

An aerial night view of London, showing a dense urban landscape with illuminated buildings and streets. The BT Wholesale logo is in the top left, and the title text is centered. The BT Tower is visible in the distance.

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Communication in an All-IP world – a shared journey towards convergence

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Communication in an All-IP world - a shared journey towards convergence

Are we ready?

UK landscape

Customer challenge

Service portfolio

Introducing

The UK landscape is changing – the move to IP is already well underway



ISDN double
digit declines

1m+ reduction of lines in last 5 years

100+ IP comms
operators

Diverse supply landscape already in place

Over 2.5m SIP
channels deployed

Growth rate: 300K channels added last year

Over 3m hosted
telephony seats
deployed

Growth rate: 500K seats added last year



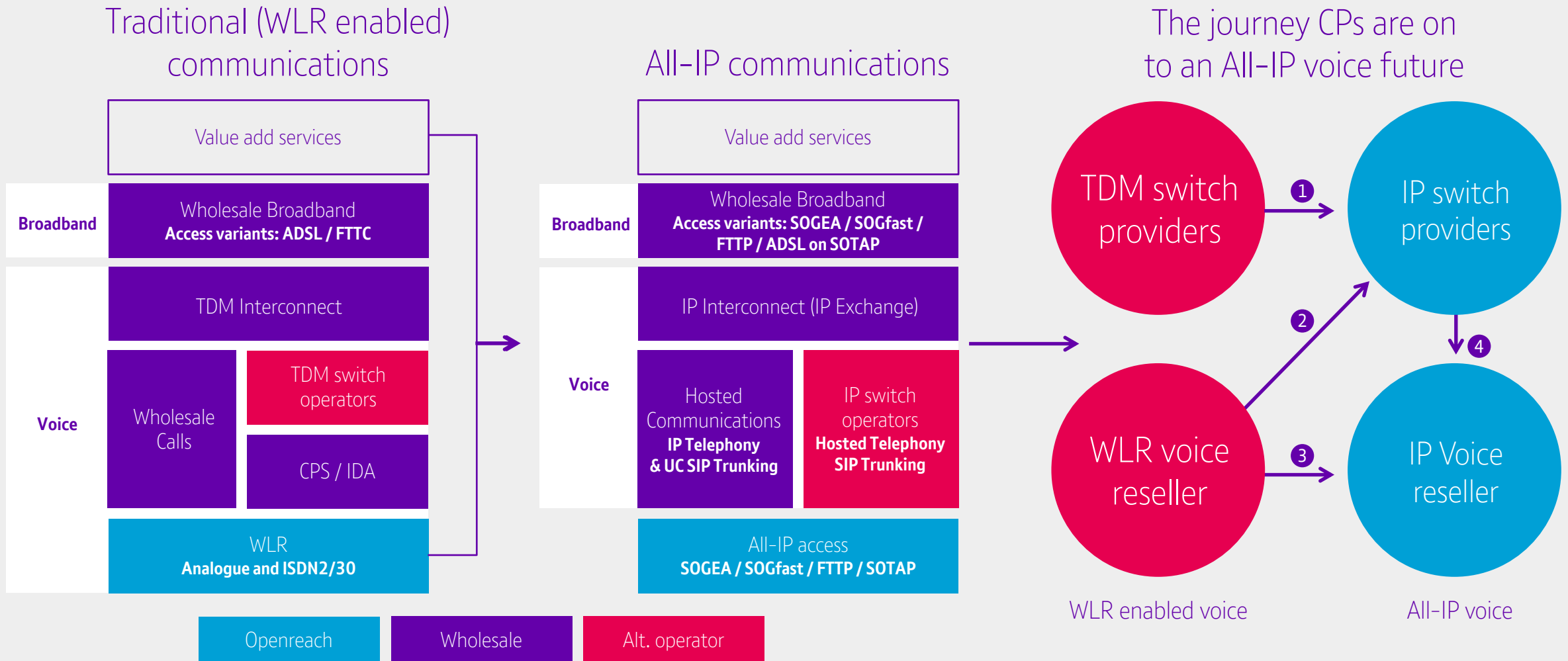
4G penetration
exceeds 70%

5G services are coming soon

Over 50% business
IP comms
penetration

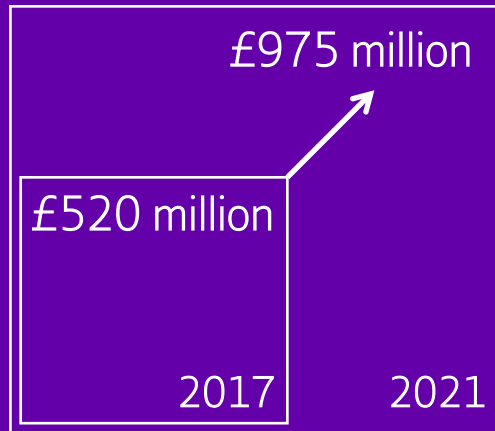
17/18 was the tipping point

The UK landscape is changing – the introduction of converged access

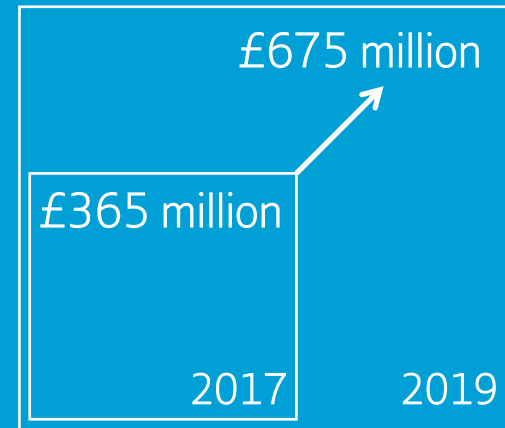


The UK landscape is changing – the service provider opportunity

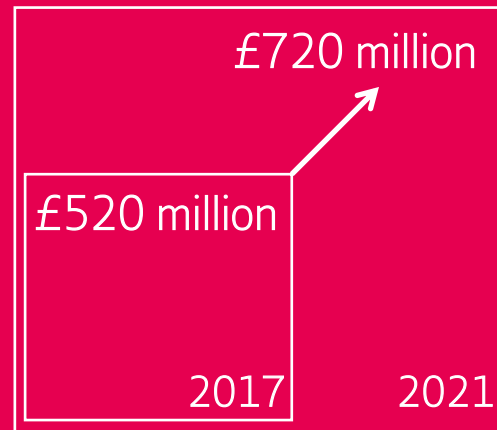
Unified Communications



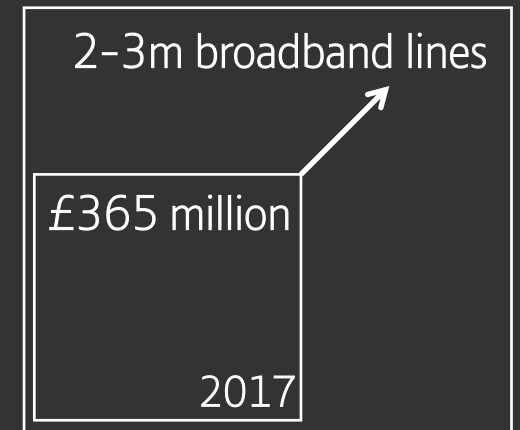
Contact Centre



SIP Trunks



IP Access Market



Customer challenge - digital literacy is a concern as reliance on ICT grows



Understanding customer needs and offering a solution

What do our customers require?

What they don't need?

Solutions equivalent to legacy
– QoS, reliability, speed, reach



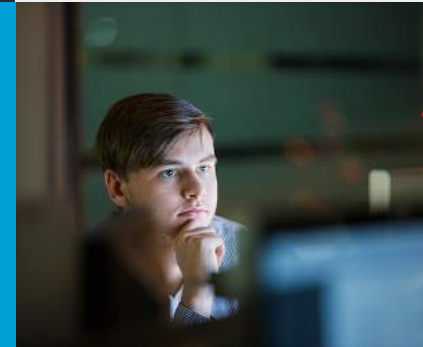
Introduce innovation:
collaboration tools
and flexible working

Reduced lead to cash /
time to market

Cost reductions versus
value for money

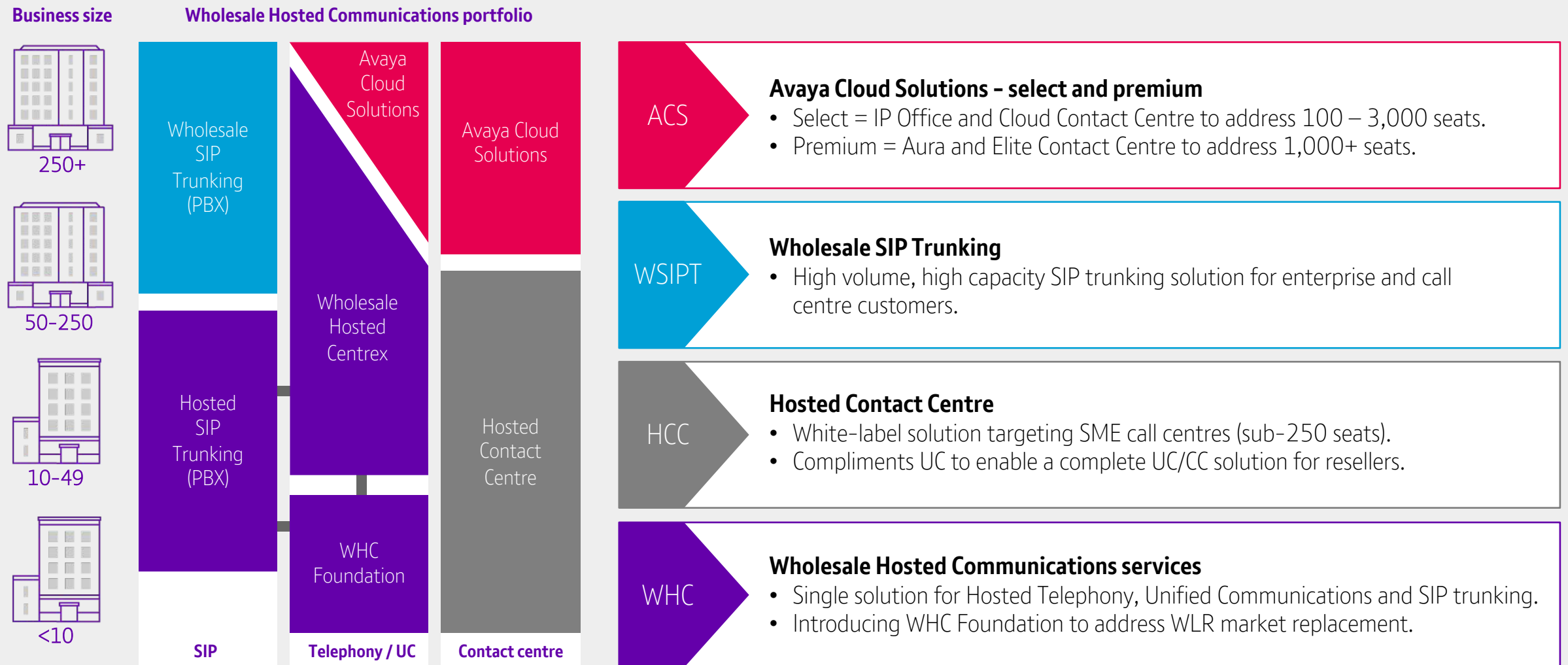
Enable better
customer service and
ability to self serve

Enable
business
continuity



Self provision

Hosted Communications Services portfolio overview



Avaya Cloud Solutions - designed to deliver enterprise grade service

ACS
Select

ACS Select: Mid-market (200-3k seats)

- Simple, repeatable model enabling speed of delivery.
- Platform based on IPO/ IPO/ACCS/ AWFOS.
- Multi-instance for high level of partner control.
- Requires 3 year minimum commitment.

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ACS
Premium

ACS Premium: Large enterprise (1k+ seats)

- Single instance, usage based charging model.
- Platform based on Aura - enterprise class UC / CC.
- Enables rich application integration and customisation.
- Requires 5 year minimum commitment.

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ACS



Complete cloud solution
UC, CC and adjacent services
CP flexibility to tailor service
Credibility of BT and Avaya
Managed network solutions
End to end quality / security
SLGs

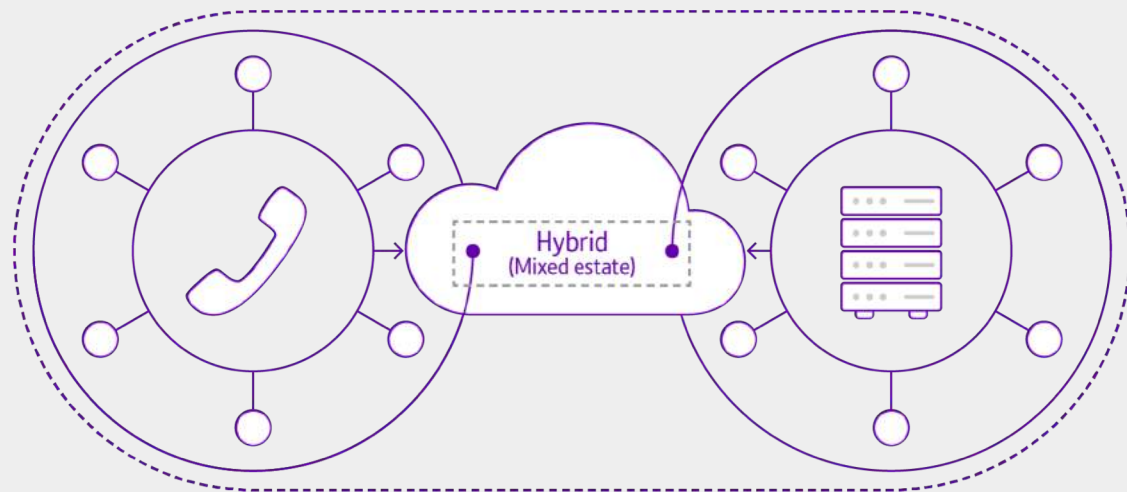
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Tier 4 data centres
Ethernet market leader
IP / SIP market leader
Security practice
Complementary services

AVAYA

UC market leader
CC market leader
Massive UK installed base
High touch sales team
Cloud focus and roadmap

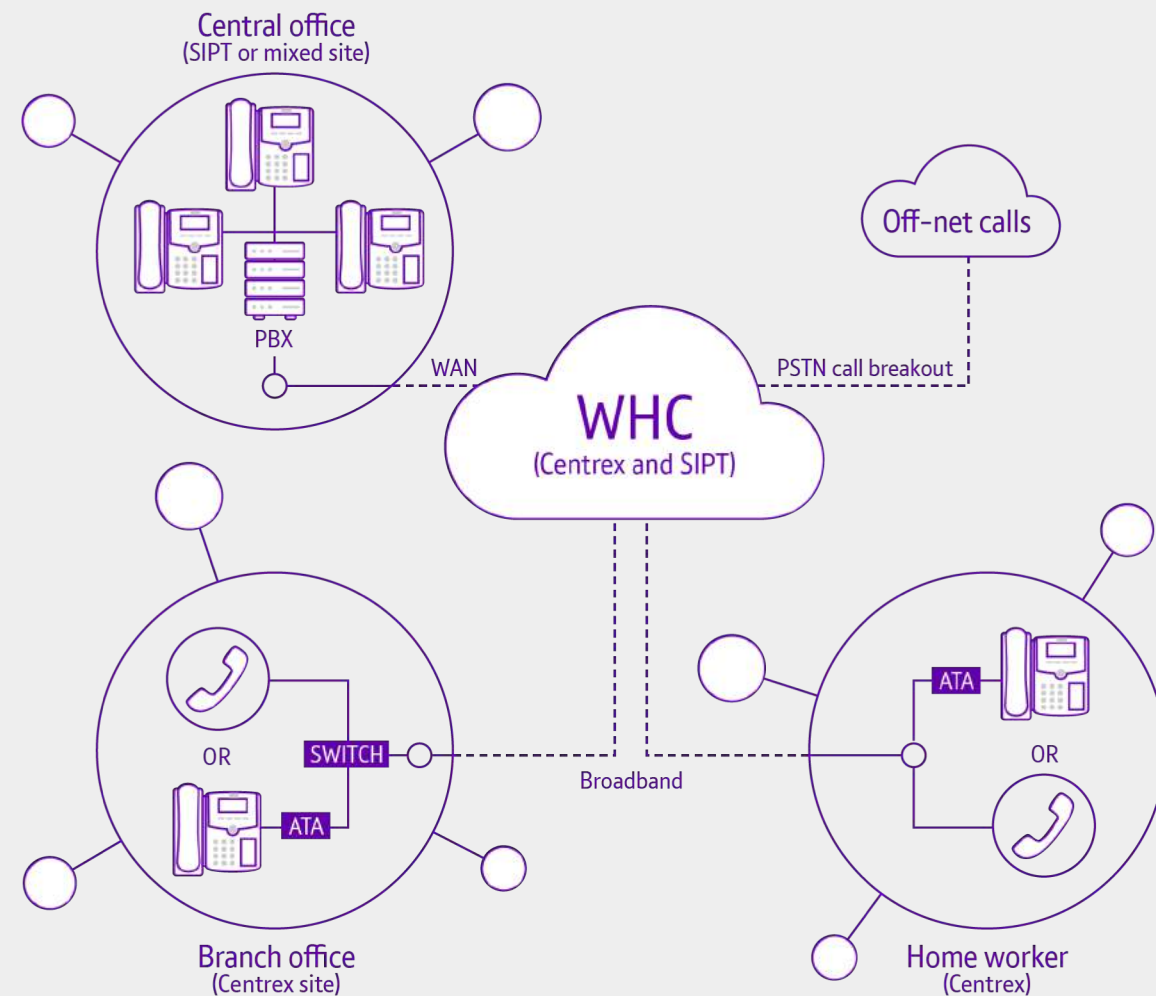
Wholesale Hosted Communications a cloud technology which provides two UC solutions in one simple proposition



Simplicity and customer experience

Fraud management services

Converged connectivity



The Office-UC application brings Fixed Mobile Convergence to life

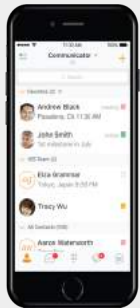
Providing an efficient way for a mobile business user to stay in touch with their office, and have the office facilities extended to wherever they are, so that they get all the benefits of being part of a community.

Personas

Smart features



MyRoom



Convergence

Collaborate

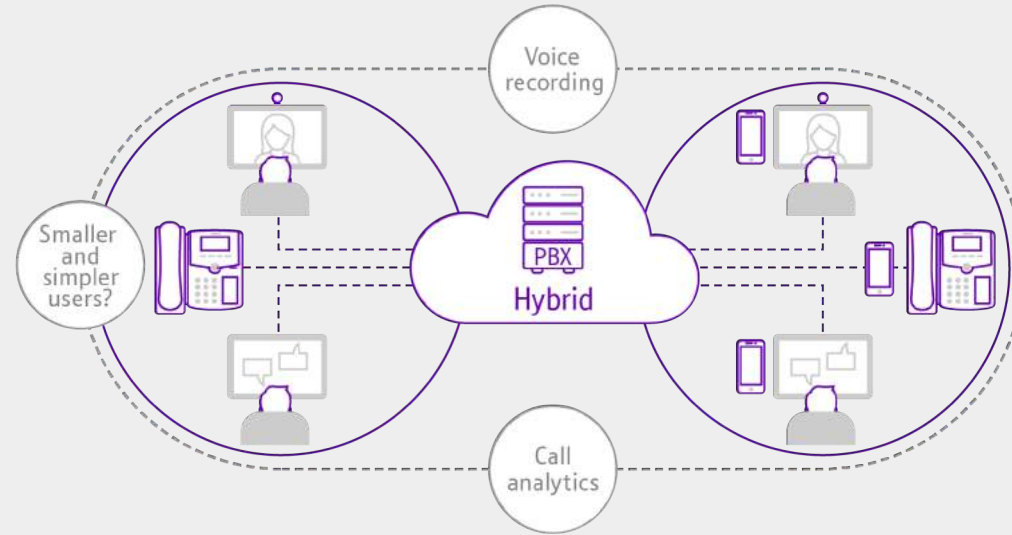
Integrate

Introduction of the foundation license

Hosted market moves

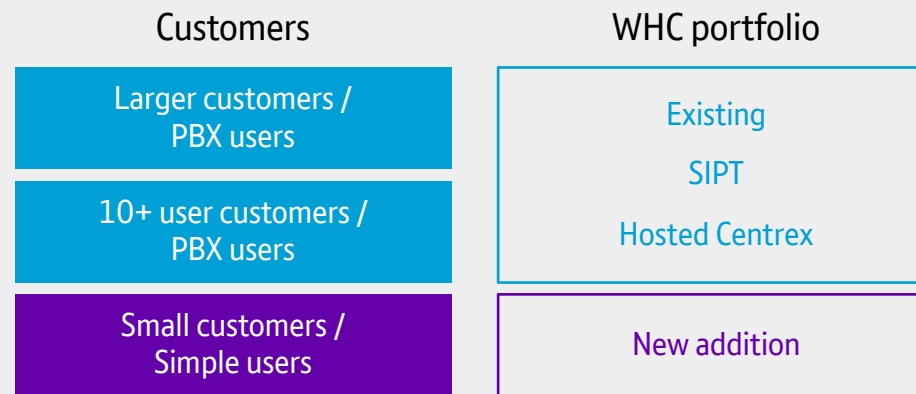
Smaller customers with simpler functional need.

- Simpler functionality profile for better fit with subsets within larger customers.
- Lower entry price point to WHC portfolio.



In response

- New simpler feature pack / license addition to WHC portfolio.
- Lowers entry point to the WHC portfolio.
- Can target small customers.
- Mix with other licenses for larger customers to improve competitiveness.
- New lower cost handsets further enabling CPs to target price sensitive end users.



Core license

Operational extras

Proposition bundle including phone and calls (PayG or PayM)

Value add services

Pick and mix to suit customer needs

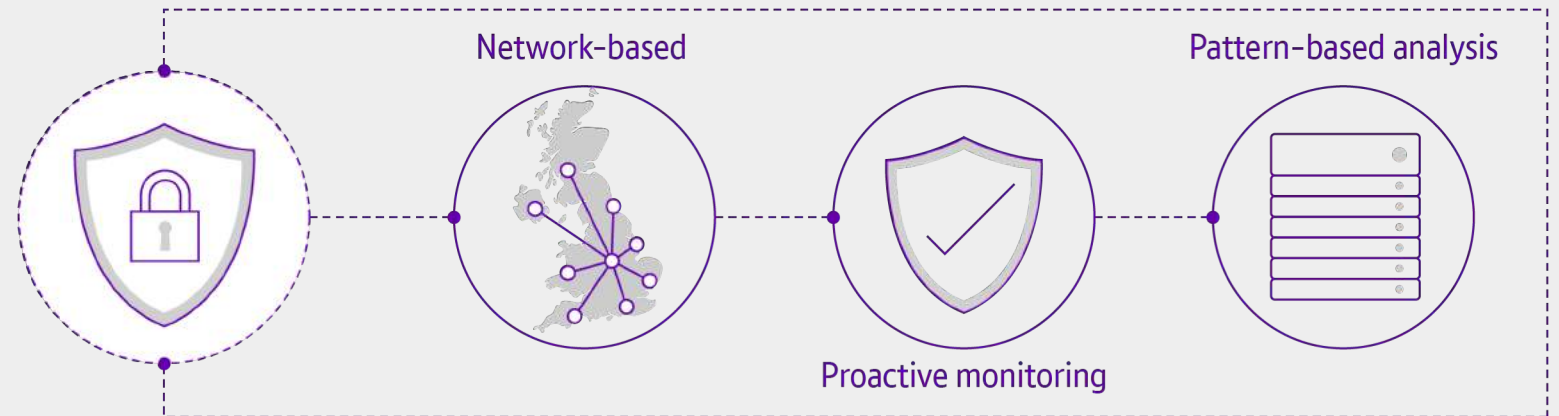
Fraud Management Services - more than just setting caps

More than just setting caps...



Sophisticated tool
to stop fraud
before it attacks

You can stop fraud
in its tracks



Making things simple



Sales training

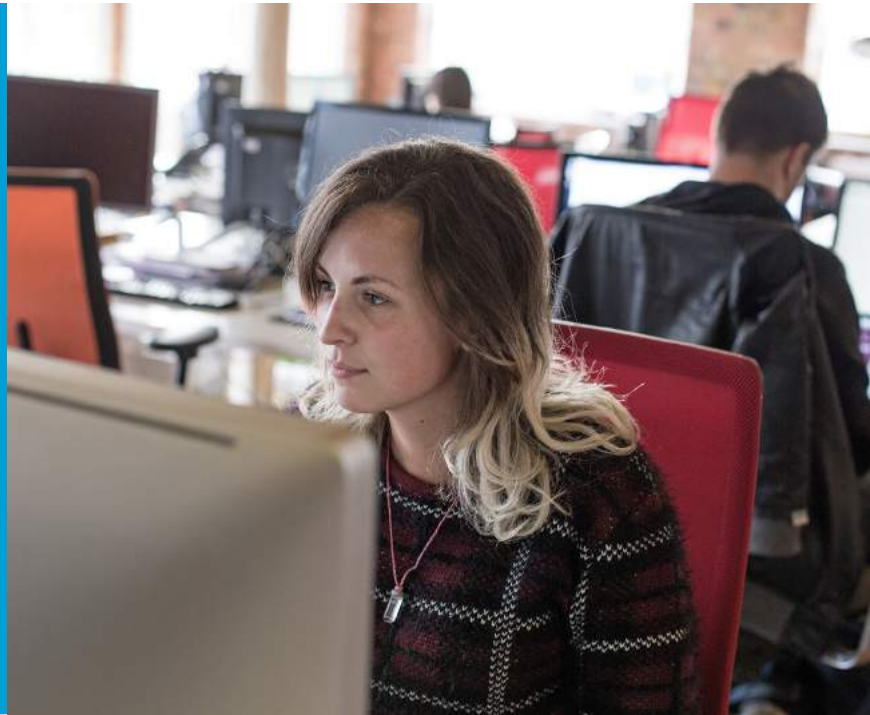


CBT training material

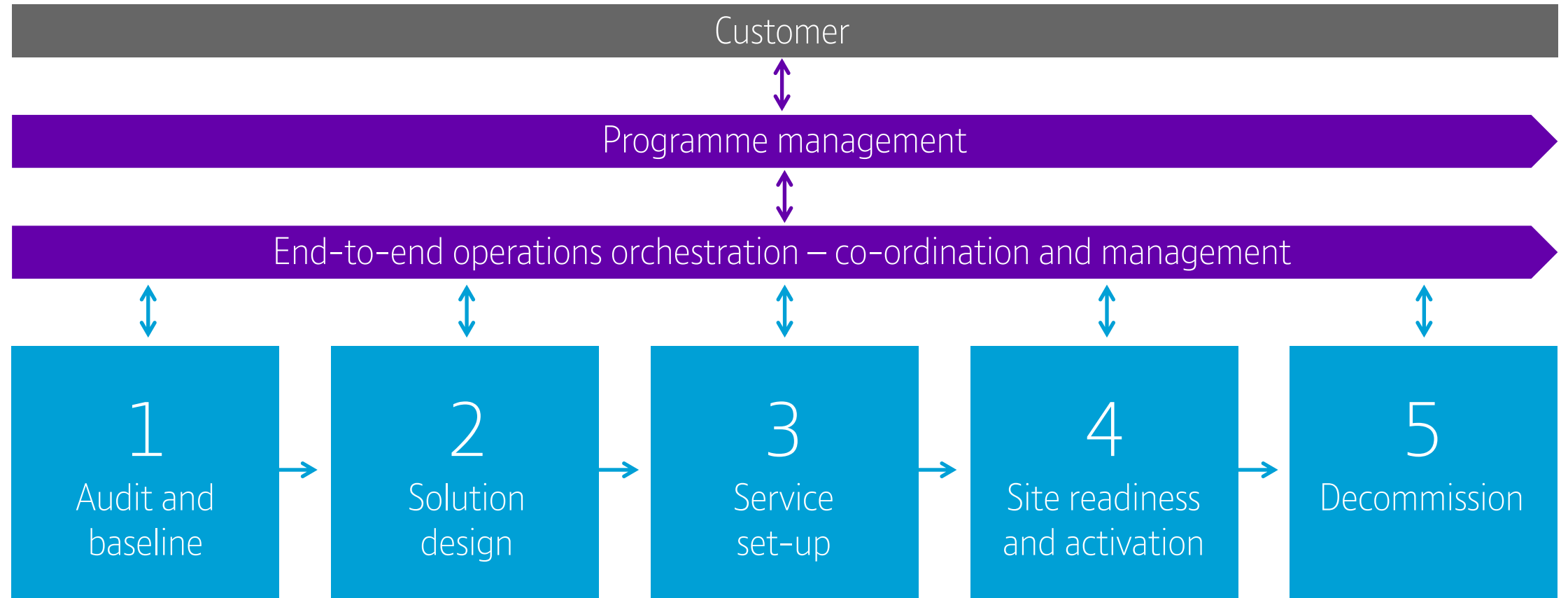


Opportunity support

WHC how 2 videos



Voice to cloud transformation solves migration to IP challenges faced



Single customer interface and co-ordinated operations delivery management

Communication in an All-IP world - a shared journey towards convergence

The market is already moving to IP and this creates significant opportunities for CPs



BT Wholesale can help CPs in a number of different ways, depending on the nature of your business, and path you take to an All-IP future

WLR withdrawal will accelerate the pace of change

BT Wholesale continue to invest to enrich and expand our portfolio to offer market leading, differentiated services



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