



**The business formerly known as**  
**WHOLESALE**

# THE REALITY

Of the business formerly  
known as **wholesale**



# Carrier selfie

## Target market

- Fixed operators
- Mobile operators
- OTTs
- Quad-players
- MVNO
- Content providers

## Technology

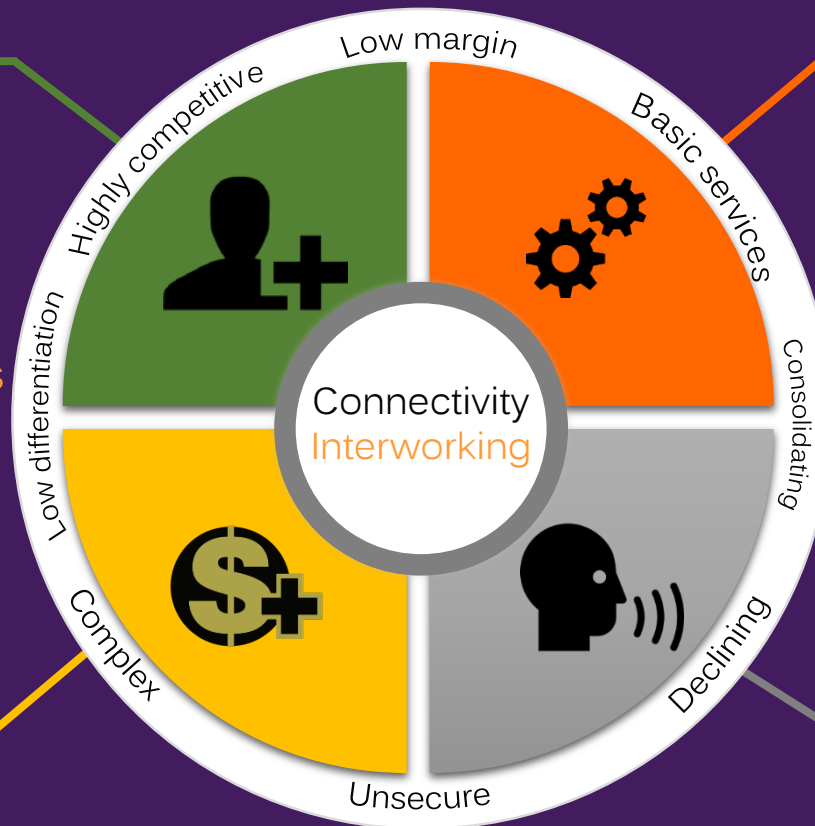
- TDM moving to IP
- LTE
- NFV
- Cloud

## Business model

- Per minute
- Per MB
- Per port
- Port utilization

## Services

- Voice
- Messaging
- Signalling
- Capacity
- IP transit
- Value added services





**VOICE**

**KEEP**

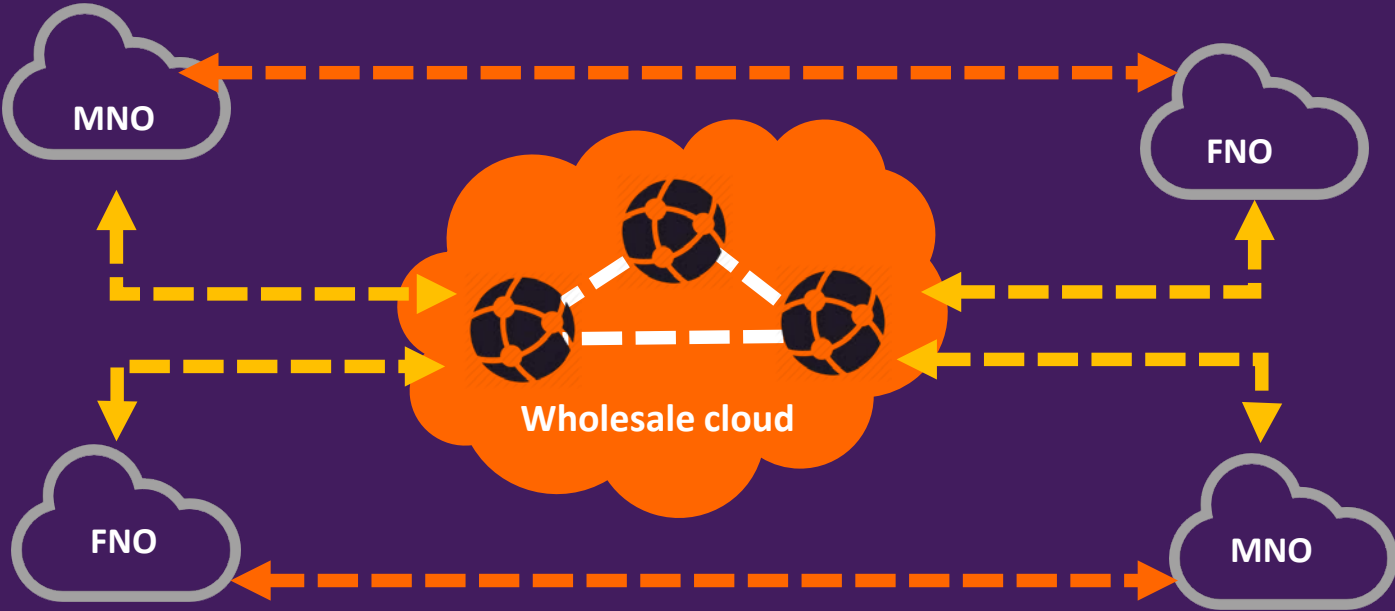
**CALM**





**I'M**

**NOT**

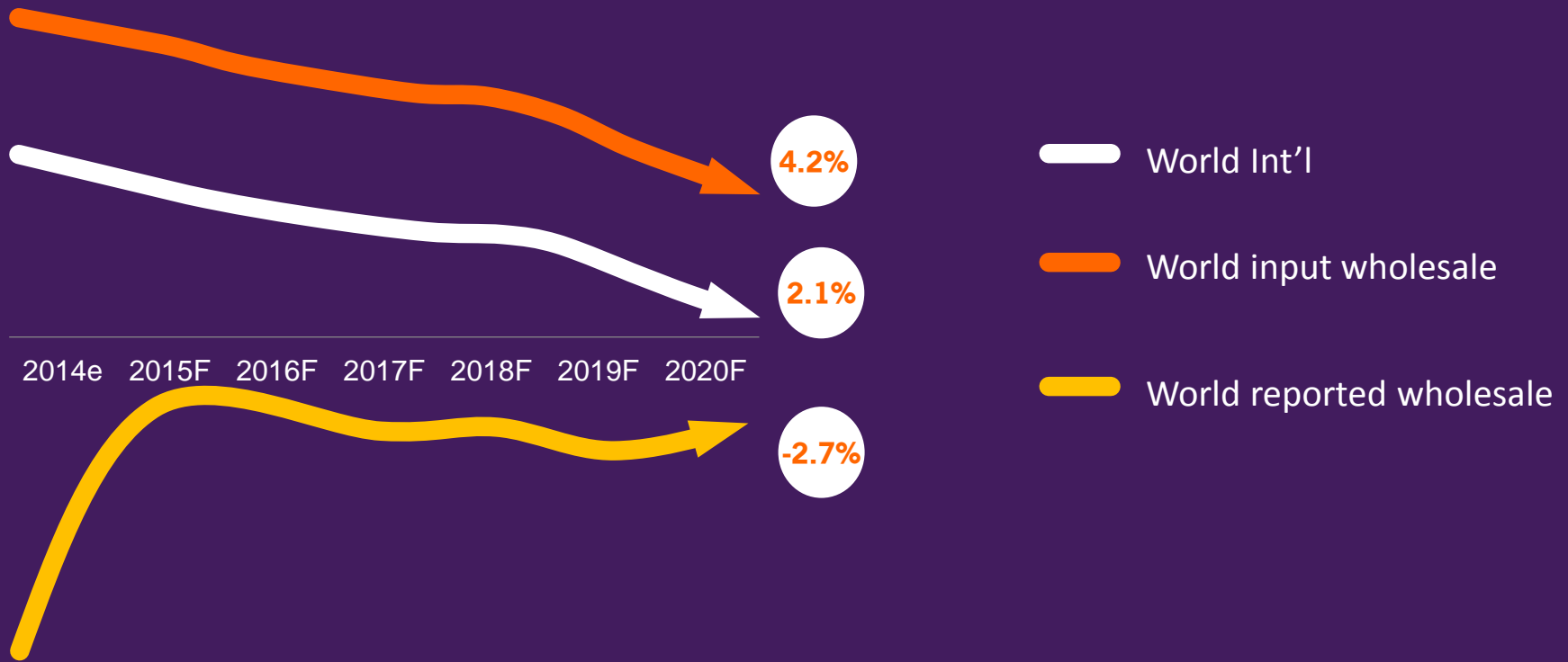
**DEAD YET**

# International voice traffic types

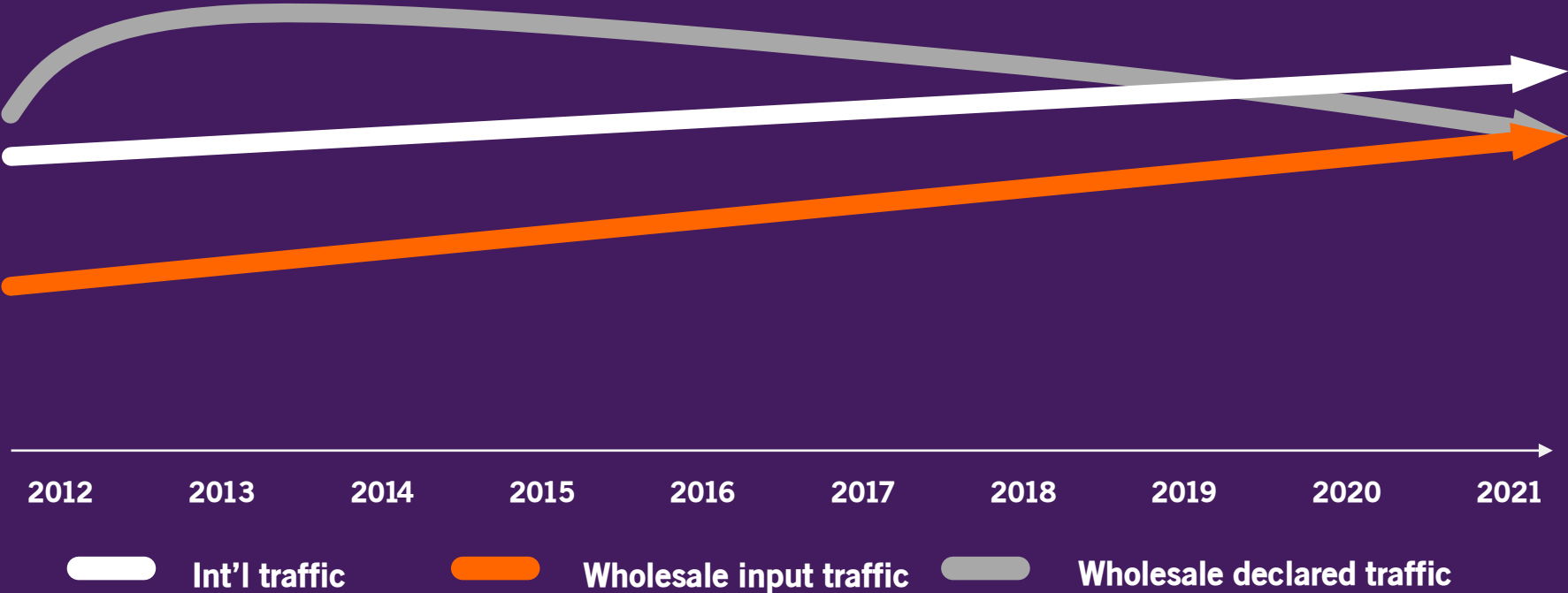


-  +  = International traffic
-  = Wholesale input traffic
-  = Wholesale reported traffic

# International voice traffic growth trends



# International voice traffic trends

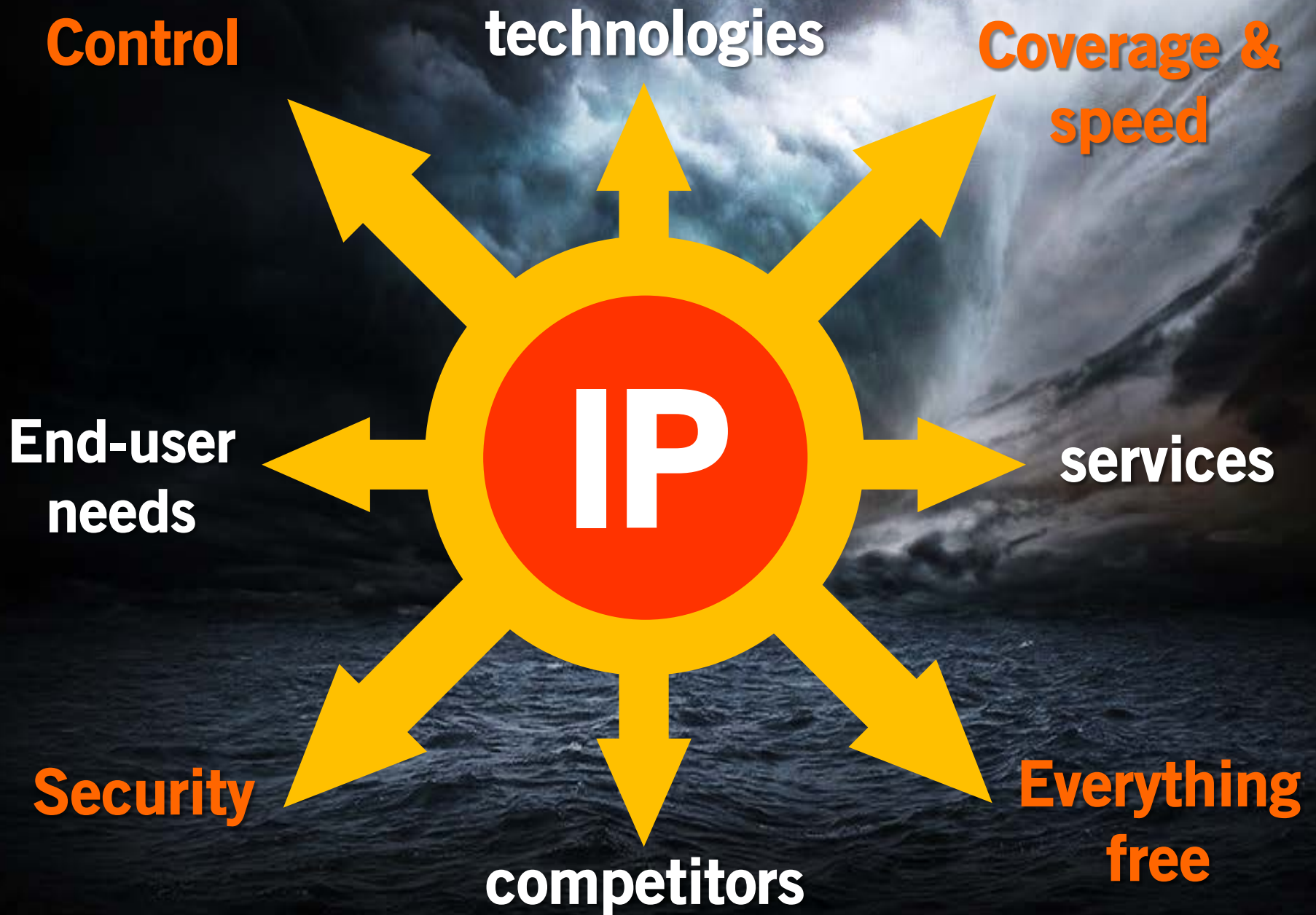


Source: HOT TELECOM's report on the Future of Int'l Carriers

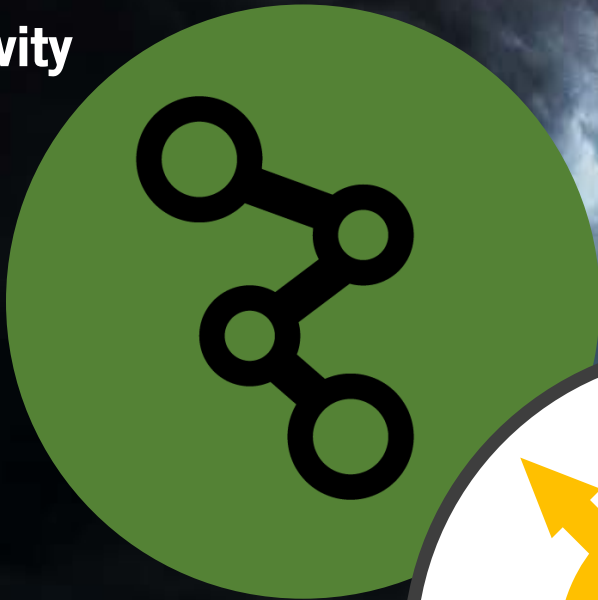
# The perfect storms

A dramatic, dark storm over the ocean. The sky is filled with heavy, dark clouds, and a bright light source, possibly the sun or moon, is breaking through the clouds, creating a bright, glowing area. The water is dark and choppy, with whitecaps visible. The overall mood is intense and ominous.

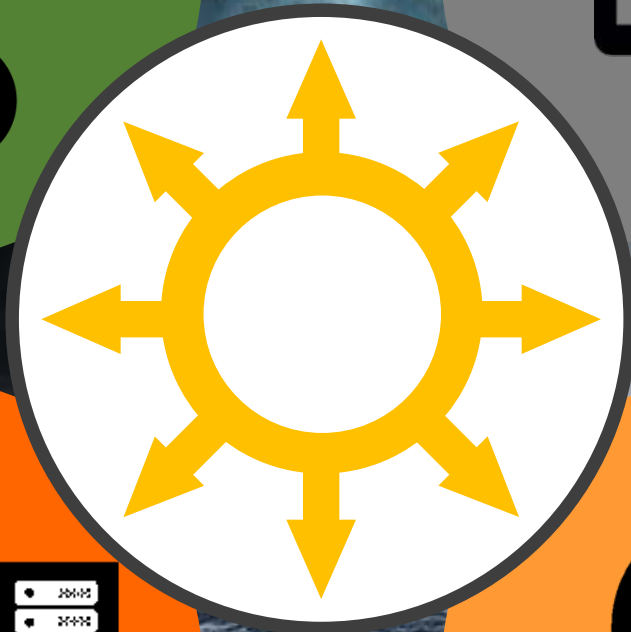




**Connectivity providers**



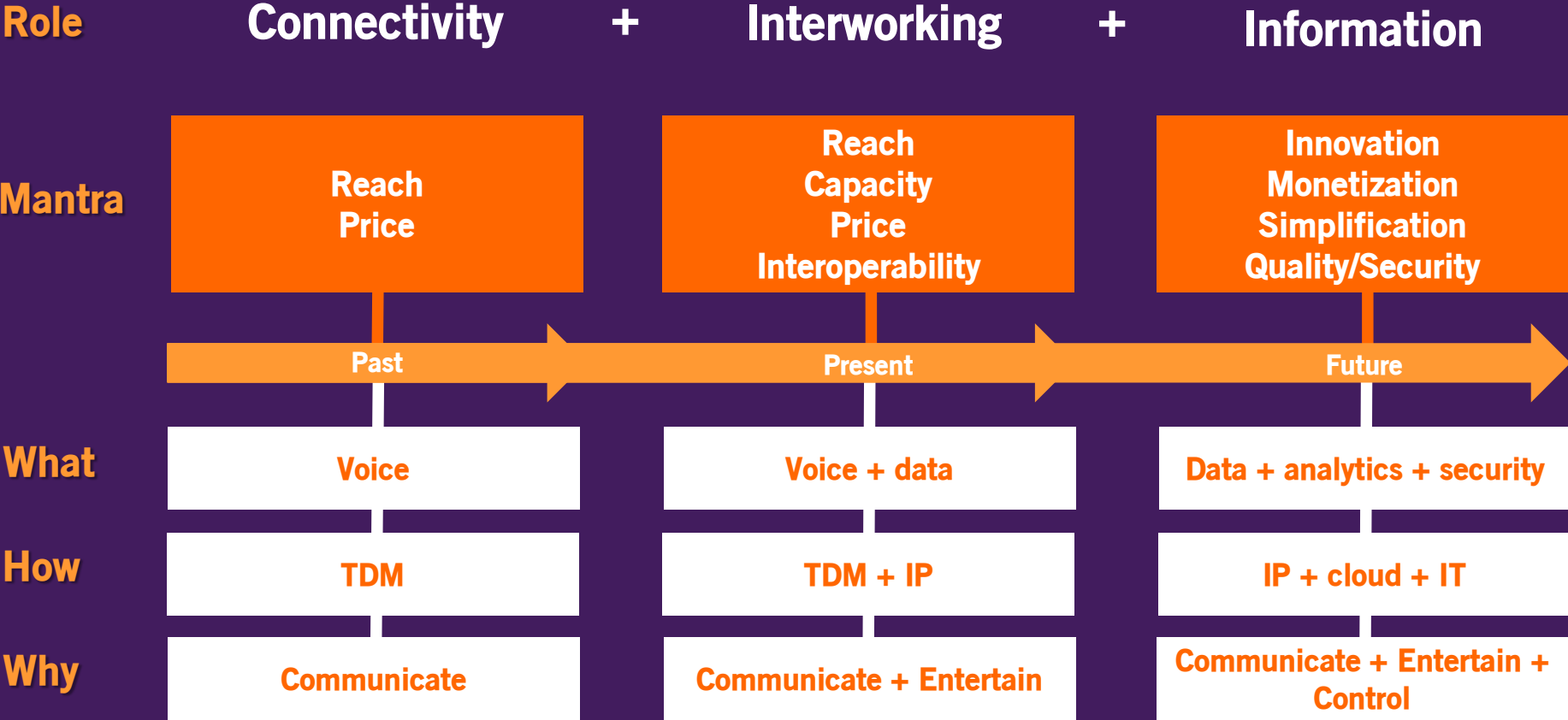
**IT providers**



**Co-location providers**

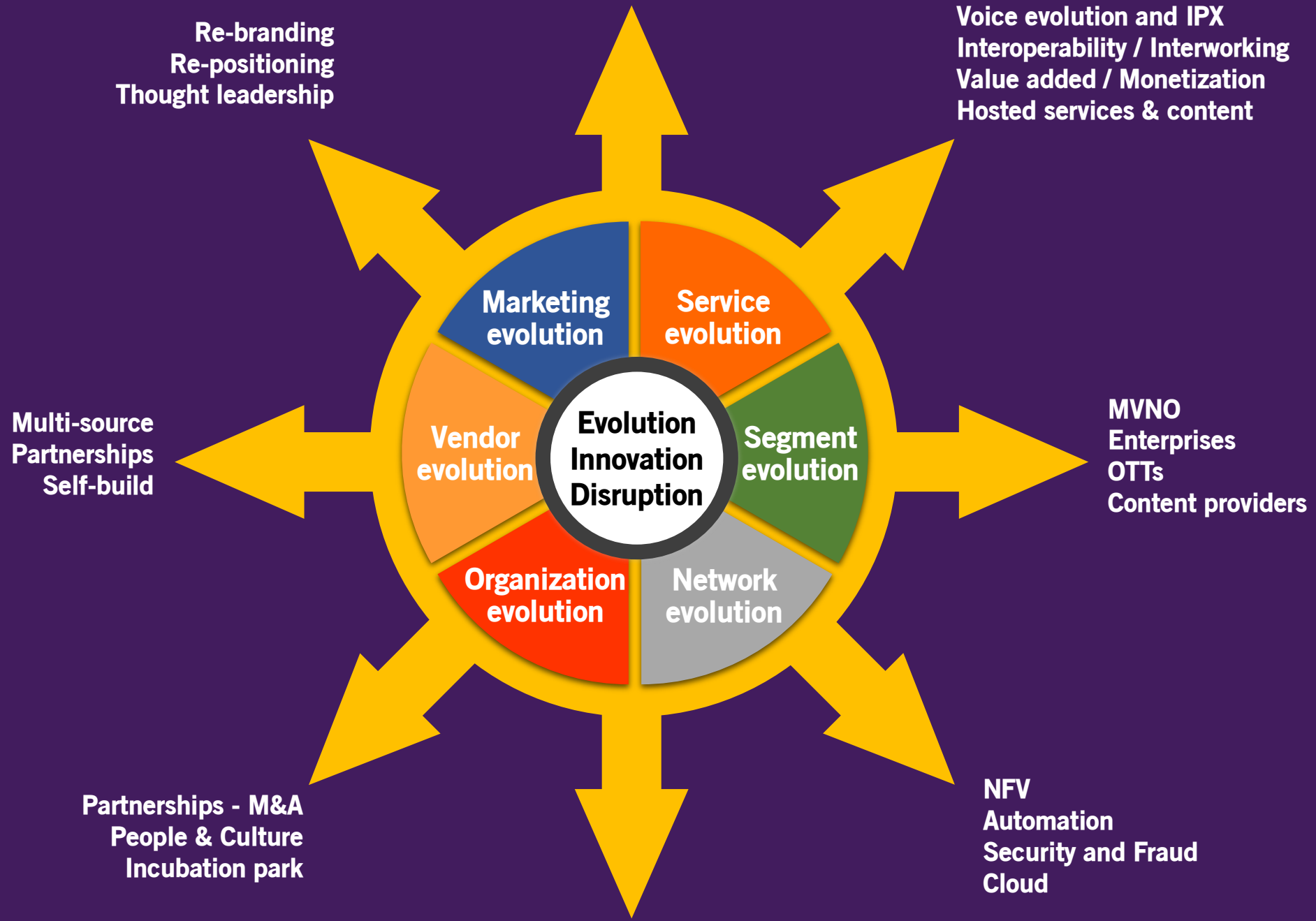
**Software providers**

# Carriers' roadmap up the value chain



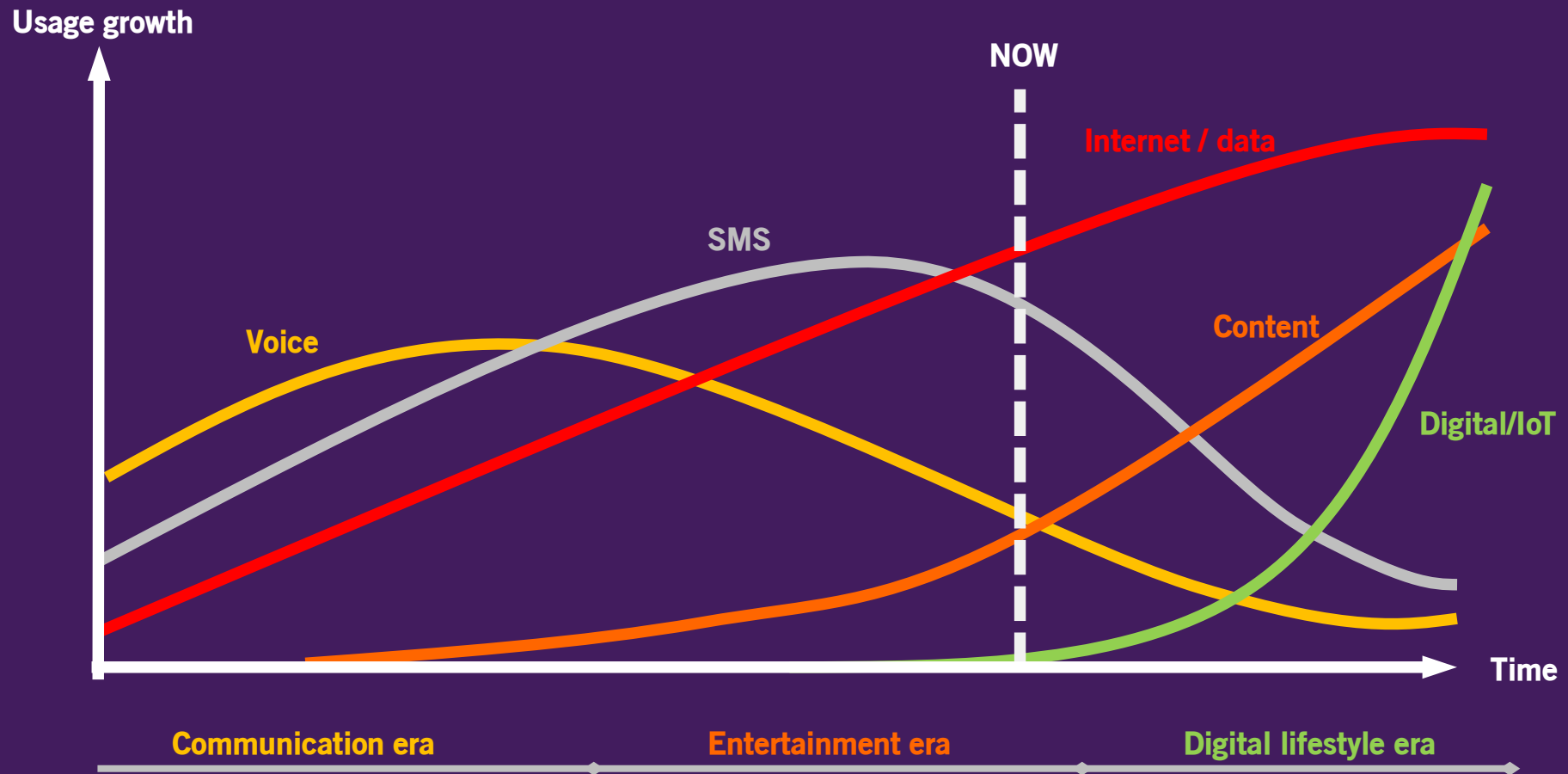
# THE BIG BANG

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# Service evolution

## Where is the growth and the value?

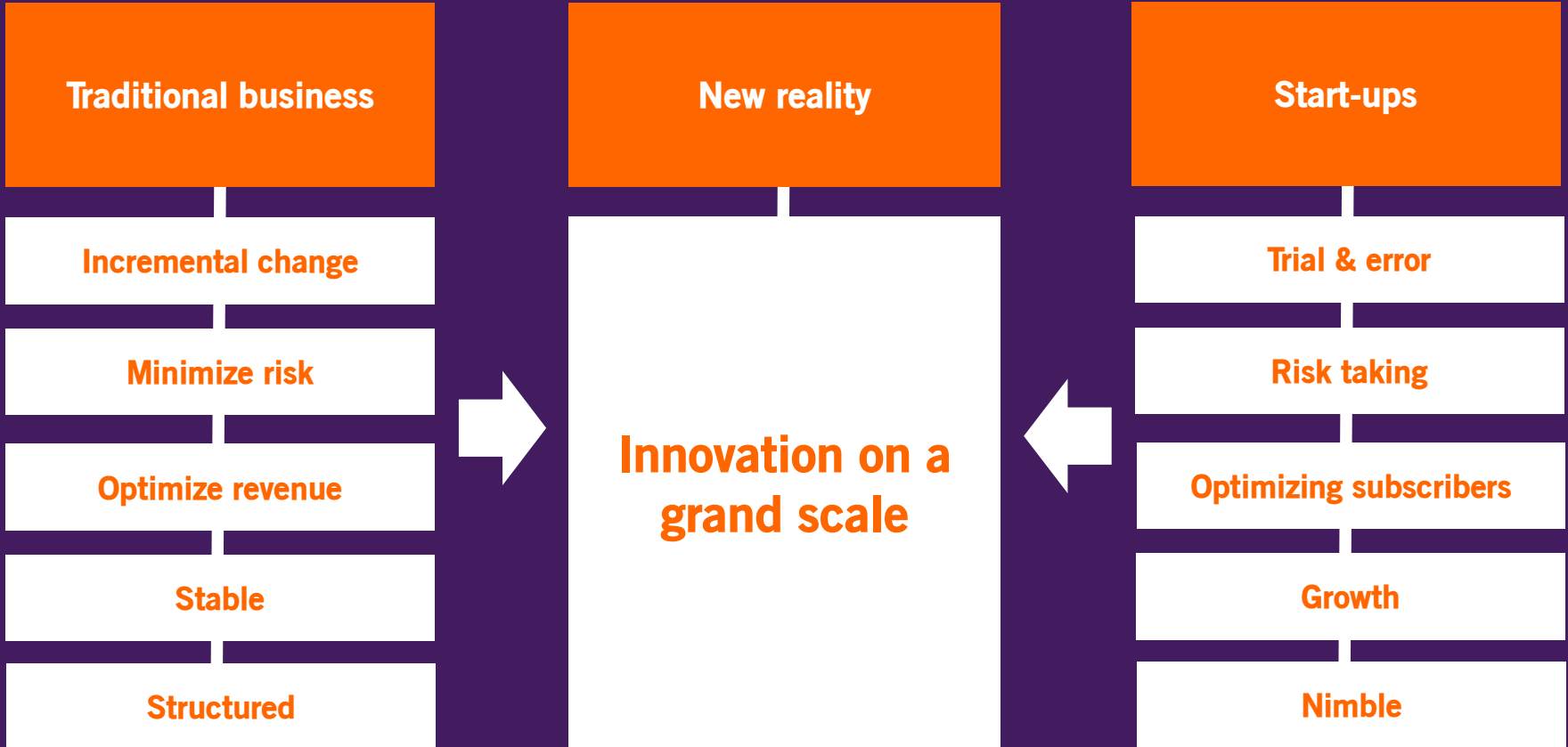


# Creation of a new wholesale reality

**Control**

**Agile**

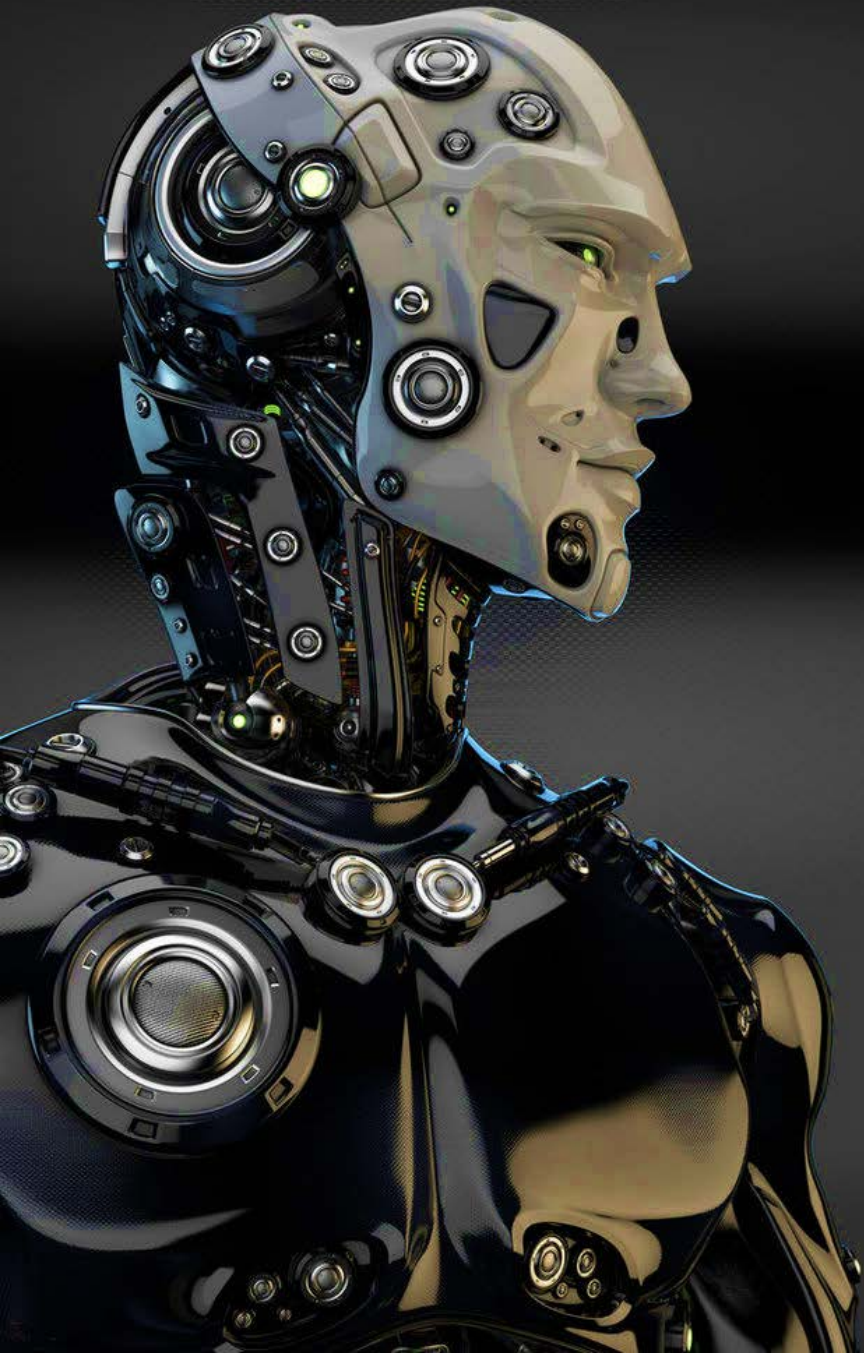
**Freedom**



# Organisation evolution

- ✓ People
- ✓ Culture
- ✓ Structure
- ✓ Leadership

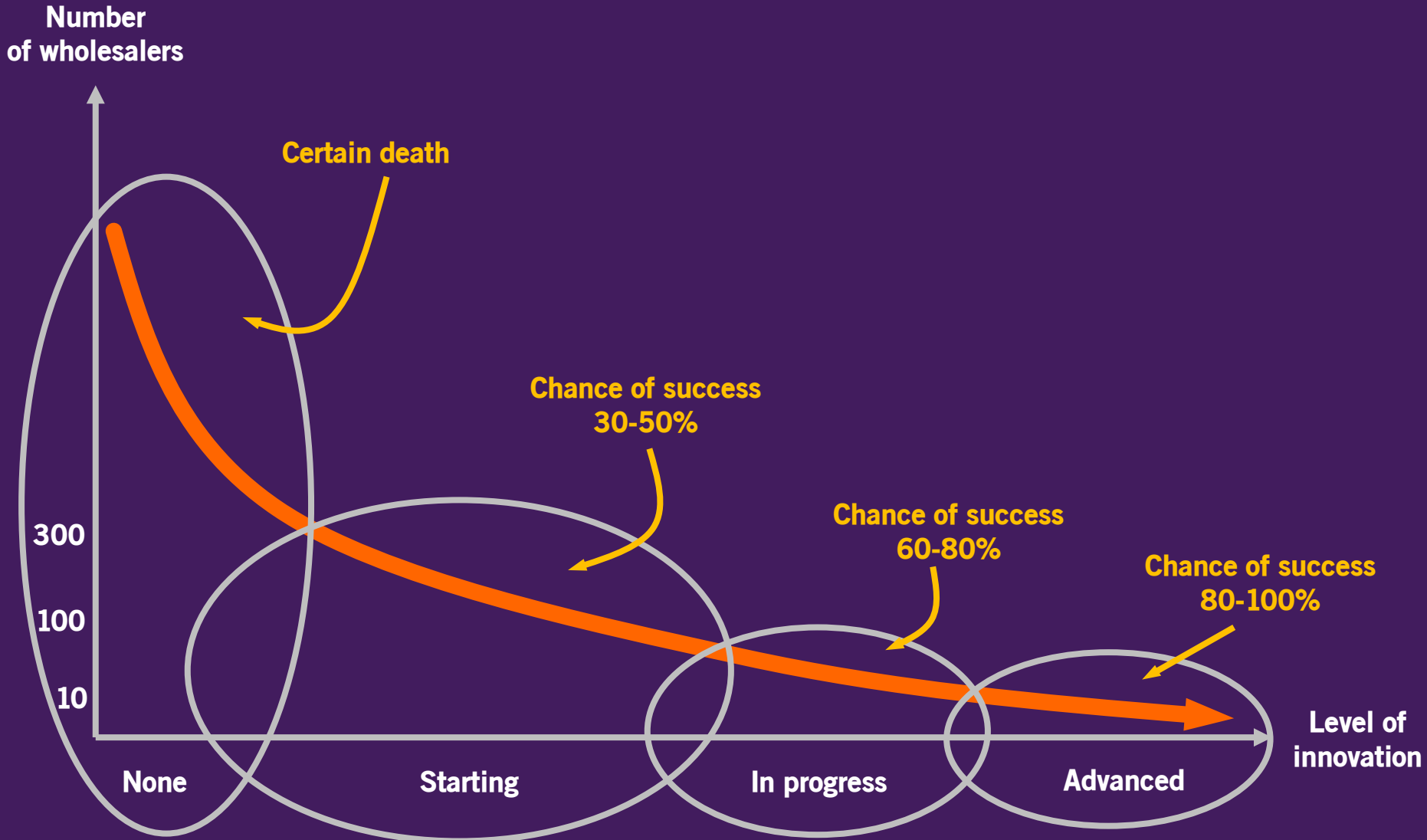




# THE FUTURE

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# Wholesale evolution status



**Amazonized  
customer service**

**Appleized  
marketing**

**Uberized  
products**

**Netflixized  
business  
model**

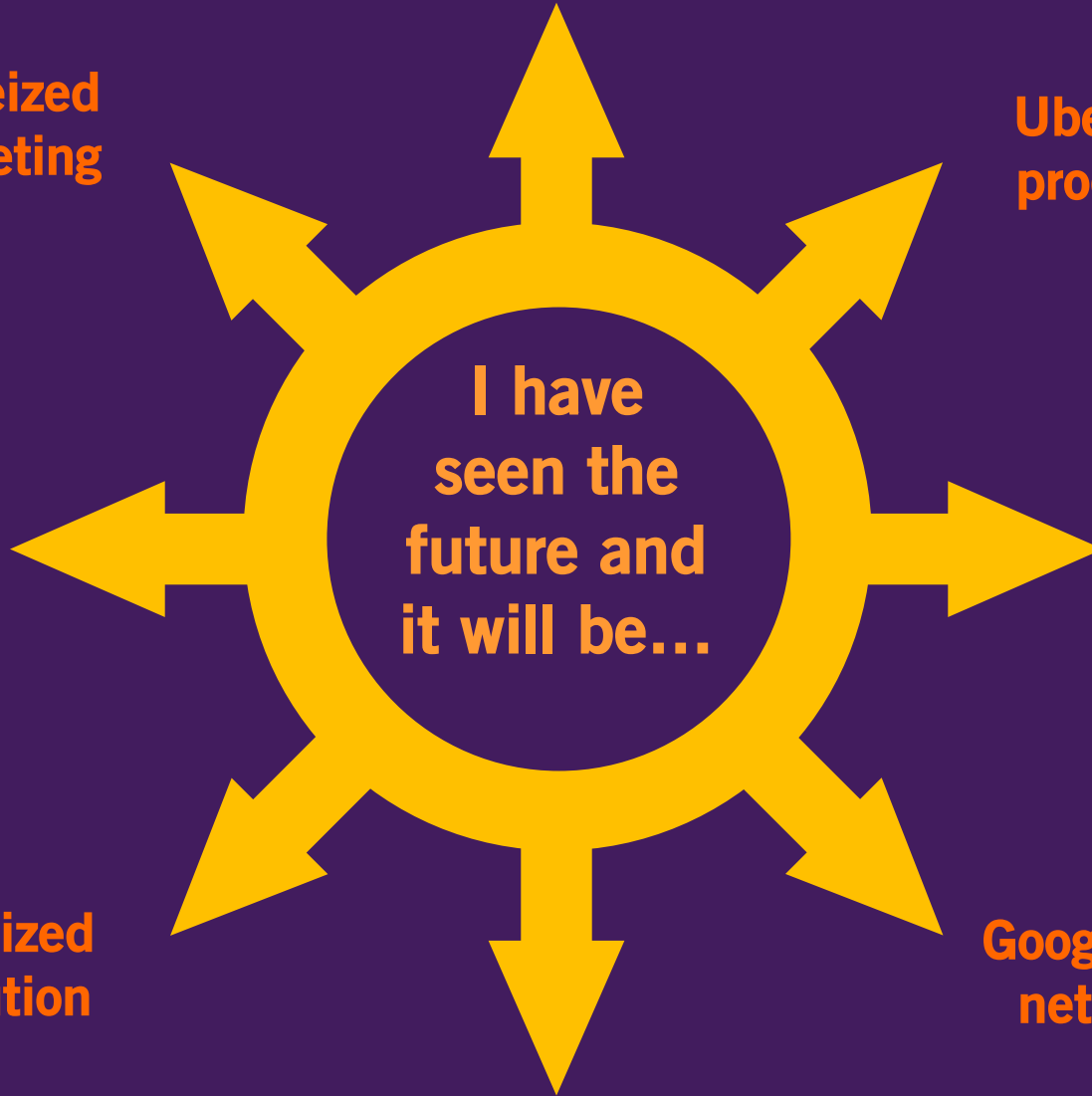
**I have  
seen the  
future and  
it will be...**

**Twitterized  
culture**

**Princized  
evolution**

**Googleized  
network**

**Virginized  
leadership**



**‘The visionary starts with a clean sheet of paper, and re-imagines the world.’**

**Malcolm Gladwell**

# HOT TELECOM offer



# Information of interest

The Future of Int'l carriers

[www.hottelecom.com/reports/wholesale-2015.html](http://www.hottelecom.com/reports/wholesale-2015.html)

IPX Competitive Analysis 2015

[www.hottelecom.com/reports/ipx-competitors-2015.html](http://www.hottelecom.com/reports/ipx-competitors-2015.html)

WP – VoWiFi and the carrier world

[www.hottelecom.com/white-papers/VoWiFi-roaming.html](http://www.hottelecom.com/white-papers/VoWiFi-roaming.html)

WP – Locking down on fraud

[www.hottelecom.com/white-papers/fraud-management.html](http://www.hottelecom.com/white-papers/fraud-management.html)

WP – PoP virtualization

[www.hottelecom.com/white-papers/virtualized-pops.html](http://www.hottelecom.com/white-papers/virtualized-pops.html)

WP - A map to the IoT gold rush

[www.hottelecom.com/white-papers/IoT-carrier.html](http://www.hottelecom.com/white-papers/IoT-carrier.html)

WP - Pathways to IPX Innovation

[www.hottelecom.com/reports/pathways-to-IPX-innovation.html](http://www.hottelecom.com/reports/pathways-to-IPX-innovation.html)

WP - 4 Keys to shaping QoE

[www.hottelecom.com/white-papers/4-keys-to-shaping-QoE.html](http://www.hottelecom.com/white-papers/4-keys-to-shaping-QoE.html)



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