

# THE BATTLE FOR MOBILE TRANSFORMATION

INVINCIBLE OTT PLAYERS vs. VENERABLE OPERATORS

AFTER YEARS OF CONFINING SERVICES FROM OPERATORS, GROWING LEGIONS OF SMARTPHONE USERS CRY OUT FOR LOW-COST AND FLEXIBLE SOLUTIONS. OTT TELEPHONY SERVICES ANSWER THE CALL; DEMAND FOR SERVICES SKYROCKET, FURTHER STIFLING OPERATOR REVENUES.

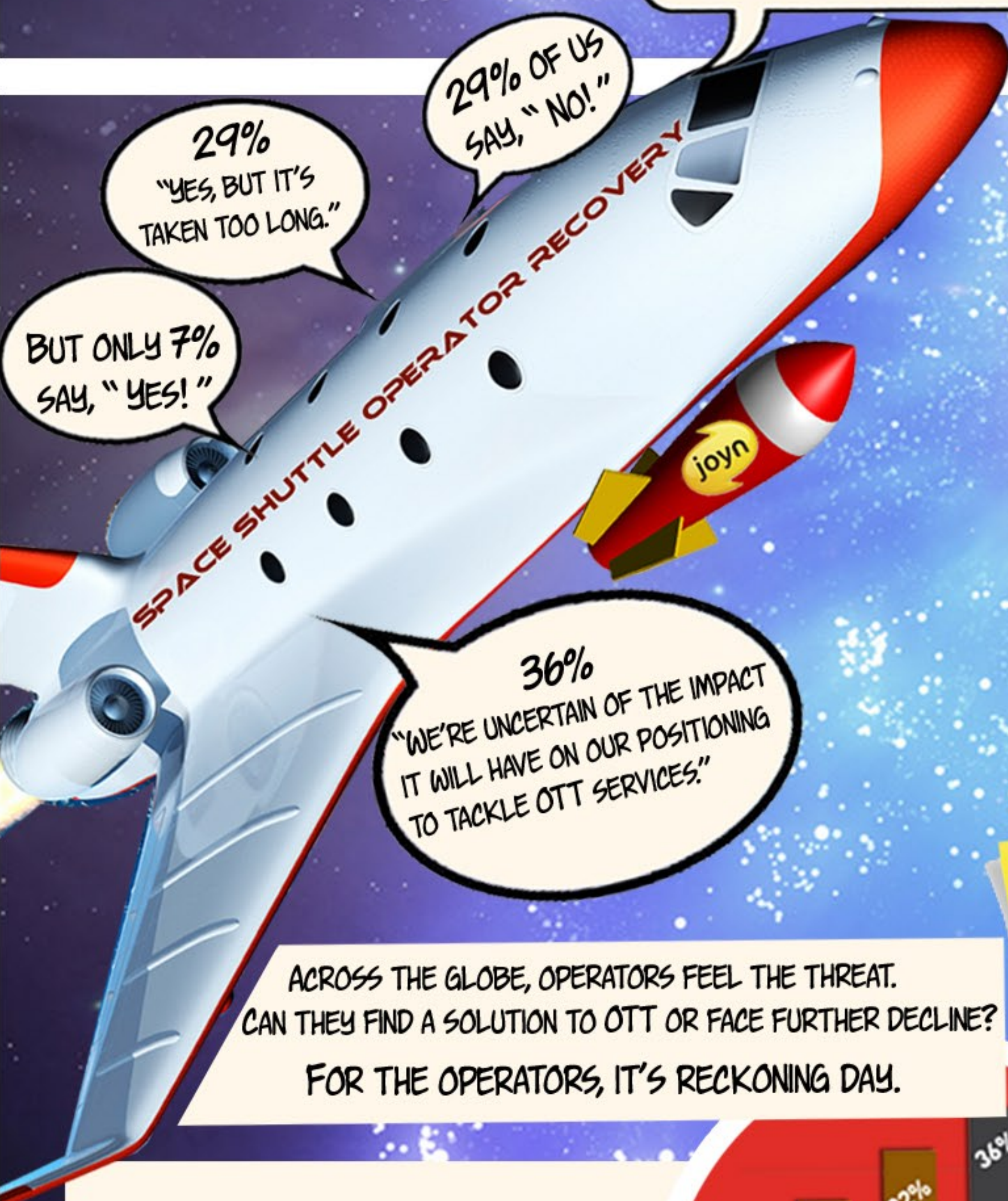


SMARTPHONE OWNERS USING OTT SERVICES TO COMMUNICATE ON A DAILY BASIS ARE INCREASING EXPONENTIALLY!

OPERATORS HOPED THAT THE "JOYN" INITIATIVE WOULD OFF-SET DECLINING VOICE AND SMS REVENUES. AMONGST OPERATORS BELIEVING IN THE POTENTIAL OF THE SCHEME, THE SLOW-TO-MARKET LAUNCH HAS CAUSED DOUBT.

IN 2013, OTT USAGE IS ACCELERATING—BLOWING UP THE MOBILE UNIVERSE.

"DO YOU THINK JOYN CAN HELP US TACKLE THESE OTT PLAYERS? LET'S TAKE A POLL..."



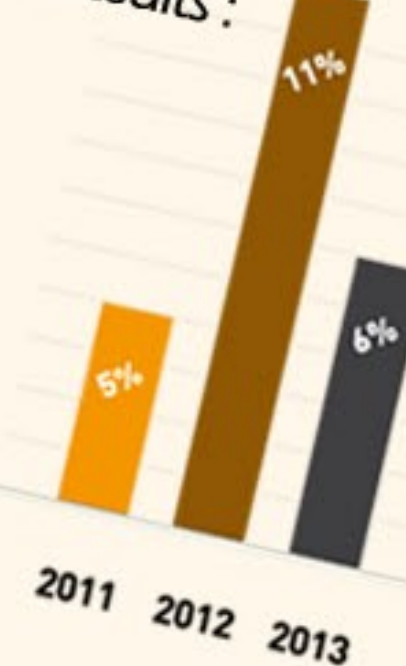
ACROSS THE GLOBE, OPERATORS FEEL THE THREAT. CAN THEY FIND A SOLUTION TO OTT OR FACE FURTHER DECLINE? FOR THE OPERATORS, IT'S RECKONING DAY.

NONE OF THESE ATTEMPTS WERE AS EFFECTIVE AS WE THOUGHT. WE HAVE TO TRY A DIFFERENT APPROACH, SOMETHING NEW... WHAT ABOUT PARTNERING?

## OPERATOR INITIATIVE PLAN OF ACTION FOR OPERATORS

1. BLOCK OTT services.

Results:



2. IMPOSE surcharges on OTT services.

Results:



3. CHARGE for data from OTT services.

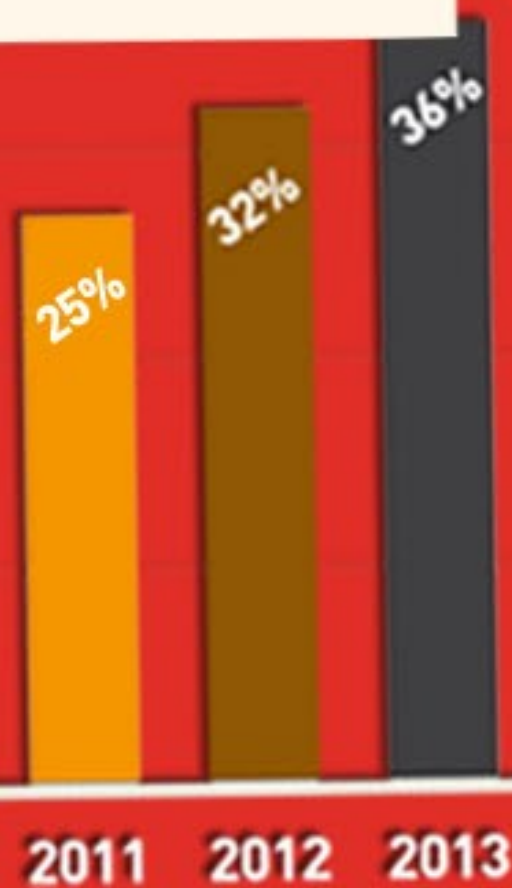
Results:



Source: mobile squared

OPERATORS PARTNERING WITH OTT PLAYERS HAS RISEN HIGHER EACH YEAR.

2011 2012 2013



MEANWHILE...

A NEW FUTURE AWAITS. WHAT WILL IT HOLD?

"CEASE-FIRE!"

THE INCREASING NUMBER OF ALLIANCES MAKES PARTNERSHIP LOOK PROMISING AND OTT OFF-NET TERMINATION REVENUES ARE FORECASTED TO TAKE OFF!

