

The future is going to be hybrid, without a doubt. And how people work together in that hybrid future is an underlying theme behind this session.

One of the things that must be faced is the ever increasing wave of demand on our networks. A huge amount of traffic is going to be coming on to the networks. And that traffic is in a sense the worst sort of traffic that we can imagine because it is going to be dominated by consumer video. So this is real-time, a lot of it is P2P, and orders of magnitude more traffic coming over the next few years. That has to be handled. And to handle that, spectrum is needed.

Who gets that spectrum is a real problem. Because there is more than one industry sector who are after it: the broadcasters want it, mobile broadband people want it as well. Somebody has to decide. And it is a difficult decision for those that do have to decide. How can they decide, how do they value one proposition against another? Because the mobile broadband industry and the broadcasters' industry are very differently structured in terms of the business models and in terms of the way that they provide benefits.

The digital dividend has already happened in US, the US has gone digital with their TV broadcasts, it's happening in Europe, in different timescales with different countries, and it's about to happen in Asia and Asia are looking at experiences in Europe and United States hoping to learn from these continents.

#### Moderator

- \* **Dr Stuart Sharrock**, Chairman, Telemates, ICIN Events, United Kingdom

#### Panellists

- \* **Mr Karl-Heinz Laudan**, Vice President Spectrum and Technology Policy, Deutsche Telekom AG, Germany
- \* **Dr Sebiletso Mokone-Matabane**, CEO, Sentech Ltd., South Africa
- \* **Mr Phillip L. Spector**, Executive Vice President, Business Development, & General Counsel, Intelsat, United States
- \* **Mr Jean-Pierre Bienaimé**, Chairman, UMTS Forum, France
- \* **Mr Lieven Vermaele**, Director, Technical & IT Services, European Broadcasting Union, EBU