

The Emergence of the 3rd Generation Telco



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The Challenge of Change

Insights from Global IPTV Leaders



The Challenge of Change

Despite...

- 12 – 14 years on the IPTV learning curve
- Millions of customers
- Billions in investments
- The emergence of industry giants in the TV space...



The Challenge of Change

IPTV leaders continue to struggle with...

- Vast amounts of performance data, yet challenged with customer insight
- Acceptance by and the evolution of service delivery teams
- The challenge of customer acquisition/activation costs
- Is this “where we leave cable behind”?
- The ubiquity of video (TV)
- The constant raising of the bar by the customer

Mariner has seen these challenges across the board.

Bringing TV to Hyper-Local



The Power of Local Content

Smithville[®]

Service Quality



Superior TV



Taking Bundles to the Next Level

Don't Count the Local Brands Out



Industry Directions – “The Squeeze”

Telcos Face the Challenge of Bridging the Two



The 3rd Generation Telco

What will it take to manage the squeeze?

End to end Customer Experience Management

Local Content

Human Touch

Self Service on Steroids

Training On-Demand

Standards Based Infrastructure

New Monetization Models

IP-Based Billing Systems

IP-Ready Legacy Systems

Application Delivery Platform(s)

Rapid App Delivery

Customer Insight

Empowered Customer Contact Teams

Bandwidth On-Demand

Profile-based Security

Inter-working Nets

Service Assurance for all Apps & Services

Bell Aliant - Playing to Your Strengths

- **Embrace Innovation**
- **Capitalize on Hyper-Local**
- **Make Servicing
“the Secret Sauce”**

