

MOBILE INDIA 2015

State of the Net

Challenges and Opportunities for Telcos

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Over the past 20 years...

Connected World

Ever-changing life and work





Trend 1:

The Internet will become a fundamental element of our business mindset...

- The Internet becomes an "inherent" business mindset instead of merely a tool.
- Restructure mindset with the Internet as the starting point

Trend 2:

All Mobile, at least Mobile first ...

- On-demand
- Anytime, anywhere
- Borderless enterprise

Trend 3:

The new, connected and shared wisdom...





Trend 4:

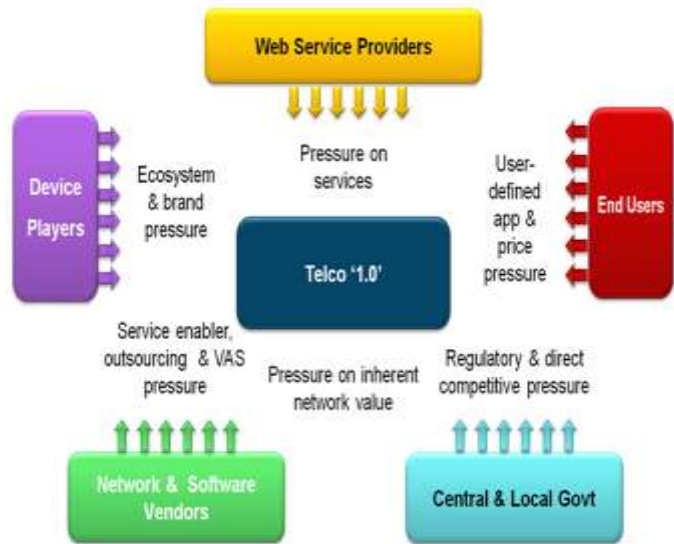
Social media's influence is everywhere...

- With borderless social media, the ways individuals behave and the things they like become similar.
- Niche and domestic markets will shrink and enterprises must do business globally.

Telco Transformation Path

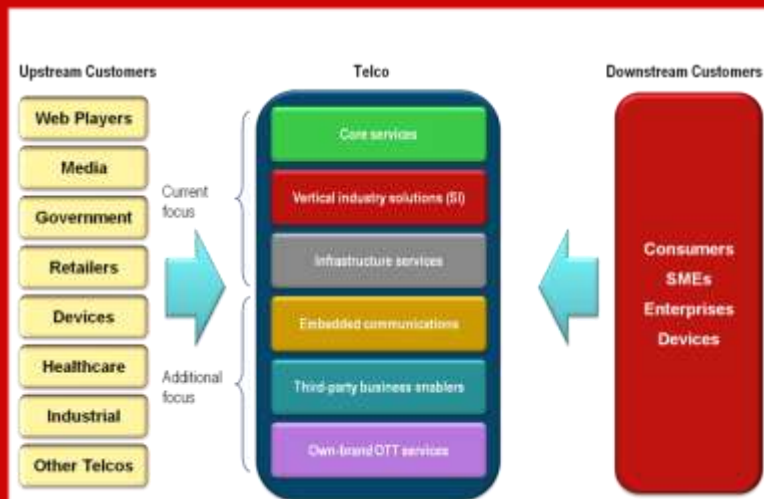
Telco 2.0

Telco 1.0



- ✓ One-sided business model (B2C)
- ✓ Controls the services on the network,
- ✓ Voice, SMS, IN, SS7
- ✓ Mass market
- ✓ Bundling & multi-play
- ✓ Siloed, focused on internal operations

Survival Mode



- ✓ Two-sided business model (B2B2C)
- ✓ Opens the control of services to partners and innovation
- ✓ Telco assets platform
- ✓ Wholesale, MVNx
- ✓ 3rd-party bundled
- ✓ Horizontal, focused on strategic innovation

New Value Mode

Telco 3.0 → Digital Telco



- ✓ Multi-sided business model
- ✓ Virtualized, shared, or outsourced
- ✓ Customer asset monetization
- ✓ Managed OTT Video, managed QoS
- ✓ Integrated vertically and horizontally focused on 'intelligently automated'

IT Becomes the Business

Summary - Digital Telco

1. **Customer Experience** – Personalization and superior user experience
 - a) Speed, Intelligent Proactive Pursuit, Simplicity, Sharing, Freedom and Reality
2. Realization of new **business Models**
 - a) Expose network functionality and exploit Developers, OTT players and Customer
 - b) Storage & Communication (Voice, Video, Audio, Text) offerings with the whole service environment
 - c) Lifestyle App store with meaningful apps that address day to day needs of Customer
3. **SMAC**
 - a) **Channel Transformation** – Mobile first and Omni Channel requirements
4. Competition from **OTT** players
5. Exponentially growing 'Connected Devices' creating **IoT** opportunities
6. **Virtualization** and **Cloudification**
 - a) Everything on the Cloud
 - b) XaaS – IaaS, PaaS, SaaS, NaaS, etc.

Thank you!

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