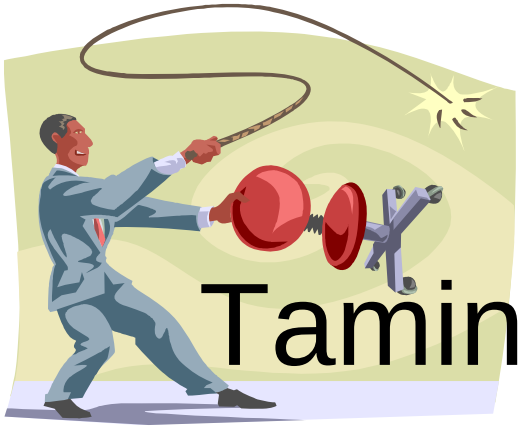
Please click on the note callout for speaker notes!



Taming the Open Network Ecosystem

Presented by Tom Nolle

President, CIMI Corp.

Chief Strategist, ExperiaSphere

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Industry Stratification

High internal rate of return, low capital inertia, high risk tolerance

Monolithic Regulated Public Carriers

Internet Information Companies (IICs)

Network Operators/ Infrastructure Builders

Low internal rate of return, high capital inertia, low risk tolerance

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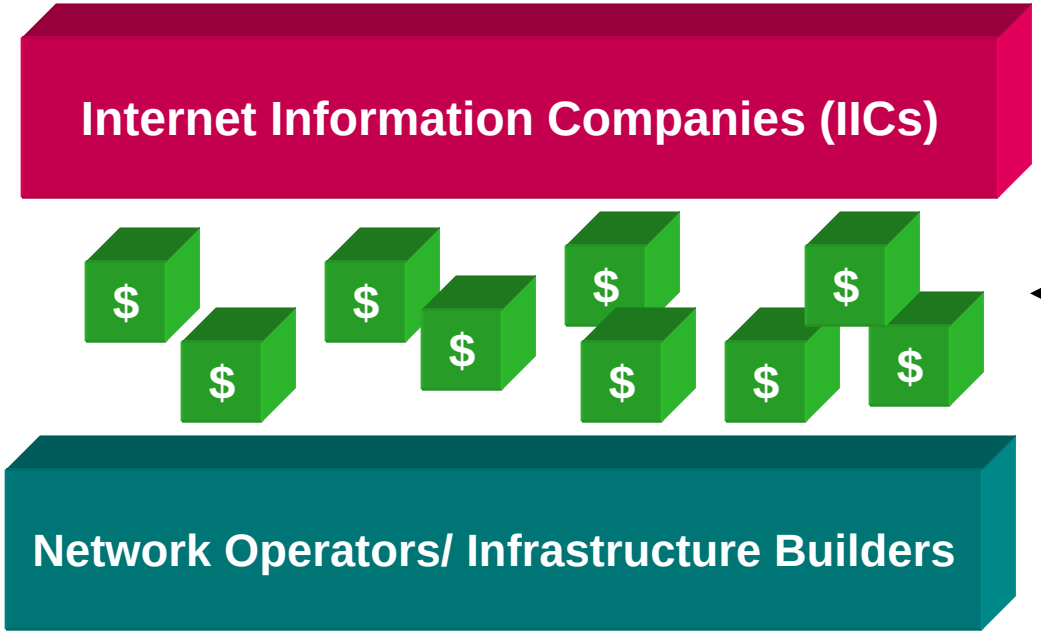
An Opportunity Unmet?

High internal rate of return, low capital inertia, high risk tolerance



Low internal rate of return, high capital inertia, low risk tolerance

Essential Stuff is falling between the ROI cracks!

Fixing this problem is a key requirement in maximizing network utility and profit for all

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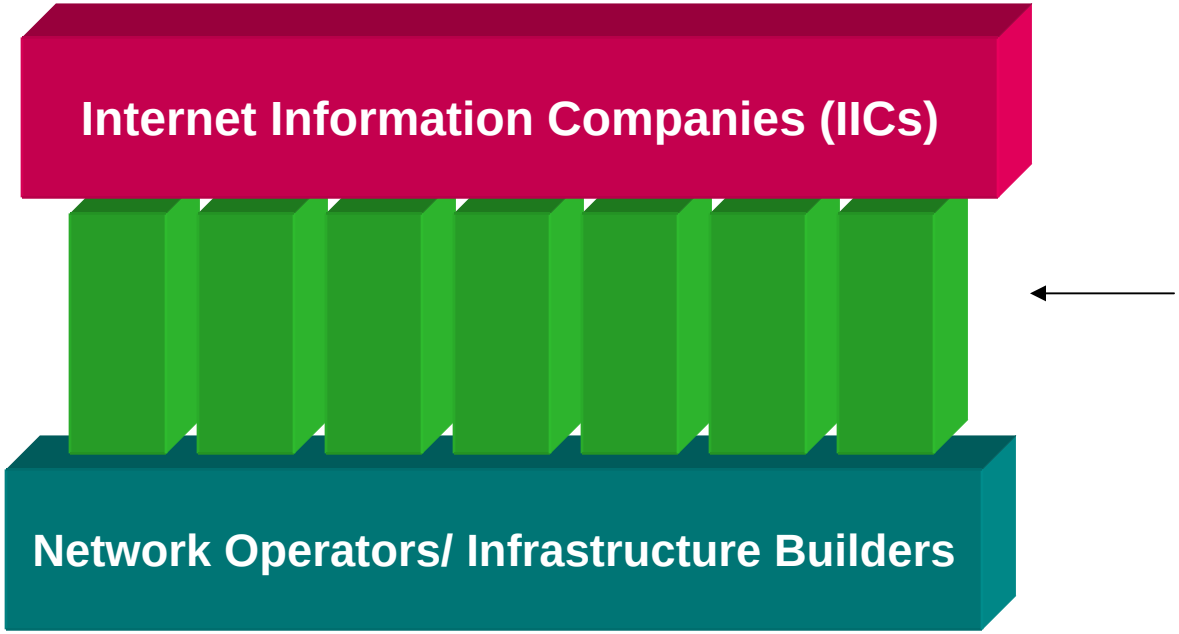
Binding Two ROI Worlds with Open Networks

High internal rate of return, low capital inertia, high risk tolerance



Operators create open features from networks, features beyond connection and transport, and expose them as for-fee offerings to developers and IICs

Low internal rate of return, high capital inertia, low risk tolerance

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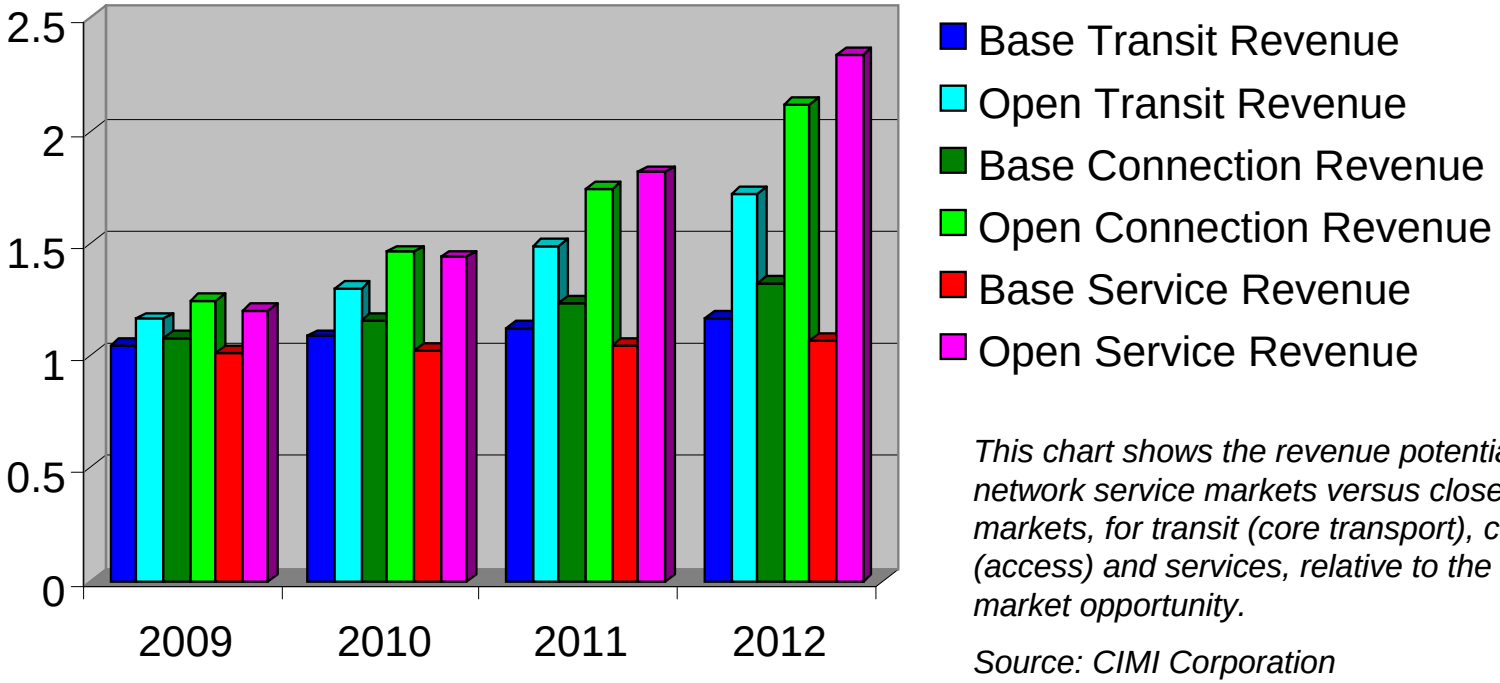
The Incentive



This chart shows the revenue potential for open network service markets versus closed or "base" markets, for transit (core transport), connection (access) and services, relative to the baseline of 2008 market opportunity.

Source: CIMI Corporation

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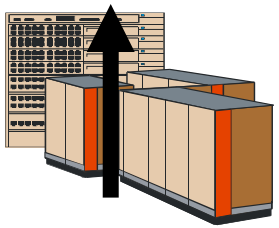
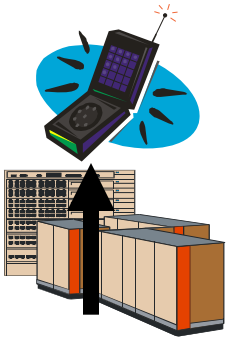
Approaches

***Open handset (LiMO, Android)**: Advantages: lots of industry buzz, involves handset vendors too, Google loves you (maybe). Disadvantages: May focus more on over-the-top applications, doesn't address specific network operator feature exposure by itself.*



***Open APIs (TMF, IPsphere, vendor programs)**: Advantages: creates direct value for the network operator, adds to asset base available for open applications. Disadvantages: No explicit framework for open applications, business and operations framework for operator needs definition.*



***Open Ecosystem:** Advantages: Applicable on both client and network side, creates application framework, can link business models of all the players. Disadvantages: **None yet widely available or accepted**.*

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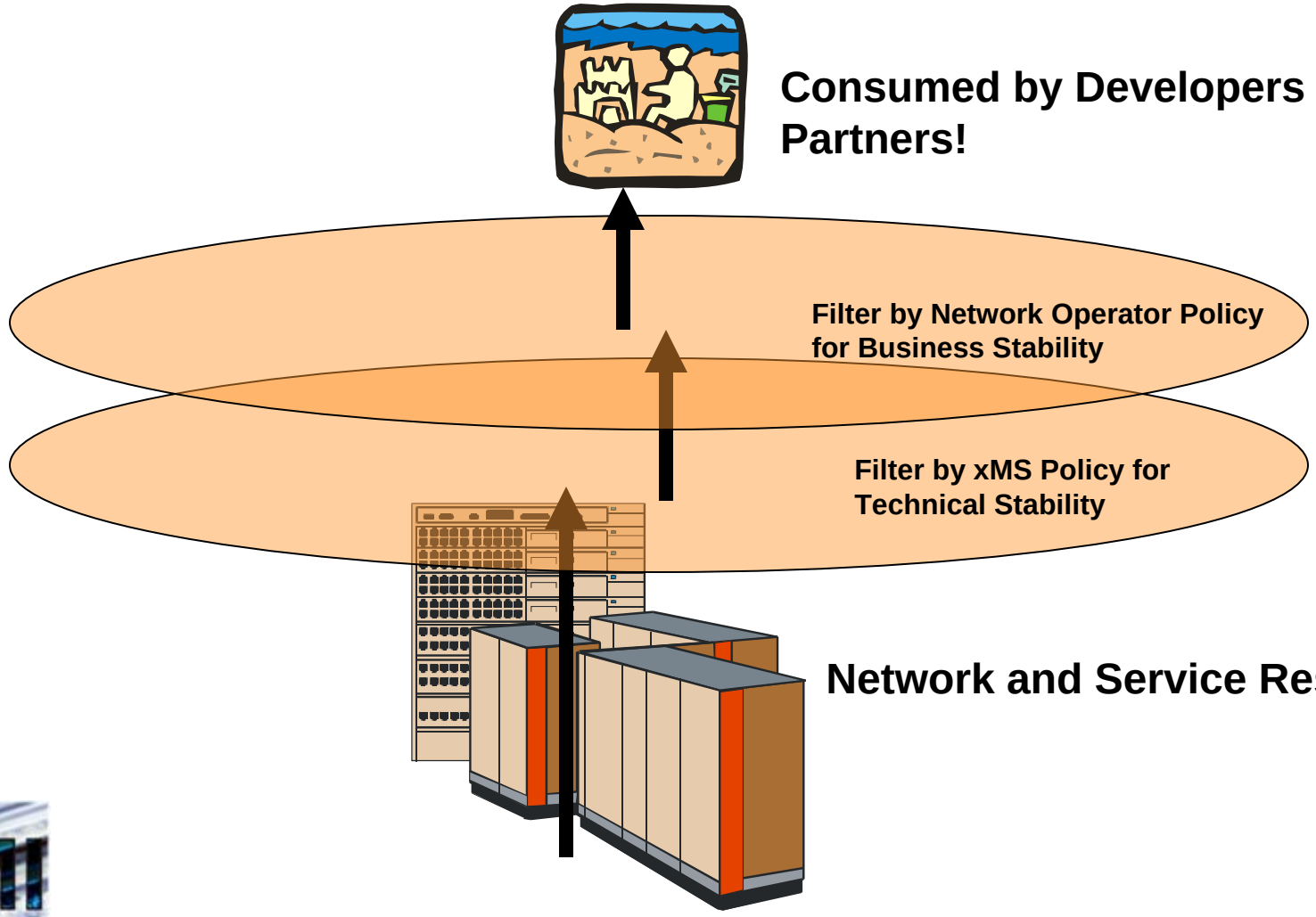
Challenges to be Met



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Going Forward

- Every major network operator supports an open, cooperative, direction
- Standards are developing (IPSF, TMF) to support open collaboration to create services
- Equipment vendors are starting to create the technical tools needed
- **An ecosystem is needed and not just a set of isolated approaches!**

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Thank You!

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