

Introductions and Welcome

TFI News and Overview

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TFI Communications Technology Asset Valuation Conference

> January 28-29, 2015 Radisson Downtown Austin, Texas

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TECHNOLOGY ELITLIBES INC

Housekeeping

- Welcome and Introductions
- Lunch and Reception
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Developments of Note since TFI 2014



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Increased consumer awareness – and falling prices – have helped spur Ultra-HD TV sales in the first 10 months of the year with the holiday shopping season likely to goose it a little more.

Researcher NPD Group said 4K TV sales now account for 7% of overall U.S. flat panel revenues, or about \$668 million through October 25. Already this year, unit sales of 4K/UHD televisions are 9X the number of sets sold in 2013. Average selling price (ASP) of the 4k/UHD sets was \$2,400, compared to an average of \$450 for flat panel TV options overall, highlighting the industry's opportunity to benefit from the growth in 4K/UHD this holiday season. In the past four weeks, prices for the 4K/UHD sets have come down 10%, with more cuts expected for the holiday season.

 $- See \ more \ at: http://www.ooyala.com/videomind/blog/4kuhd-tv-sales-accelerating-awareness-rises-prices-drop\#sthash.hBCarcOW.dpuf$



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TELECOM TV

NEWS

TOPICS

VIDEOS

NETWORK INNOVATION

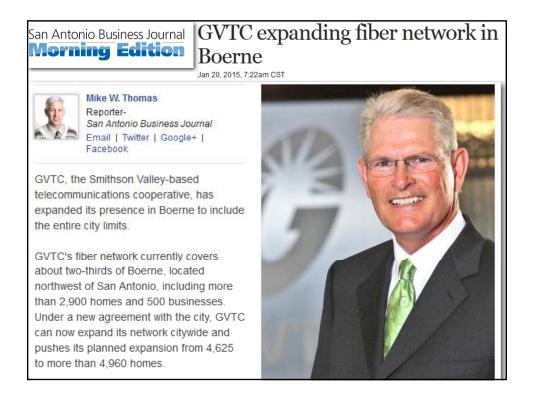
EVENTS

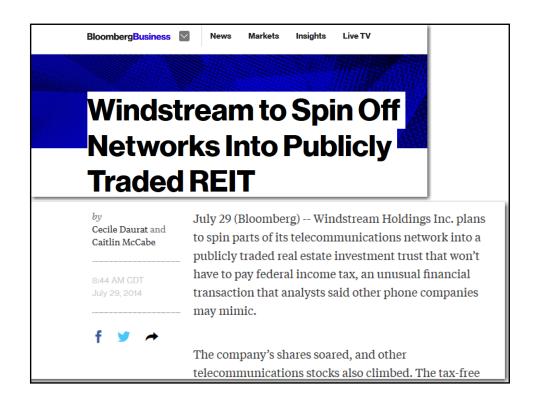
Why might Google want to go wireless?

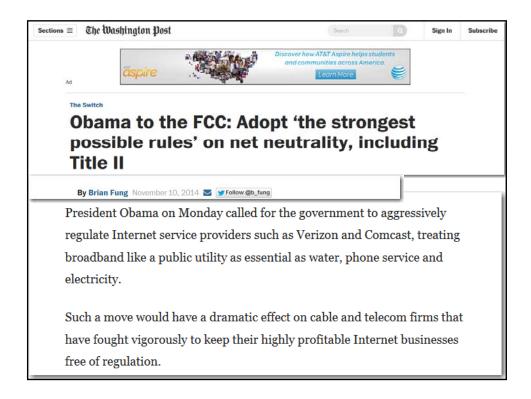


As rumors go this one now seems pretty convincing. Google appears likely to be embarking on its long-awaited mobile ...play, first in the US ...and apparently through a dual-sourcing arrangement involving both Sprint and T-Mobile.









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UPDATE 3-AT&T to pause fiber spending on net neutrality uncertainty

Wed Nov 12, 2014 7:07pm EST

By Marina Lopes

Nov 12 (Reuters) - AT&T Inc on Wednesday raised pressure on the U.S. telecommunications regulator's work on new "net neutrality" rules, saying it would stop investing in high-speed Internet connections in 100 cities until the Web rules were settled.

The statement from AT&T Chief Executive Officer Randall Stephenson is the first move by an Internet service provider in response to President Barack Obama's unexpected call on the Federal Communications Commission on Monday to regulate these companies more like public utilities.



TFI 2015



This Morning

THE INTERNET OF THINGS

The Internet of Things: Overview & Outlook
 Dub Dublin, IoT Pioneer, Serial CTO and Entrepreneur

TRANSFORMING LEGACY NETWORKS

- REITs and the Windstream Strategy Overview Joan Engebretson, Telecompetitor
- —REITs, Connect America Fund, and Network Neutrality:

 Implications for Network Evolution and Valuation Panel
 Joan Engebretson, Telecompetitor (Moderator/Panelist)
 Jason Chao, Earnst & Young
 Larry Vanston and Ray Hodges, TFI
 Jim Stegeman, CostQuest Associates
- Transforming the Local Exchange Network Lawrence Vanston, TFI



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This Afternoon

WIRELESS

- Keynote: Small Cells and Het-Nets, The Wave of the Future Iain Gillott, President and Founder, iGR
- —Urbanization and the Future of Communication Networks Charlie Burkhardt and Ron Williams, CostQuest Associates Ruben Miranda, Duff & Phelps Iain Gillott, President and Founder, iGR
- —Wireless Industry Panel Gary Wiggins, AT&T David Schneider, Sprint Stephen Yergeau, T-Mobile Michael Mupo, Verizon
- —TFI Wireless Forecast Update
 —Wireless Performance Trends
 Ray Hodges, TFI

ASSESSOR ISSUES
Jerry Weinert, AUS
Paul Tucker, Independent Appraiser



Tomorrow Morning

VIDEO AND CABLE TELEVISION

- Future of Television and Video
 August Grant, Professor, School of Journalism and Mass Communications,
 University of South Carolina
- -Forecasts of Online Video and Gigabit Access
- —Impacts on Cable HFC Networks
 - Lawrence Vanston, TFI
- —Trending for Cable Television Assets-Panel Christian Altenburger, Comcast Carl Hoemke, CorrelationAdvisors Jim Stegeman, CostQuest Associates Jeff Binkley, Deloitte

GENERAL

- -What's Around the Corner? Larry Vanston, TFI, and Others
- -Closing Remarks
- —**Box Lunch and Discussion** (box lunches provided by TFI)

TECHNOLOGY



