

Presentation from Analysys Mason

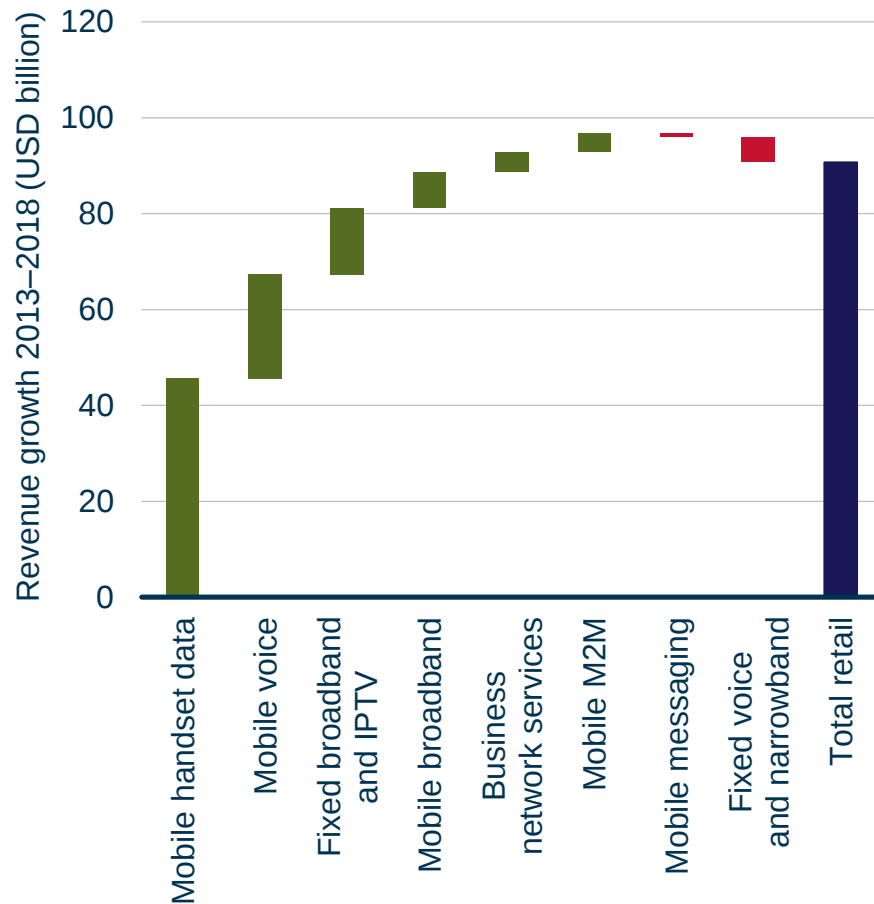
Transforming the telco network

21st May 2014

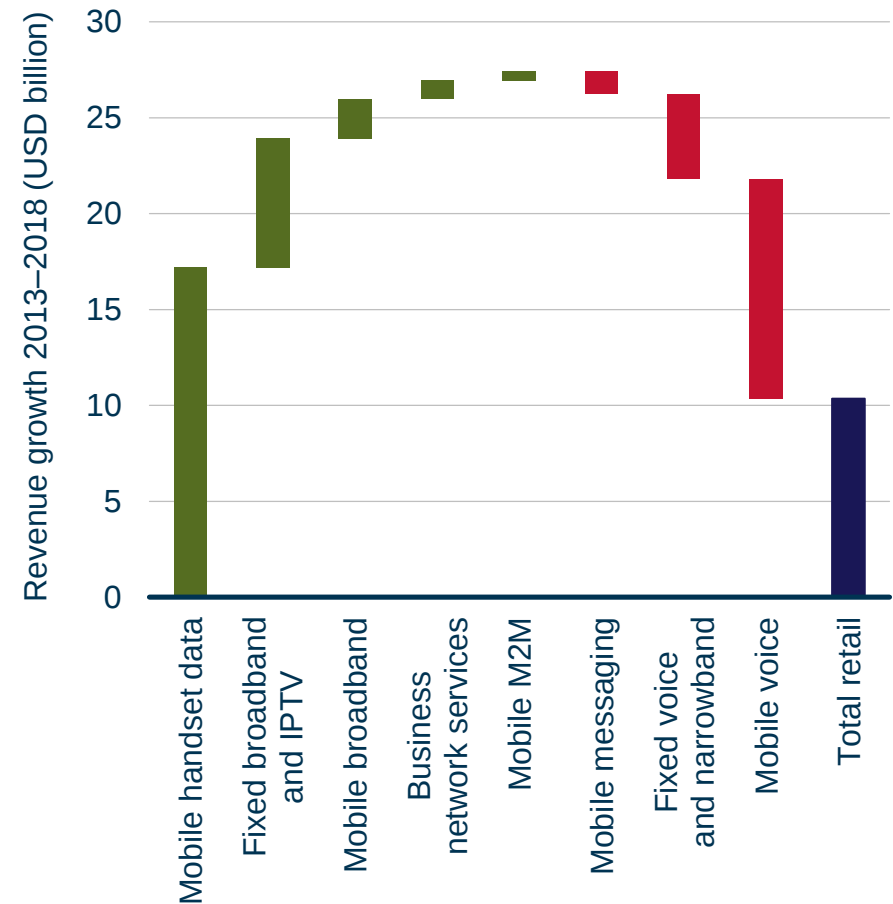
Tom Mowat

A radically changing portfolio of revenue will present different challenges in different parts of the region

EMAP revenue forecasts 2013-18

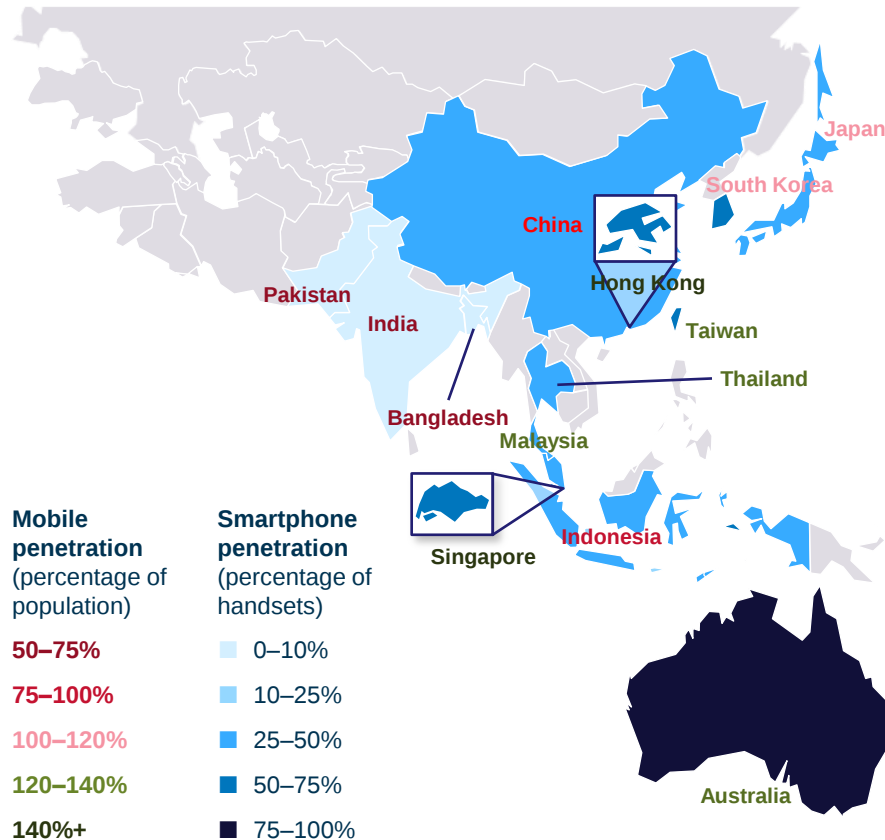


DVAP revenue forecasts 2013-18

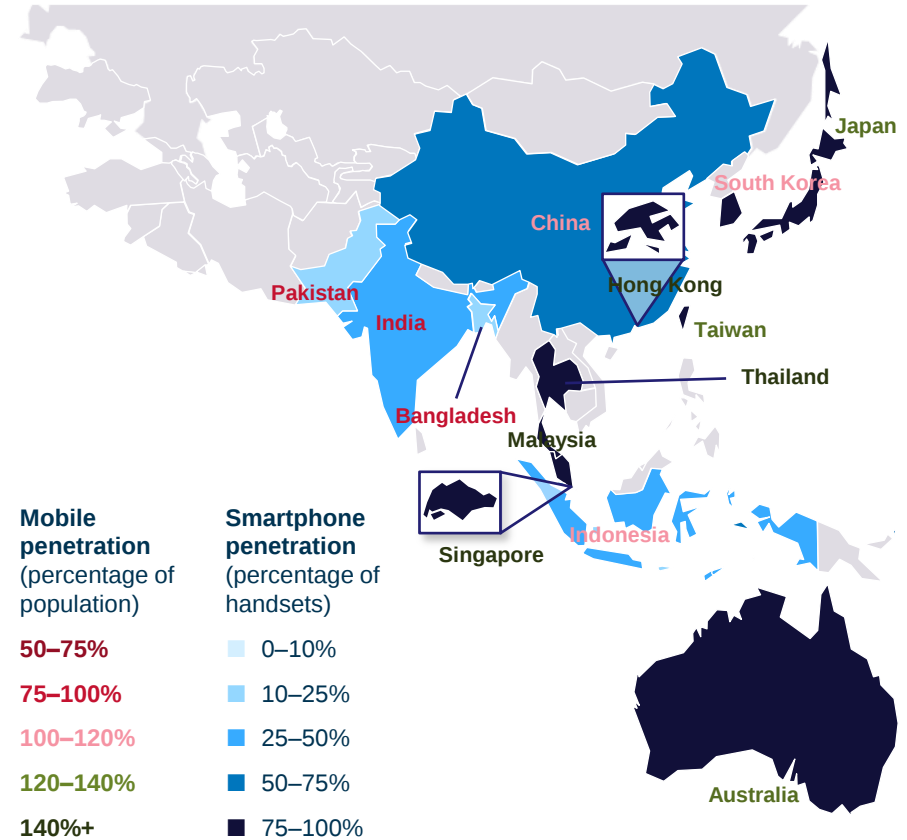


Smartphone penetration across the region will increase considerably over the next five years further driving the threat from OTT communication

2013

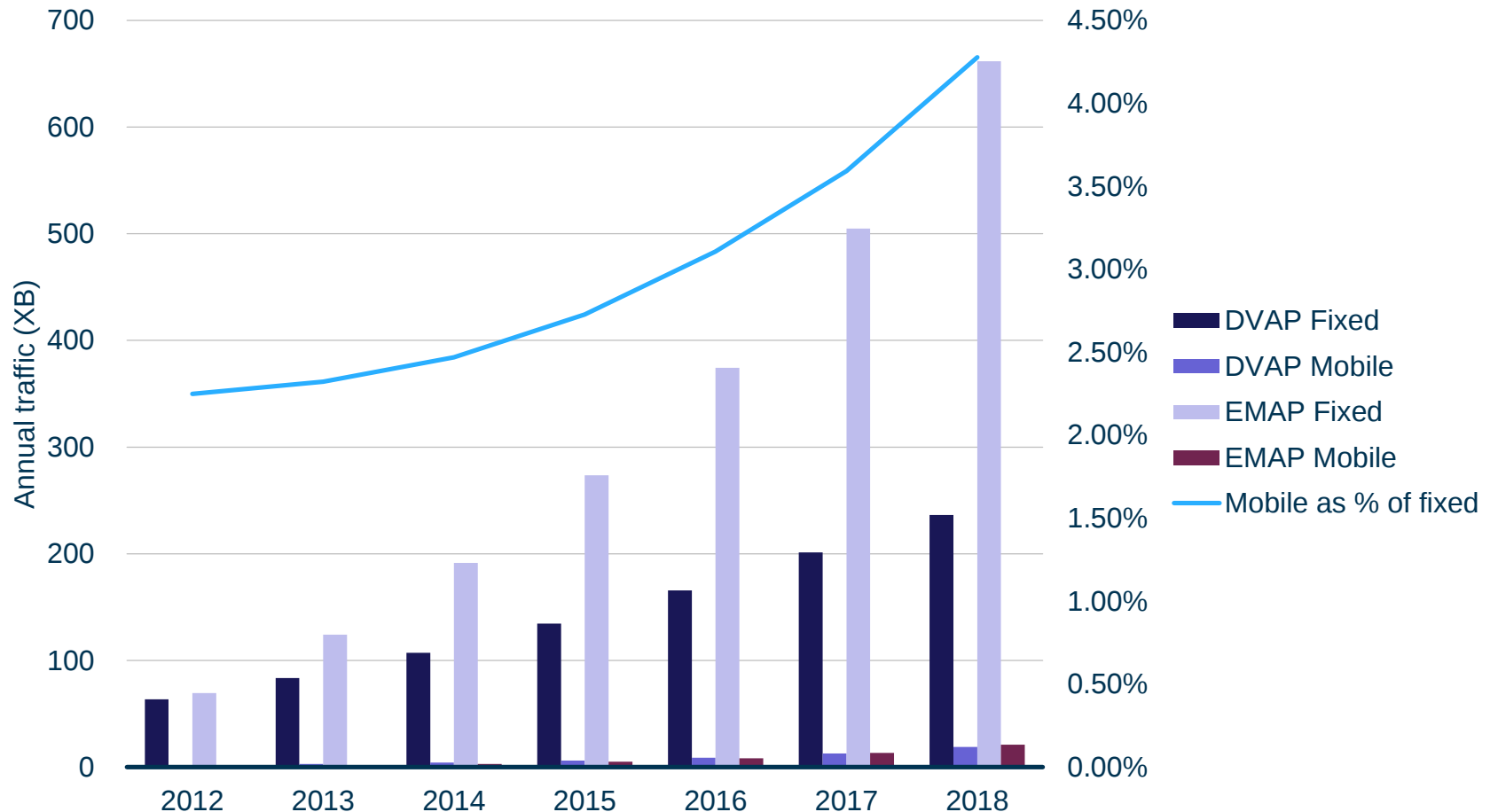


2018

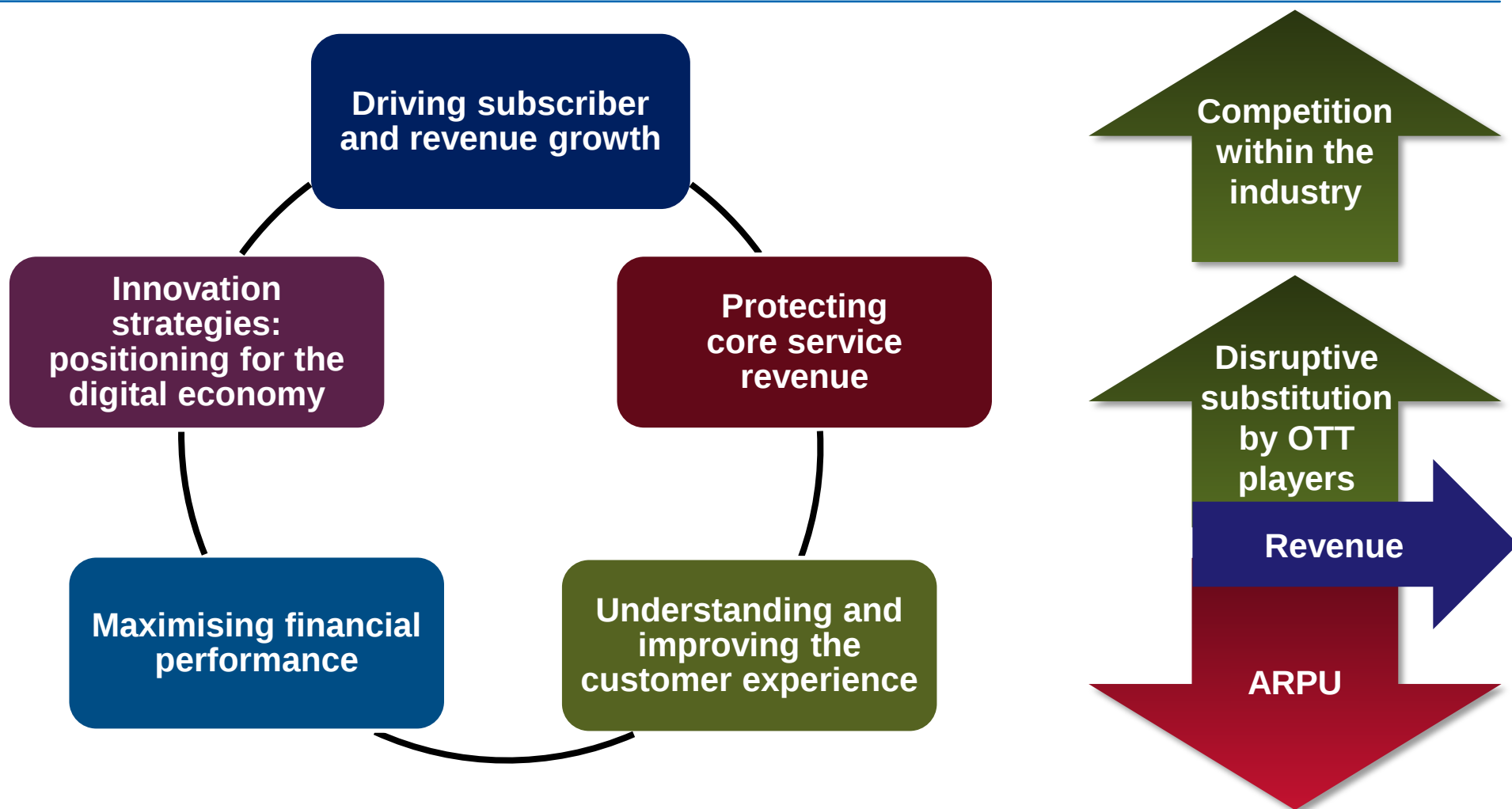


Strong (but linear) data growth is forecast, and presents both an opportunity and threat to be managed

Analysys Mason traffic forecasts 2012-2018



Five key challenges for network operators – and the telecoms industry – in 2014 and beyond



Telecom software decisions are critical to the future of all network operators

Operators have invested about USD 100 / sub in IT systems support

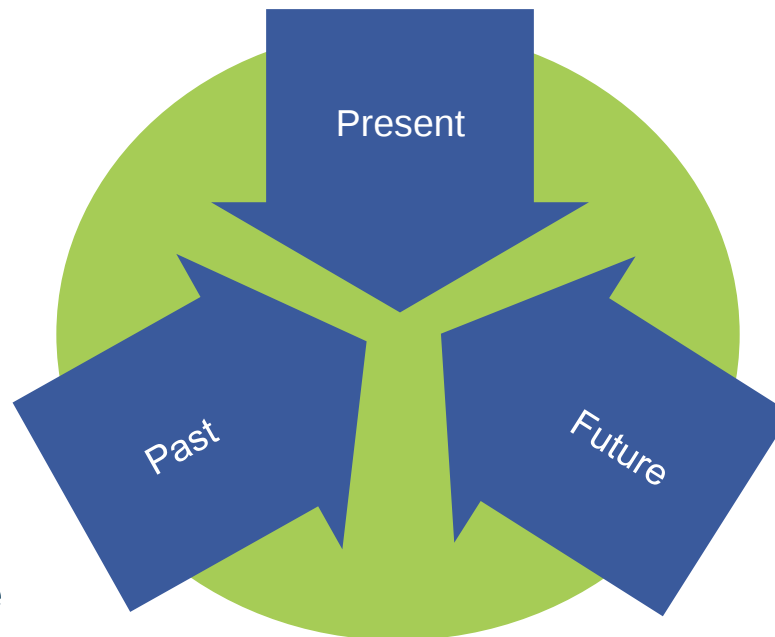
Operators continue to spend about USD 10 / sub / year on IT (dev \$15 / emerging \$5)

- **Past investments control current offers**

- Billing, ordering, fulfillment, assurance all critical to the current business
- Established systems constrain the way future improvements are made

- **Current focus on improved personalization**

- Retention – better customer experience
- Apply Big Data, CEM, better integrated systems



- **Future focus on a transformed business**

- Digital economy expands new business opportunity
- Networks transformed by software control dramatically change network cost and flexibility

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