

CHANGING

the way we think about

WHOLESALE



HOT TELECOM

What is



What is

Target market

- Fixed operators
- Mobile operators
- OTTs
- Quad-players

Technology

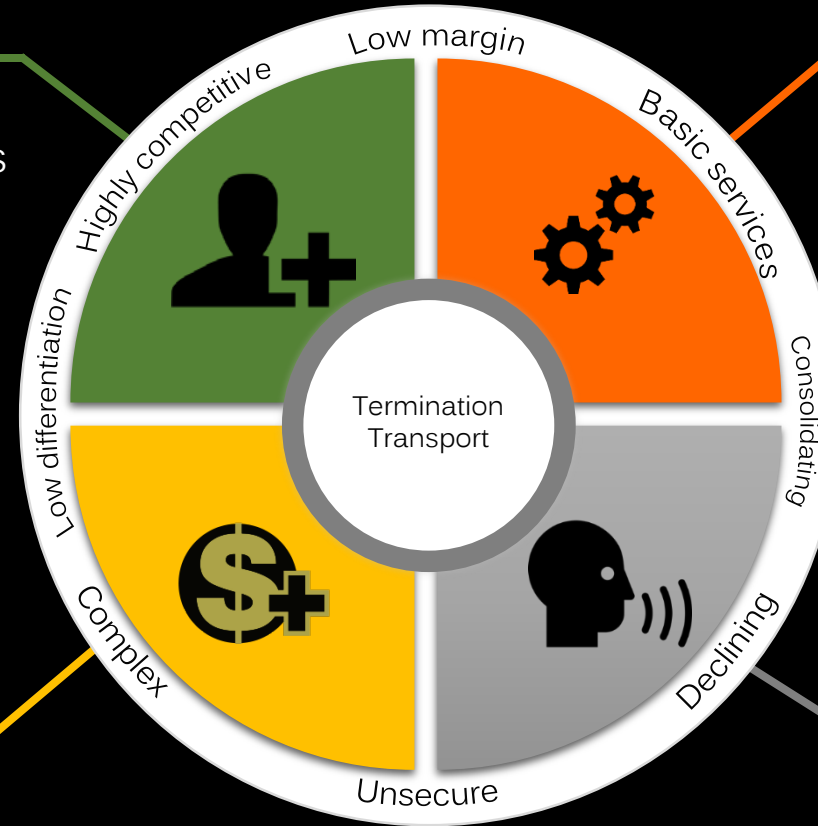
- TDM moving to IP

Business model

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

Services

- Voice
- Messaging
- Signalling
- Capacity
- IP transit



Empowerment of the end user

**WIRELESS
IP
DATA
FREE**



**Mobile
substitution:
mission
accomplished**

90%
of total subscribers
will be **mobile users** by
the end of 2018

**IP at the
centre of the
digital life**

1.3 billion
mobile subscribers will
be 4G users by the
end of 2018

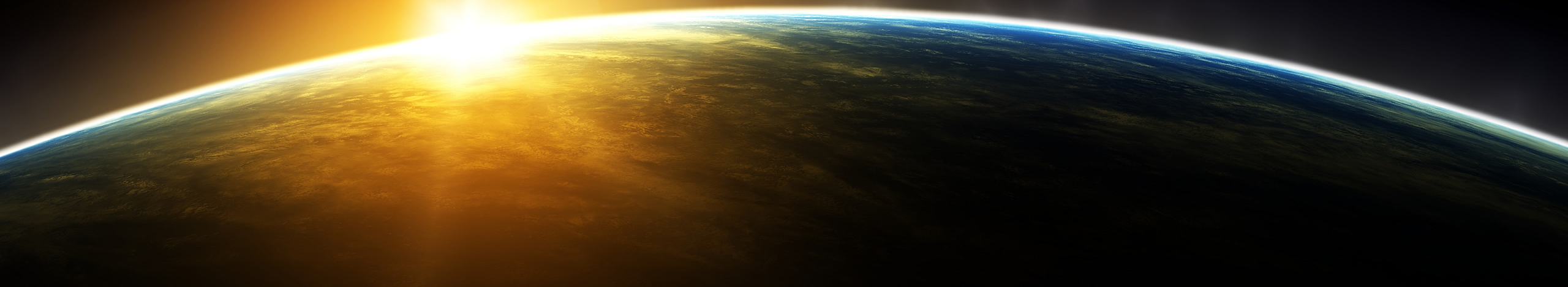
Data is the new black

64%

of **4G users** say they
would prefer to have
access to **data** instead
of voice in times of
crisis

A New World

Order is coming

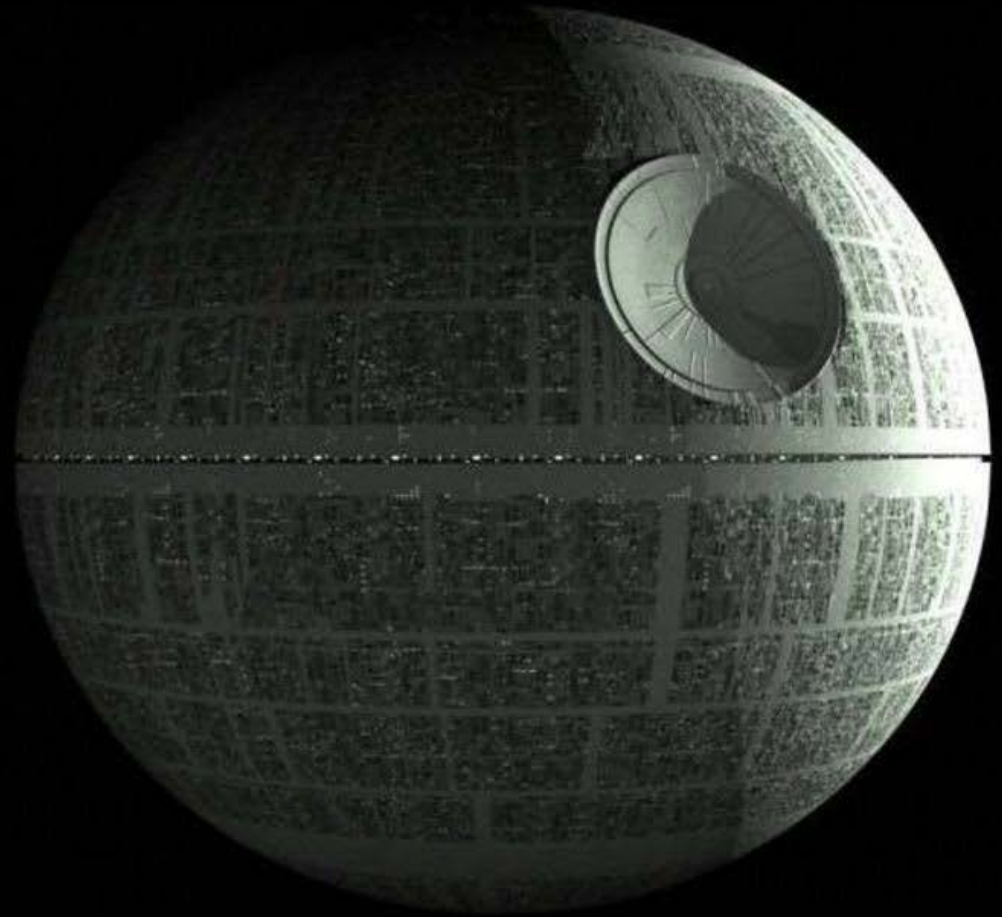




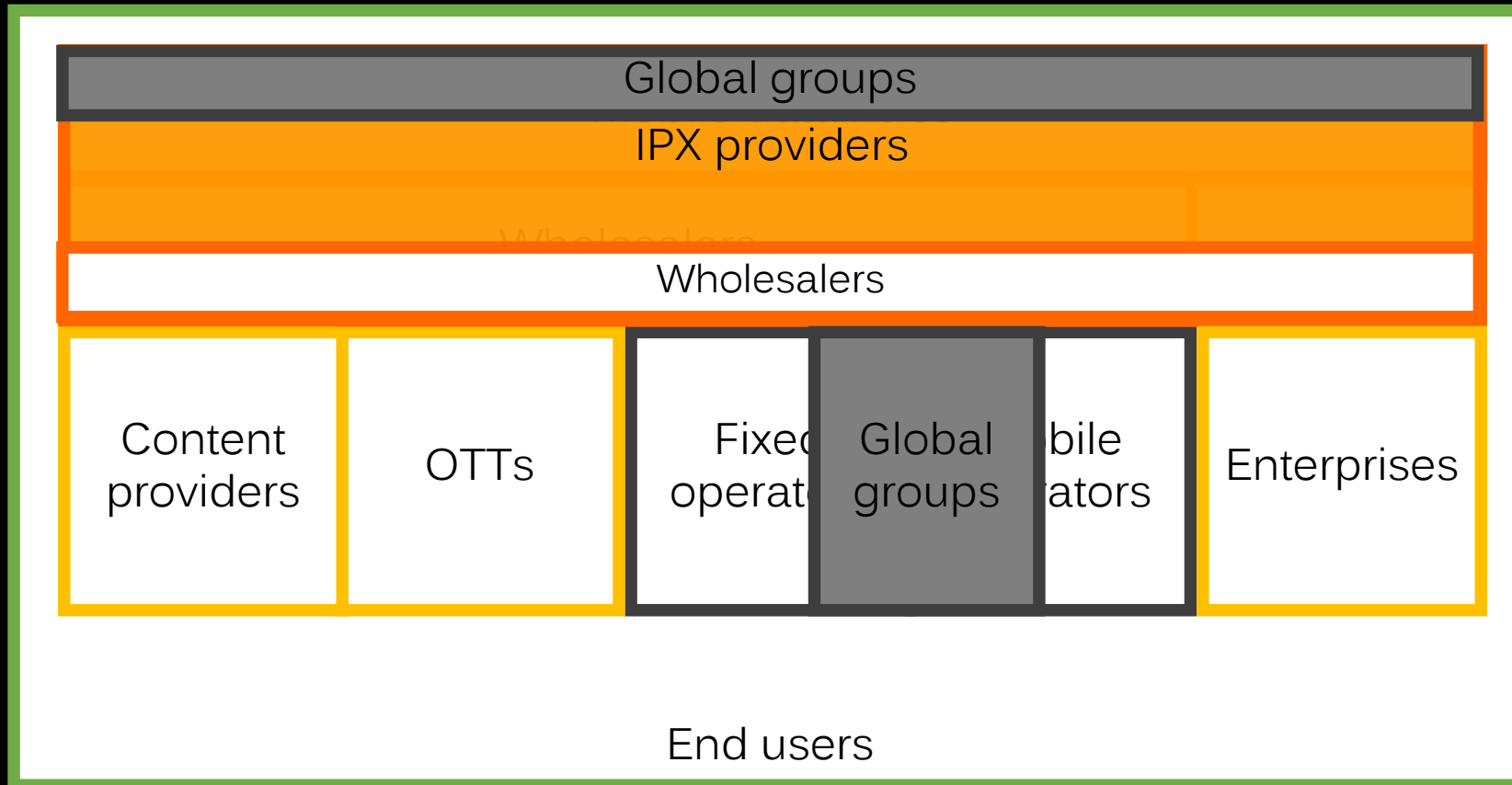
CONVERGENCE

of the services
of the carriers

The growing power of the Global groups



Complexification



High relevance

IP
Mobile segment
Data service
Per MB business model

The wholesale
HOT box

Low margin

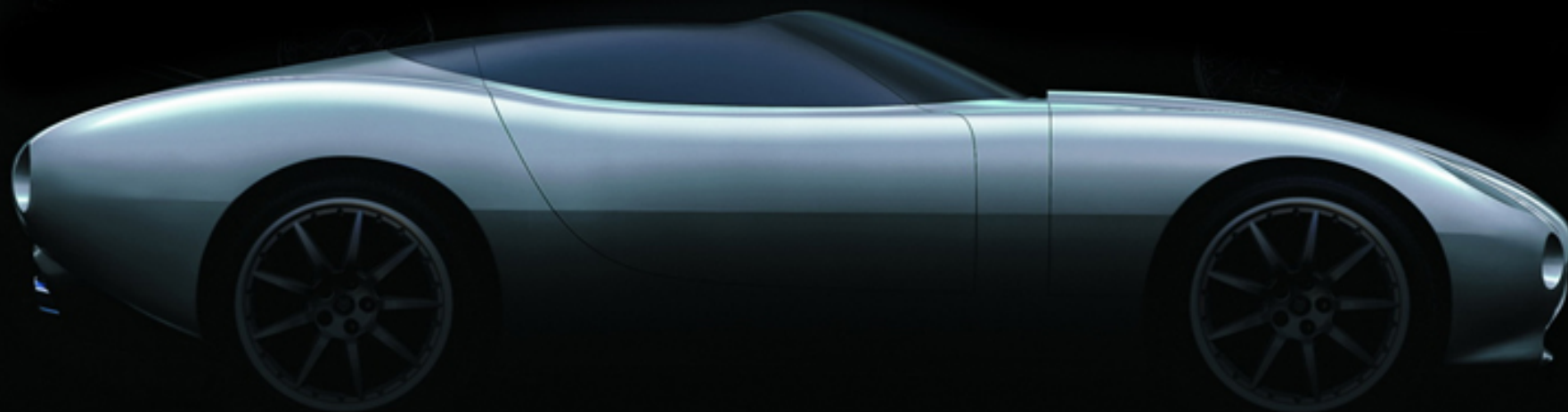
High margin

TDM
Fixed segment
Voice termination
Per minute business model

Low relevance

HOT TELECOM

What could be



Differentiation
Relevance
Growth



]unlock[simplification

‘The art of simplicity is a puzzle of complexity.’

Douglas Horton

]unlock[monetization

‘Strive not to be a success, but rather to be of value.’

Albert Einstein

]unlock[innovation

‘Innovation is the ability to convert ideas into invoices.’

L. Duncan

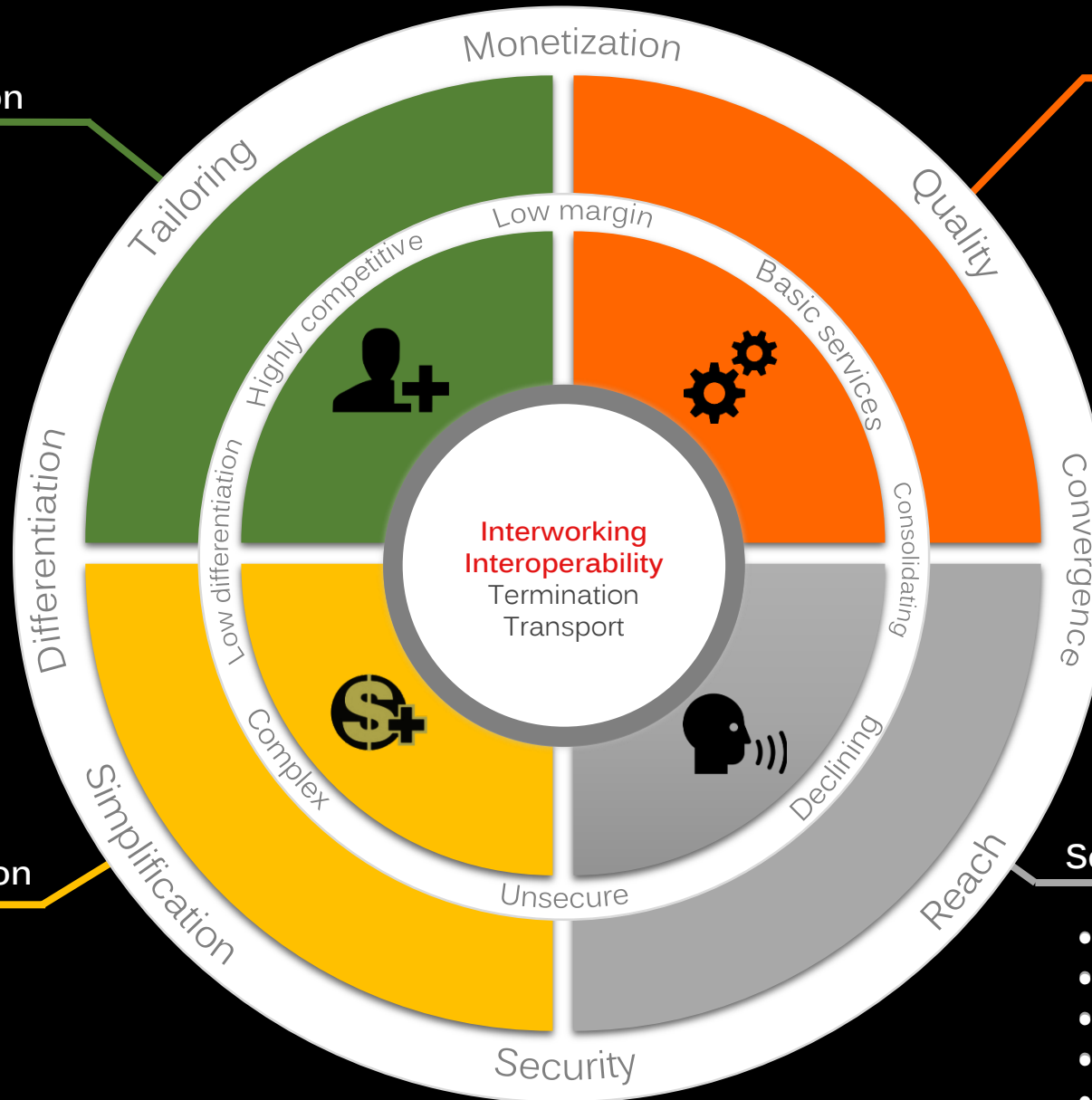
What could be

Target market evolution

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

Business model evolution

- Per minute
- Per MB
- Per port
- Port utilisation
- Bundles
- Shift of the per minute model



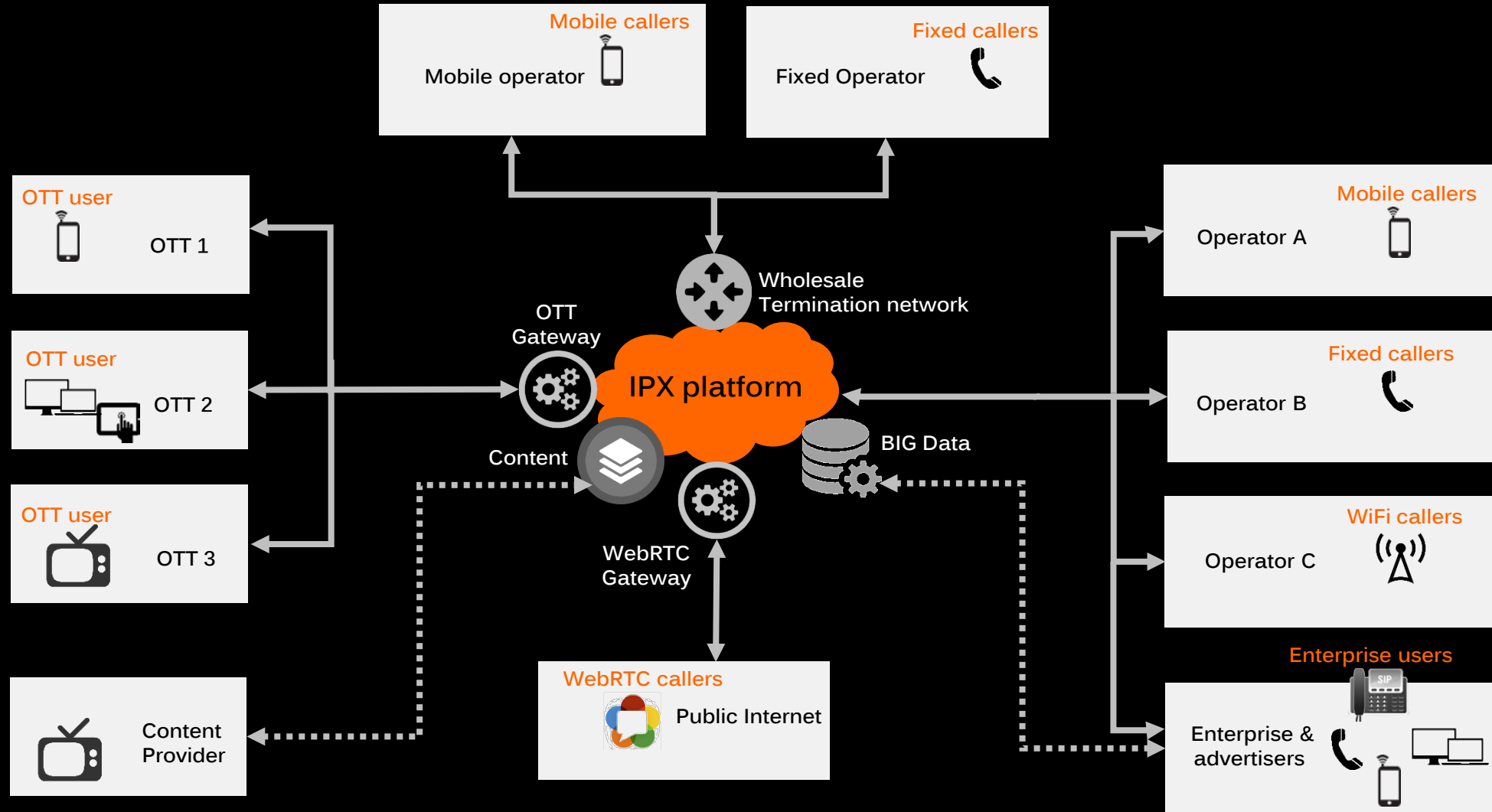
Technology evolution

- TDM
- IP
- LTE
- 5G

Services evolution

- Separate voice/data
- Voice evolution services
- Messaging services
- Signaling services
- Capacity
- IP transit

Growth through IPX interworking & new segments



Growth through new high value IPX supported services





THE NEW YOU

MANTRA

- Simplification
- Monetization
- Innovation
- High quality

BLISS

- Differentiation
- Relevance
- Growth



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Information of interest

IPX Competitive Analysis 2015

www.hottelecom.com/reports/ipx-competitors-2015.html

The Future of Int'l wholesale

www.hottelecom.com/reports/wholesale.html

WP – Pathways to IPX Innovation

www.hottelecom.com/reports/pathways-to-IPX-innovation.html

WP – 4 Keys to shaping QoE

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