

# Technology Trends Shaping Australia's Telecom Future

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Sydney

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## Agenda

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- About Telsyte
- The Three Mega Technology Trends
  - ❖ Convergence
  - ❖ Wireless: Beyond 3G
  - ❖ Wired: FTTX
- Conclusion
- **Promotion!!**



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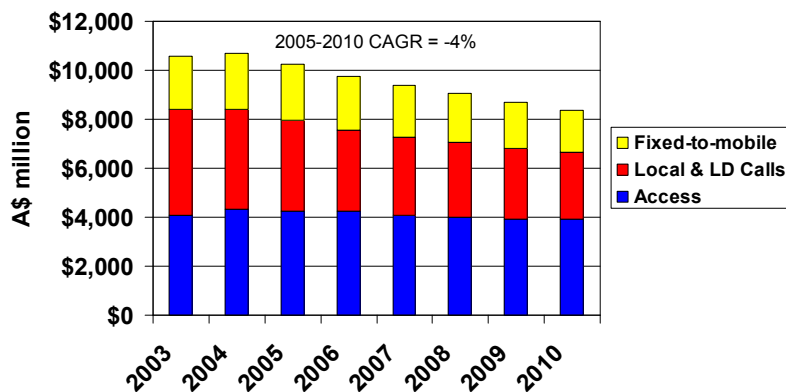
## About Telsyte

- Independent telecom market research and strategic consulting firm focusing on the Australian market
- Services include:
  - Telecom Service Price Benchmark
  - Market analysis and forecasts
  - Carrier, vendor and product analysis and positioning
  - Customised research and consulting
- Established in 1997 and became part of Gibson Quai-AAS in 2002
- Gibson Quai-AAS, a telecom technology consultancy with 60 staff in Adelaide, Brisbane, Canberra, Melbourne, Perth and Sydney



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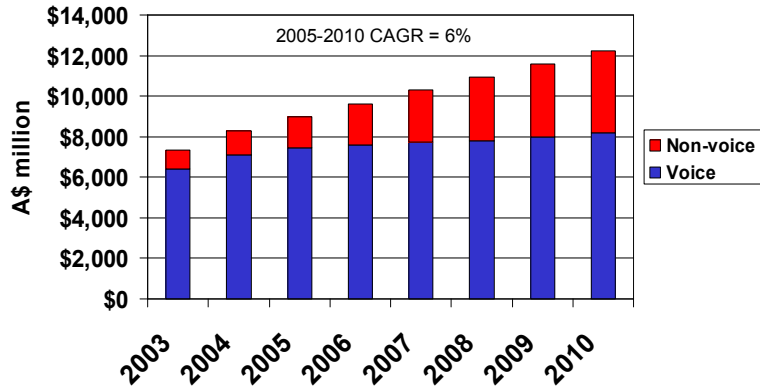
## Australia's PSTN Revenue



Source: Telsyte, March 2006

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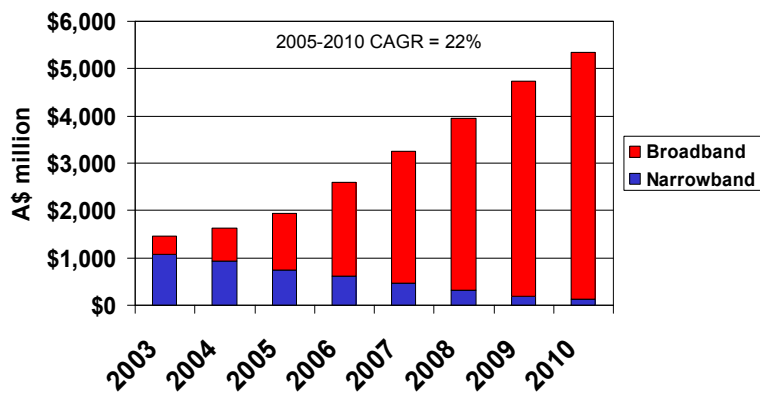
## Australia's Mobile Revenue



Source: Telsyte, March 2006

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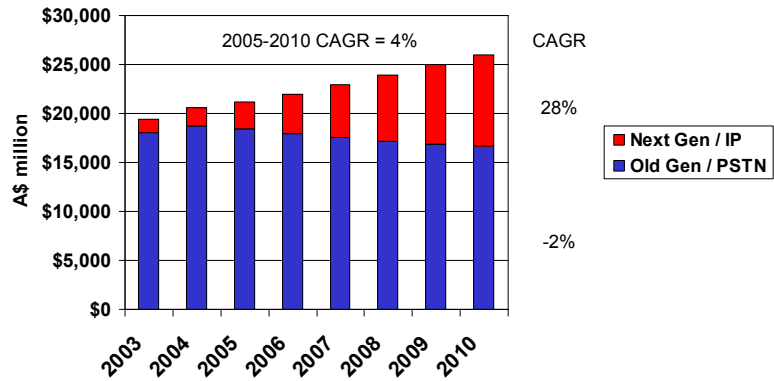
## Australia's Internet Revenue



Source: Telsyte, March 2006

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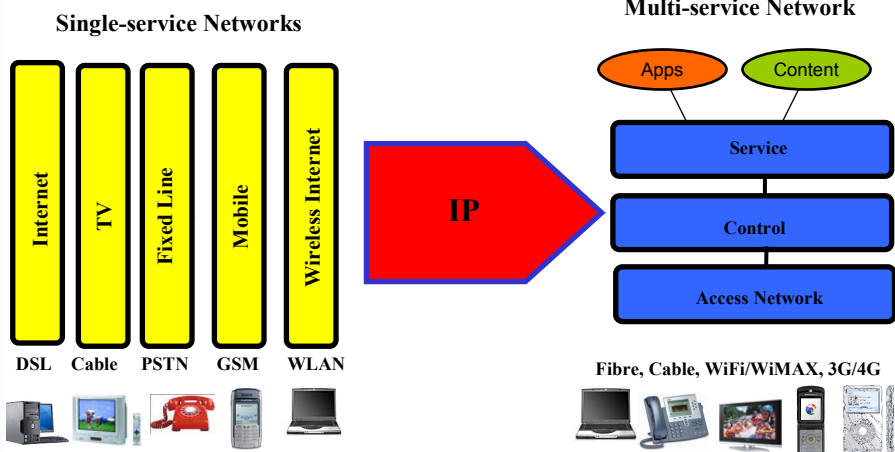
# Next Generation-driven Growth



Source: Telsyte, March 2006

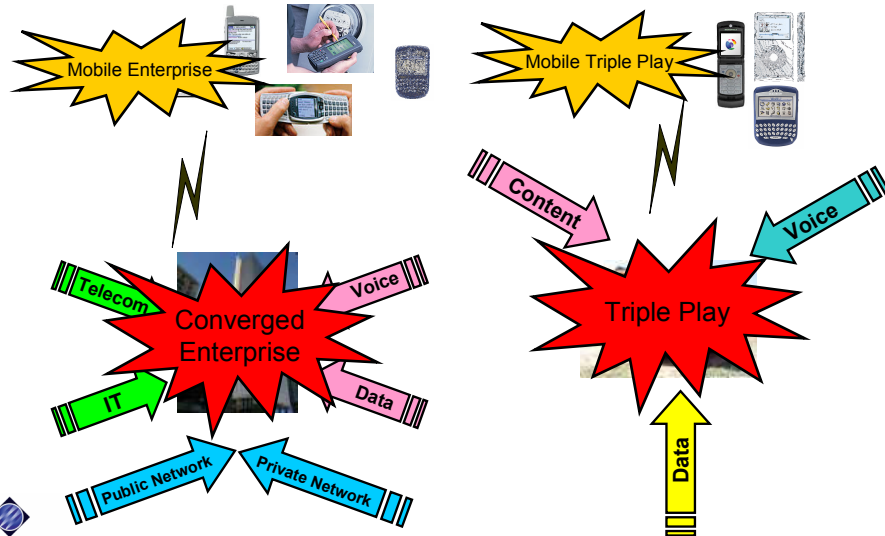
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# Next Gen Convergence - Networks



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# Next Gen Convergence - Apps



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# Wireless: Beyond 3G

3G	3.5G (HSDPA)	3G LTE / Super 3G	4G ?
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Pre-WiMAX	WiMAX (802.16d)	WiMAX (802.16e)	
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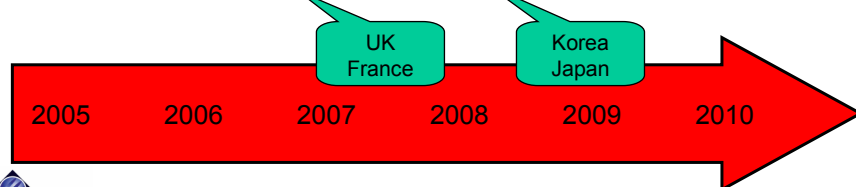
200-400 Kbps	1-2 Mbps	5-10 Mbps	20-40 Mbps
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- |   |  |  |   |
|---|--|--|---|
| <ul style="list-style-type: none"> <li>• Video calls</li> <li>• Movie clips, music videos</li> <li>• Pictures/Multimedia msg</li> </ul> | <ul style="list-style-type: none"> <li>- Mobile TV</li> <li>- Wireless VoIP</li> <li>- Fixed-mobile convergence</li> </ul> | <ul style="list-style-type: none"> <li>- Home automation</li> <li>- Mobile commerce</li> <li>- Mobile "triple play"</li> </ul> | <ul style="list-style-type: none"> <li>- Single subscription</li> <li>- Converged experience</li> <li>- Any device, connectivity</li> </ul> |
|---|--|--|---|

Strategy: Discounts & Bundles

Service Integration

Device Convergence



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# Wired: FTTX

ADSL

ADSL2/2+

FTTX

Next-gen Fibre

1-2 Mbps

20-30 Mbps

100+ Mbps

Giga bps

- "Broadband" Internet
- Multimedia applications
- Movie/video clips

- Movie/VoD
- VoIP
- Fixed-mobile convergence

- IPTV / Triple Play
- Digital Home / Automation
- Multimodal comms

- Single subscription
- Converged experience
- Any device, connectivity

Strategy: Discounts & Bundles

Service Integration

Device Convergence

2005

2006

2007

2008

2010

Japan  
Korea  
Sweden  
Netherlands  
Canada  
US



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# Conclusion

For suppliers...

- Convergence, a multi-faceted evolution, is the new telecom battleground
- New ecosystems are forming, new friends and foes are emerging
- Heavy alliance and acquisition activities are on the horizon
- Dynamic user segmentation is key to success

For users...

- Education and assistance will be needed with adoption of new technologies
- Commoditisation will be relentless in "Old Gen" products and bundles will be commonplace
- Selection and procurement criteria: single vs multiple providers; national vs global providers; telcos vs SIs; self managed or outsourced
- Ease of use/simplicity and personalisation/unified experience are winning features



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## Promotion !!

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For ATUG members and participants...

- 2-week free access to the Telsyte Instant Benchmark online database (ends COB 22 March)
- Visit our GQ-AAS / Telsyte stand for more information



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## Thank You

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### Questions/Discussion

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