THE ONLINE TELCO

HTE 2014

BARTL ISTVÁN - TELEKOM

TRENDS SHAPING THE INDUSTRY

NEW CHALLENGERS

THE ONLINE INDUSTRY

Standard products and services

Global markets

Ultra-efficient processes

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Ultra-low cost infrastructure

... HAS DISRUPTIVE EFFECT ON TELCO BUSINESS
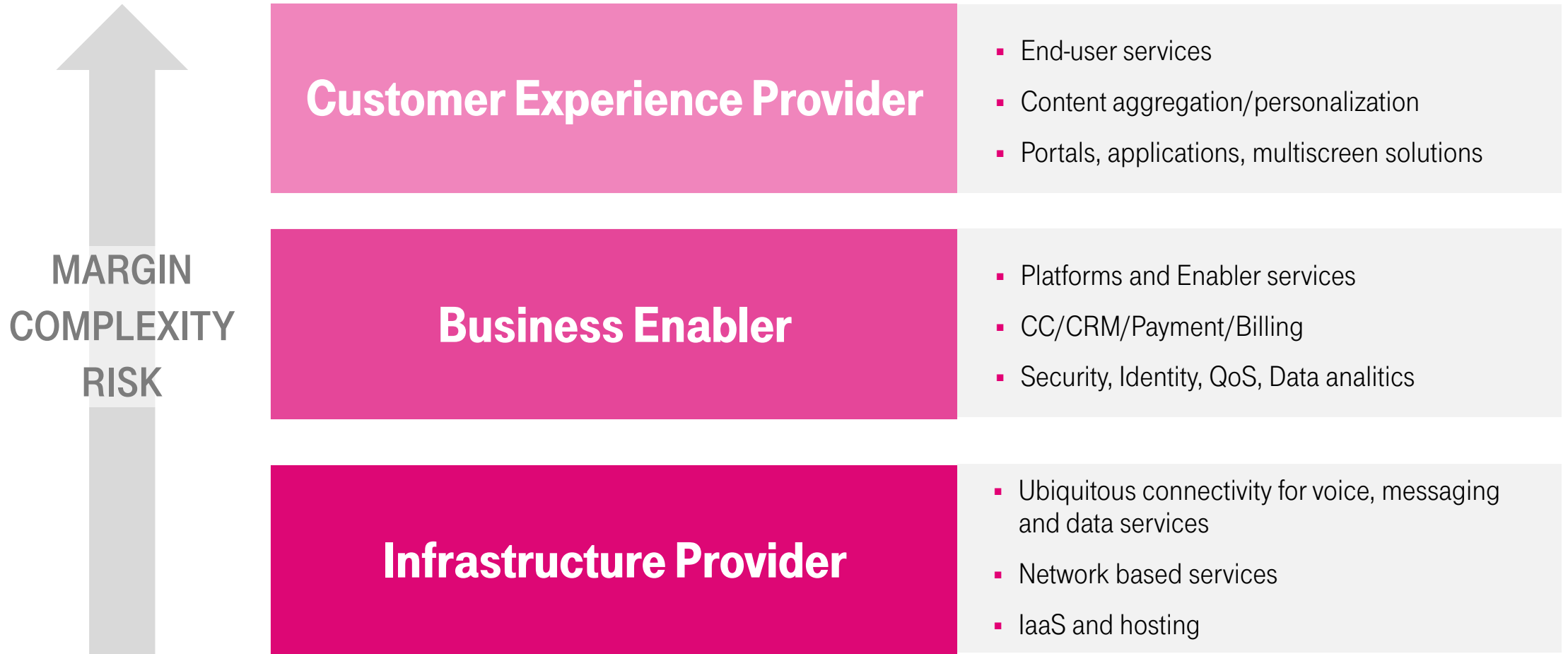
OUR BUSINESS MODEL IS CHALLENGED

"Every industry that becomes digital eventually becomes free."

Wired Magazine

T··· ·· ·   LIFE'S FOR SHARING

TELCO STRATEGIES VERSUS ONLINE PLAYERS

MARGIN
COMPLEXITY
RISK

Customer Experience Provider

- End-user services
- Content aggregation/personalization
- Portals, applications, multiscreen solutions

Business Enabler

- Platforms and Enabler services
- CC/CRM/Payment/Billing
- Security, Identity, QoS, Data analitics

Infrastructure Provider

- Ubiquitous connectivity for voice, messaging and data services
- Network based services
- IaaS and hosting

BUILDING BLOCKS FOR ONLINE TRANSFORMATION

TECHNOLOGY TRANSFORMATION
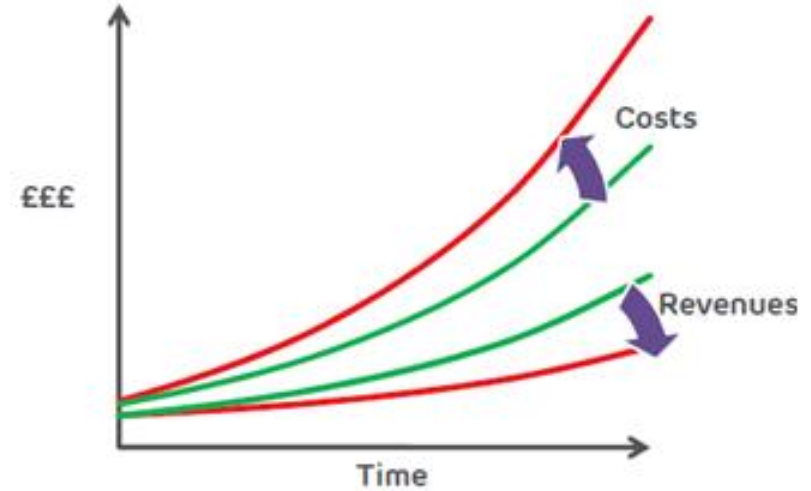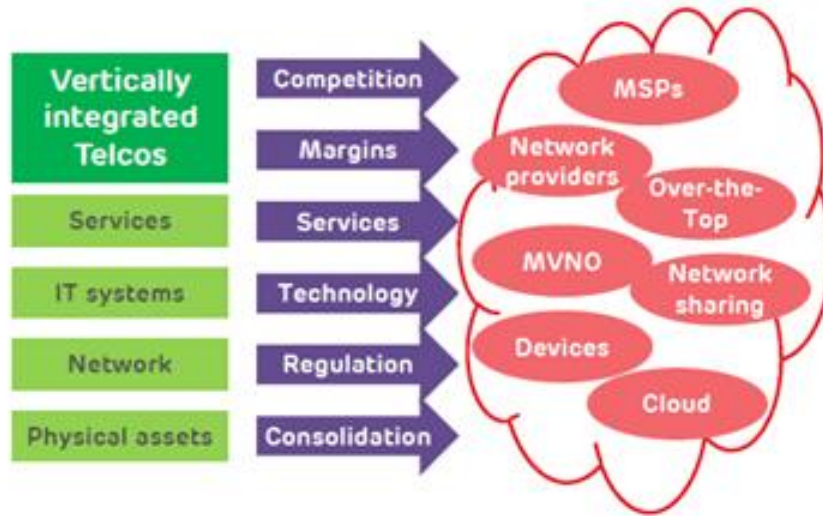
PRODUCT TRANSFORMATION

PROCESS TRANSFORMATION

FULLY INTEGRATED, SCALED-UP DISTRIBUTION AND CRM/BILLING

UBIQUITOUS NETWORK CONNECTIVITY AND INFRASTRUCTURE

TECHNOLOGY TRANSFORMATION

Today's Network and IT architecture were meant for 'vertical' Telcos

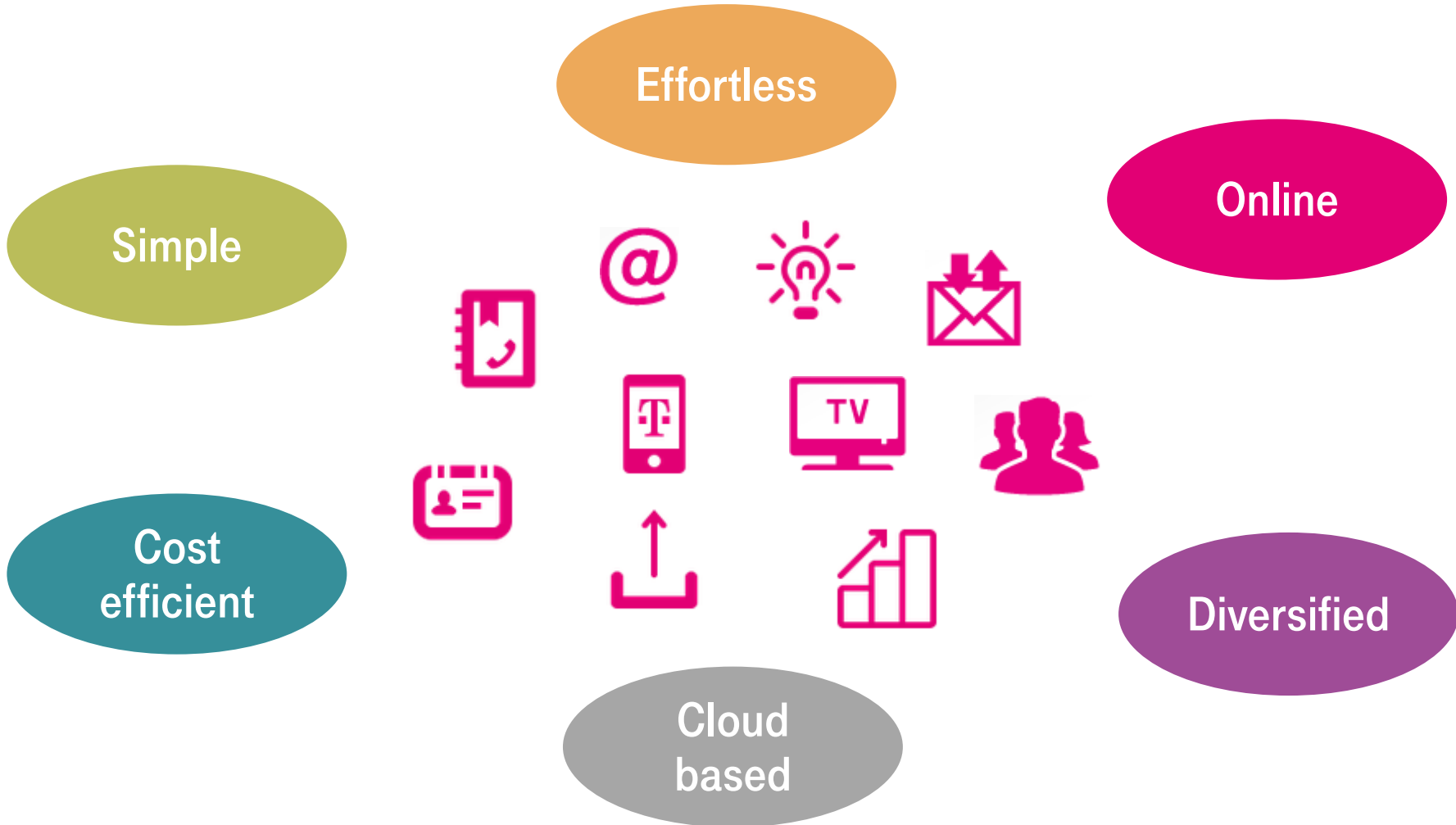**The industry direction makes us to shift towards a 'software-defined' operator**

NFV

SDN

PROCESS TRANSFORMATION

ACCELERATED BUSINESS ADOPTION

ONLINE SHOP AND CARE PROCESSES

CORPORATE AGILITY

QUO VADIS TELEKOM?