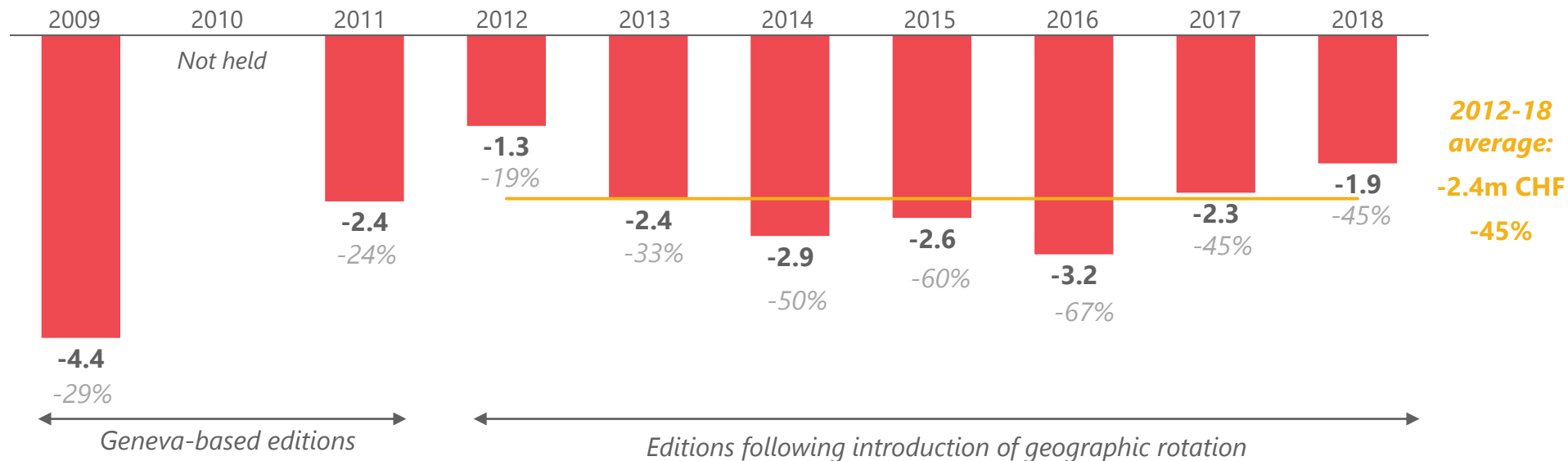
Sources: ITU Telecom financials; Dalberg analysis

Note: Prior to taking into account delayed payments. Corrected results in 2018 (following delayed payments) are ~0.0m CHF

# Net income: Financial contributions from the host country are fundamental to event profitability; in their absence, events report losses of over 2m CHF on average



**Evolution of ITU Telecom World profits and profit margins (excluding host country contributions)**  
*Million CHF, %, 2009-2018*



- **Financial viability of ITU Telecom is highly dependent on contributions from host country... which are increasingly difficult to find.** Few countries bid to host the event (sometimes none), and some withdraw their interest following submission, once aware of host country requirements. In addition, host country contributions have been inconsistent over time (with an overall downward trend), therefore reducing total budget available and adding unpredictability to budget planning
- **Host country also provides in-kind services not reported in the events' financial accounts** (e.g., venue, safety and security services, registration and reception services, in-country advertising and communication, protocol services). If they were reported, net profits would be worse off

# Appendix

Reminder on project context, guiding principles and approach (5 min)

Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)

Summary findings from the strategic and financial review (10 min)

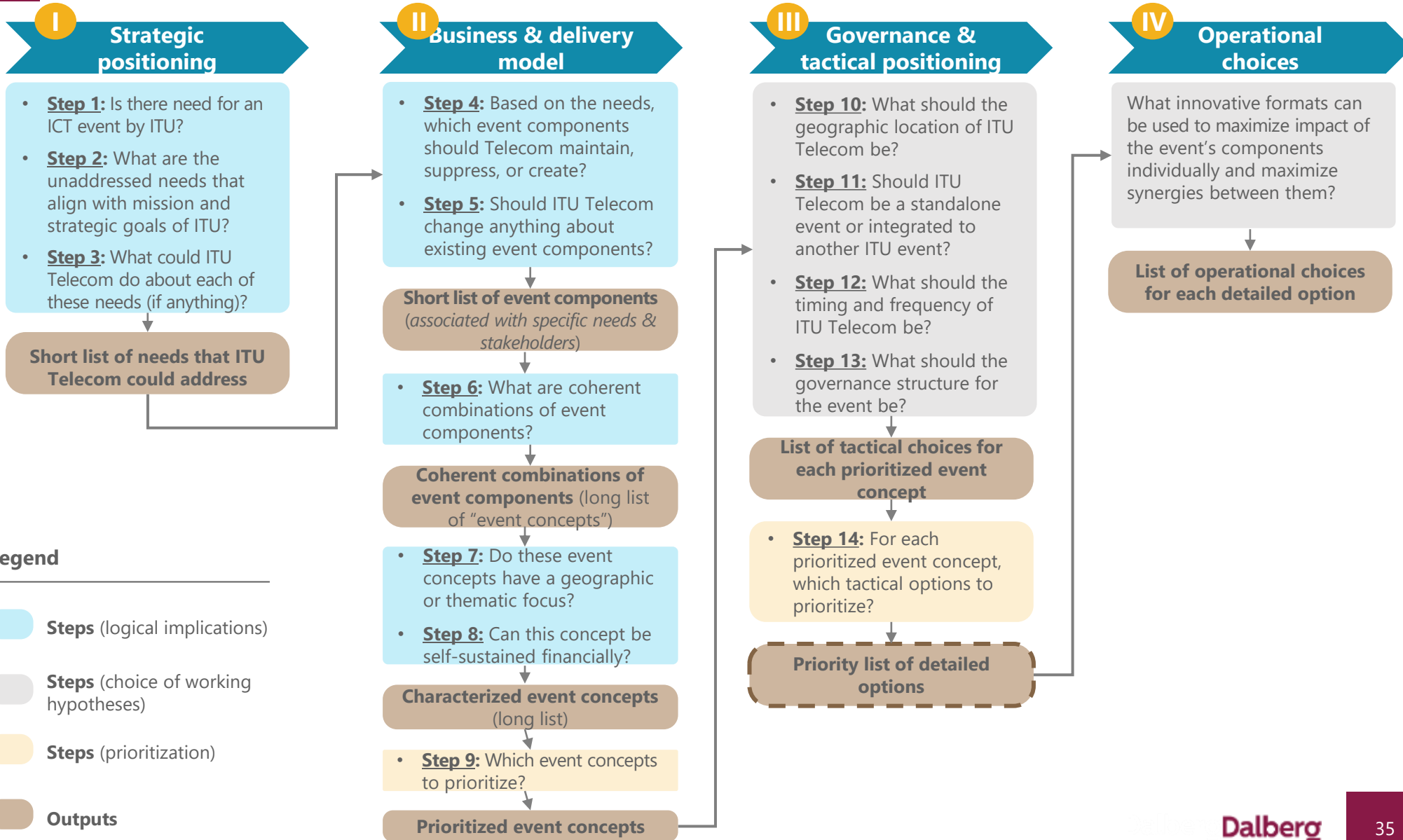
## **Approach for identifying future options (5 min)**

Recommended options (20 min)

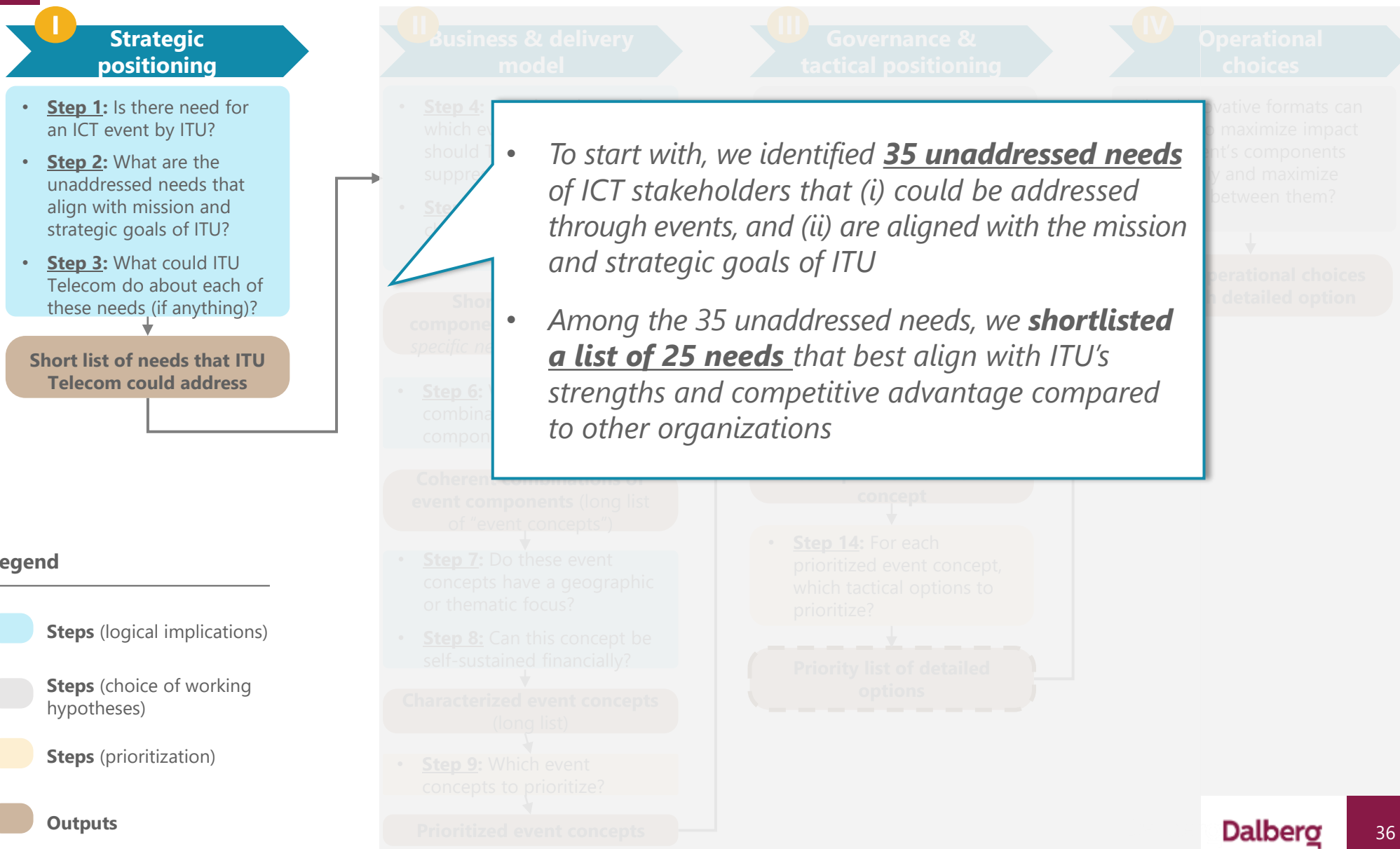
Q&A (10 min)

Annex

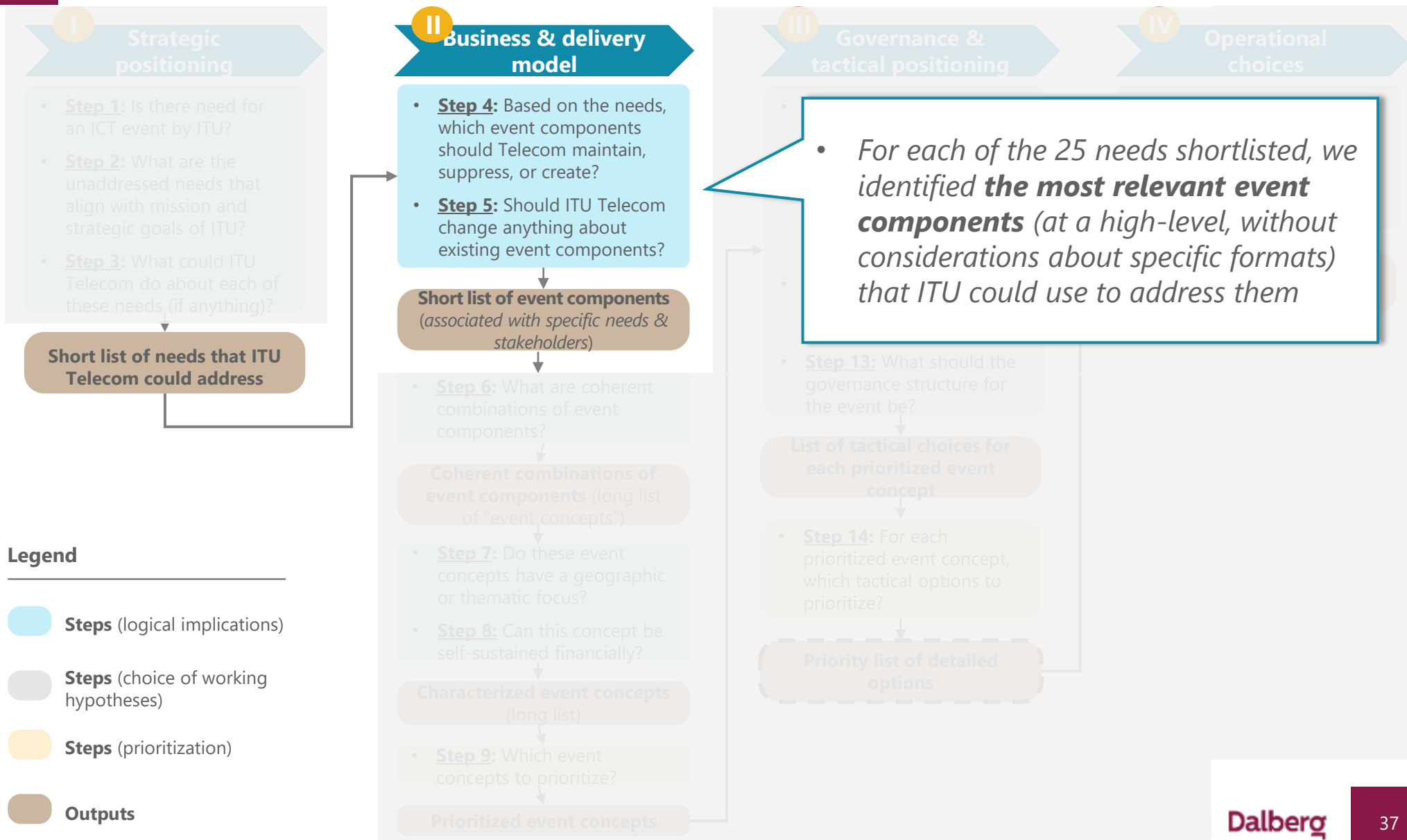
# We used a rigorous and linear decision-making framework to identify, prioritize and qualify potential future options for ITU Telecom



# We started by identifying 35 unaddressed needs, and then shortlisted **25 needs** that ITU could address

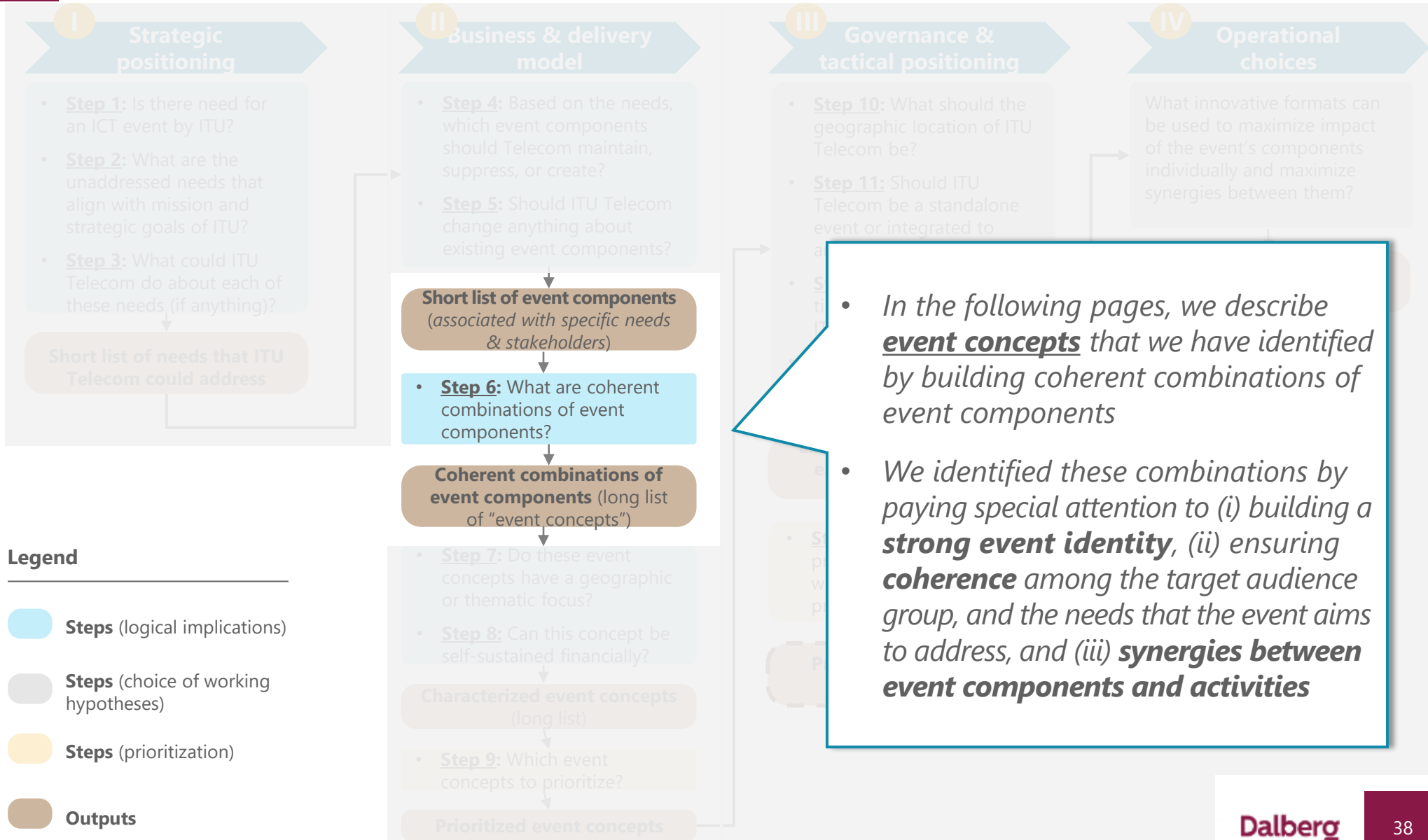


# We then identified **which event components** could address these shortlisted needs



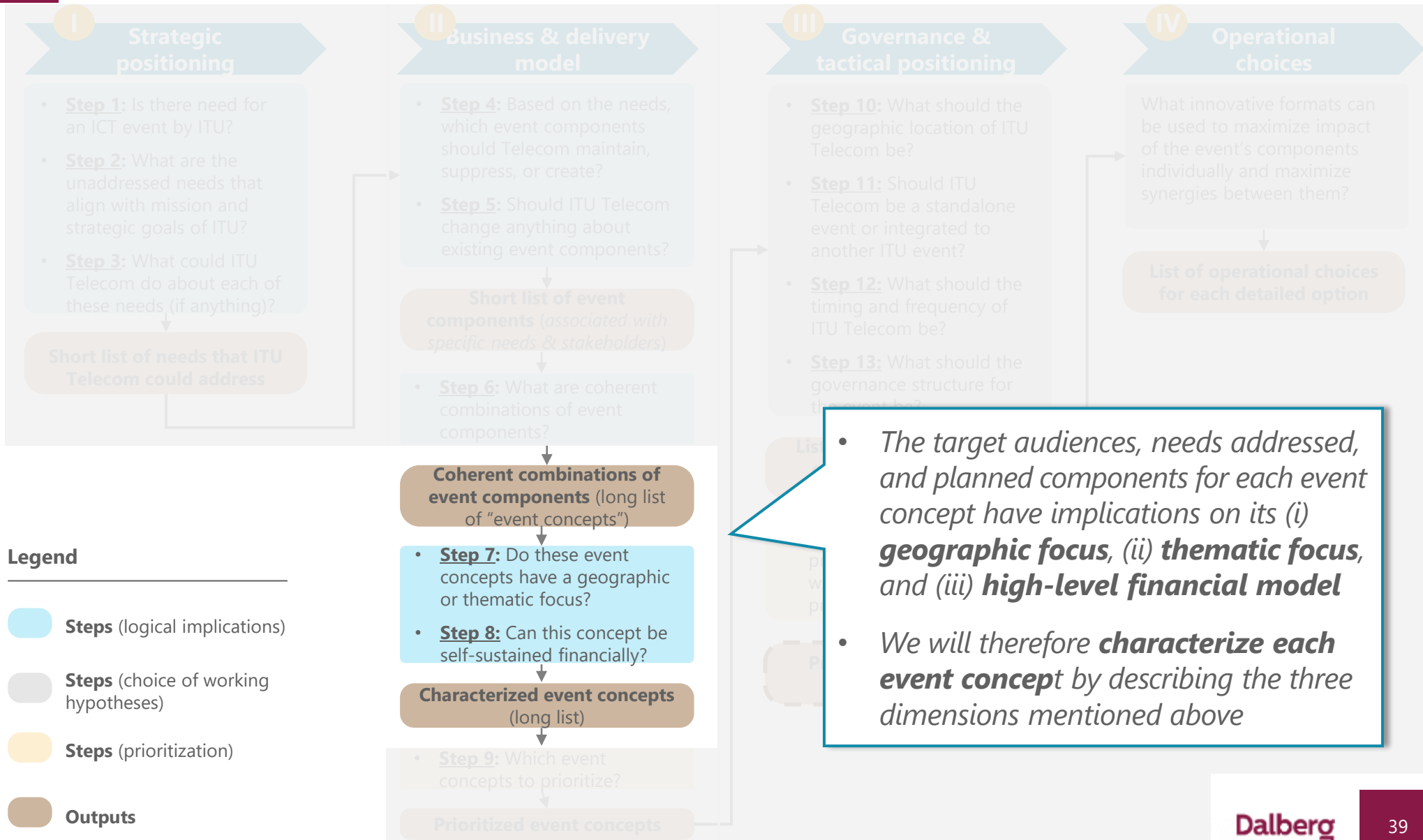
- Legend**
- Steps (logical implications)
  - Steps (choice of working hypotheses)
  - Steps (prioritization)
  - Outputs

# We first identify event concepts based on **coherent combinations of event components**

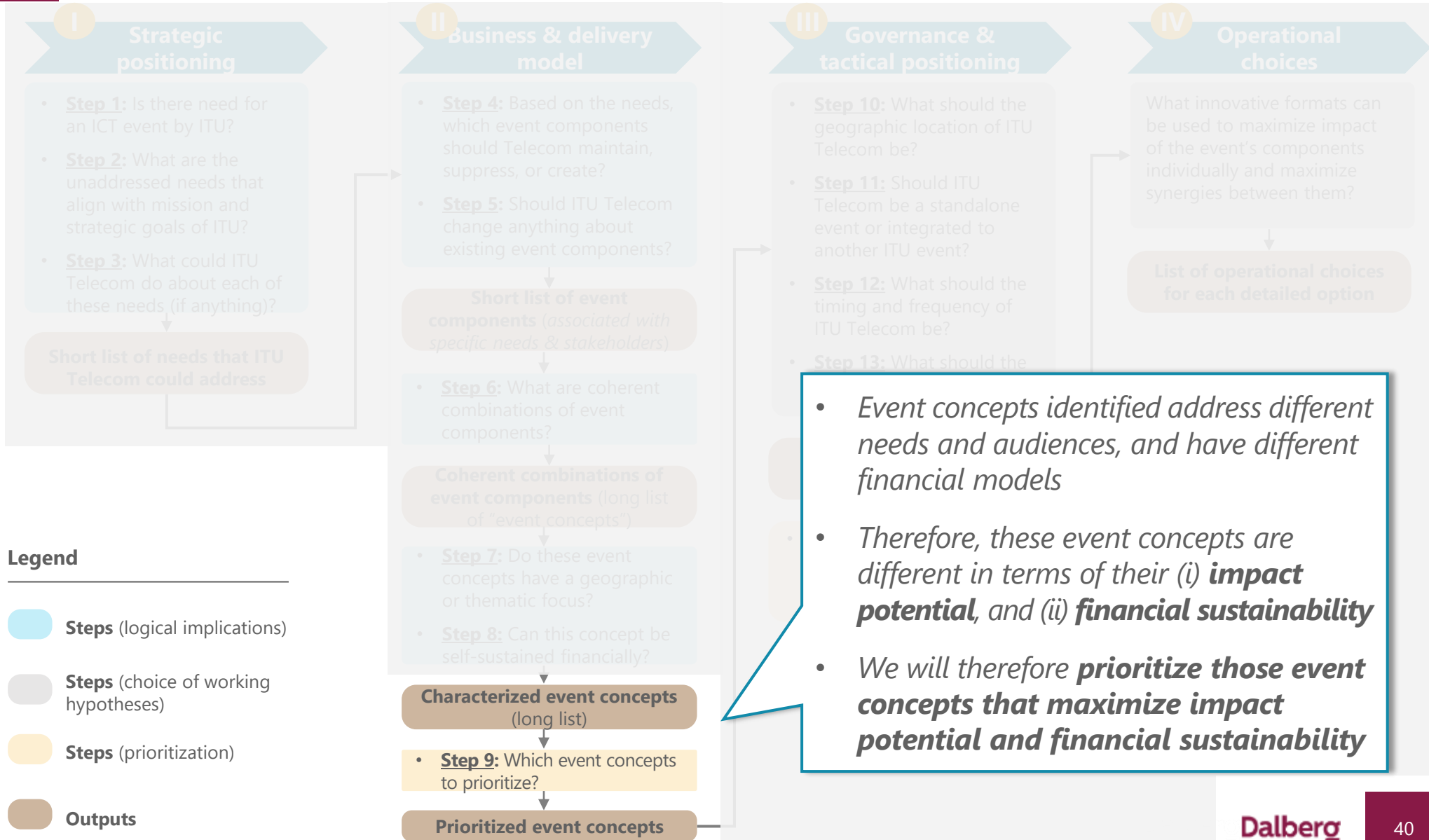




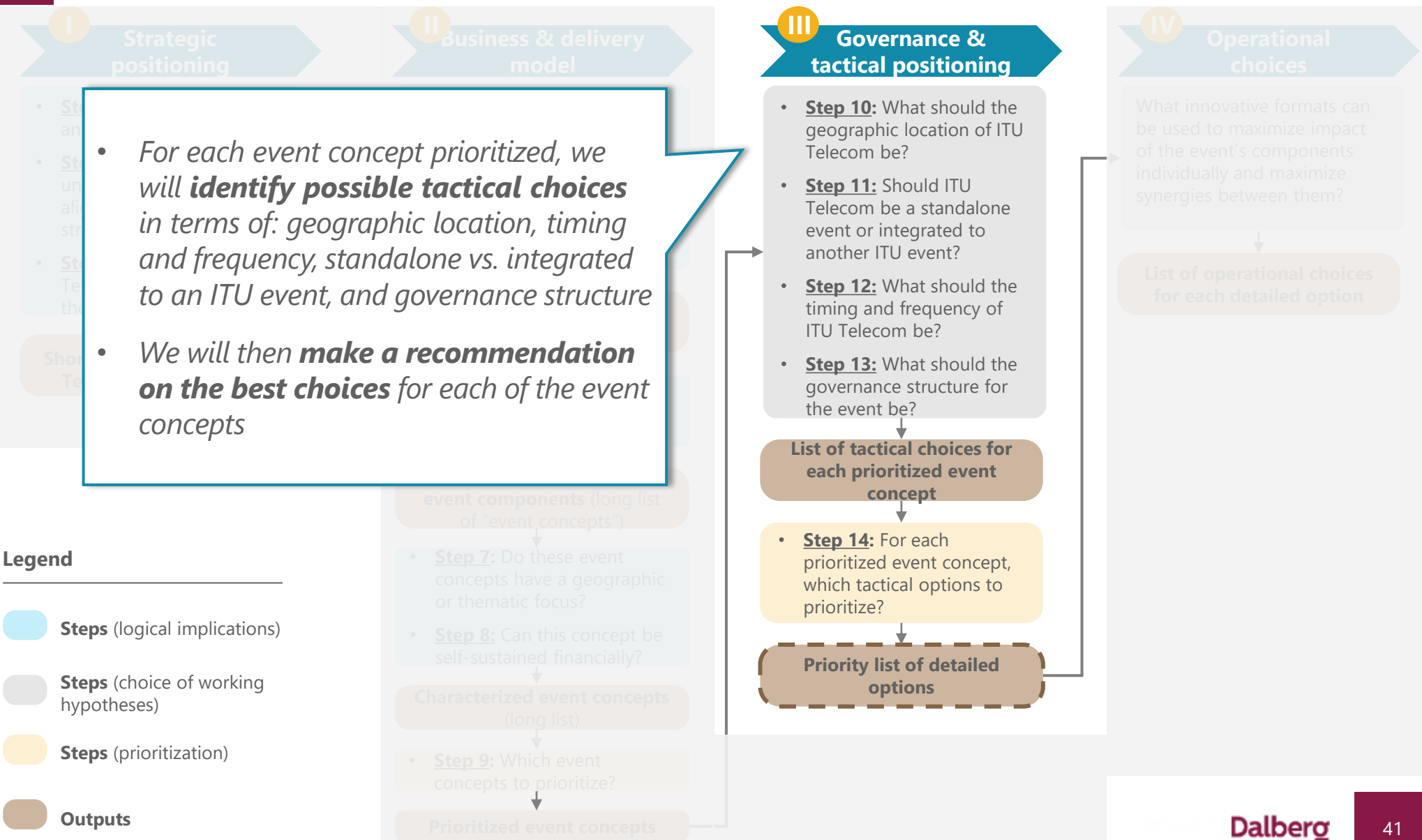
# We then describe the event concepts identified







# Next, we **prioritize a subset of these event concepts** based on our evaluation framework



# For each prioritized concept, we then make **recommendations on tactical choices** (e.g., geographic location, timing, and governance)



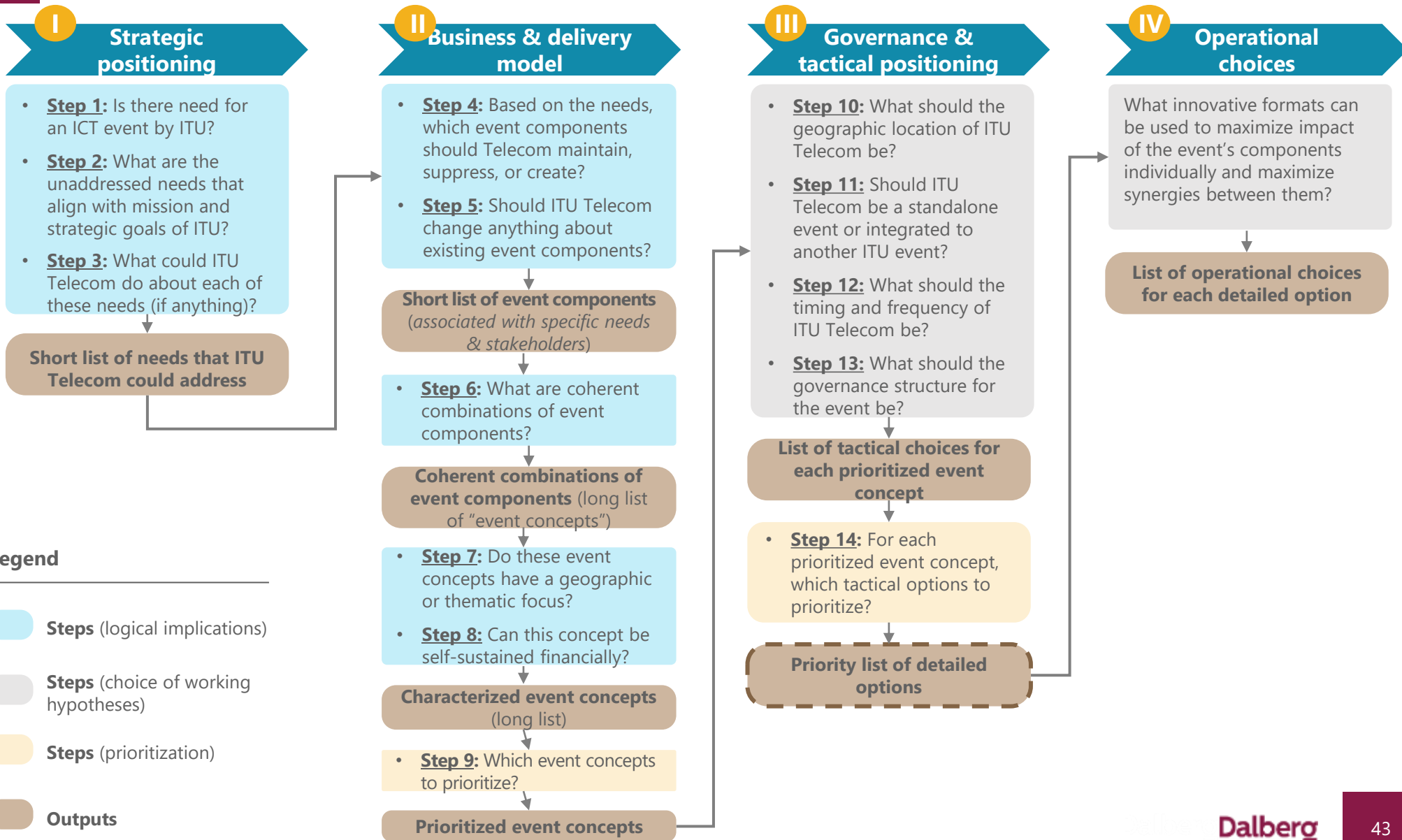
## Legend

-  **Steps** (logical implications)
-  **Steps** (choice of working hypotheses)
-  **Steps** (prioritization)
-  **Outputs**

# Finally, we will provide guidance on the operational choices that can be considered for each of the prioritized concepts



# We used a rigorous and linear decision-making framework to identify, prioritize and qualify potential future options for ITU Telecom



# Appendix

Reminder on project context, guiding principles and approach (5 min)

Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)

Summary findings from the strategic and financial review (10 min)

Approach for identifying future options (5 min)

## **Recommended options (20 min)**

Q&A (10 min)

Annex

We have identified **five potential event concepts**, based on the logical steps of our decision-making guide

A

**Emerging & frontier  
markets ICT event\***

B

**Digital for Development  
event\*** (*developing  
country-focused*)

C

**Digital for Good  
event\***  
(*Global*)

D

**Davos-style ICT forum**

E

**Support program for  
ICT SMEs**

*Details for each event concept are provided in the following pages*

Source: Dalberg analysis

Note: (\*) Event concepts A, B and C have two versions each: one including a forum only, a second one including a forum and an exhibition

# Event concept: Emerging & frontier markets ICT event



**RATIONALE:** Currently, developing countries do not have a dedicated platform to support them in their ICT development journeys, and that specifically address their needs and aspirations. The events that they participate to tend to have a broad audience that is not necessarily interested in engaging in developing country-specific issues, or whose topics are too far off from the learning needs of developing countries

A	Event concept	High-level objective	Target audience	Event components
	<b>Emerging &amp; frontier markets ICT event</b>	This is an event to <b>support developing countries strengthen and grow their local ICT sectors</b> by learning about the latest trends and innovations, understanding the ICT development journeys of peer countries, and communicating emerging needs and risks to drive coordinated action to address them, including through regulation	<ul style="list-style-type: none"> <li>• Governments and regulators from developing countries</li> <li>• International organizations</li> <li>• Corporates (local companies, and regional offices of global companies)</li> </ul>	<p><i>Option 1</i></p> <ul style="list-style-type: none"> <li>• <b>Forum sessions</b> including (i) <b>state of the ICT sector</b> to provide an overview of the latest trends and innovations, (ii) <b>national ICT development journeys</b> to showcase different stages of development in the sector and best practice to support it (e.g., policy and regulation, private sector role, etc.), and (iii) <b>thematic sessions on emerging needs and risks</b> to drive collective and coordinated action on specific ICT areas in a given country or region</li> <li>• <b>Networking activities and spaces</b> to allow all stakeholders involved in the development of local/regional ICT sectors in the target countries to exchange ideas, share opinions, and identify potential partnership opportunities aligned with the agenda of developing local ICT ecosystems</li> <li>• <b>Media interviews with government stakeholders OR a publication</b> to develop profiles of the local ICT sectors in the target countries with a view to develop a landscape of the state of the sector in these countries to communicate needs and showcase success stories</li> </ul> <hr/> <p><i>Option 2</i></p> <ul style="list-style-type: none"> <li>• <b>Forum sessions</b> (same as above)</li> <li>• <b>Networking activities</b> (same as above)</li> <li>• <b>Exhibition of national pavilions</b> of target developing countries to allow them to showcase their local ICT sectors in terms of level of development, key achievements, most critical needs and achievements</li> </ul>

# Event concept: **Digital for Development event** (*developing country-focused*)



**RATIONALE:** The current ICT event landscape offers limited opportunities for key stakeholders in the Digital for Development (D4D) sector to learn about the latest trends, share learnings and experiences, and network to build new partnerships and development programs. Existing ICT4Dev events also tend to be focused on specific technologies and do not offer a comprehensive view of the sector overall.

B	Event concept	High-level objective	Target audience	Event components
	<b>Digital for Development event</b>	This is an event to <b>drive innovation, adoption and use of ICT solutions in support of development objectives of developing countries.</b> It allows all stakeholders active in this sector to (i) learn about the latest trends in technology, policy, and regulation; (ii) showcase their latest technological innovations, programs, initiatives, or policies; and (iii) network to build partnerships around key issues or needs in the sector	<ul style="list-style-type: none"> <li>• Government officials and regulators from developing countries</li> <li>• Bilateral development institutions from developed countries</li> <li>• NGOs and foundations active in D4D</li> <li>• International Organizations active in D4D</li> <li>• Corporates active in D4D</li> <li>• SMEs and social enterprises</li> </ul>	<p><i>Option 1</i></p> <ul style="list-style-type: none"> <li>• <b>Forum sessions</b> including (i) <b>state of the D4D sector</b> thematic discussions to provide an overview of the latest in technology and policy trends; (ii) <b>multi-stakeholder knowledge sharing sessions</b> where governments, NGOs, foundations, social enterprises can showcase their initiatives and share their learnings with the broader community</li> <li>• <b>Networking activities and spaces</b> to allow all stakeholders to exchange ideas, share opinions, and identify potential partnership opportunities</li> <li>• <b>D4D awards</b> to showcase success stories and the social impact stemming from new ICT technologies, as well as allow the participants to attract funding from bilaterals or build partnerships</li> </ul> <p><i>Option 2</i></p> <ul style="list-style-type: none"> <li>• <b>Forum sessions</b> (same as above)</li> <li>• <b>Networking</b> (same as above)</li> <li>• <b>D4D awards</b> (same as above)</li> <li>• <b>Exhibition</b> including i) a section devoted to showcasing new D4D technologies from SMEs and social enterprises; and ii) a section for NGOs, foundation, and IOs to showcase their programs and network with potential partners</li> </ul>

# Event concept: **Digital for Good event (Global)**



**RATIONALE:** ICT events increasingly include Digital for Good (D4Good) themes into their programs; however, these are sometimes marginal within the overall event program and there are close to no events specifically dedicated to D4Good. At the same time, stakeholders (e.g., governments, corporates, NGOs) involved in the global SDG agenda need a platform to increase awareness of technologies available, discuss trends and risks, and identify areas of collaboration and partnership

C	Event concept	High-level objective	Target audience	Event components
<b>Global Digital for Good event</b>	This is an event to <b>drive innovation, adoption and use of ICT solutions for the common global good</b> in support of the SDGs. The event offers to (i) improve collective knowledge and understanding of digital innovations for the common good, and (ii) enable discussions (e.g., on policy and regulation) among D4Good stakeholders (e.g., NGOs, IOs, corporates, governments) with a view to support adoption and scale (when appropriate), and address potential risks	<ul style="list-style-type: none"> <li>• Corporates developing D4Good solutions</li> <li>• Governments and regulators from developed and developing countries</li> <li>• SMEs developing D4Good solutions</li> <li>• NGOs, foundations, and international organizations active in the D4Good sector</li> </ul>	<p><i>Option 1</i></p> <ul style="list-style-type: none"> <li>• <b>Forum sessions</b> including (i) <b>state of the D4Good sector</b> to highlight the most important ICT innovations across all SDGs, (ii) <b>multi-stakeholder experience sharing sessions</b> where governments, NGOs, foundations, corporates, SMEs can showcase how they have developed or adopted specific D4Good solutions, policies or regulations</li> <li>• <b>Networking activities and spaces</b> to allow all stakeholders to exchange ideas, share opinions, and identify potential partnership opportunities to develop, adopt, or scale D4Good solutions</li> <li>• <b>D4Good awards</b> to showcase success stories and the social impact stemming from new ICT technologies</li> </ul> <p><i>Option 2</i></p> <ul style="list-style-type: none"> <li>• <b>Forum sessions</b> (<i>same as above</i>)</li> <li>• <b>Networking activities and spaces</b> (<i>same as above</i>)</li> <li>• <b>D4Good awards</b> (<i>same as above</i>)</li> <li>• <b>Exhibition</b> to showcase D4Good solutions by large corporates, SMEs, and potentially NGOs – potentially organized by SDG tracks (e.g., health, nutrition, climate, education, gender)</li> </ul>	

# Event concept: Davos-style ICT forum

**RATIONALE:** There is increasing need for international cooperation on the societal implications of ICT applications in various fields. While many events or working groups allow these discussions to happen at a regional level, there are few global platforms that create space for senior decision-makers from around the world to identify and discuss emerging societal risks related to ICT technology, with a view to encourage coordinated action (e.g., through regulation) to address them

D	Event concept	High-level objective	Target audience	Event components
	<b>Davos-style ICT forum</b>	This is an event <b>bringing together global shapers of the ICT sector</b> including governments, the private sector, international organizations, and NGOs <b>to discuss the most pressing societal issues</b> related to ICT, <b>shape global regulation</b> for the sector, and <b>support coordinated action</b>	<ul style="list-style-type: none"> <li>• Governments (senior representatives)</li> <li>• Large corporates (public affairs representatives)</li> <li>• International organizations</li> <li>• NGOs and foundations (senior representatives)</li> <li>• Working groups and experts</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Forum sessions</b> including (i) <b>keynotes and presentations on the state of the global sector</b> to allow all stakeholders to take stock of the current state of technological innovation in different fields of ICT, (ii) <b>panels and roundtables on societal risks</b> to discuss emerging risks (e.g., data privacy, cybersecurity, discrimination and bias, open and free information), (iii) <b>panels and roundtables to discuss best practices and solutions</b> (particularly coordinated action and partnerships) to address these risks, e.g., from a regulation and policy-making perspective</li> <li>• <b>Networking activities and spaces</b> to allow interactions between different types of stakeholders (e.g., government-international organizations, government-corporate, government-government) on the margins of the forum sessions or through dedicated sessions</li> </ul>

# Event concept: **Support program for ICT SMEs** *(from developing countries)*

**RATIONALE:** SMEs are important players in the ICT ecosystems of developing countries, as they contribute to ICT innovation and technology adoption. However, they lack access to information about the latest trends and developments in their respective sectors, have few opportunities to express their needs and aspirations to other stakeholders who could support them (e.g., development actors, local governments)

E	Event concept	High-level objective	Target audience	Event components
	<p><b>Support program for ICT SMEs in developing countries</b></p>	<p>This is an event to <b>help ICT SMEs from developing countries (i) learn</b> about the latest trends and developments in the sector(s), <b>(ii) get coaching</b> on specific areas related to their growth and development, and <b>(iii) share concerns and needs</b> with the broader community (especially governments and development actors)</p>	<ul style="list-style-type: none"> <li>ICT SMEs of developing countries</li> </ul>	<ul style="list-style-type: none"> <li><b>SME program</b> including:               <ul style="list-style-type: none"> <li><b>Keynote speeches and presentations</b> by experts and sector specialists/executives to share knowledge about the latest trends, developments, and innovations in the sector</li> <li><b>Panels and discussions</b> led by SME executives (e.g., CEOs) to share experiences on relevant topics (e.g., technology adoption, innovation, business growth, market entry, talent, government relations, etc.)</li> <li><b>Coaching sessions</b> on specific areas of need of ICT SMEs in developing countries (e.g., how to engage with governments, development actors)</li> </ul> </li> <li><b>Publication or communication by ITU to relevant stakeholders</b> (e.g., regional governments, development organizations) to share findings and learnings from the SME program and, in particular, provide insight on the challenges faced by ICT SMEs, their unaddressed needs, and how governments and other stakeholders could provide support to address these</li> </ul>

## Evaluation framework: We evaluated these event concepts based on three criteria

Evaluation criterion	Question answered	Evaluation outcomes	Evaluation sub-criteria
<b>Value proposition</b>	<i>How likely is it that the event will attract and retain the target stakeholders?</i>	<ul style="list-style-type: none"> <li>• <b>High</b> likelihood</li> <li>• <b>Moderate</b> likelihood</li> <li>• <b>Low</b> likelihood</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Ability of ITU to <u>attract</u></b> each target stakeholder category</li> <li>• <b>Ability of ITU to <u>retain</u></b> each target stakeholder category</li> </ul>
<b>Impact potential</b>	<i>What is the level of impact the event could achieve based on ITU's Strategic Goals?</i>	<ul style="list-style-type: none"> <li>• <b>High</b></li> <li>• <b>Moderate</b></li> <li>• <b>Low</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Relevance to ITU Strategic Goals</b> – alignment of the event concept with the Union's Strategic Goals</li> <li>• <b>Urgency of action</b> – urgency of the needs addressed to the target beneficiaries</li> </ul>
<b>Financial sustainability</b>	<i>How sustainable is the event's business model in the long term?</i>	<ul style="list-style-type: none"> <li>• <b>High</b></li> <li>• <b>Moderate</b></li> <li>• <b>Low</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Dependency on external funders</b> – <i>criteria relevant for subsidized events</i></li> <li>• <b>Predictability of revenues</b> – <i>criteria relevant for self-sustained events</i></li> </ul>

# This evaluation framework allowed to prioritize 3 event concepts

Detailed assessment for each event concept across the three dimensions in [appendix](#)

Event concepts		Value proposition	Impact potential	Financial sustainability
A.1	Emerging & frontier markets ICT event - forum only	High	High	Medium
A.2	Emerging & frontier markets ICT event - forum and exhibition	High	High	Low
B.1	Digital for Development event (developing country-focused) - forum only	High	High	Medium
B.2	Digital for Development event (developing country-focused) - forum & exhibition	High	High	Low
C.1	Global Digital for Good event - forum only	Medium	High	Medium
C.2	Global Digital for Good event - forum and exhibition	Medium	High	Medium to high
D	Davos-style ICT forum	Low	Medium	Medium
E	Support program for ICT SMEs from developing countries	Medium	Medium	Medium

Legend: ■ Low ■ Medium ■ High   Prioritized concepts

# Each prioritized concept was qualified at the tactical level (1/3)

## *Emerging & frontier markets ICT event – forum only*

Areas of tactical choice	Potential options	Recommendation	Rationale of recommendation
<b>Geographic location</b>	<ul style="list-style-type: none"> <li>Fixed global location</li> <li>Rotating location within developing countries and emerging markets</li> </ul>	<ul style="list-style-type: none"> <li><b>Rotating location</b> within developing countries and emerging markets</li> </ul>	<i>Countries of the same region may face similar challenges in developing their ICT sectors. Holding the event in the targeted regions (e.g., Sub-Saharan Africa, Asia) would increase attendance given ease of access and improve financial sustainability by preventing costs of travel to a global location</i>
<b>Standalone vs. merged or combined</b>	<ul style="list-style-type: none"> <li>Standalone</li> <li>Merge with Regional Development Forums for developing regions (e.g., Africa, Asia)</li> <li>Combine with Regional Development Forums for developing regions (e.g., Africa, Asia)</li> </ul>	<ul style="list-style-type: none"> <li>Combine with <b>Regional Development Forums</b> for developing regions</li> </ul>	<i>Every year, ITU-D organizes Regional Development Forums (RDF) in each of ITU's regions. These forums gather decision-makers from Sector Members and Member States at the regional level (and are open to other regional stakeholders), and aim to discuss various matters related to ICT development in the region. ITU could consider enhancing the reach and impact of Regional Development Forums in developing regions and combining them with larger regional events specifically tailored to the ICT development needs of developing countries in those regions</i>
<b>Timing &amp; frequency</b>	<ul style="list-style-type: none"> <li>Align on the timing of Regional Development Forums</li> </ul>	<ul style="list-style-type: none"> <li>Align on the <b>timing of Regional Development Forum</b></li> </ul>	<i>If ITU combines RDF editions focused on developing regions with the proposed event concept ("Emerging &amp; frontier markets ICT event"), the timings of these events need to be aligned</i>
<b>Governance structure</b>	<ul style="list-style-type: none"> <li>Managed by a partnership between Telecom Secretariat and team in charge of the Regional Development Forums</li> </ul>	<ul style="list-style-type: none"> <li><b>Managed by a partnership</b> between Telecom Secretariat and ITU-D</li> </ul>	<i>RDF editions focused on developing regions can be managed in conjunction by ITU Telecom Secretariat and ITU-D</i>

# Each prioritized concept was qualified at the tactical level (2/3)

## *Digital for Dev event (developing country-focused) – forum only*

Areas of tactical choice	Potential options	Recommendation	Rationale of recommendation
<b>Geographic location</b>	<ul style="list-style-type: none"> <li>Fixed global location</li> <li>Rotating location within developing countries and emerging markets</li> </ul>	<ul style="list-style-type: none"> <li><b>Fixed global location</b> (e.g., Geneva)</li> </ul>	<i>Digital applications in the development sector are relevant to all developing countries and regions, and there is little variability or specificity based on regions. In addition, there is value in bringing stakeholders from various developing regions to learn from each other rather than have regional editions. A fixed global location would also contribute to consolidating the event's brand and therefore attract global development actors active in the Digital 4 Dev sector</i>
<b>Standalone vs. merged or combined</b>	<ul style="list-style-type: none"> <li>Combine with WSIS</li> <li>Merge with WSIS</li> </ul>	<ul style="list-style-type: none"> <li><b>Combine or merge with WSIS</b></li> </ul>	<i>The WSIS Forum, organized by ITU alongside other UN organizations, is considered to be the “<b>world’s largest annual gathering of the ICT for development community</b>” and brings together stakeholders from public and private sectors to discuss and learn about ICT for the SDGs. As a result, the proposed event concept (focused on developing countries) can take the format of a track or set of event activities dedicated to ICT applications for supporting the development agenda of developing countries specifically</i>
<b>Timing &amp; frequency</b>	<ul style="list-style-type: none"> <li>Flexible timing &amp; frequency</li> <li>Align on timing &amp; frequency of WSIS</li> </ul>	<ul style="list-style-type: none"> <li>Align on <b>timing &amp; frequency</b> of WSIS</li> </ul>	<i>The timing of the Digital for Development event needs to be coordinated with and aligned on the timing of WSIS</i>
<b>Governance structure</b>	<ul style="list-style-type: none"> <li>Managed by a partnership between Telecom Secretariat and other ITU team (e.g., in charge of WSIS)</li> </ul>	<ul style="list-style-type: none"> <li><b>Managed by a partnership</b> between Telecom Secretariat and ITU GS</li> </ul>	<i>ITU Telecom can partner with the ITU team in charge of organizing WSIS in order to develop a developing country-specific track or set of activities. Given its close relationship and experience working with developing countries, ITU-D could also be part of the ITU team in charge of organizing these activities</i>

# Each prioritized concept was qualified at the tactical level (3/3)

## *Global Digital for Good event – forum and exhibition*

Areas of tactical choice	Potential options	Recommendation	Rationale of recommendation
<b>Geographic location</b>	<ul style="list-style-type: none"> <li>Fixed global location</li> </ul>	<ul style="list-style-type: none"> <li><b>Fixed global location</b> (e.g., Geneva)</li> </ul>	<p><i>The Digital for Good concept is a global event with no geographic focus. It aims to bring global stakeholders in the Digital for Good sector. Therefore, a fixed location with ability to attract a large size of participants from all over the world would be the most optimal geographic location</i></p>
<b>Standalone vs. merged or combined</b>	<ul style="list-style-type: none"> <li>Combine with AI for Good Global Summit</li> <li>Merge with AI for Good Global Summit</li> <li>Combine with WSIS</li> <li>Merge with WSIS</li> <li>Merge with AI for Good and WSIS</li> </ul>	<ul style="list-style-type: none"> <li><b>Merge</b> (or combine) <b>with AI for Good Global Summit</b>, and/or <b>WSIS</b></li> </ul>	<p><i>ITU-T organizes the AI for Good Global Summit alongside other UN agencies. This event focuses on AI in particular and its applications for the global common good (the SDGs). Therefore, the AI for Good Global Summit could be seen as a subset (or one component) of a larger event dedicated to all types of ICT innovations (not only AI) for the SDGs. At the same time, ITU also organizes the WSIS Forum alongside other UN agencies with a view to discuss and learn about ICT for the SDGs. As such, ITU could consider integrating the AI for Good Global Summit and the WSIS Forum into a larger event concept dedicated to digital for good, including both a forum and an exhibition</i></p>
<b>Timing &amp; frequency</b>	<ul style="list-style-type: none"> <li>Flexible timing &amp; frequency</li> <li>Align on timing &amp; frequency of AI for Good Global Summit or WSIS</li> </ul>	<ul style="list-style-type: none"> <li><b>Align on timing &amp; frequency of AI for Good Global Summit</b> or <b>WSIS</b></li> </ul>	<p><i>ITU could organize the broader Digital for Good event at the same period of the year and with the same frequency as it currently does for either the AI for Good Global Summit or the WSIS Forum. It is worth noting that the two editions take place at around the same time of the year (May and April respectively) and both have annual frequency</i></p>
<b>Governance structure</b>	<ul style="list-style-type: none"> <li>Managed by a partnership between Telecom Secretariat and other ITU stakeholders</li> </ul>	<ul style="list-style-type: none"> <li><b>Managed by a partnership</b> covering the Union</li> </ul>	<p><i>The global ITU event on Digital for Good can be managed by a partnership of ITU bodies (including relevant Bureaus), where ITU Telecom would bring specific expertise in organizing exhibitions</i></p>

# Financial outlook: Our analysis shows that the **Digital for Good** global event could be profitable, while the other two prioritized event concepts are more likely to require subsidization

**A.1** Emerging & frontier markets  
ICT event - forum only

**B.1** Digital for Development event  
(developing country-focused) - forum only

**C.2** Global Digital for Good event  
- forum and exhibition

	~0.6m CHF	~1.6m CHF	~18m CHF
<b>REVENUES</b>	<i>This regional event concept relies quasi-exclusively on sponsorships, and contributions from a host country. This is based on an assumption of sponsorships amounting to +300k CHF (~50% of total) and host country contributions (250k CHF, 40%)</i>	<i>Forum is the main source of revenues (0.8m CHF, ~50% of total) mostly from sponsorships (0.5m CHF based on 10 sponsorships at 50k CHF each) and admission fees (0.3m CHF based on sales of 20 premium passes at 3,000 CHF and 150 basic passes at 1,500 CHF) followed by different types of sponsorships (~0.8m CHF in total) including admin and non-activity related sponsorships (0.3m CHF) and networking activities sponsorships (0.25m CHF) among others</i>	<i>Exhibition is the main source of revenues (14m CHF, +75% of total) mostly from exhibition fees, based on an assumption of 90 exhibitors (70 raw space, 20 turnkey), 100-150 m2 rented on average, and 800 CHF/m2 for raw space and 2,000 CHF/m2 for turnkey stands. Forum revenues are second largest revenue source (3m CHF, 18%) based on ~2m CHF in sponsorships and 1m CHF in admission fees (50 premium passes at 5,000 CHF and 500 basic passes at 2,000 CHF)</i>
<b>COSTS*</b>	~2.6m CHF <i>Admin costs are the largest cost category (1.6m CHF, 63%) mostly from permanent staff salaries and benefits (1m CHF based on 10 staff) and ITU cost recovery (0.5m CHF). Venue costs are second largest (~0.5m CHF, 18%) mostly due to venue rental (0.2m CHF based on 1,000 m2 total size and 200 CHF/m2 cost), tech and production (0.1m CHF) and on-site services (0.1m CHF)</i>	~5.6m CHF <i>Admin costs are the largest cost category (2.6m CHF, 46%) mostly from permanent staff salaries and benefits (1.5m CHF based on 15 staff) and ITU cost recovery (0.75m CHF). Venue costs are second largest (1.3m CHF, 24%) mostly due to venue rental (0.6m CHF based on 2,000 m2 total size and 300 CHF/m2 cost), tech and production (0.4m CHF) and on-site services (0.2m CHF)</i>	~17m CHF <i>Venue costs are the largest cost category (6m CHF, 37%) mostly from rental (4.5m CHF based on 15,000 m2 total size and 300 CHF/m2 cost), tech and production (0.7m CHF) and on-site services (0.5m CHF). Admin costs are second largest (~6m CHF, 36%) mostly due to permanent staff salaries (3m CHF based on 30 staff), temporary staff (1m CHF), and ITU cost recovery (1.5m CHF)</i>
<b>PRO FITS</b>	<b>-2m CHF</b> (DIRECTIONAL)	<b>-4m CHF</b> (DIRECTIONAL)	<b>~1m CHF</b> (DIRECTIONAL)

## KEY METHODOLOGICAL NOTES:

- 1) These revenue and cost estimates should not be compared to the current financial performance of ITU Telecom World given the structural differences in positioning, value proposition and scale (especially for the exhibition).
- 2) These financial profiles are "steady state" estimates for each event concept, that do not reflect the ramp-up period that will take place before the event concept reaches maturity.

## ADDITIONAL METHODOLOGICAL NOTES:

- 1) Estimates are based on high-level assumptions by Dalberg. These will have to be refined and tested in a potential Phase 2 prior to confirming financial profile of the event concepts.
- 2) Costs are estimated for standalone event concepts, not taking potential combination or merger with other ITU events. Such possibilities could increase event profitability thanks to revenue/cost synergies.

Source:  
Dalberg  
analysis

# Financial outlook: Sensitivity analyses, particularly on revenues, strongly suggest to test further the appetite from potential exhibitors

## A.1 Emerging & frontier markets ICT event - forum only

Low case

High case

## B.1 Digital for Development event (developing country-focused) - forum only

Low case

High case

## C.2 Global Digital for Good event - forum and exhibition

Low case

High case

	0.5m CHF	0.7m CHF	1.4m CHF	1.9m CHF	14m CHF	22m CHF
REVENUES	<ul style="list-style-type: none"> <li><b>Sponsorships:</b> 6 (vs. 9 in base case)</li> </ul>	<ul style="list-style-type: none"> <li><b>Sponsorships:</b> 11 (vs. 9 in base case)</li> </ul>	<ul style="list-style-type: none"> <li><b>Sponsorships:</b> 15 (vs. 19 in base case)</li> </ul>	<ul style="list-style-type: none"> <li><b>Sponsorships:</b> 23 (vs. 19 in base case)</li> </ul>	<ul style="list-style-type: none"> <li><b>Number of exhibitors:</b> 63 (vs. 90 in base case)</li> </ul>	<ul style="list-style-type: none"> <li><b>Number of exhibitors:</b> 108 (vs. 90 in base case)</li> </ul>
COSTS	<p>Similar to base case</p> <ul style="list-style-type: none"> <li><b>Admin:</b> 10 staff members at 100k CHF on average; 0.5m CHF cost recovery</li> <li><b>Venue:</b> 1,000 m2 at 200 CHF/m2</li> </ul>	<p>5% reduction in all costs thanks to synergies with partner ITU events</p>	<p>Similar to base case</p> <ul style="list-style-type: none"> <li><b>Admin:</b> 15 staff members at 100k CHF on average; 0.75m CHF cost recovery</li> <li><b>Venue:</b> 2,000 m2 at 300 CHF/m2</li> </ul>	<p>5% reduction in all costs thanks to synergies with partner ITU events</p>	<p>Similar to base case</p> <ul style="list-style-type: none"> <li><b>Admin:</b> 30 staff members at 100k CHF on average; 1.5m CHF cost recovery</li> <li><b>Venue:</b> 17,000 m2 at 300 CHF/m2</li> </ul>	<p>5% reduction in all costs thanks to synergies with partner ITU events</p>
PRO FITS	<b>-2.1m CHF</b>	<b>-1.7m CHF</b>	<b>-4.3m CHF</b>	<b>-3.5m CHF</b>	<b>-3.2m CHF</b>	<b>5.5m CHF</b>

Notes: (\*) Only main assumptions are shown on the table; (\*\*) Sensitivities are based on -30% reduction for most important revenue drivers (for low cases) and +20% for high cases

### KEY METHODOLOGICAL NOTES:

- 1) **These revenue and cost estimates should not be compared to the current financial performance of ITU Telecom World given the structural differences in positioning, value proposition and scale (especially for the exhibition).**
- 2) **These financial profiles are "steady state" estimates for each event concept, that do not reflect the ramp-up period that will take place before the event concept reaches maturity.**

### ADDITIONAL METHODOLOGICAL NOTES:

- 1) Estimates are based on high-level assumptions by Dalberg. These will have to be refined and tested in a potential Phase 2 prior to confirming financial profile of the event concepts.
- 2) Costs are estimated for standalone event concepts, not taking potential combination or merger with other ITU events. Such possibilities could increase event profitability thanks to revenue/cost synergies.

Source: Dalberg analysis

# Risks: Prioritized event concepts present different risk profiles

## A.1 Emerging & frontier markets ICT event - forum only

## B.1 Digital for Development event (developing country-focused) - forum only

## C.2 Global Digital for Good event - forum and exhibition

	A.1 Emerging & frontier markets ICT event - forum only	B.1 Digital for Development event (developing country-focused) - forum only	C.2 Global Digital for Good event - forum and exhibition
Value Proposition	<ul style="list-style-type: none"> <li>• <b>Impossibility to partner with existing ITU events</b> (e.g., Regional Development Forums) preventing the implementation of proposed concept. An additional standalone event would not necessarily succeed given the already crowded ITU event agenda, which would lead to internal competition for event participants</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Impossibility to partner with existing ITU events</b> (e.g., WSIS) preventing the implementation of the prioritized concept</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Impossibility to partner with existing ITU events</b> (e.g., WSIS, AI for Good) leading to a crowded ITU event agenda related to digital for global good, and internal competition over participants and financial resources</li> <li>• <b>Competition from private global events</b> given increasing interest from global private events to include digital for good components</li> </ul>
Impact	<ul style="list-style-type: none"> <li>• <b>Inability to attract change agents (e.g., senior stakeholders from local public sector)</b> with ability to use learnings and interactions from the event and apply them to achieve intended impact (advancing ICT sector development locally)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Inability to attract change agents</b> (e.g., senior stakeholders from local public sectors, international development organizations)</li> <li>• <b>Inability to foster sustained commitment through post-event collaboration</b> between stakeholders present at the event</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Inability to attract change agents</b> (e.g., senior stakeholders from large companies active in digital for good)</li> <li>• <b>Inability to foster commitment through post-event collaboration</b> between stakeholders present at the event</li> </ul>
Financial sustainability	<ul style="list-style-type: none"> <li>• <b>Inability to attract sponsors</b> would affect financial sustainability of the event (given dependence on sponsors as sources of revenue) and further increase reliance on ITU budget to finance the event</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Inability to attract sponsors</b> would affect financial sustainability of the event (given dependence on sponsors as sources of revenue) and further increase reliance on ITU budget to finance the event</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Inability to secure a high number of exhibitors</b> (particularly from the private sector) due to competition from other events, which would put financial profitability at risk</li> </ul>

# Risks: Some of these risks can be reduced through appropriate mitigation

## A.1 Emerging & frontier markets ICT event - forum only

## B.1 Digital for Development event (developing country-focused) - forum only

## C.2 Global Digital for Good event - forum and exhibition

	A.1 Emerging & frontier markets ICT event - forum only	B.1 Digital for Development event (developing country-focused) - forum only	C.2 Global Digital for Good event - forum and exhibition
Value Proposition	<ul style="list-style-type: none"> <li>• <b>Articulate a clear rationale for partnership with target ITU events</b> particularly in terms of (i) increased impact aligned with the mission and objectives of the Union, (ii) cost efficiency of development budgets and Member State investments, (iii) optimization of the ITU event agenda</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Articulate a clear rationale for partnership with target ITU events</b> for increased impact cost efficiency, and agenda optimization</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Articulate a clear rationale for partnership with target ITU events</b> for increased impact cost efficiency, and agenda optimization</li> <li>• <b>Build a strong and distinctive event identity and brand</b> focused on “digital for good” with clear differentiation with other events</li> </ul>
Impact	<ul style="list-style-type: none"> <li>• <b>Use ITU networks to attract target participants</b> (e.g., through ITU’s regional presence) and articulate a compelling value proposition for their presence</li> <li>• <b>Build relationships with target institutions</b> (e.g., local regulation authorities, telco’s)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Use ITU networks and build relationships with target institutions</b> (e.g., development organizations active in digital for development, ministries in target sectors)</li> <li>• <b>Support post-event follow-up between stakeholders;</b> for example, putting in place working groups on specific areas (e.g., ed-tech, or e-health in developing countries)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Use ITU networks and build relationships with target institutions</b> (e.g., large corporates from Sector Membership)</li> <li>• <b>Support post-event follow-up between stakeholders;</b> for example, by setting up working groups or developing a publication summarizing key learnings from the event</li> </ul>
Financial sustainability	<ul style="list-style-type: none"> <li>• <b>Plan for contingencies in the budget</b> due to variability in sponsorship revenues. In particular, event organizers can use historical trends on number and level of sponsorships secured to predict future sponsorship revenues, and adjust budget accordingly (e.g., by seeking alternative sources)</li> <li>• <b>Secure long-term sponsors/partners for the event</b> to enhance predictability of revenues</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Plan for contingencies in the budget</b> due to variability in sponsorship revenues</li> <li>• <b>Secure long-term sponsors/partners for the event</b> to enhance predictability of revenues (e.g., from large development organizations, large corporates active in digital for development)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Test profitability assumptions</b> (particularly revenues) with target stakeholders (exhibitors, buyers of forum passes, sponsors) before deciding on the financial status of the event (completely self-sustained vs. subsidized)</li> <li>• <b>Put in place an ITU-backed loss-absorption fund</b></li> </ul>

Conclusion: We recommend the Council to use the Phase II already considered to investigate further the development of a Global Digital-for-Good event, based on a realigned event portfolio strategy at the Union level



*Two options could be implemented with no or limited impact on ITU's event portfolio*

*Two options would require strategic alignment at the Union level on its event portfolio strategy*

**I**  
Develop and organize regional forum sessions on **"ICT development in emerging and developing markets"** tailored to the needs of specific developing regions and **organized alongside annual Regional Development Forums**

**II.a**  
Develop and organize a **"digital for development"** forum – focused on developing countries – **alongside WSIS** (a few days before, after, or on the sidelines)

**II.b**  
Develop **"digital for development"** forum sessions - focused on developing countries – **within WSIS**, as a core part of the event's agenda

**III**  
Develop exhibition and forum sessions dedicated to **"digital for good"** as part of a global Union-level event, built on an **integration with WSIS and/or AI for Good Global Summit**

Options that build on synergies with other ITU events are **likely to strengthen the Union's value proposition on the event scene** given the increasing competition within the ICT event landscape

# Appendix

Reminder on project context, guiding principles and approach (5 min)

Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)

Summary findings from the strategic and financial review (10 min)

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Recommended options (20 min)

**Q&A (10 min)**

Annex

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Financial sustainability assessment – key hypotheses

Reminder – Executive summaries of Phase I and II work modules

# Unaddressed needs – long list (I/II)

<i>Stakeholder type</i>	<b>Unaddressed needs</b>	<b>ITU Strategic goals ('20-'23)</b>
SMEs from developing countries	<ol style="list-style-type: none"> <li>1. Learn about new trends, innovations and developments in the ICT sector (including from peer organizations)</li> <li>2. Learn about other markets and regions for potential market entry</li> <li>3. Meet potential investors from other countries or regions to attract investment</li> <li>4. Meet potential buyers/customers to sell products and services</li> <li>5. Gain brand visibility and legitimacy</li> </ol>	<ul style="list-style-type: none"> <li>• Growth</li> <li>• Innovation</li> <li>• Inclusiveness</li> </ul>
SMEs from developing countries	<ol style="list-style-type: none"> <li>6. Learn about other markets and regions for potential market entry (particularly from developing countries)</li> <li>7. Network with governments and regulators (particularly from developing countries)</li> <li>8. Gain brand visibility and legitimacy</li> </ol>	<ul style="list-style-type: none"> <li>• Growth</li> <li>• Innovation</li> </ul>
Large corporates	<ol style="list-style-type: none"> <li>9. Contribute to strategic discussions with high-level corporate executives and government officials to build a vision for the ICT sector and address the most pressing societal issues (from a non-technical perspective)</li> <li>10. Learn about other markets and regions for potential market entry (particularly from developing countries)</li> <li>11. Learn about key policy and regulatory developments in specific ICT sector areas (potentially in specific regions)</li> <li>12. Network with national government officials and regulators to influence policy-making and regulation</li> <li>13. Network with international regulators to influence global regulation</li> </ol>	<ul style="list-style-type: none"> <li>• Growth</li> <li>• Innovation</li> <li>• Sustainability</li> <li>• Partnership</li> </ul>
Governments & regulators from developing countries	<ol style="list-style-type: none"> <li>14. Learn about new trends, innovations and developments in the ICT sector as a whole</li> <li>15. Learn about ICT development journey of other developing countries</li> <li>16. Learn about ICT applications for development</li> <li>17. Attract foreign investment into the local ICT sector</li> <li>18. Identify potential partners (SMEs, corporates, NGOs, foundations) for ICT development programs and strategies</li> <li>19. Communicate needs and risks related to the local ICT sector to the broader community</li> <li>20. Network with governments and regulators from the same region (or other developing countries) for collaboration and peer-learning</li> </ol>	<ul style="list-style-type: none"> <li>• Growth</li> <li>• Sustainability</li> <li>• Inclusiveness</li> <li>• Partnership</li> </ul>

# Unaddressed needs – long list (II/II)

<i>Stakeholder type</i>	<b>Unaddressed needs</b>	<b>ITU Strategic goals ('20-'23)</b>
Governments & regulators from developed countries	21. Contribute to strategic discussions with high-level corporate executives and government officials to build a vision for the ICT sector and address the most pressing societal issues (from a non-technical perspective) 22. (Bilateral development agencies) Learn about ICT development needs in developing countries 23. (Bilateral development agencies) Identify potential partners for ICT development programs in developing countries (e.g., SMEs, NGOs) 24. Discuss and debate pressing societal issues related to recent trends and developments in the ICT sector 25. Influence ICT policy and regulation in developing countries	<ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Inclusiveness</li> <li>• Partnership</li> </ul>
NGOs & Foundations	26. Share learnings on ICT development experience and programs to inform the broader community 27. Learn about new trends, innovations and developments in the ICT sector (in general) 28. Learn about new innovations in the ICT4Good or ICT4Dev sectors 29. Learn about the needs of developing countries for ICT development 30. Network to identify potential partners among SMEs, large corporates, governments, donors/funders for ICT development programs 31. Network to attract funding for ICT development programs	<ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Inclusiveness</li> <li>• Innovation</li> <li>• Partnership</li> </ul>
International Organizations	32. Contribute to strategic discussions with high-level corporate executives and government officials to build a vision for the ICT sector and address the most pressing societal issues (from a non-technical perspective) 33. Raise awareness of specific stakeholders (e.g., governments, corporates) on pressing risks or issues in the ICT sector 34. Learn about new innovations in the ICT4Good or ICT4Dev sectors 35. Learn about trends and developments in the ICT sector in developing countries 36. Network to identify/source potential partners for the organization's ICT programs and initiatives	<ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Inclusiveness</li> <li>• Innovation</li> <li>• Partnership</li> </ul>

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# Shortlisted unaddressed needs (I/II)

<i>Stakeholder type</i>	<b>Unaddressed needs</b>	<b>ITU Strategic goals ('20-'23)</b>
SMEs from developing countries	<ol style="list-style-type: none"> <li>1. Learn about new trends, innovations and developments in the ICT sector (including from peer organizations)</li> <li>2. Learn about other markets and regions for potential market entry</li> </ol>	<ul style="list-style-type: none"> <li>• Growth</li> <li>• Innovation</li> <li>• Inclusiveness</li> </ul>
SMEs from developing countries	<ol style="list-style-type: none"> <li>3. Learn about other markets and regions for potential market entry (particularly from developing countries)</li> <li>4. Network with governments and regulators (particularly from developing countries)</li> </ol>	<ul style="list-style-type: none"> <li>• Growth</li> <li>• Innovation</li> </ul>
Large corporates	<ol style="list-style-type: none"> <li>5. Contribute to strategic discussions with high-level corporate executives and government officials to build a vision for the ICT sector and address the most pressing societal issues (from a non-technical perspective)</li> <li>6. Learn about other markets and regions for potential market entry (particularly from developing countries)</li> <li>7. Learn about key policy and regulatory developments in specific ICT sector areas (potentially in specific regions)</li> <li>8. Network with national government officials and regulators to influence policy-making and regulation</li> <li>9. Network with international regulators to influence global regulation</li> </ol>	<ul style="list-style-type: none"> <li>• Growth</li> <li>• Innovation</li> <li>• Sustainability</li> <li>• Partnership</li> </ul>
Governments & regulators from developing countries	<ol style="list-style-type: none"> <li>10. Learn about new trends, innovations and developments in the ICT sector as a whole</li> <li>11. Learn about ICT development journey of other developing countries</li> <li>12. Learn about ICT applications for development</li> <li>13. Identify potential partners (SMEs, corporates, NGOs, foundations) for ICT development programs and strategies</li> <li>14. Communicate needs and risks related to the local ICT sector to the broader community</li> </ol>	<ul style="list-style-type: none"> <li>• Growth</li> <li>• Sustainability</li> <li>• Inclusiveness</li> <li>• Partnership</li> </ul>

# Shortlisted unaddressed needs (II/II)

<i>Stakeholder type</i>	<b>Unaddressed needs</b>	<b>ITU Strategic goals ('20-'23)</b>
Governments & regulators from developed countries	15. (Bilateral development agencies) Identify potential partners for ICT development programs in developing countries (e.g., SMEs, NGOs) 16. Influence ICT policy and regulation in developing countries	<ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Inclusiveness</li> <li>• Partnership</li> </ul>
NGOs & Foundations	17. Share learnings on ICT development experience and programs to inform the broader community 18. Learn about new trends, innovations and developments in the ICT sector (in general) 19. Learn about new innovations in the ICT4Good or ICT4Dev sectors 20. Learn about the needs of developing countries for ICT development 21. Network to identify potential partners among SMEs, large corporates, governments, donors/funders for ICT development programs	<ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Inclusiveness</li> <li>• Innovation</li> <li>• Partnership</li> </ul>
International Organizations	22. Raise awareness of specific stakeholders (e.g., governments, corporates) on pressing risks or issues in the ICT sector 23. Learn about new innovations in the ICT4Good or ICT4Dev sectors 24. Learn about trends and developments in the ICT sector in developing countries 25. Network to identify/source potential partners for the organization's ICT programs and initiatives	<ul style="list-style-type: none"> <li>• Sustainability</li> <li>• Inclusiveness</li> <li>• Innovation</li> <li>• Partnership</li> </ul>

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# Unaddressed needs of SMEs from developing countries

Unaddressed needs <i>(long list)</i>	<u>Step 3</u> : Is ITU well-positioned to address these needs?
1. Learn about new trends, innovations and developments in the ICT sector (including from peer organizations)	<b>Yes.</b> ITU has access to SMEs from developing countries through relationships with local governments, <b>and</b> is able to cater learning opportunities on specific ICT topics by tapping internal knowledge and/or leveraging expertise from the broader ICT community (including Sector Members)
2. Learn about other markets and regions for potential market entry	<b>Yes.</b> ITU has access to SMEs from developing countries, <b>and</b> is able to bring together country representatives (and SMEs) from different regions, especially developing countries, through relationships with local governments
3. Meet potential investors from other countries or regions to attract investment	<b>No.</b> ITU does not have access to commercial investors (e.g., private equity funds, VC funds, etc.) while development finance institutions have their own strategies for sourcing investments in the ICT sector (e.g., through local presence in target countries). In addition, ITU is not perceived by the private sector (including investors) as a place for business making
4. Meet potential buyers/customers to sell products and services (B2B)	<b>No.</b> ITU is not perceived by the private sector as a place for business making and is not able to attract a sheer and diverse mass of private buyers that would be interested in the broad range of products and services offered by SMEs
5. Gain brand visibility and legitimacy	<b>No.</b> Compared to other events, ITU Telecom events do not have high media coverage, nor do they attract a sheer mass of relevant visitors that would allow SMEs to get the desired visibility. Looking at recent editions, only SMEs who were awarded an award by ITU gained some legitimacy. However, the level of legitimacy acquired is limited given that the ITU award (and the jury providing the award) are not recognized externally as a guarantee of exceptional achievement or as a quality assurance mechanism

# Unaddressed needs of SMEs from developed countries

Unaddressed needs <i>(long list)</i>	<u>Step 3:</u> Is ITU well-positioned to address these needs?
6. Learn about other markets and regions for potential market entry (particularly from developing countries)	<b>Yes.</b> ITU is able to bring together country representatives (and SMEs) from different regions, especially developing countries, through relationships with local governments – and therefore, could help SMEs from developed countries have access to the relevant stakeholders in the ICT sector in these countries
7. Network with governments and regulators (particularly from developing countries)	<b>Yes.</b> ITU is able to attract country representatives and regulators from developing countries thanks to relationships with local governments
8. Gain brand visibility and legitimacy	<b>No.</b> Compared to other events, ITU Telecom events do not have high media coverage, nor do they attract a sheer mass of relevant visitors that would allow SMEs to get the desired visibility. Looking at recent editions, only SMEs who were awarded an award by ITU gained some legitimacy. However, the level of legitimacy acquired is limited given that the ITU award (and the jury providing the award) are not recognized externally as a guarantee of exceptional achievement or as a quality assurance mechanism

# Unaddressed needs of large corporates

Unaddressed needs <i>(long list)</i>	<u>Step 3</u> : Is ITU well-positioned to address these needs?
9. Contribute to strategic discussions with high-level corporate executives and government officials to build a vision for the ICT sector and address the most pressing societal issues (from a non-technical perspective)	<b>Yes.</b> ITU brings expertise and knowledge (both internally and through relationships with external experts) on (i) governance and regulatory issues related to ICT, and (ii) societal risks and implications of the ICT sector. In addition, ITU has the legitimacy (through the UN brand) to act as a bridge between ICT stakeholders and the broader SDG and social impact community (worldwide, not exclusive to developing countries)
10. Learn about other markets and regions for potential market entry (particularly from developing countries)	<b>Yes.</b> ITU is able to attract country representatives from developing countries thanks to relationships with local governments. Presence of country representatives from developing countries (if at the right level of seniority and with the right expertise) can help corporates
11. Learn about key policy and regulatory developments in specific ICT sector areas (potentially in specific regions)	<b>Yes – in developing countries.</b> ITU brings expertise and knowledge (both internally and through relationships with external experts) on governance and regulatory issues related to ICT, and has access to national and regional regulators in developing countries who can share perspectives on their local policy and regulatory environments
12. Network with national government officials and regulators to influence policy-making and regulation	<b>Yes – in developing countries.</b> ITU, as a trusted partner for governments, and a multi-stakeholder organization bringing together the private sector (Sector Members and beyond) and the public sector (Member States and beyond) is well-positioned to either facilitate dialogue between corporates and governments/regulators, or allow safe and open spaces for productive conversations between the two. However, this is most likely to be relevant in developing countries (with whom the Union has privileged relationships) rather than with developed countries (e.g., Europe, U.S.) who have gradually disengaged from the organization
13. Network with international regulators to influence global regulation	<b>Yes – in developing regions.</b> <i>See above</i>

# Unaddressed needs of **governments and regulators** from **developing countries** (I/II)

Unaddressed needs <i>(long list)</i>	<b>Step 3:</b> Is ITU well-positioned to address these needs?
14. Learn about new trends, innovations and developments in the ICT sector as a whole	<b>Yes – from a non-technical perspective.</b> ITU is able to attract governments and regulators from developing countries thanks to good relationships and privileged access to the right stakeholders. In addition, ITU has internal expertise and can tap external experts and sector stakeholders to provide governments and regulators opportunity to learn about recent developments in the ICT sector
15. Learn about ICT development journey of other developing countries	<b>Yes – to some extent.</b> ITU is able to attract governments, regulators, and some private sector actors from developing countries. These stakeholders are able to describe and share the experience/journey of their own country in developing the ICT sector in terms of innovation, ecosystem building and support, regulation, etc.
16. Learn about ICT applications for development	<b>Yes.</b> ITU has the legitimacy (through the UN brand) to act as a bridge between ICT stakeholders and the broader SDG and social impact community. It is able to attract governments from developing countries, international development actors from the UN system (and potentially beyond) and could therefore facilitate exchange of ideas and experiences in the field of ICT for development
17. Attract foreign investment into the local ICT sector	<b>No.</b> ITU does not have access to commercial investors (e.g., private equity funds, VC funds, etc.) while development finance institutions have their own strategies for sourcing investments in the ICT sector (e.g., through local presence in target countries). In addition, ITU is not perceived by the private sector (including investors) as a place for business making

# Unaddressed needs of **governments and regulators** from **developing countries** (II/II)

Unaddressed needs <i>(long list)</i>	<b>Step 3:</b> Is ITU well-positioned to address these needs?
18. Identify potential partners (SMEs, corporates, NGOs, foundations) for ICT development programs and strategies	<b>Yes.</b> ITU is, by nature, a multi-stakeholder organization comprising the public and private sectors. In addition, the UN brand provides the organization with legitimacy that enables it to attract other types of stakeholders (e.g., international organizations, NGOs, foundations). Access to and ability to bring together a broad and diverse group of stakeholders could allow governments from developing countries to identify potential partners for their national ICT development programs
19. Communicate needs and risks related to the local ICT sector to the broader community	<b>Yes.</b> ITU has access to governments and ICT stakeholders in developing countries. In addition, ITU has a mission to bridge the digital divide between countries – and has therefore internal knowledge and access to external expertise on the realities of ICT sector development in developing countries – including areas of risks and unaddressed needs. It could therefore provide a platform for these governments to communicate these needs and risks to the broader community of ICT actors
20. Network with governments and regulators from the same region (or other developing countries) for collaboration and peer-learning	<b>No.</b> ITU has access to governments and regulators from developing countries, especially in Africa and South/South-East Asia, less so in Latin America (as can be seen from the attendance of recent ITU Telecom events). However, national governments of countries from the same region have other avenues to identify collaboration opportunities in the ICT sector (e.g., bilateral or regional ministerial committees) that might be more effective than informal meetings at an ITU event (especially as ministerial committees or similar types of bilateral/regional meetings or working groups might involve more senior stakeholders who are able to drive collaboration)

# Unaddressed needs of governments and regulators from developed countries

Unaddressed needs <i>(long list)</i>	<b>Step 3:</b> Is ITU well-positioned to address these needs?
21. Contribute to strategic discussions with high-level corporate executives and government officials to build a vision for the ICT sector and address the most pressing societal issues (from a non-technical perspective)	<b>No.</b> Governments of developed countries (especially Europe and the US) have gradually disengaged from ITU Telecom events (and potentially also from the organization to some extent, except for the regulation-making bodies). In addition, there are other avenues where the governments of development countries can come together to discuss ICT issues and their societal implications (e.g., World Economic Forum, government tracks of other global ICT events, regional committees or working groups such as the European Parliament or the European Commission for EU countries)
22. (Bilateral development agencies) Learn about ICT development needs in developing countries	<b>No.</b> Bilateral development agencies usually have other avenues for engaging local stakeholders from the public sector to identify potential areas of support and collaboration, including in the ICT sector – for example, through a local presence in the country, or through a field mission in the country (if it is a new country of interest for the development organization)
23. (Bilateral development agencies) Identify potential partners for ICT development programs in developing countries (e.g., SMEs, NGOs)	<b>Yes.</b> ITU is able to identify and potentially attract SMEs and NGOs from developing countries active in the ICT sector, particularly through its relationship with local governments
24. Influence ICT policy and regulation in developing countries	<b>Yes.</b> ITU has access to governments in developing countries and is able to attract them. In addition, it is recognized as a facilitator for international discussions and negotiations on global regulation of the sector

# Unaddressed needs of NGOs and foundations

Unaddressed needs <i>(long list)</i>	<b>Step 3:</b> Is ITU well-positioned to address these needs?
25. Share learnings on ICT development experience and programs to inform the broader community	<b>Yes.</b> ITU can identify and attract heads of NGOs and foundations focused on ICT, who would value the opportunity to showcase their programs to the broader community of ITU Telecom participants. Given the ITU's status as a UN agency, attending the event would strengthen the brand of NGOs and foundations focused on ICT.
26. Learn about new trends, innovations and developments in the ICT sector (in general)	<b>Yes.</b> ITU has internal expertise and can tap external experts and sector stakeholders to provide NGOs and foundations the opportunity to learn about recent developments in the ICT sector
27. Learn about new innovations in the ICT4Good or ICT4Dev sectors	<b>Yes.</b> ITU has the legitimacy (through the UN brand) to act as a bridge between ICT stakeholders and the broader SDG and social impact community. It can attract governments from developing countries, international development actors from the UN system (and potentially beyond) and could therefore facilitate exchange of ideas and experiences in the field of ICT for development
28. Learn about the needs of developing countries for ICT development	<b>Yes.</b> ITU is able to attract governments and private companies from developing countries thanks to good relationships and privileged access to the right stakeholders. These stakeholders can offer NGOs and foundations unique perspectives on the needs of developing countries.
29. Network to identify potential partners among SMEs, large corporates, governments, donors/funders for ICT development programs	<b>Yes.</b> ITU can attract a significant number of SMEs and governments from developing countries, especially from Asia and Africa, who would be interested in joining forces with NGOs and foundation on development and sector growth related initiatives. There would be fewer opportunities for exchange with donors from developed countries.
30. Network to attract funding for ICT development programs	<b>No.</b> Given ITU Telecom's low capacity in attracting developed country donors, governments, or corporates, the event does not have the comparative advantage in offering NGOs and foundations focused on ICT the opportunity to network for funding.

# Unaddressed needs of international organizations

Unaddressed needs <i>(long list)</i>	<u>Step 3</u> : Is ITU well-positioned to address these needs?
31. Contribute to strategic discussions with high-level corporate executives and government officials to build a vision for the ICT sector and address the most pressing societal issues (from a non-technical perspective)	<b>No.</b> Given ITU Telecom’s low capacity in attracting senior government officials and corporate executives, it is unlikely IOs would be able to participate in strategic discussions about the future of the sector. There would be a large set of critical players missing from the conversation.
32. Raise awareness of specific stakeholders (e.g., governments, corporates) on pressing risks or issues in the ICT sector	<b>Yes – to some extent.</b> ITU can attract relevant government and corporate stakeholders who can act on IOs’ advocacy. However, given the lack of senior corporates and low presence of developed country governments, IOs attending ITU can only raise awareness among a smaller group of relevant stakeholders
33. Learn about new innovations in the ICT4Good or ICT4Dev sectors	<b>Yes.</b> ITU has the legitimacy (through the UN brand) to act as a bridge between ICT stakeholders and the broader SDG and social impact community. It can attract governments from developing countries, international development actors from the UN system (and potentially beyond) and could therefore facilitate exchange of ideas and experiences in the field of ICT for development
34. Learn about trends and developments in the ICT sector in developing countries	<b>Yes.</b> ITU is able to attract governments and private companies from developing countries thanks to good relationships and privileged access to the right stakeholders. These stakeholders can offer NGOs and foundations unique perspectives on the needs of developing countries.
35. Network to identify/source potential partners for the organization’s ICT programs and initiatives	<b>Yes – to some extent.</b> ITU can attract relevant government and corporate stakeholders that IOs can partner with. However, given the lack of senior corporates and low presence of developed country governments, IOs attending ITU can only network with a subset of relevant stakeholders.

# Agenda

Reminder on project context, guiding principles and approach (5 min)

Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)

Summary findings from the strategic and financial review (10 min)

Approach for identifying future options (5 min)

Recommended options (20 min)

Q&A (10 min)

## Annex

Shortlist of addressable needs (Step 2)

Rationale for shortlisting needs (Step 3)

## Mapping of shortlisted needs to event components (Steps 4 & 5)

Mapping of event concepts to needs and event components (Step 6)

Assessment of prioritized event concepts (step 9)

Financial sustainability assessment – key hypotheses

Reminder – Executive summaries of Phase I and II work modules

# We identified **18 event components** linked to the shortlisted unaddressed needs



Legend: ■ Forum components ■ Networking components ■ Exhibition components ■ Special programs ⊗ Shortlisted need number

# SMEs from developing countries: event components associated with shortlisted needs

Unaddressed needs ( <i>shortlisted</i> )	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
1. Learn about new trends, innovations and developments in the ICT sector (including from peer organizations)	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is not tailored to the learning needs of SMEs and generally focuses on policy and regulatory issues. More generally, the topics discussed on forums are generally higher-level and the format of forum sessions do not allow for substantial engagement between SMEs and other stakeholders to allow experience sharing and learning</li> <li>• <b>Exhibition</b> could support learning of SMEs if it is able to attract the right organizations and people and allows meaningful conversations and learning. Currently, the format and attendance of the exhibition do not allow learning for SMEs</li> <li>• <b>SME program</b> does not allow learning for SMEs. However, if formats and sessions content change, there is potential to allow</li> <li>• <b>Networking</b> is not a relevant event component for learning</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design of the SME program</li> </ul>	<b>Redesigned SME program</b> that specifically addresses the learning needs of ICT SMEs from developing countries
2. Learn about other markets and regions for potential market entry	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is not tailored to learning about other regions and markets. Topics discussed are more high-level and are not specific to a given region or market</li> <li>• <b>Exhibition</b> could support SMEs to get an understanding of ICT industries in different regions or markets and currently does so to a certain extent by bringing together country representatives and SMEs from various regions of the world, especially from developing countries</li> <li>• <b>SME program</b> does not allow learning about other markets or regions, as this is more likely to happen by engaging stakeholders from these regions directly in conversations either through the exhibition (if countries have their own stands) or through networking</li> <li>• <b>Networking</b> could allow SMEs to engage stakeholders from target countries or regions in meaningful conversations that allow them to understand local contexts and market dynamics. However, this does not happen as SMEs are sidelined and are not empowered to take an active role in networking. In addition, stakeholders who would be able to provide this information to SMEs (e.g., country representatives) are more interested in engaging large corporates and fellow government stakeholders rather than SMEs from other countries or regions</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design and format of the exhibition and/or networking event</li> </ul>	<b>Presentation sessions (e.g., at country pavilions)</b> that give an overview of the country's ICT sector (main actors, needs, developments, etc.)

# SMEs from developed countries: event components associated with shortlisted needs

Unaddressed needs ( <i>shortlisted</i> )	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
3. Learn about other markets and regions for potential market entry (particularly from developing countries)	<i>Same as for SMEs from developing countries</i>	<b>Presentation sessions (e.g., at country pavilions)</b> that give an overview of the country's ICT sector (main actors, needs, developments, etc.)
4. Network with governments and regulators (particularly from developing countries)	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> allows some networking on the sidelines of sessions; however, SMEs are rarely part of panels that include governments.</li> <li>• <b>Exhibition</b> does not provide room for meaningful networking between SMEs and governments/regulators, especially as regulators/governments rarely engage in the exhibition and are more involved in the forum and networking space</li> <li>• <b>SME program</b> does not attract stakeholders other than SMEs, and therefore does not allow for networking</li> <li>• <b>Networking</b> activities could be the appropriate avenue for allowing interactions between SMEs and governments/regulators of developing countries; however, SMEs have limited access to this space and are not seen as a priority stakeholder for networking by other participants, particularly governments and regulators (who are more interested in interacting with fellow public sector actors, or large corporates)</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components to address this need, as it can be addressed by including different types of sessions within the forum</li> </ul>	<b>Interactive forum sessions</b> that include SMEs and governments of developing countries and allow meaningful conversations on the participation of SMEs in the development agenda of the local ICT sector

# Large corporates: event components associated with shortlisted needs (I/II)

Unaddressed needs ( <i>shortlisted</i> )	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
5. Contribute to strategic discussions with high-level corporate executives and government officials to build a vision for the ICT sector and address the most pressing societal issues (from a non-technical perspective)	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum debates and panels</b> are appropriate event components that allow these strategic discussions to take place. However, currently, the formats, the seniority of speakers, and the topics covered are not conducive to vision-building type of discussions</li> <li>• <b>Exhibition</b> is not well-suited for strategic discussions</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> <li>• <b>Networking activities</b> can provide an opportunity for large corporates to interact and discuss with different stakeholders, from the government, international organizations, and other private sector actors. However, these networking opportunities do not have a defined agenda and the ability to have meaningful strategic discussions depends on the presence of relevant stakeholders. In addition, one-to-one networking does not allow for building a vision for the sector – which requires multiple stakeholders to take part to the conversation</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• N/A</li> </ul>	<p><b>High-level forum panels with diverse and senior participation and relevant topics</b> allowing meaningful discussions on the ICT sector and the most pressing societal issues</p>
6. Learn about other markets and regions for potential market entry (particularly from developing countries)	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is not tailored to learning about other regions and markets. Topics discussed are more high-level and are not specific to a given region or market</li> <li>• <b>Exhibition</b> could support SMEs to get an understanding of ICT industries in different regions or markets and currently does so to a certain extent by bringing together country representatives and SMEs from various regions of the world, especially from developing countries</li> <li>• <b>SME program</b> does not allow learning about other markets or regions, as this is more likely to happen by engaging stakeholders from these regions directly in conversations either through the exhibition (if countries have their own stands) or through networking</li> <li>• <b>Networking</b> could allow SMEs to engage stakeholders from target countries or regions in meaningful conversations that allow them to understand local contexts and market dynamics. However, this does not happen as SMEs are sidelined and are not empowered to take an active role in networking. In addition, stakeholders who would be able to provide this information to SMEs (e.g., country representatives) are more interested in engaging large corporates and fellow government stakeholders rather than SMEs from other countries or regions</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• N/A</li> </ul>	<p><b>Presentation sessions (e.g., at country pavilions)</b> that give an overview of the country's ICT sector (main actors, needs, developments, etc.)</p>

# Large corporates: event components associated with shortlisted needs (II/II)

Unaddressed needs (shortlisted)	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
7. Learn about key policy and regulatory developments in specific ICT sector areas (potentially in specific regions)	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> provides opportunity for different stakeholders to discuss policy and regulation on specific ICT areas from a non-technical perspective, and</li> <li>• <b>Exhibition</b> does not allow corporates (or other stakeholders) to learn about policy and regulatory developments</li> <li>• <b>SME program</b> is not relevant for this need</li> <li>• <b>Networking</b> activities are not an appropriate avenue for learning about policy and regulatory issues in the ICT sector</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design and format of the exhibition and/or networking event</li> </ul>	<p><b>Forum sessions</b> to discuss policy and regulatory aspects for specific ICT sector areas</p>
8. Network with national government officials and regulators to influence policy-making and regulation	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions allow some level of networking between government officials/regulators and corporates when they are involved in the same panels or sessions</li> <li>• <b>Exhibition</b> is not relevant for this need</li> <li>• <b>SME program</b> is not relevant for this need</li> <li>• <b>Networking</b> activities provide opportunity for corporates to engage governments, especially from developing countries, to influence regulation and policy-making</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design and format of the exhibition and/or networking event</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Forum sessions</b> including corporates and government officials to discuss policy and regulatory issues</li> <li>• <b>Networking activities or spaces</b> that allow government-corporate interactions</li> </ul>
9. Network with international regulators to influence global regulation	<p><i>Same as above</i></p>	<ul style="list-style-type: none"> <li>• <b>Forum sessions</b> including corporates and international regulators to discuss policy and regulatory issues</li> <li>• <b>Networking activities or spaces</b> that allow interactions between corporates and international regulators</li> </ul>

# Governments and regulators from developing countries: event components associated with shortlisted needs (I/III)

Unaddressed needs ( <i>shortlisted</i> )	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
<p>10. Learn about new trends, innovations and developments in the ICT sector as a whole</p>	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions do provide opportunity for different stakeholders, including government and regulators from developing countries, to learn about new trends, innovations and developments. However, the contents are not always be tailored to their needs, or at the right level of specificity, and the formats are not always engaging and conducive to learning</li> <li>• <b>Exhibition</b> could allow governments to learn about new technological innovations in the sector if it is able to attract the largest players in the field of ICT (or in a specific sub-field). However, currently the largest tech players prioritize exhibiting in other events like MWC Barcelona</li> <li>• <b>SME program</b> is not relevant for this need</li> <li>• <b>Networking</b> activities can support learning opportunities for governments and regulators of developing countries</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design of the SME program</li> <li>• However, ITU could consider a <b>regular newsletter or publication</b> to update interested stakeholders (e.g., ministries of ICT from developing countries) on the new trends, innovations and development of the ICT sector</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Forum sessions</b> that feature leading actors of the ICT sector and showcase the most recent developments and innovations</li> <li>• <b>Alternative: regular newsletter or publication for ICT Ministries</b></li> </ul>
<p>11. Learn about ICT development journey of other developing countries</p>	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions could be opportunities for representatives of different developing countries to come together and share experiences and discuss the ICT development journey of their respective countries</li> <li>• <b>Exhibition</b> can help specific countries share their ICT development journey with the broader audience, through dedicated sessions in the national pavilions</li> <li>• <b>SME program</b> is not relevant for this need</li> <li>• <b>Networking</b> activities can support learning opportunities for governments and regulators of developing countries</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design of the SME program</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Forum panels</b> gathering representatives of different countries to discuss their respective development journeys</li> <li>• <b>Presentation sessions (e.g., at country pavilions)</b> that give an overview of the country's ICT development journey</li> </ul>

# Governments and regulators from developing countries: event components associated with shortlisted needs (II/III)

Unaddressed needs ( <i>shortlisted</i> )	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
12. Learn about ICT applications for development	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions do not currently focus on ICT application for development, but could provide opportunity for developing countries to learn more about ICT applications for development through an appropriate mix of experts, stakeholders, and topics discussed</li> <li>• <b>Exhibition</b> could also provide opportunity for developing countries to learn about ICT applications for development if it attracts solution developers who are active in the ICT4Dev space and can showcase these solutions</li> <li>• <b>SME program</b> is not relevant for this need</li> <li>• <b>Networking</b> activities can support this need but are not the primary channel through which this objective is achieved</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design of the SME program</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Forum sessions focusing on ICT4Dev</b></li> <li>• <b>Exhibition showcasing innovations in the ICT4Dev sector</b></li> </ul>
13. Identify potential partners (SMEs, corporates, NGOs, foundations) for ICT development programs and strategies	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions can, to some extent, provide opportunity to identify relevant actors that governments could partner with. However, they are not the main avenue for identifying these partnerships</li> <li>• <b>Exhibition</b> (if it has the right thematic focus -e.g., ICT4Dev) can allow country representatives (not only Ministries of ICT, but also other Ministries such as health or agriculture – where there are potential ICT applications) to identify the right partners</li> <li>• <b>SME program</b> is not relevant for this need</li> <li>• <b>Networking</b> activities can help governments from developing countries to identify potential partners for ICT development programs, but this require that other event components (e.g., forum or exhibition) attract the relevant stakeholders</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design of the SME program</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Exhibition showcasing innovations in the ICT4Dev sector</b></li> <li>• <b>Networking activities</b> between government officials and actors of the ICT4Dev sector</li> </ul>

# Governments and regulators from developing countries: event components associated with shortlisted needs (III/III)

Unaddressed needs ( <i>shortlisted</i> )	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
14. Communicate needs and risks related to the local ICT sector to the broader community	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions can provide a window for governments of developing countries to communicate needs and risks in their local ICT sector, in order to increase awareness of the broader community (development actors, government partners, international regulators), and learn from other countries on how they have managed these needs and risks</li> <li>• <b>Exhibition</b> is not relevant for this need</li> <li>• <b>SME program</b> is not relevant for this need</li> <li>• <b>Networking</b> activities can help governments from developing countries to communicate these needs or risks at a more informal level</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design of the SME program</li> </ul>	<p><b>Forum sessions</b> focused on the needs and risks facing developing countries in the ICT sector</p>

# Governments and regulators from developed countries: event components associated with shortlisted needs ()

Unaddressed needs (shortlisted)	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
<p>15. (Bilateral development agencies) Identify potential partners for ICT development programs in developing countries (e.g., SMEs, NGOs)</p>	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions do not focus on development programs and face low presence of SMEs and social enterprises.</li> <li>• <b>Networking</b> sessions could be an appropriate venue for these interactions. However, there are no opportunities dedicated specifically to development programs/partnerships.</li> <li>• <b>Exhibition</b> is not well-suited for strategic discussions</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> </ul> <p><i>New</i></p> <p>A new event component could be created to bolster connections between bilaterals and NGOs/social enterprises/SMEs</p>	<p><b>Program devoted to development.</b> The program could include a keynote address from a bilateral leader, a panel discussion showcasing successful initiatives, while also highlighting critical gaps potentially filled through these types of partnerships, followed by a dedicated networking session</p>
<p>16. Influence ICT policy and regulation in developing countries</p>	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> could provide a useful venue for government officials from developed countries to i) showcase and advocate for their policy choices/preferences and ii) meet government officials from developing countries (through panel discussions) who they can then reach out to individually to exert influence. However, the current program does not offer sufficient sessions that are exclusively dedicated to countries showcasing policy choices or making policy recommendations.</li> <li>• <b>Networking</b>, especially in dedicated spaces such as the Leader Space, or on the sidelines of the Forum, offers a good opportunity for government officials from developed countries to discuss policy with their counterparts from developing countries</li> <li>• <b>Exhibition</b> is not well-suited as a place for networking for policy influence. The space is mainly used for showcasing countries' ICT sectors and not for in-depth policy discussions.</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components to address this need, as it can be addressed by including different types of sessions within the forum</li> </ul>	<p><b>Short TedX-type forum sessions</b> where officials from both developed and developing countries can showcase a policy their country implemented or make a pitch/policy recommendation for other countries to consider</p>

# NGOs & foundations: event components associated with shortlisted needs (I/III)

Unaddressed needs (shortlisted)	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
<p>17. Share learnings on ICT development experience and programs to inform the broader community</p>	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions where NGOs and foundations take center stage to showcase their work and share relevant learnings from their experience can be effective to address this need</li> <li>• <b>Exhibition</b> could provide opportunity for NGOs and foundations to showcase their work on ICT development. However, the quality of interactions and the outcomes from these interactions will be highly dependent on the visitors of the exhibition (over which the event has limited control as compared to forum speakers or panelists where the event has greater visibility). In addition, the format of the exhibition might not be the most effective to share compelling messages with a target audience (as compared to a forum format)</li> <li>• <b>SME program</b> is not a relevant event component for this activity</li> <li>• <b>Networking</b> provides opportunity for NGOs and foundations to share learnings from their work with other event participants on an informal basis, but is not the most effective format to do so</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design of the SME program</li> </ul>	<p><b>Forum sessions</b> involving NGOs and foundations to share learnings from their work with the broader community (e.g., development actors, governments, private sector)</p>
<p>18. Learn about new trends, innovations and developments in the ICT sector (in general)</p>	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> sessions do provide opportunity for different stakeholders, including NGOs and foundations, to learn about new trends, innovations and developments. However, the contents are not always be tailored to their needs, or at the right level of specificity, and the formats are not always engaging and conducive to learning</li> <li>• <b>Exhibition</b> could provide opportunity to learn about new trends and innovations in the ICT sector. However, ITU Telecom is no longer able to attract the audience that is at the forefront of technological innovation (mostly corporates) and therefore an exhibition would not be effective in enabling learning opportunities that NGOs and foundations seek</li> <li>• <b>SME program</b> is not a relevant event component for this activity</li> <li>• <b>Networking</b> is not a relevant event component for this activity</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design of the SME program</li> </ul>	<p><b>Forum sessions</b> that feature leading actors of the ICT sector and showcase the most recent developments and innovations</p>

# NGOs & foundations: event components associated with shortlisted needs (II/III)

Unaddressed needs (shortlisted)	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
19. Learn about new innovations in the ICT4Good or ICT4Dev sectors	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is no well-suited to showcase the latest innovations in ICT for good – most sessions focus on policy and regulatory issues.</li> <li>• <b>Exhibition</b> is not well-suited due to low presence overall of corporates and SMEs producing the most innovative products (they attend other global ICT events)</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• New awards program for ICT4Good innovations</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Exhibition space devoted to ICT4Good companies</b></li> <li>• <b>ICT4Good award program</b>, supported by select IOs and bilaterals to showcase the new innovations</li> </ul>
20. Learn about the needs of developing countries for ICT development	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is generally not focused on providing learnings about trends in specific countries or regions.</li> <li>• <b>Exhibition</b> could support NGOs in building an understanding of ICT industries in different regions or markets and currently does so to a certain extent by bringing together country representatives and SMEs from various regions of the world, especially from developing countries (through the country pavilions). However, very few countries invest in large country presentations, which skews the overall perspective on trends in the developing world.</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> <li>• <b>Networking</b> opportunities on the sidelines of well-delivered country pavilions could provide additional opportunities to learn about broader trends in developing countries</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design and format of the forum and exhibitions space</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Interactive forum panels</b> where government officials present their countries' main challenges/ trends and exchange on lessons learned and next steps</li> <li>• <b>Country presentations (e.g., at country pavilions)</b> that give an overview of the country's ICT sector (main actors, needs, developments, etc.) – <i>this is only useful if many countries choose to invest in hosting and delivering the country presentations (IOs or ITU may choose to subsidize these presentations)</i></li> </ul>

# NGOs & foundations: event components associated with shortlisted needs (III/III)

Unaddressed needs ( <i>shortlisted</i> )	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
21. Network to identify potential partners among SMEs, large corporates, governments, donors/funders for ICT development programs	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is not well-suited given most sessions focus on policy and regulatory issues.</li> <li>• <b>Networking</b>, especially in dedicated spaces such as the Leader Space, or on the sidelines of the Forum, offers a good opportunity for NGOs to seek out potential partners</li> <li>• <b>Exhibition</b> is not well-suited as a place for NGOs to seek partners given the low presence of corporates and senior government officials in the space.</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components to address this need, as it can be addressed by modifying the networking opportunities</li> </ul>	<p><b>Formal, dedicated networking session for NGOs to interact with government officials and corporates.</b> These sessions could follow</p>

# International organizations: event components associated with shortlisted needs (I/II)

Unaddressed needs ( <i>shortlisted</i> )	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
22. Raise awareness of specific stakeholders (e.g., governments, corporates) on pressing risks or issues in the ICT sector	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> can provide a useful venue for IOs to raise awareness on pressing risks in the sector, particularly those in developing countries (given the audience). However, they lack engaging “calls to action” or requests for commitments</li> <li>• <b>Networking</b>, especially in dedicated spaces such as the Leader Space, or on the sidelines of the Forum, offers a good opportunity for IOs to discuss policy with government officials.</li> <li>• <b>Exhibition</b> is not well-suited as a place for IOs to highlight pressing challenges in the ICT sector, especially given the low presence of corporates and governments in the space.</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components to address this need, as it can be addressed by including different types of sessions within the forum</li> </ul>	<p><b>TedX-style forum sessions</b> devoted to describing the most pressing issues facing the sector and including clear ‘calls to action’ for governments, followed by a dedicated networking session</p>
23. Learn about new innovations in the ICT4Good or ICT4Dev sectors	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is not well-suited to showcase the latest innovations in ICT for good – most sessions focus on policy and regulatory issues.</li> <li>• <b>Exhibition</b> is not well-suited due to low presence overall of corporates and SMEs producing the most innovative products (they attend other global ICT events)</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• New awards program for ICT4Good innovations</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Exhibition space devoted to ICT4Good companies</b></li> <li>• <b>ICT4Good award program</b>, supported by select IOs and bilaterals to showcase the new innovations</li> </ul>

# International organizations: event components associated with shortlisted needs (II/II)

Unaddressed needs (shortlisted)	Steps 4 & 5: Which event components should Telecom maintain, suppress, or create? Should Telecom change anything about existing event components?	Outcome
<p>24. Learn about trends and developments in the ICT sector in developing countries</p>	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is generally not focused on providing learnings about trends in specific countries or regions.</li> <li>• <b>Exhibition</b> could support IOs in building an understanding of ICT industries in different regions or markets and currently does so to a certain extent by bringing together country representatives and SMEs from various regions of the world, especially from developing countries (through the country pavilions). However, very few countries invest in large country presentations, which skews the overall perspective on trends in the developing world.</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> <li>• <b>Networking</b> opportunities on the sidelines of well-delivered country pavilions could provide additional opportunities to learn about broader trends in developing countries</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components, as this need could be addressed by adjusting the design and format of the forum and exhibitions space</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Interactive forum panels</b> where government officials present their countries' main challenges/ trends and exchange on lessons learned and next steps</li> <li>• <b>Country presentations (e.g., at country pavilions)</b> that give an overview of the country's ICT sector (main actors, needs, developments, etc.) – <i>this is only useful if many countries choose to invest in hosting and delivering the country presentations (IOs or ITU may choose to subsidize these presentations)</i></li> </ul>
<p>25. Network to identify/source potential partners for the organization's ICT programs and initiatives</p>	<p><i>Existing</i></p> <ul style="list-style-type: none"> <li>• <b>Forum</b> is not well-suited given most sessions focus on policy and regulatory issues.</li> <li>• <b>Networking</b>, especially in dedicated spaces such as the Leader Space, or on the sidelines of the Forum, offers a good opportunity for IOs to seek out potential partners</li> <li>• <b>Exhibition</b> is not well-suited as a place for IOs to seek partners given the low presence of corporates and senior government officials in the space.</li> <li>• <b>SME program</b> is solely dedicated to SMEs and is not relevant for this need</li> </ul> <p><i>New</i></p> <ul style="list-style-type: none"> <li>• There is no need for new event components to address this need, as it can be addressed by modifying the networking opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• <b>formal, dedicated networking session for IOs to interact with government officials and corporates.</b> These sessions could follow</li> </ul>

# Agenda

Reminder on project context, guiding principles and approach (5 min)

Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)

Summary findings from the strategic and financial review (10 min)

Approach for identifying future options (5 min)

Recommended options (20 min)

Q&A (10 min)

## Annex

Shortlist of addressable needs (Step 2)

Rationale for shortlisting needs (Step 3)

Mapping of shortlisted needs to event components (Steps 4 & 5)

## Mapping of event concepts to needs and event components (Step 6)

Assessment of prioritized event concepts (step 9)

Financial sustainability assessment – key hypotheses

Reminder – Executive summaries of Phase I and II work modules

# Event concepts are based on coherent combinations of event components

A.1

Emerging & frontier markets  
ICT event - forum only

	X		X
		X	
X			
		X	

A.2

Emerging & frontier markets  
ICT event - forum & exhibition

	X		X
		X	
X			
		X	
X			

B.1

Digital for Development event  
(developing country focused) –  
forum only

X			
	X	X	

B.2

Digital for Development event  
(developing country focused) – forum  
& exhibition

X			
	X	X	
X			X

C.1

Global Digital for Good event  
– forum only

X			
X	X		
	X	X	
X			
X			X

C.2

Global Digital for Good event  
– forum & exhibition

X			
X	X		
	X	X	
X			X
X			X

D

Davos-style ICT forum

X			
	X	X	
	X		X
	X	X	

E

Support program for ICT SMEs

		X	
		X	

Note: As a reminder, we chose coherent combinations of event components based on the following criteria (defined in our decision-making guide): **1. coherence and synergies within the target audience**, **2. coherence between the needs addressed** allowing for a distinctive identity and mission; and **3. coherence between the event components** to avoid excessive segmentation across activities

# Event concepts identified through groupings and combinations of coherent event components (I/IV)

Event concept	Coherent combination of event components included	Shortlisted needs addressed
<b>Emerging &amp; frontier markets ICT event (option 1 – forum only)</b>	<ul style="list-style-type: none"> <li>• Forum panels gathering representatives of different countries to discuss their respective development journeys</li> <li>• Forum sessions focused on the needs and risks facing developing countries in the ICT sector</li> <li>• Forum sessions where country officials showcase their ICT policy/regulation frameworks</li> <li>• Forum sessions that feature leading experts of the ICT sector and showcase the most recent developments and innovations</li> <li>• Networking activities</li> </ul>	10, 11, 14, 16
<b>Emerging &amp; frontier markets ICT event (option 2 – forum and country pavilions)</b>	<ul style="list-style-type: none"> <li>• Country presentation sessions (e.g., at country pavilions) that give a view on the country's ICT sector</li> <li>• Forum panels gathering representatives of different countries to discuss their respective development journeys</li> <li>• Forum sessions focused on the needs and risks facing developing countries in the ICT sector</li> <li>• Forum sessions where country officials showcase their ICT policy/regulation frameworks</li> <li>• Forum sessions that feature leading experts of the ICT sector and showcase the most recent developments and innovations</li> </ul>	2, 3, 6, 10, 11, 14, 16

# Event concepts identified through groupings and combinations of coherent event components (II/IV)

Event concept	Coherent combination of event components included	Shortlisted needs addressed
<b>Digital for development event</b> ( <i>option 1 – forum only</i> )	<ul style="list-style-type: none"> <li>• Forum sessions focusing on Digital for Development (e.g., ICT applications across key development issues: health, ag, climate, etc.)</li> <li>• Forum sessions involving NGOs, foundations, and IOs to share learnings from their work with the broader community</li> <li>• Panel discussions showcasing successful Digital for Development initiatives and highlighting critical gaps</li> <li>• Networking activities between government officials and actors of the Digital for Development sector</li> <li>• Digital for Development awards</li> </ul>	12, 13, 15, 17
<b>Digital for development event</b> ( <i>option 2 – forum and exhibition</i> )	<ul style="list-style-type: none"> <li>• Forum sessions focusing on Digital for Development</li> <li>• Forum sessions involving NGOs and foundations to share learnings from their work with the broader community</li> <li>• Exhibition showcasing innovations in the Digital for Development sector</li> <li>• Networking activities between government officials and actors of the Digital for Development sector</li> <li>• Panel discussions showcasing successful ICT4Dev initiatives and highlighting critical gaps</li> <li>• Digital for Development awards</li> </ul>	12, 13, 15, 17

# Event concepts identified through groupings and combinations of coherent event components (III/IV)

Event concept	Coherent combination of event components included	Shortlisted needs addressed
<b>Digital for Good event</b> ( <i>option 1 – forum only</i> )	<ul style="list-style-type: none"> <li>• Forum sessions focusing on Digital for Good (e.g., ICT applications for marking progress on the SDGs) showcasing successful initiative and highlighting critical gaps</li> <li>• Forum sessions involving NGOs, foundations, and IOs to share learnings from their work in Digital for Dev / Digital for Good with the broader community</li> <li>• High-level forum panels with diverse and senior participation and relevant topics allowing meaningful discussions on the most pressing societal issues</li> <li>• Networking activities between government officials and actors of the Digital for Good sector</li> <li>• Digital for Good awards</li> </ul>	5, 9, 12, 13, 21, 22, 23
<b>Digital for Good event</b> ( <i>option 2 – forum and exhibition</i> )	<ul style="list-style-type: none"> <li>• Forum sessions focusing on Digital for Good (e.g., ICT applications for marking progress on the SDGs) showcasing successful initiative and highlighting critical gaps</li> <li>• Forum sessions involving NGOs, foundations, and IOs to share learnings from their work in Digital for Dev / Digital for Good with the broader community</li> <li>• High-level forum panels with diverse and senior participation and relevant topics allowing meaningful discussions on the most pressing societal issues</li> <li>• Networking activities between government officials and actors of the Digital for Good sector</li> <li>• Exhibition showcasing innovations in the Digital for Good sector</li> <li>• Digital for Good awards</li> </ul>	5, 9, 12, 13, 21, 22, 23

# Event concepts identified through groupings and combinations of coherent event components (IV/IV)

Event concept	Coherent combination of event components included	Shortlisted needs addressed
<b>Davos-style ICT forum</b>	<ul style="list-style-type: none"> <li>• High-level forum panels with diverse and senior participation and relevant topics allowing meaningful discussions on the ICT sector and the most pressing societal issues</li> <li>• Forum sessions that feature leading actors of the ICT sector and showcase the most recent developments and innovations</li> <li>• Forum sessions to discuss policy and regulatory aspects for specific ICT sector areas</li> <li>• Forum sessions involving NGOs and foundations to share learnings from their work with the broader community</li> <li>• Forum sessions where country officials showcase their ICT policy/regulation frameworks</li> <li>• Networking activities and spaces that allow government-corporate interactions</li> <li>• Networking activities and spaces that allow interactions between corporates and international regulators</li> </ul>	5, 7, 8, 9, 10, 16, 17
<b>Support program for ICT SMEs from developing countries</b>	<ul style="list-style-type: none"> <li>• Redesigned SME program (SMEs from developing countries)</li> <li>• Interactive forum sessions that include SMEs and governments of developing countries</li> </ul>	1, 4

# Agenda

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Reminder – Executive summaries of Phase I and II work modules

# Detailed evaluation: Emerging & frontier markets ICT event

Event concept	Value proposition	Impact potential	Financial sustainability
	<p><b>Target audience</b></p> <p>This concept targets governments and regulators from developing countries, international organizations, local companies or regional representations of global corporates</p>	<p><b>Concept objective</b></p> <p>This event concept aims to <b>support developing countries strengthen and grow their local ICT sectors</b></p>	<p><b>Financial profile</b></p> <p>This event concept relies on <b>subsidization</b>, either from ITU’s regular budget or from an external funder (e.g., development agency, host country)</p>
Emerging & frontier markets ICT event - forum only	<p><b>High</b></p> <p><b>Gov’s and regulators from developing countries:</b> ITU has strong relationships with governments of developing countries and can attract them. In addition, few events specifically target developing countries, meaning there is limited competition</p>	<p><b>High</b></p> <p><b>Relevance to ITU Strategic Goals*:</b></p> <ul style="list-style-type: none"> <li>By working to bridge the ICT gap in developing countries, the event concept contributes to most of ITU’s Strategic Goals</li> <li>It has a particular focus on <b>1. Growth, 2. Inclusiveness and 5. Partnership</b></li> </ul>	<p><b>Medium</b></p> <p><b>Dependency on external funders:</b></p> <ul style="list-style-type: none"> <li>If the event concept is fully taken on ITU’s regular budget, it would be financially sustainable as there will be no uncertainty related to dependency on external funding (as is currently the case with host country contributions)</li> <li>If not, external funding would be needed. This induces lack of predictability on the scale of funding and on the partners’ appetite to fund future edition</li> </ul>
	<p><b>High</b></p> <p><b>International organizations:</b> ITU, as a UN agency, has good access to IOs and can attract them (as it currently does in other events such as AI for Good Global Summit)</p>		
	<p><b>Medium</b></p> <p><b>Corporates:</b> ITU has some access to corporates through Sector Membership (although attractiveness of ITU events has decreased lately) – particularly regional and local companies</p>		
Emerging & frontier markets ICT event - forum and exhibition	Same as above	Same as above	<p><b>Low</b></p> <p>It is unlikely that ITU would cover for the cost of national pavilions. Exhibition would therefore have to be financed externally, adding further dependency on external partners</p>

Source: Dalberg analysis  
 Note: (\*) Description of ITU Strategic Goals is available in the annex

# Detailed evaluation: **Digital for Development event** (*developing country-focused*)

Event concept	Value proposition	Impact potential	Financial sustainability
	<b>Target audience</b> This concept targets public stakeholders of developing countries, development partners (e.g., bilaterals, multilateral, IOs, NGOs), corporates and social enterprises	<b>Concept objective</b> This event concept aims to <b>drive innovation, adoption and use of ICT solutions in support of development objectives of developing countries</b>	<b>Financial profile</b> This event concept relies on <b>subsidization</b> , either from ITU's regular budget or from an external funder (e.g., development agency, host country)
<b>Digital for Development event- forum only</b>	<b>High</b> <b>Public stakeholders from developing countries:</b> ITU is well-placed to leverage relationships with developing country member states to attract government officials and regulators	<b>High</b> <b>Relevance to ITU Strategic Goals:</b> <ul style="list-style-type: none"> <li>By working to support ICT applications for development, the concept contributes to most if the five ITU Strategic objectives</li> <li>It has a particular focus on <b>1. Growth, 3. Sustainability</b> and <b>5. Partnership</b></li> </ul>	<b>Medium</b> <b>Dependency on external funders:</b> <ul style="list-style-type: none"> <li>The event's financial sustainability would face low risk if fully subsidized by ITU's regular budget, as there would be limited funding uncertainty related to dependency on external funding</li> <li>If external funding is required, the ITU Telecom team may face funding risks related to year-on-year unpredictability of funding sources and scale</li> </ul>
	<b>High</b> <b>Development partners:</b> Given ITU's status as a UN agency, the event can attract stakeholders focused on development, including bilaterals, multilateral, foundations, NGOs, IOs		
	<b>Medium</b> <b>Corporates and social enterprises:</b> ITU has some access to corporates through Sector Membership. Limited competition in the ICT4Dev event segment might strengthen ITU's appeal to corporates	<b>High</b> <b>Urgency of action:</b> <ul style="list-style-type: none"> <li>There is great variability in the progress made by developing countries against the SDGs, with many countries lagging</li> <li>Some ICT innovations have potential to accelerate progress of developing countries to achieve their objectives</li> </ul>	
<b>Digital for Development event- forum and exhibition</b>	<i>Same as above</i>	<i>Same as above</i>	<b>Low</b> Including an exhibition adds costs to the event, putting additional pressure on ITU to seek external funding, which in turn increases dependency on external partners

# Detailed evaluation: Global Digital for Good event

Event concept	Value proposition	Impact potential	Financial sustainability
Global Digital for Good event - forum only	<b>Target audience</b> This concept targets corporates and SMEs in the ICT4Good sector, governments, NGOs, and international organizations	<b>Concept objective</b> This event concept aims to <b>drive innovation, adoption and use of ICT solutions for the common global good</b> in support of the SDGs	<b>Financial profile</b> This event concept can be self-sustained financially. Revenue sources are admission fees to the forum, and sponsorships of forum sessions or networking activities
	<b>Medium</b> <b>Corporates and SMEs in the ICT4Good sector:</b> Attractiveness of ITU's events to corporates (and SMEs) in general has decreased. In addition, other ICT events targeting corporates are increasingly integrating sessions on ICT4Good into their programs	<b>High</b> <b>Relevance to ITU Strategic Goals:</b> <ul style="list-style-type: none"> <li>By working to support ICT applications for development, the concept contributes to most of the five ITU Strategic objectives</li> <li>It has a particular focus on <b>3. Sustainability, 4. Innovation, and 5. Partnership</b></li> </ul>	<b>Medium</b> <b>Predictability of revenues:</b> <ul style="list-style-type: none"> <li>Revenue generation is dependent on ability to attract and retain large corporates, international organizations, and developed country governments (likely to be the main sources of revenue for the event)</li> <li>However, increasing difficulty to attract and retain corporates and developed country governments brings uncertainty on the event's ability to generate revenues</li> </ul>
	<b>Low</b> <b>Governments from developed countries:</b> Attractiveness of ITU's events to governments from developed countries has decreased		
	<b>High</b> <b>Governments from developing countries:</b> ITU has strong relationships with governments of developing countries and can attract them	<b>High</b> <b>Urgency of action:</b> <ul style="list-style-type: none"> <li>Progress on the 2030 SDG agenda is lagging, while the pace of change and innovation in the ICT sector is accelerating</li> <li>There are ICT applications that can accelerate progress on the SDGs globally – including global sustainability issues such as climate change</li> </ul>	
	<b>High</b> <b>NGOs and IOs:</b> Given its status as a UN agency, ITU can attract NGOs and IOs with an interest in ICT4Good		
Global Digital for Good event - forum and exhibition	Same as above	Same as above	

Source: Dalberg analysis

# Detailed evaluation: Davos-style ICT forum

Event concept	Value proposition		Impact potential	Financial sustainability
	Target audience		Concept objective	Financial profile
Davos-style ICT forum	<p>This concept targets global shapers of the ICT sector, including senior stakeholders in governments, IOs, NGOs and foundations, and public affairs representatives of large corporates</p>		<p>This event concept aims to <b>advance collective thinking and coordinated action on the most pressing societal issues related to ICT</b></p>	<p>This concept can be self-sustained financially. Revenue sources are admission fees to the forum, and sponsorships of forum sessions or networking activities by corporates, governments, international organizations, or foundations</p>
	Low	<p><b>Governments of developed countries</b> (senior representatives): Attractiveness of ITU's events to governments from developed countries (esp. senior stakeholders) has decreased</p>	<p><b>Relevance to ITU Strategic Goals:</b></p> <ul style="list-style-type: none"> <li>By working to support ICT applications for development, the concept contributes to most of the five ITU Strategic objectives</li> <li>It has a particular focus on <b>3. Sustainability</b> and <b>5. Partnership</b></li> </ul>	<p><b>Predictability of revenues:</b></p> <ul style="list-style-type: none"> <li>Revenue generation is dependent on ability to attract and retain a sufficient audience from governments (esp. from developed countries) and large corporates</li> <li>However, the financial performance of forum activities of recent editions of ITU Telecom World shows that there is declining attendance (and therefore smaller sales volumes) despite price reductions</li> </ul>
	High	<p><b>Governments of developing countries</b> (senior representatives): ITU has strong relationships with governments of developing countries and can attract them</p>		
	Low	<p><b>Large corporates:</b> The face of the ICT sector is changing as it is becoming increasingly vertical and driven by other industries (e.g., automobile, finance, retail). ITU does not have a strong relationships with the new actors in the sector. In addition, other events featuring multi-stakeholder debates target large corporates</p>	<p><b>Urgency of action:</b></p> <ul style="list-style-type: none"> <li>As ICT has become ubiquitous in all aspects of social and economic life, it is increasingly important to identify and discuss potential issues and risks arising from these technologies and their use, and coordinate action to address them</li> <li>However, there might not be specific urgency to do so</li> </ul>	<p><b>Medium</b></p> <ul style="list-style-type: none"> <li>Interest from corporates and governments to sponsor forum activities could provide additional revenues, but is also highly dependent on perceived relevance of an edition's program and comparative offering of similar ICT events offering opportunity for discussion</li> </ul>
High	<p><b>International organizations, NGOs, foundations:</b> Given its status as a UN agency, ITU can attract NGOs and IOs</p>			

Source: Dalberg analysis

# Detailed evaluation: **Support program for ICT SMEs from developing countries**

Event concept	Value proposition	Impact potential	Financial sustainability
<p><b>Support program for ICT SMEs from developing countries</b></p>	<p><b>Target audience</b></p> <p>This concept targets <b>small and medium enterprises from developing countries</b> active in the ICT sector.</p>	<p><b>Concept objective</b></p> <p>This event concept would aim to <b>help ICT SMEs from developing countries (i) learn</b> about the latest trends in the sector, <b>(ii) get coaching</b> on specific areas related to SME growth, and <b>(iii) share concerns and needs</b> with the broader SME community</p>	<p><b>Financial profile</b></p> <p>The event concept relies on <b>subsidization</b> as ICT SMEs from developing countries have limited financial resources to pay for their participation to these events.</p>
	<p><b>SMEs:</b></p> <ul style="list-style-type: none"> <li>• ITU is relatively well-placed to reach SMEs from developing countries through its relationship with members states.</li> <li>• However, ITU may lack the credibility to attract and retain SMEs due to limited internal knowledge of and involvement in the SME sector.</li> <li>• Still, there are close to no events that focus exclusively on ICT SMEs in developing countries, so ITU would face limited competition</li> </ul>	<p><b>Relevance to ITU Strategic Goals:</b></p> <ul style="list-style-type: none"> <li>• By working to support the SME sector in developing countries, the concept <b>contributes to most of the five ITU Strategic objectives</b></li> <li>• It focuses on <b>1. Growth; 2. Inclusiveness</b> and <b>4. Innovation</b></li> </ul> <p><b>Urgency of action:</b></p> <ul style="list-style-type: none"> <li>• Supporting SME growth <b>contributes to achieving progress on ITU's Strategic Goals</b> and the SDGs more broadly</li> <li>• However, <b>SMEs are only a small part of the ICT ecosystem</b> (government policy and large-scale corporate investments are also essential for sector growth and innovation), which may <b>hamper the urgency to support SMEs specifically</b></li> </ul>	<p><b>Dependency on external funders:</b></p> <ul style="list-style-type: none"> <li>• Given the focus on SMEs from developing countries, this event likely requires subsidization, either from ITU's regular budget or from external funders, e.g., national governments willing to support their local SMEs, or donors</li> <li>• The event's financial sustainability would face low risk if fully subsidized by ITU's regular budget</li> <li>• If external funding is required, the ITU Telecom team may face funding risks related to year-on-year unpredictability of national governments' commitments to supporting their SME sectors or donor appetite</li> </ul>

# Agenda

Reminder on project context, guiding principles and approach (5 min)

Summary findings from the ICT event landscape analysis and from ITU Telecom Strategic Foundation's review (10 min)

Summary findings from the strategic and financial review (10 min)

Approach for identifying future options (5 min)

Recommended options (20 min)

Q&A (10 min)

## Annex

Shortlist of addressable needs (Step 2)

Rationale for shortlisting needs (Step 3)

Mapping of shortlisted needs to event components (Steps 4 & 5)

Mapping of event concepts to needs and event components (Step 6)

Assessment of prioritized event concepts (step 9)

## Financial sustainability assessment – key hypotheses

Reminder – Executive summaries of Phase I and II work modules

# Financial model assumptions (*base case*)

Assumption	A.1. ICT for emerging and developing markets	B.1. Digital for Development event	C.2. Digital for Good event
<b>1. Scale of the event</b>			
Size of event venue	1,000	2,000	15,000
# of unique visitors (including non-paying)	500	2,000	10,000
# of forum sessions	20	30	40
# of dedicated networking spaces	2	3	3
# of networking activities	3	5	10
# of days	2	3	4
<b>2. Sales volume</b>			
# of exhibitors	0	0	70
Avg size of exhibition space rented (m2)	0	0	150
# of turnkey stands sold	0	0	20
Avg size of turnkey stands sold (m2)	0	0	100
# of exhibition passes sold	0	0	2,000
# of forum passes sold – <i>premium</i>	10	20	50
# of forum passes sold – <i>basic</i>	50	150	500

# Financial model assumptions (*base case*)

Assumption	A.1. ICT for emerging and developing markets	B.1. Digital for Development event	C.2. Digital for Good event
<b>3. Pricing</b>			
Rental price of exhibition space (CHF/m2)	0	0	800
Price of turnkey stands (CHF)	0	0	2,000
Avg unit price of exhibition passes (CHF)	0	0	500
Price of forum passes sold - premium (CHF)	2,000	3,000	5,000
Price of forum passes sold – basic (CHF)	1,000	1,500	2,000
<b>4. Sponsorships and external contributions</b>			
# of exhibition sponsors	0	0	2
Avg sponsorship size for the exhibition (CHF)	0	0	100,000
# of forum sponsors	5	10	25
Avg sponsorship size for the forum (CHF)	30,000	50,000	75,000
# of networking activities sponsors	2	5	10
Avg sponsorship size for networking activities (CHF)	30,000	50,000	75,000
# of general sponsorships	0	1	1
Avg size of general sponsorships (CHF)	0	50,000	50,000
Host country lump sum (CHF)	0	0	0
Host country – other financial contributions (CHF)	0	0	0
Host country – in-kind services (CHF)	250,000	250,000	0

# Financial model assumptions (*base case*)

Assumption	A.1.	B.1.	C.2.
<b>5. Costs</b>			
Price of venue rental (CHF/m2)	200	300	300
Unit cost of carpeting (CHF/m2)	5	5	5
Construction and set-up of specific areas (CHF)	30,000	75,000	200,000
Decoration and signage (CHF)	30,000	50,000	100,000
Tech and production (CHF)	100,000	400,000	700,000
On-site services (registration, security) (CHF)	100,000	200,000	500,000
On-site facilities (CHF)	10,000	20,000	50,000
Unit cost of turnkey stands (CHF)	0	0	7,000
Unit cost of setting up a forum room (CHF)	2,500	15,000	
Unit cost of setting up networking spaces (CHF)	5,000	15,000	30,000
Cost of catering per networking activity (CHF)	20,000	30,000	50,000
Cost of award ceremony organization (CHF)	0	30,000	50,000
Number of permanent staff	10	15	30
Avg cost of permanent staff per staff (CHF)	100,000	100,000	100,000
ITU cost recovery (CHF)	500,000	750,000	1,500,000
Mission expenses (CHF)	50,000	100,000	250,000
Materials and supplies (CHF)	30,000	50,000	75,000
Advertising and communication (CHF)	250,000	500,000	1,000,000
Digital platform (CHF)	20,000	50,000	75,000

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**Reminder – Executive summaries of Phase I and II work modules**

# Executive summary – Phase I – *Strategic Foundation* (I/II)

1

## Strategic Foundation definition

- **The Strategic Foundation is the framework that links an entity's strategic aspirations with its activities and end-results.** For ITU Telecom, we have chosen to re-use the structure used for ITU in the 2016–2019 Strategic Plan, which includes 4 levels: i) Vision & Mission; ii) Strategic Goals; iii) Objectives & Outcomes; iv) Outputs
- **A Strategic Foundation is key to ensure clarity and alignment on the entity's purpose and to guide its strategic, tactical and operational choices, but also to measure its impact over time.** In the context of this project, the output of this strategic foundation review will be fundamental to design the **impact assessment framework** used in Phase II (2a).
- **This analysis focuses on ITU Telecom's past Strategic Foundation** and is based on available information, and **does not assess its relevance**, neither in absolute terms not given ITU's constraints.

2

## Consolidated view of the Strategic Foundation

- **In the absence of a consolidated view of ITU Telecom's Strategic Foundation, we have aimed at "reconstituting" it,** and to achieve this goal we have followed a **two-step approach**: i) **Consolidate the existing, fragmented elements** on ITU Telecom's Strategic Foundation, reviewing available relevant documents (*ITU past Strategic Plans, Resolution 11, event communication materials & programs, and KPI framework*) ; ii) **Articulate these elements** in a holistic, coherent framework:
  - ✓ **Vision & Mission:** The Union's overall Vision & Mission focuses on **broadening access to ICT to achieve sustainable development**. This message is reiterated in documents specific to ITU Telecom World.
  - ✓ **Strategic Goals:** ITU Strategic plan highlights **4 core goals for the Union**: i) Growth – Enable and foster access to and increased use of telecommunications/ICTs; ii) Inclusiveness – Bridge the digital divide and provide broadband for all; iii) Sustainability – Manage challenges resulting from telecommunication/ ICT development; iv) Innovation and partnership – Lead, improve and adapt to the changing Telecom/ICT environment. **ITU Telecom communications materials content resonate with these Strategic Goals**, although they are not reused explicitly.
  - ✓ **Objectives & Outcomes:** **4 Objectives** are recurring across ITU Telecom documents: i) Promote innovation for social impact; ii) support the SME sector; iii) address major trends in the ICT industry; iv) foster collaboration between the private and public sectors. However, **none of the documents reviewed describe the Outcomes** that would help measure progress on these Objectives.
  - ✓ **Outputs:** We define the event's list of activities as its Outputs. These include: i) Forum & specialized sessions; ii) Exhibition; iii) SME program; iv) Networking sessions. Each event component supports one or more of the objectives mentioned above. **KPIs provide a useful measure of the output delivery, but not the end-results against the objectives.**

# Executive summary – Phase I – *Strategic Foundation* (II/II)

3

## Diagnostic on the current definition of the Strategic Foundation

- The consolidated view of the Strategic Foundation based on available documentation, and interviews with ITU Telecom staff and CWG-FHR members reveals three challenges to define the current Strategic Foundation:
  1. **Lack of clarity in the documentation.** Written sources do not offer a clearly defined view of the Strategic Foundation; they also tend to lack consistency and prioritization across objectives.
  2. **Lack of internal alignment.** In-person consultations with ITU Telecom staff and CWG members reveal diverse views on ITU Telecom's core objectives (also not always aligned with the 4 objectives from the documentation.)
  3. **Variations from one year to the other.** Host country rotation seems to have caused year-on-year changes in host objectives.

4

## Impact assessment framework

- **We will draw on this Strategic Foundation review to base the impact assessment in Phase 2.** Two key questions need to be answered to build the Impact Assessment framework:
  1. Given the different versions of the Objectives observed, against which will results be measured?
  2. As the Outcomes required to measure results against the Objectives are not documented, which ones will be used?
- **Objectives:** To maintain a common basis of understanding, **we will focus on the four objectives that are included in ITU Telecom-specific documents** (often mentioned in interviews as well, at least partly): i) Promote innovation for social impact ii) Support the SME sector; iii) Address major trends in ICT industry; iv) Foster public-private collaboration
- **Outcomes:** **We will define the Outcomes as a set of metrics that directly map to each of the individual Objectives**, and that will be measured through a survey. Three impact dimensions guide the design of Outcome metrics:
  1. Quantity of sessions and interactions with potential for impact (i.e., the number of times participants have interactions or attend session that may contribute to an Objective)
  2. Depth of potential impact from those sessions/interactions (i.e., session/interactions relevance to participants)
  3. Realization of impact potential (i.e., extent to which the participant is able to apply learnings or connections to his/her organization). Each impact dimension is applicable to each Objective.
- **The survey results and select interviews will allow us to estimate results against each Objective.** Of course, this estimate will need to be considered as the fruit of a one-time, time-constrained review, that can not pretend to the level of precision of a multi-year, continuous and exhaustive impact measurement program built with statistical precautions.

# Executive summary – Phase I – *Landscape analysis* (I/II)

## Overall landscape of ICT events

- **The global landscape of ICT events is crowded and rapidly changing**, as new events appear and grow (e.g., VivaTech), while established players sometimes fail to keep up with the pace of change (e.g., CeBIT Hannover)
- As a result, **the ICT event landscape has become very competitive** as more events target the same market. As there is more choice for participants, they are increasingly selective when deciding which event(s) are the best investment(s) of time and resources
- **Within ITU events portfolio, many events are competing for similar participants.** This multiplication of solicitation drives participants to trade-offs between different ITU events

## Segmentation of ICT events

- **In order to better describe the dynamics of the global ICT event market, we have chosen to segment this market into 5 categories, following a rigorous methodology** (*detailed page 57*). Each of these five categories of events have their own vision and objectives:
  - Global generalist events (e.g., MWC Barcelona, CES, VivaTech, Web Summit). These are a handful of events attracting a large audience with the goal to set a shared vision for the sector globally and showcase state-of-the art technology. This category has seen new actors emerge recently (e.g., VivaTech) and other decline (e.g., CeBIT Hannover)
  - Regional generalist events (e.g., CommunicAsia, Computex Taipei, AfricaCom). These events focus on promoting trade and investment, fostering innovation, and encouraging coordinated action within a region. Emerging regions (e.g., Asia) are particularly active in this category; and some organizers of global generalist events are increasingly setting up regional editions (e.g., MWC Shanghai starting 2014, MWC Los Angeles starting 2017)
  - Large-scale global specialist events focusing on core technologies (e.g., 5G Expo Global, World Summit AI) with the aim to showcase innovation, share knowledge, and discuss regulation. This category is relatively dynamic (with many new events appearing), reflecting the dynamism within the sector as new technologies emerge
  - Small-scale global specialist events focusing on niche topics (e.g., ICT4Dev Conference, AI for Good Global Summit). Many of these events tend to focus on knowledge sharing, discussion, and networking among a target audience of specialists. Some event organizers active in the global generalist category (e.g., GSMA) are setting up small-scale theme-focused events to address knowledge gaps and the need for dialogue on niche issues (e.g., Mobile 360 series)
  - Regional specialist events (e.g., AI & Big Data Expo North America, IoT Tech Expo Europe). These events bring together stakeholders within the same region and focus on a specific ICT issue or technology field. Some of these events are regional editions of global specialist events

# Executive summary – Phase I – *Landscape analysis* (II/II)

## Positioning of ITU Telecom World

- **ITU Telecom World's communication suggests that it is a "global generalist event"**; however, geographic analysis of participants reveals a strong representation from developing countries, especially Africa, and a severe lack of leading western private-sector players across the sectors of information technologies and telecommunications.
- **Telecom World's programming suggests that it is aiming for multiple objectives:** showcasing innovation, networking for trade and business, knowledge sharing, partnership, and influence
- However, **across these objectives, there are several overlaps with other ICT events** (within and outside ITU):
  - **Showcasing innovation:** Telecom World's exhibition targets participants and partners from the private sector (including large companies), and therefore overlaps with larger-scale global generalist events like MWC Barcelona and VivaTech who also aim to showcase state-of-the-art technology
  - **Business and trade:** Telecom World's exhibition and networking activities intend to enable business opportunities among private sector participants (large companies, SMEs), and therefore overlap with other events that allow business-to-business interaction such as global and regional generalist events (e.g., MWC Barcelona, CommunicAsia)
  - **Knowledge sharing:** Telecom World's Forum activities aim to share knowledge and stimulate debate among the ICT community across the public and private sectors, and therefore overlap with global generalist events with strong knowledge components (like the Web Summit), but also with smaller-scale global specialist events like ITU-T's Kaleidoscope events, and ITU's World Telecommunication Development Conferences (WTDC)
  - **Partnership:** Telecom World's exhibition and networking activities are also intended to create partnership opportunities (other than business) between participants (e.g., governments, companies, NGOs). Telecom World therefore overlaps with global specialist events within and outside ITU who also aim for this objective (e.g., ICT4Dev Conference, AI for Good Global Summit)
  - **Influence:** Telecom World's networking activities and participant mix allow for industry-government discussions on regulatory issues. This overlaps with the positioning of other ITU events (e.g., the Global Symposium for Regulators, World Radiocommunication Conference) that attract governments and companies and enable discussions on regulation, but also some non-ITU global generalist events (e.g., MWC's Ministerial Program)

# Executive summary – Phase I – *Trend analysis* (I/II)

## Trends in the ICT sector

### Four types of trends in the ICT sector are emerging:

- **Economic:** Private sector actors and emerging regions are increasingly driving innovation; and new actors and business models are emerging. The sector is also becoming vertical as ICT is now core to multiple industries (e.g., automobile, finance, retail). This could mean for ICT events like Telecom World that an evolution will be needed to include new actors and industries in their audience, collaborate further with the private sector, and enable debate on the profound economic changes happening in the sector
- **Political and regulatory:** There is increasing scrutiny from the public sector on ICT companies, with domestic regulations having a broad geographic reach (beyond domestic borders). At the same time, there is more self-regulation by the private sector. ICT is also increasingly used for political purposes. As a result, ICT events like ITU Telecom could be driven to further i) support dialogue between the public and private sector on regulations and policies, ii) support harmonization between countries and regions on ICT regulations, as well as ICT diplomacy, and iii) advance thinking and enable debate within the broader community on the political risks of ICT and regulatory best practices
- **Environmental and socio-cultural:** There are increasing applications of ICT to the social sector, and increasing implications of ICT use on society (e.g., data privacy, inclusion, hate speech). ICT events like ITU Telecom could become platforms to i) showcase, advance thinking, and enable debate on the social applications of ICT with a view on highlighting opportunities, and ii) advance thinking and support coordinated action on the social risks related to current use patterns of ICT
- **Technological:** New ICT technologies are constantly being developed and existing ones continue to be improved. In particular, public sector actors and companies from developing markets might fail to keep up with the pace of technological innovation in the sector. ICT events like ITU Telecom could be used as platforms to keep all stakeholders informed of current state of the art and their broader implications

# Executive summary – Phase I – *Trend analysis* (II/II)

## Trends in the events sector

### At the same time, the events sector is also undergoing profound change globally:

- **Thematic focus:** There is a trend towards specialization with more events focusing on niche topics (or specific technologies). There is also an increasing focus on integrating the voice of beneficiaries (or consumers) and having the youth take part to events or side-events
- **Vision & objectives:** More and more events are purpose- and agenda-driven. This means that they link their activities to greater objectives (e.g., development of clean energy for a solar event) and agendas other than their own (e.g., advancing the SDGs, preparing for other meetings)
- **Participants:** More events try to convene a “community” of actors or changemakers from different backgrounds and bringing different perspectives. The private sector is also increasingly represented
- **Formats:** There is more innovation in the formats, as well as more sessions driving towards collective problem solving and concrete results
- **Hosts:** The private sector is increasingly a convener of events, mostly for influence and public relations

## Implications for ICT events (and Telecom World)

- In this context, **ICT events (including Telecom World) will likely need to adapt** in order to remain relevant and achieve the impact that will be defined by its future Strategic Foundation. This adaptation will affect both *what* these events are doing, and *how* they are doing it
- We will use these implications as a **“check list” against which we will test the future options available for Telecom World**, to ensure that the event is not only fit for purpose today but also in the long term

# Executive summary – Phase II

## *Value proposition assessment (I/III)*

### Historical view of ITU Telecom World's value proposition

- **Until the early 2000s, ITU Telecom World was the leading global ICT event**, attracting a large participant base. Its core value proposition was to provide senior government officials and ICT corporates an opportunity to learn from each other about the latest trends in the industry and network for business opportunities and influence policy
- **The high degree of attendance of senior decision-makers provided the critical mass of participants required to create a fruitful networking environment** that could meet participant expectations. Participants included a diverse mix of public and private sector actors from both developed and developing countries
- **Starting in the early 2000s, the event began to face declining participation, especially from the corporate sector, undermining the event's original value proposition.** This decline was largely driven by competition from new global ICT events organized by the private sector, which reflected broader structural changes in the ICT industry, including the privatization of telecoms
- **To confront the declining attendance, the event undertook changes to its format and expanded the scope of the value proposition.** Starting in 2012, the regional editions of the event were canceled and the global edition became an annual event (no longer every 3-4 years), rotating across regions. Around the same period, the forum was strengthened and the SME program was introduced in 2015. These changes were intended to expand the range of offerings and target participants

### Overall event satisfaction

- **Despite these changes, the event's value proposition shows clear signs of weakness.** Its net promoter score (NPS) is relatively low when compared to benchmark scores for B2B events across industries
- A breakdown by type of participant shows that **corporates are particularly unsatisfied** with the event, while **government officials are largely positive**. SMEs gain some value from the event, but still believe there is significant room for improvement
- **These satisfaction levels reflect the extent to which each participant is able to achieve his/her core objectives in attending the event.** This exercise therefore includes an analysis of participant priorities as an entry point to assess satisfaction drivers

# Executive summary – Phase II

## *Value proposition assessment (II/III)*

### Large companies/Corporates

- Overall satisfaction: **Corporates are severely dissatisfied with the current offering** (more than any other stakeholder).
- Attendance priorities: Beyond learning about current trends in the ICT industry, corporates seek to **meet governments to influence policy** and **conduct business with other companies**.
- Satisfaction across activities and priorities
  - **Exhibition: This is not a space that offers value for corporates**. The low presence of large companies in the exhibition space reduces the potential for fruitful networking for business. Interactions between government and corporates are also scarce due to low attendance of senior government officials, reducing opportunities to network for policy influence.
  - **Forum & networking: The forum is a more useful activity for corporates** as it gives speakers an opportunity to meet government officials and regulators through the panels, which can lead to networking on the forum sidelines. However, this opportunity typically materializes **only for a small group of corporate** participants with speaker roles.
  - **All activities: US and European industry leaders are largely absent from the event** as other global ICT events are more effective in delivering on their priorities. The event's **unbalanced regional representation**, driven by the host country rotation further reduces its appeal for corporates keen to engage in a global event.

### Small and medium enterprises (SMEs)

- Overall satisfaction: **SMEs are not as uniformly negative as corporates and express different views** about the event's value proposition depending on their role.
- Attendance priorities: In addition to learning about current trends in the ICT industry, most SMEs attend the event to **network for business opportunities** and **to attract funding**.
- Satisfaction across activities and priorities
  - **SME program**: The **awards provide a useful platform to refine sales pitches** and attract business. However, not all SMEs participate in the awards. The **rest of the program is perceived as lacking content depth** and opportunities to interact with potential business partners and investors.
  - **Exhibition**: SMEs who are invited to attend national pavilions are largely satisfied, while **those who pay out of pocket for independent stands don't achieve value-for-money** due to low traffic of potential investors or clients.
  - **Forum & networking**: **SMEs struggle to make connections through the forum and other dedicated networking spaces** (e.g., the Leader Space) as government officials and senior corporates are largely uninterested in networking with SMEs

# Executive summary – Phase II

## *Value proposition assessment (III/III)*

### Government officials/regulators

- Overall satisfaction: In contrast to the private sector participants, **government officials and regulators are positive** about their event experience
- Attendance priorities: Government officials' are most keen **to learn about policy trends, foster inter-governmental policies, and attract private sector investment in their country.**
- Satisfaction across activities and priorities:
  - **Forum**: The content of the forum sessions **adequately addresses the latest policy and regulatory questions** in the industry.
  - **Forum & networking**: The forum also **offers an opportunity to make new connections that can lead to fruitful networking** opportunities following the forum sessions. Forum speakers appreciate the networking area immediately adjacent to the forum, as it offers a straightforward way to connect with other panelists following the sessions.
  - **Exhibition**: Developing country governments take up the majority of exhibition space to promote local industry through national pavilions. **Satisfaction levels are mixed** across participants (more detail on page 37).

### Findings on interactions between activities

- **The event has developed two parallel tracks**: senior participants – both government and corporate – gravitate around the forum and exclusive networking spaces (e.g., Leader Space, Leaders Lunch, etc.), while lower-level corporates and SMEs attend the exhibition and SME program sessions (more detail on page 39).
- **Event activities are therefore not self-reinforcing**. Most notably, the **weak** flow of forum speakers to the exhibition reduces attendance of senior participants in the exhibition, which undermines the space's role as a catalyzer for networking. Moreover, the SME program rarely hosts senior attendees of the forum and dedicated networking spaces, as senior corporate and government participants don't prioritize meeting with SMEs.

### Findings on lower priority stakeholders

- Academics: Academics focus on sharing their latest work and networking to affect policy decisions. **They are largely satisfied with their ability to meet these goals through forum sessions and networking** that takes place on the sidelines of the forum.
- International organizations (IOs): IOs focus on sharing their policy work and seeking partnerships with their peers as well as corporates and governments. **They are able to make moderate progress** on this priority, but **find the forum's policy discussions lack depth** compared to other global events run by international organizations.

# Executive summary – Phase II

## ***Impact assessment (I/III)***

### Strategic foundation recap and objectives for the impact assessment

- **In Phase I, we “reconstructed” a high-level Strategic Foundation for ITU Telecom.** The exercise had revealed a wide range of perspectives among ITU Telecom staff as to the event’s strategic objectives.
- To have a common basis of understanding, **we chose to focus on the four objectives that were referred to in official documents** (e.g., Resolution 11, ITU Strategic plan, etc.) and that all ITU staff agreed on:
  1. Promote ICT innovation to achieve social impact
  2. Support the SME sector
  3. Address major trends and challenges in the ICT industry
  4. Foster public-private collaboration
- **Given its time-limited nature, this exercise takes the form of a qualitative assessment based on participant perspectives rather than a scientifically rigorous impact measurement.** Quantitative impact measurements would require monitoring the direct outputs and outcomes of the events over several years, which was not possible within the timeline of this engagement.
- **This analysis will therefore evaluate whether ITU Telecom World’s current form is well-suited to achieve impact on the four objectives.** Evaluating the event’s readiness to deliver on ITU Telecom’s objectives will be a starting point for discussions about how best to maximize ITU Telecom’s impact going forward (Phase III).

### Defining conditions required for impact

- By combining insights from stakeholder interviews (both internal and external to ITU Telecom World) and past Dalberg experience in impact assessment engagements, **we define three conditions that are key to achieving tangible impact through an event like ITU Telecom World.**
  - Program relevance: The content of the program should **disseminate ideas and solutions that can contribute to making progress on the objectives.**
  - Presence of change agents: The event should **attract the participants best placed to leverage the learnings and connections made to realize the impact** after the events.
  - Sustained commitment: The event should actively **encourage change agents to make trackable commitments and support them in bringing them to fruition** beyond the confines of the event itself.
- As part of this exercise, **we detail what it would take to meet these three conditions specifically for ITU Telecom World’s four strategic objectives** (pages 52-54). This provides a **basis on which to assess ITU Telecom’s readiness** in achieving impact.

# Executive summary – Phase II

## ***Impact assessment*** (II/III)

### Impact assessment

- **The content and format of ITU Telecom World’s key activities show the intention to make progress on the four objectives.** The exhibition, the forum, the SME program, and the broader networking opportunities offered by the event all aim to support one or more of the four objectives.
  - In summary, **each activity supports the four objectives as follows** (page 56 provides details on how each objective is mapped to one or more of the activities):
    - **Forum:** 1. Promote innovation for social impact; 3. Address major trends in the ICT industry
    - **Exhibition:** 1. Promote innovation for social impact; 2. Support the SME sector; 4. Foster public-private collaboration
    - **Networking:** 1. Promote innovation for social impact; 2. Support the SME sector; 3. Address major trends in the ICT industry; 4. Foster public-private collaboration
    - **SME program:** 2. Support the SME sector
- **Despite these intentions, each activity shows weaknesses across the three impact conditions,** which undermine the chances of making progress on the objectives. Key findings are provided below – greater detail is available on pages 58-61.
  - Program relevance: **All activities demonstrate content and delivery shortcomings that undermine the potential for impact across the four objectives** (details on page 58)
    - **Forum:** Forum is perceived as lacking constructive debates that involve the audience and challenge conventional thinking.
    - **Exhibition:** Low attendance and number of stands, especially from corporates, undermines the ability to create a fruitful networking environment in the space.
    - **Networking:** The exclusive nature of certain networking spaces (e.g., Leaders Space) reduces potential for interactions between senior stakeholders and SMEs/ smaller corporates.
    - **SME program:** While the awards help SMEs practice sales pitches, the rest of the program lacks a focus on key topics relevant for business growth (funding, market entry, product development, etc.).

# Executive summary – Phase II

## ***Impact assessment (III/III)***

- Presence of change agents: Event activities **lack the presence of private sector change agents**, especially among more senior decision-makers. The low presence of these private sector change agents is driven by self-reinforcing weaknesses described in the value proposition assessment (details on pages 59-60)
  - **Forum: The level of seniority of forum participants has diminished, particularly in the private sector**, and panel speakers and audiences are more rarely the key decision-makers in their organizations who can bring about change.
  - **Exhibition: The exhibition space not longer attracts a critical mass of private sector participants.** Government officials present are lower-level and focused on showcasing vs. engaging in substantive policy discussions.
  - **Networking: The event lacks US and European decision-makers**, who would be required to achieve progress across objectives that require global efforts
  - **SME program: SME program does not host a significant number of funders and investors and lacks opportunities for SMEs to network and share experiences with corporates.** Yet both play a critical role in supporting SME growth.
- Sustained commitment: **ITU Telecom World does not direct significant resources to three activities that could play an important role in supporting tangible impact beyond the event** (greater detail on page 61).
  - **Lack of trackable commitments**: ITU Telecom World rarely supports ‘calls to action’ or **trackable commitments** that could come out of the event, nor does it take the initiative to build partnerships in support of the four objectives.
  - **Weak change agent support post event**: ITU Telecom World lacks **longer-term support for change agents post event**, including online networking platforms, ongoing workshops, learning labs, etc.
  - **Low creation of a long-term community of actors: The host country rotation weakens the possibility for change agents to build relationships/trust over time and build partnerships through continued interaction**, as a portion of attendees change from year-to-year, depending on the location.
- As a result of these weaknesses across the three impact conditions, **ITU Telecom World’s current design and delivery are not well-suited to achieving impact** against the four strategic objectives defined in the Strategic Foundation .
- Going forward, should these objectives be confirmed, **the required changes to achieve impact might be significant**. This will be explored in phase 3, through a systematic approach described in the decision-making guide.

# Executive summary – Phase II

## ***Financial sustainability assessment (I/IV): Overall Context***

- **Resolution 11 has moved from requiring “financial success”** of ITU Telecom events (Rev. Antalya 2006) **to requiring “financial viability”** and **“no negative impact on the ITU Budget”** (Rev. Guadalajara 2010) as a reflection of the decline of the financial performance of the event since the early 2000s
  - As an illustration of this change in paradigm, the Exhibition Working Capital Fund (EWCF), which holds all accumulated profits of the event, has *de facto* moved from being an important financing source for ICT development projects through the ICT Development Fund (ICTDF) to being a cash reserve to address ITU Telecom’s potential liabilities in case of termination or event cancellation. In the 2011-17 period, there have been two transfers to ICTDF (2m CHF each, in 2014 and 2017), which were possible thanks to accumulated positive profits for 2-3 year periods (2012-13 and 2014-16 respectively). There is now limited room for transfers from EWCF to ICTDF: a hypothetical transfer of 2m CHF in 2019 would bring the EWCF balance close to the 5m CHF threshold
- While Resolution 11 (in its current version, revised in 2018) still requires “financial viability”, **there are no clear nor well-defined criteria**, except for the 5m CHF minimum balance requirement on the EWCF, introduced in 2018
- In practice, the financial viability requirement has been understood within the Secretariat as a **“breakeven requirement”**. While this has led to increased efforts by the Secretariat to develop balanced budgets, it has also given way to practices that (i) affect event performance, and (ii) undermine accurate financial reporting of the true cost of the event:
  - **Cost cuts and budget adjustments:** In response to the decline of revenues over the years, the Secretariat has had to substantially reduce marketing and communication budgets (yet critical activities for event success). In fact, during the preparation of an event, marketing and communication costs are usually the first areas to be cut when actual sales do not match budgeted revenues
  - **Potential under-reporting of the true cost of ITU services to Telecom:** There is currently no rigorous mechanism to quantify the level of services provided by ITU to ITU Telecom. However, the decision-making process for setting the cost recovery amount (decided by the General Secretariat) and the evolution of this amount over the past years indicate that it might be calibrated to support the event to break-even.\* For instance, while the level of ITU services might have increased (e.g., former Telecom staff assigned to other ITU departments while still rendering services to Telecom), the cost recovery amount has *in turn* declined (-11% p.a. in 2012-18)
- As a result, **Telecom’s response to the breakeven requirement has produced unintended effects that undermine the spirit of financial viability:** (i) cost cuts on marketing and communication reduce the appeal and reach of the brand and therefore reduce revenue potential\*\*; (ii) under-estimation of ITU cost recovery disguises the real impact of ITU Telecom on the ITU budget

Sources: Analysis of ITU Telecom financials; Stakeholder interviews; Dalberg analysis

Notes: (\*) ITU Telecom Secretariat Budget 2018-19 mentions the following: “*In order to assist the ITU Telecom Secretariat and alleviate the difficulties that it has been experiencing due to the current economic situation affecting the industry that led to lower revenue, it has been decided to maintain the same amount of cost recovery of CHF 3 million for 2018-2019 biennium*”; (\*\*) This supposes effective and efficient use of marketing and communication budgets to ensure the event has a distinctive and compelling brand, and a strong communication plan for the target audiences

# Executive summary – Phase II

## ***Financial sustainability assessment*** (II/IV): Overall Context

- In addition, **there are programmatic and operational constraints that limit Telecom’s ability to ensure financial sustainability:**
  - *Programmatic constraints*
    - **Focus on SMEs:** As large corporates gradually disengaged from the event, the focus of the event turned to SMEs since 2015 when they were identified as a priority stakeholder. As large corporates were responsible for the majority of exhibition revenue, this shift has significantly reduced revenues. SMEs have not been able to cover this gap as they are either hosted by National Pavilions or purchase smaller lower-price exhibition space
    - **Affordability to developing countries:** Resolution 11 calls the Union to “ensure accessibility and affordability of access passes for participants, especially from developing countries, to join ITU Telecom forums”. This creates a tension with financial viability as price reductions on admission fees reduce overall revenues as they do not always translate into higher sales volumes (that could compensate for price reduction)
  - *Operational constraints*
    - **Geographic rotation:** While geographic rotation allows ITU Telecom to (i) organize the event in locations where costs are, in general, lower than in Geneva, and (ii) benefit from financial and in-kind contributions from the host country, it has also brought about new costs and constraints to the Secretariat that may affect optimal delivery. It prevents efficiencies related to developing long-term relationships with authorities and sub-contractors in the same location. Rather, it requires additional admin time for the negotiation and management process of Host Country Agreements, which could otherwise be spent on event design, preparation and delivery
    - **Requests for free passes:** Telecom Secretariat is sometimes pressured to provide free access passes to other ITU Departments and Member States. According to Telecom Secretariat, the estimated value of free passes provided can sometimes amount to USD 1m. This might represent foregone revenues to ITU Telecom (as a share of these visitors might have been able and willing to pay)
- Reciprocally, **some financial constraints undermine Telecom’s ability to achieve its programmatic objectives and indented impact**
  - **Systematic profit transfers to EWCF:** ITU Telecom cannot keep a share of event profits (if any) in order to make long-term investments for the future development of the event, and restricts expenses to the organization and delivery of specific editions. This prevents ITU Telecom from adapting to and keeping pace with the rapid changes that affect both the ICT sector as a whole, and the ICT event sector in particular
  - **Balanced biennial budgets of the Secretariat:** Budgets of Telecom’s Secretariat are set every two years for two-year periods. The Secretariat’s budget mostly consists in staff salaries and benefits and services provided by ITU. The short time horizon for financial planning and the requirement to run balanced budgets prevents long-term investments for the future development of the event

# Executive summary – Phase II

## ***Financial sustainability assessment (III/IV): Assessment***

- **The current business model of ITU Telecom is not financially sustainable** for the following reasons:
  - Profitability
    - **Profits are low** (0.3m CHF on average in 2014-18) **and declining** (from 0.8m to -0.3m\* CHF in the same period)
    - **Revenues (other than host country contributions) have significantly declined** from 15m CHF in 2009 to 3m in 2018 (-16% p.a.) mostly due to a decline in revenues generated from the exhibition. *See following page for more detail*
    - **Financial contributions from the host country attempt to bridge this revenue gap. In fact, Telecom’s ability to generate profits has been entirely dependent on these contributions.** Not taking into account the host country lump sum and other sponsorships (2.9m CHF on average in 2014-18), ITU Telecom makes losses of -2.6m CHF annually on average between 2014 and 2018
    - **Decreasing interest from Member States to host the event therefore undermines Telecom’s financial viability.** Few countries bid to host the event (sometimes none), while some withdraw their bid following submission, once they are made aware of host country requirements and fail to see value in the investment
    - While costs have declined on paper, **there are many “hidden” costs** that are not taken into account in financial reporting. If taken into account, **Telecom’s financial performance would be worse off.** Telecom does not pay for in-kind services provided free of charge by the host country. These include the event’s venue (space and infrastructure) and other services (e.g., marketing, transportation, security, reception, protocol). In addition, some Telecom staff are transferred to other ITU departments while still rendering services to Telecom. These cost transfers (that lighten Telecom’s core expenditure) are, however, not reflected in the level of the cost recovery. As a result, there is *de facto* a subsidy from ITU’s regular budget to ITU Telecom
  - Solvency
    - The balance of the EWCF (currently 8m CHF) is above the 5m CHF minimum requirement (supposed to cover for potential liabilities). However, while this threshold (5m CHF) covers the salaries of 23 Telecom staff for a year (3.9m CHF, as per the 2018-19 budget of the Secretariat), it might not be able to cover additional liabilities such as health insurance and pension claims. In addition, **the balance of the EWCF has been declining** over the years (-7% p.a. in 2009-18), **leaving limited room for transfers to the ICT Development Fund**
  - Liquidity
    - While ITU Telecom does not face liquidity issues, this is partly because **ITU finances a large share of Telecom’s working capital.** Indeed, ITU pays for Telecom Secretariat salaries in advance, which Telecom later reimburses every three-to-six months based on its cash balance. ITU also pays for the salaries of ITU staff rendering services to Telecom, and is only paid by Telecom for these services, through the cost recovery mechanism, later in the year

# Executive summary – Phase II

## ***Financial sustainability assessment (IV/IV): Assessment***

- **Many factors have contributed to the decline of the event's financial performance**, particularly from a revenue perspective:
  - **Reduction of exhibition revenues is the single most important factor.** The exhibition went from generating 14m CHF in 2009 to 3m CHF in 2018. This represents 84% of the drop in total revenues in the same period. This is due to (i) a decline in overall space rented especially for National Pavilions, the largest source of revenue of the exhibition, and (ii) a decline in the average revenue per square meter as the number of SME exhibitors (who pay the lowest space rental price) has increased
  - **Forum admission revenues have declined.** They have moved from 1.4m CHF to 0.3m CHF (11% of overall drop in revenues). This is mostly due to a decline in the total number of Forum access passes sold despite a deliberate shift towards lower prices over the years. While aggressive reduction in Forum pass prices for nationals (300 CHF) has supported demand and revenues in Durban 2018, low pass prices for Hungarian nationals in 2019 did not have the same effect on attendance
  - **Sponsorship revenues (other than for the Forum) have declined.** Sponsorships for networking activities went from 0.5m CHF in 2009 to 0.2m CHF in 2018 (2% of overall drop in revenues), while non-attributable sponsorships (e.g., for admin, marketing) went from 1.2m CHF in 2009 to 0.2m CHF in 2018 (10% of overall drop in revenues). This is partly because governments and companies are more interested in Forum sessions sponsorships (which have increased significantly between 2009 to 2018) than other types of sponsorships
- At the same time, **the event has made improvements on cost effectiveness** that were, however, not sufficient to support the event's financial performance:
  - **Reorganization of the Telecom Secretariat.** The Secretariat underwent a restructuring that reduced its total size from ~60 to ~20 employees in 2003, while transferring non-core support functions to ITU (paid by Telecom through the cost recovery mechanism). More recently, staff costs of Telecom Secretariat have overall followed a downward trend since 2012 and systematically been lower than budgets
  - **Reliance on zero-cost services.** Telecom Secretariat is relying on zero-cost labor to support its operations. For example, Telecom had ~5 non-remunerated interns for 3-to-6 month-periods in preparation of the 2019 edition
- These **cost effectiveness gains are (i) over-estimated** given Telecom's reliance on zero-cost services, and (ii) **saturated** as there is little room for further cost cuts without jeopardizing the delivery of the event