

OUR TELECOMS DEPENDENCY & SECURING THE CNI

We are more dependant on networks so what do we do to keep the country running?

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Cable&Wireless



HOW MUCH VOICE IS MOVING TO IP?

VoIP business lines increase by 72%
PSTN business revenue fall by 27%
(CAGR 2007-2012 enterprise voice)

New drivers:

CISCO IPT

Skype

Microsoft OCS

Cable & Wireless Fixed Mobile
Convergence (FMC)

Source: Gartner



DATA CRITICALITY

Thin client

Virtual desktop

Server centralisation & virtualisation

Hi-def video / telepresence / immersive technology

Lower cost of networks

These all save money , we are in a recession

A NETWORK OUTAGE OF 4 HOURS USED TO BE
TOLERABLE FOR MANY ORGANISATIONS

NOW 4 MINUTES IS OFTEN AN ISSUE



Next Generation Networks (NGN) & “ALT-NETS”

· A PARADOX

De-regulation = More competition = Diversity = Security

NGNs are expensive but you have to have one !!

Many operators who have not achieved free cash flow are outsourcing their infrastructure

Mergers and Acquisitions have been alive and well

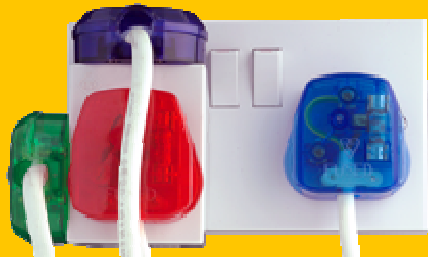
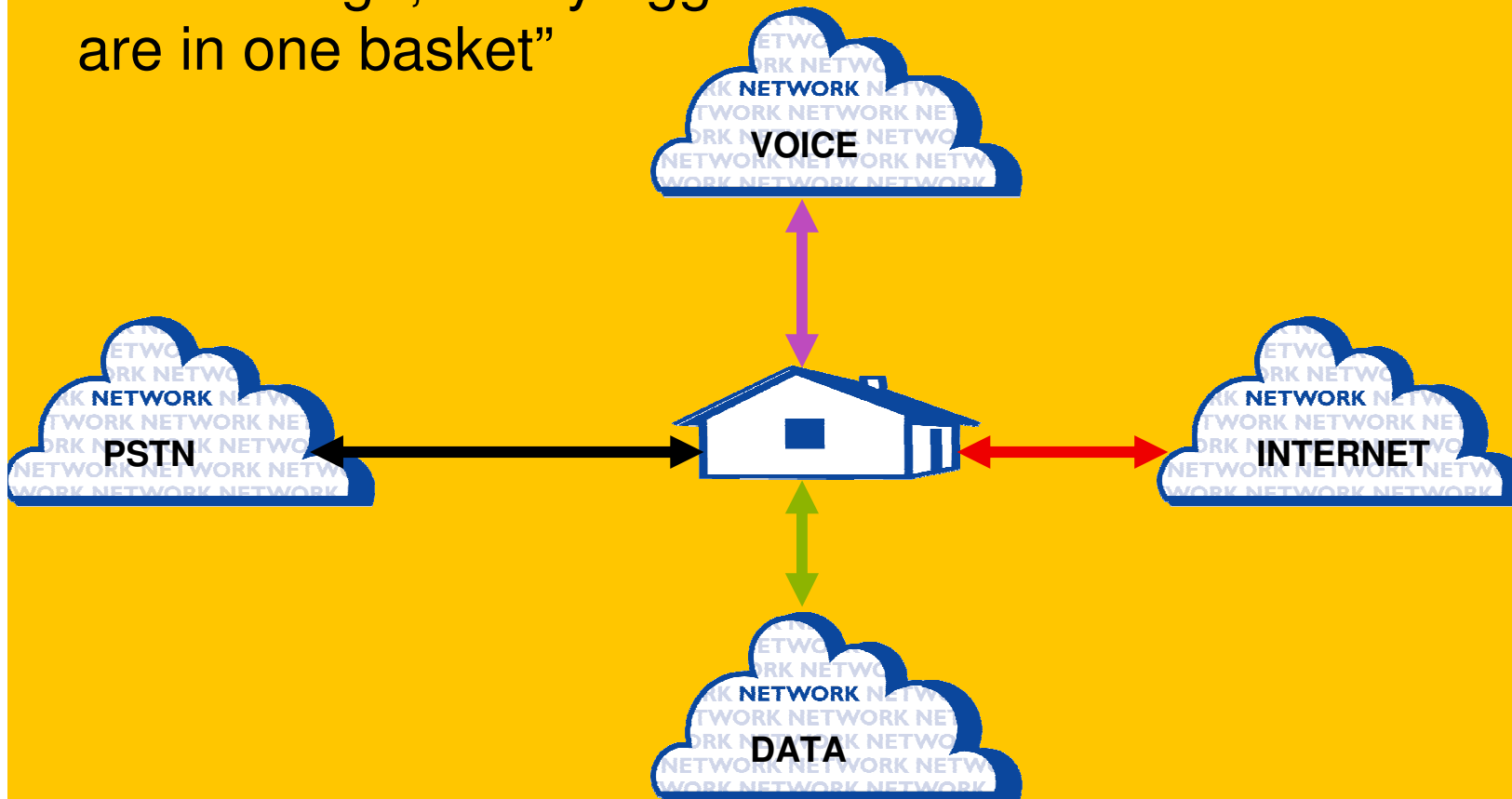
A return to duopoly? = fewer, larger IP networks

But the number of mobile operators has grown and are migrating to IP



ALL EGGS IN ONE BASKET?

“If I converge, all my eggs are in one basket”



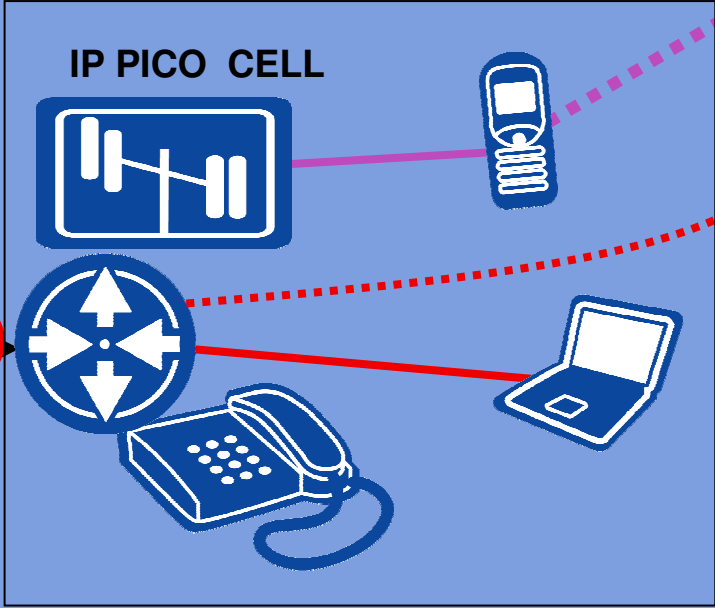
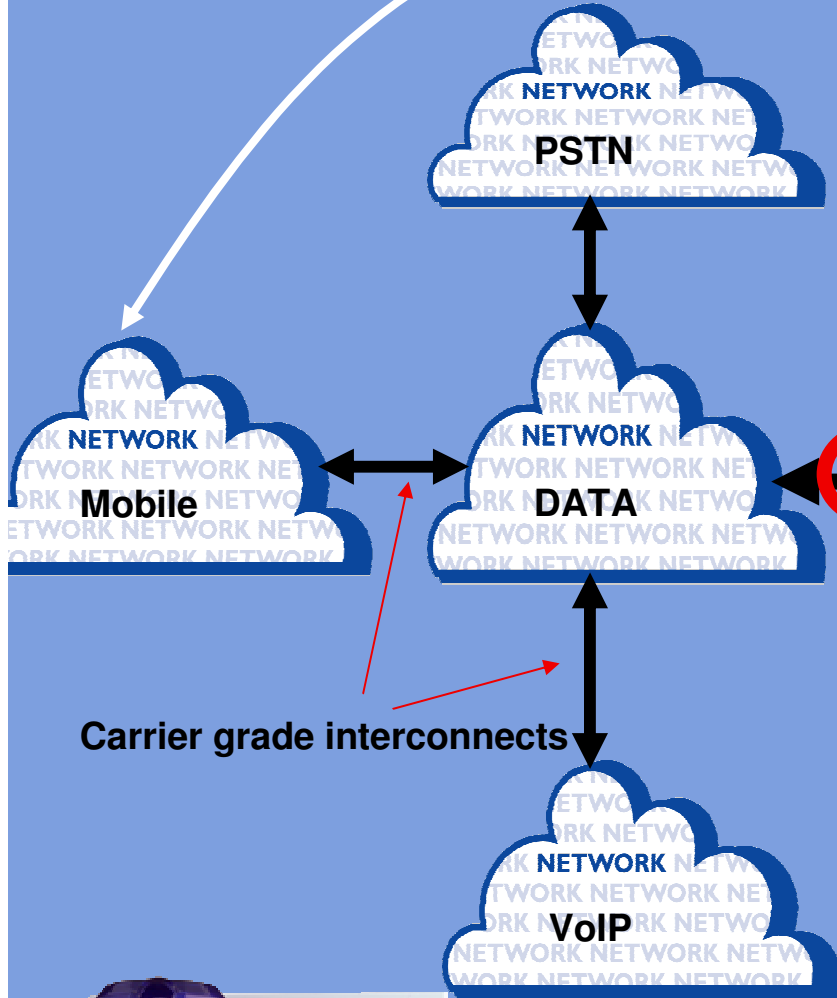
The 4 fundamental utility telco services from 4 different suppliers on 4 different backbones ?

THE REALITY!



**DIVERSITY IS EXPENSIVE , IF POSSIB
YOU NEVER PLAN FOR A 1 IN 10 YEA
OR SHOULD WE?**

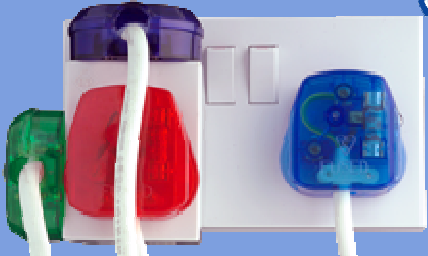
A SOLUTION ?



GSM MACRO CELL

GSM BASED FMC

Standards based
National roaming agreements
Guard band GSM technology
30% of office based calls are made on mobile
Mobile becomes the most available technology



SUMMARY

New technology is driving voice to IP
[faster]

IT is more reliant on networks to save
cost

There will be fewer but bigger national
IP networks

The mobile operators will be some of
these

CONVERGENCE OF MOBILE AND
TERRESTRIAL TECHNOLOGIES
COULD BE OUR SAVIOUR





Thank you for listening

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