



Presentation for

CommsDay Summit 2008

GET READY for the GIGABIT AGE

Stream: IP Futures

VoIP – The Next Wave

Alastair Slattery
Business Development Manager
Symbio Networks

Tuesday April 15, 2008

<http://www.symbionetworks.com>

Introduction



- **Who we are:**

- ◆ Symbio Networks is a market leader of state-of-the-art development and delivery of IP applications specialising in VoIP

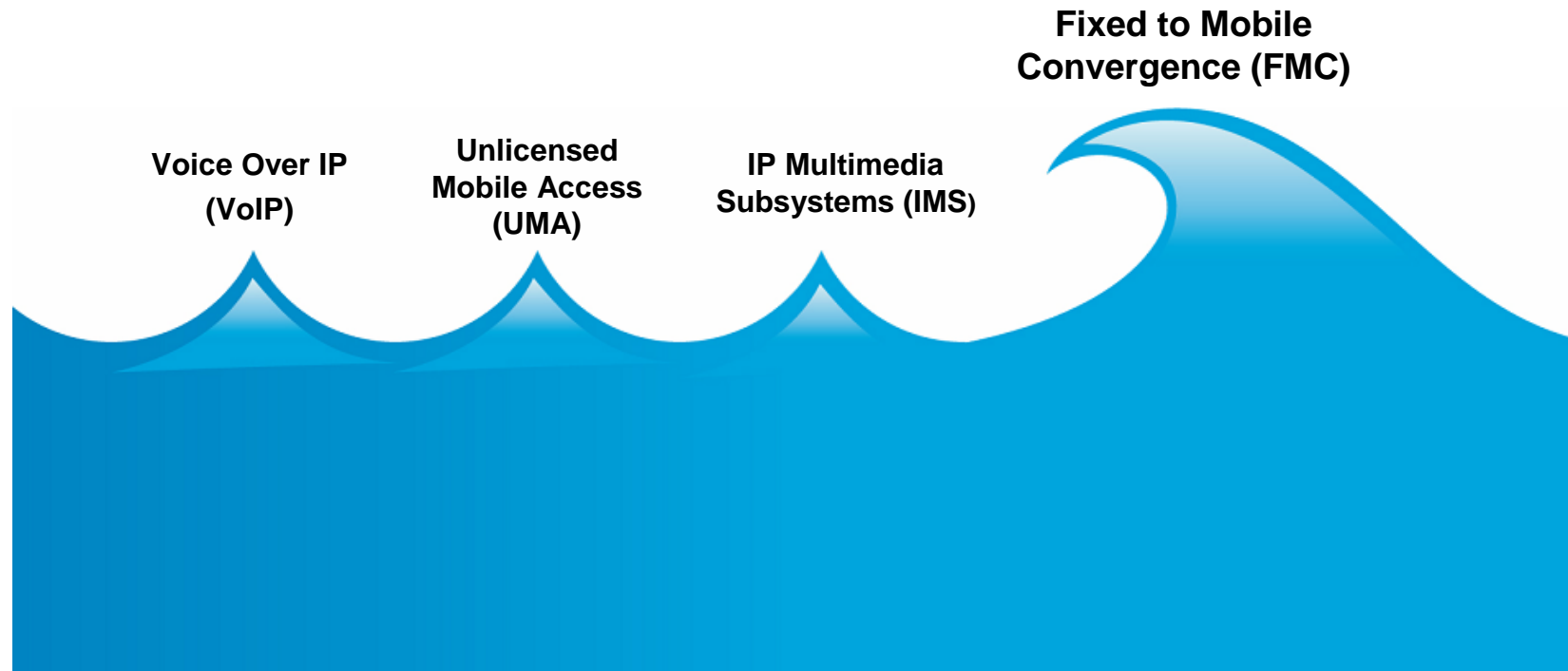
- **What we do:**

- ◆ Provide design, integration & deployment
- ◆ Managed services and hosted solutions

- **Who we do it for:**

- ◆ We cater for large service providers within Australia the region

Fixed to Mobile Convergence (FMC) – The next wave



● How soon will this wave hit?

FMC User Benefits

- **Seamless handoff – traditional to next generation**
- **Handset convergence - home, mobile, work, conference phone etc**
- **Universal origination – one number**
- **Ultimate user flexibility & control**



Roadmap to FMC Success

- **Strategic View**
- **Business case**
- **Access**
 - ◆ Spectrum
 - ◆ Network access
- **Technology**
 - ◆ Handset
 - ◆ Core network
- **Go-to-market model**
 - ◆ Consumer Drive



Who holds the advantage

- **Landline/mobile operators - the incumbents.**
 - ◆ Any adoption will further eat into the cash cow that is PSTN services. These are already under fierce attack from competitors
 - ◆ In real terms, there is no business case!
- **Pure Mobile operators**
 - ◆ Has been industry's growth area – taking revenue from landline operators at significant rate
 - ◆ FMC adoption may further stimulate growth after recent slowdown
- **Access Providers**
 - ◆ Existing data usage rates will only continue to rise
 - ◆ FMC adoption provides a product differentiator
- **Application-only providers (disruptors)**
 - ◆ Disruptive players hold no real existing threat by moving into the space.
 - ◆ The business case is definitely there!



The driving forces behind the FMC wave today

- Not traditional Telco Operators
- Traditional user telephony usage patterns changing
- Increased broadband penetration – esp. wireless broadband (3G/Wi-Fi/Wi-Max etc)
- Maturity of Next-Gen voice technology – e.g VoIP
- Innovative operators



● Case Study 1 – Skype

- ◆ Driving convergence to the handset
- ◆ Partnering with access providers & handset manufacturers

● Case Study 2 – Vodafone Germany

- ◆ Driving convergence to the desktop
- ◆ PC client allows for sms, mobile & VoIP calls with existing mobile number



Winners/Losers

Winners

- **Consumer**
 - ◆ Competition between service providers offering converged services leaves the consumer with more options at a lesser price
- **The potential disruptive operators**



Losers

- **Traditional landline operators**
 - ◆ Many competing providers will be aiming to eat into their margins
- **Access providers may also suffer**
 - ◆ Access providers that apply barriers that reduce the rich media experience of FMC (by applying download limits etc) may find their policies for doing so placed under the spotlight.
 - ◆ Similarly focus on access pricing may find itself come under scrutiny

Adoption of FMC by key players today



- **Skype**
 - ◆ Skype have a number of products available now focused on mass-market entry into the FMC space
 - ◆ Applications available on Windows Mobile, PSP & a 3G-only handset
- **Vodafone**
 - ◆ Will the German experience be a precursor to a similar push worldwide for the Vodafone Group?
- **T-Mobile**
 - ◆ HotSpot@Home - Seamless roaming between Wi-Fi & T-mobile's wireless GSM/GPRS/EDGE network
 - ◆ Samsung/Nokia Handset & D-link router for Wi-Fi
- **BT**
 - ◆ BT Fusion – modified Motorola handset & Bluetooth/Wi-Fi for fixed (VoIP), MVNO with Vodafone for mobile.
- **C&W / Orange (UK)**
 - ◆ Uses low-powered GSM spectrum on-campus via C&W. Can roam to the Orange network off-campus.
 - ◆ Service to be launched in late 2008
- **Google, Microsoft could all enter**
- **Adoption within Australia**
 - ◆ Some VoIP providers provide applications for Dual-Mode handsets (e.g. MyNetFone on-the-go)
 - ◆ Who will drive FMC delivery to the local mass-market?
 - Disruptors, mobile operators, ISP's?

Where is the FMC wave headed?

- **Much interest but little application locally**
- **Implementation of FMC today early
UMA solutions from disruptive
players, e.g.**
 - ◆ Skype
 - ◆ MyNetFone

- **Symbio Networks' IP solution architecture is FMC ready (IMS Phase 1).**
- **We are looking for Service Provider partners within Australia & the region to trial an IMS solution**



Thank You

VoIP – The Next Wave

Alastair Slattery
Business Development Manager
Symbio Networks

alastair@symbionetworks.com
Phone: (61) 2 9994 8594