

The Telco Transformation is Underway

Communications Trends

- Ubiquitous broadband networking
- Wireline and Wireless convergence
- Price and Quality based competition
- Convergence of life
- Always on always available

Web & Entertainment Trends

- IT is the critical success factor
- Digital media (TV & Music)
- Social networking
- Cloud service models
- Web 2.0
- Mobile

Consumer Services

- Communications
- Entertainment
- Home Management

Business Services

- Communications
- IT Management
- Business Process Outsourcing

Telco Operating Platform

- Marketing
- Product Development
- Billing
- Financial Management
- Advertising
- Sales
- Service Management
- Customer Care
- IT Tools & Platforms
- Business Intelligence

The Connected World

- Nearing 1.5 billion people online
- 55% in U.S. are connected via broadband
- Estimated 285 million new PCs in 2008
- PC adoption worldwide topped 1 billion in 2008, will top 2 billion by 2015

- Global mobile phone use topped 3.9 billion in 2008 And nearly 1 core in Nepal
- Social media explosion with 63% daily usage of Facebook, Messenger, or Spaces
- Consumerization affecting IT

Overall reliance on Internet growing rapidly

Driving significant opportunities in services

The New Generation

Very Tech Savvy
Always Connected
Multiple Devices
Want their Media "On-demand"

Industry Transformations

New Strategic Services Fueling Service Provider Growth

Service Providers are investing in:

Next Generation Networks Services

mobile, broadband, & triple play

Emerging Markets

focus on BRIC, CEE, & Southeast Asia

Driving Efficiency

with cloud services, productivity increases, ROI

Opportunity to combine:

Software Services

Platforms, Networks, Applications

Service Provider

Broadband & Mobile Networks
Information & Comms Technologies

Go-to-Market with compelling bundled offerings

14 hours of load shedding... A boon or a bane for broadband

Software vs Services

When it comes to running applications, organizations today face a tension between control and economy of scale

On-premise vs In the Cloud ("Software" vs "Services")

High Control Low Control

Low Economy of Scale High Economy of Scale

Software + Services (On-Premise + In the Cloud)

- Best of both worlds
- User in control
- Deployment choices for IT

- Extending tools and platform to cloud
- Experience across multiple devices
- Best-in-class SLAs and IT governance