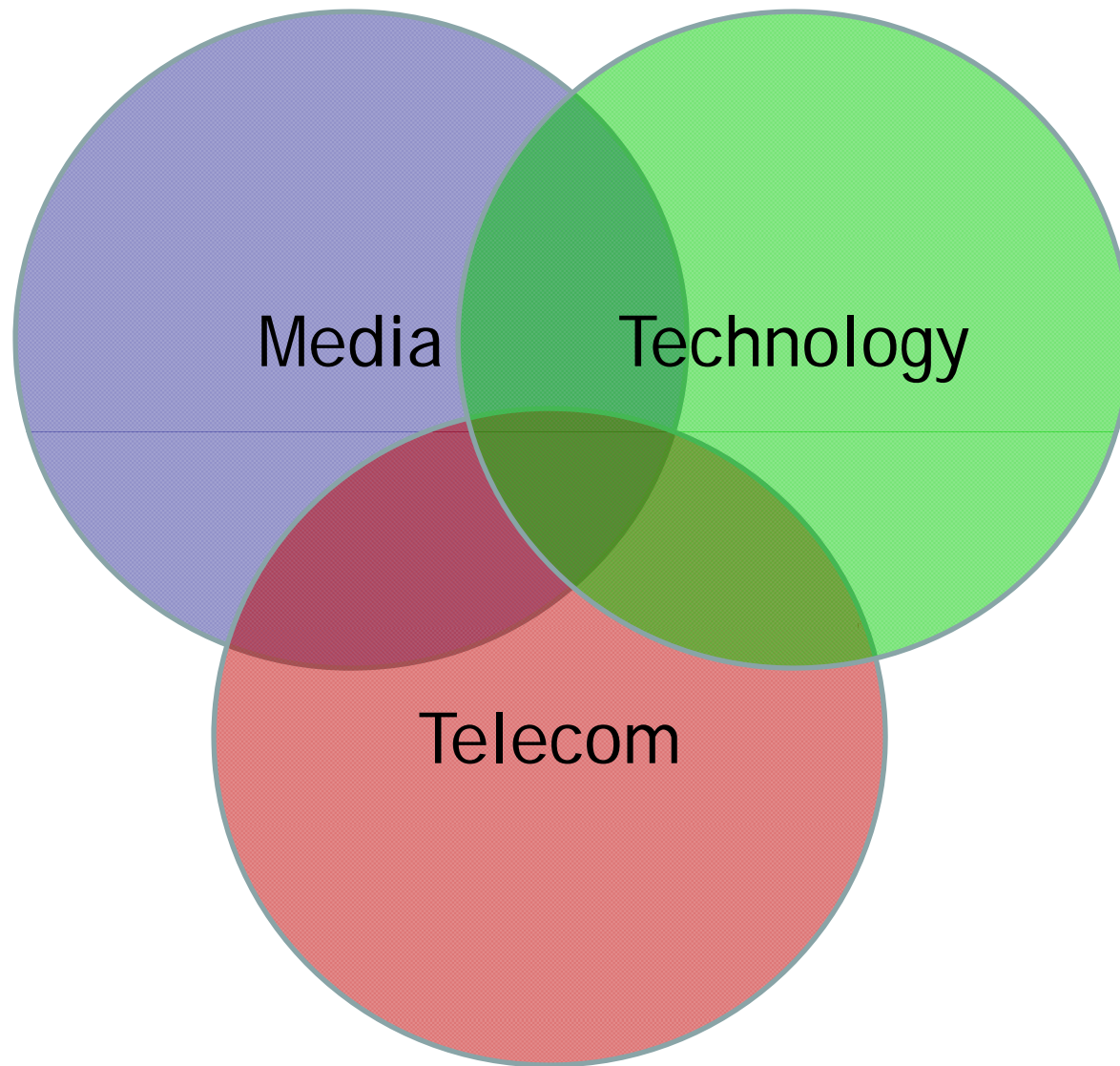


The Brave, New IP World: Giving Up Control to Take Control



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Challenges to the Telecom Industry

- Service cannibalization
 - Mobile replacement
 - Third party VoIP, other technology advancements
 - Loss of relevance of access and transport
- Web 2.0/3.0 + Telco 2.0
- The inexorable, inevitable IP migration
 - VoIP
 - IPTV
 - IMS
- Changes in regulatory requirements - and perspectives

From this...  Google talk BETA

Perspectives on Net Neutrality

To this!  Google Voice

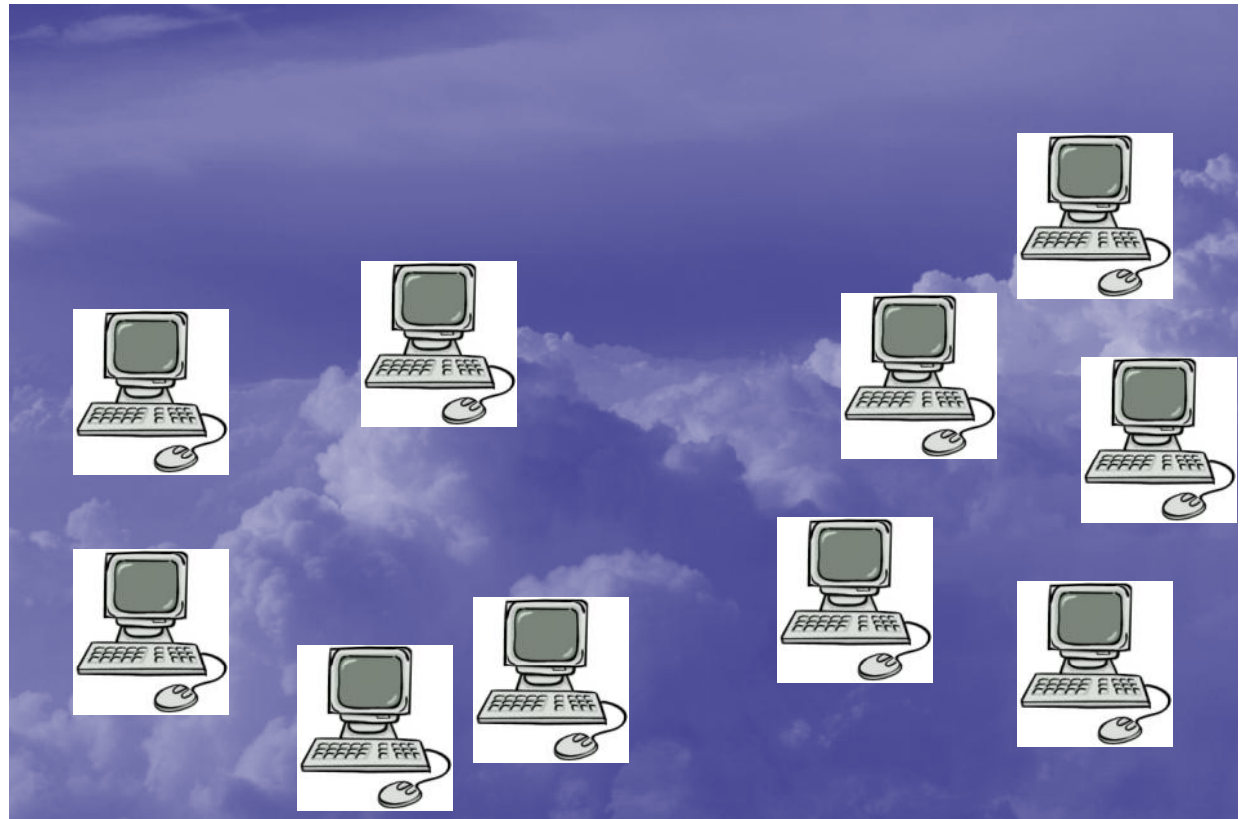
Challenges to the Media Industry

- Technology, once an inhibitor, is now an enabler
- DRM, CP
- Emerging (and different) revenue models
- Not to mention unintended consequences



Challenges to the Technology Industry

- Changing business models
- Virtualization
- Cloud architectures

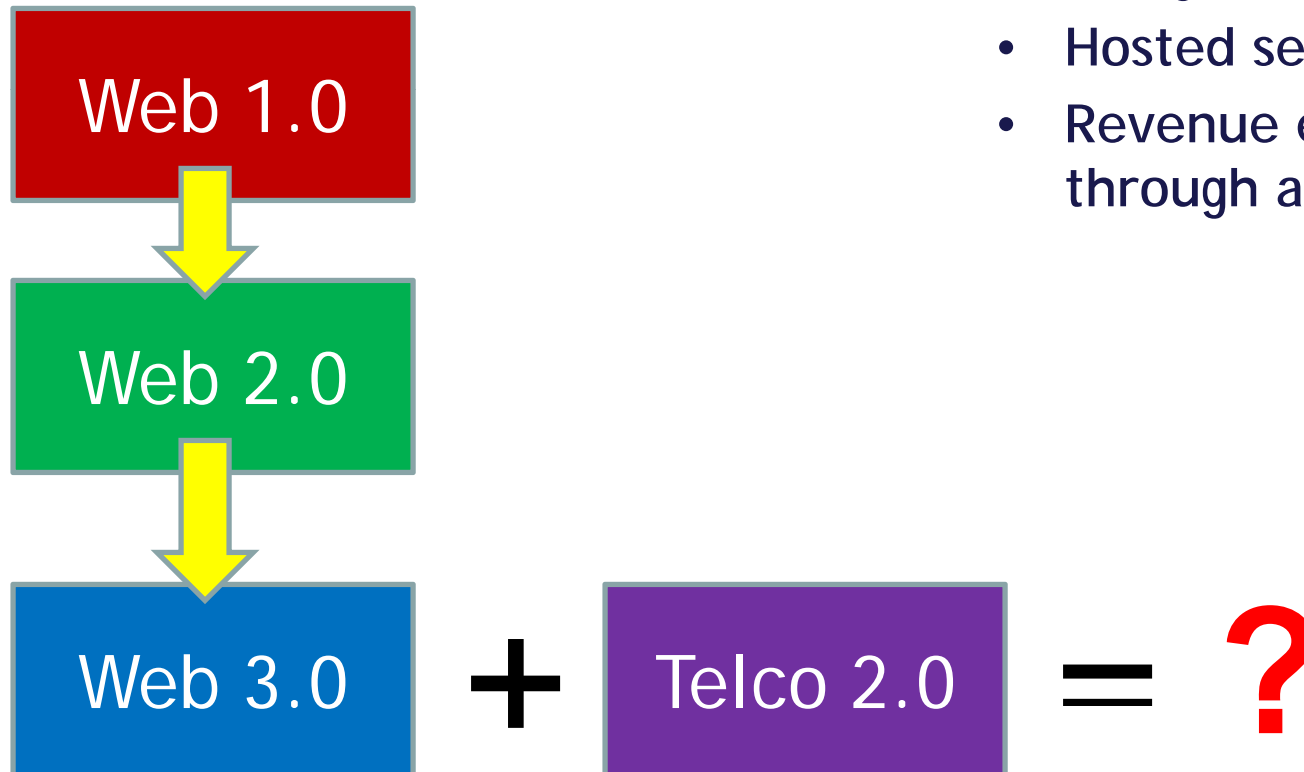


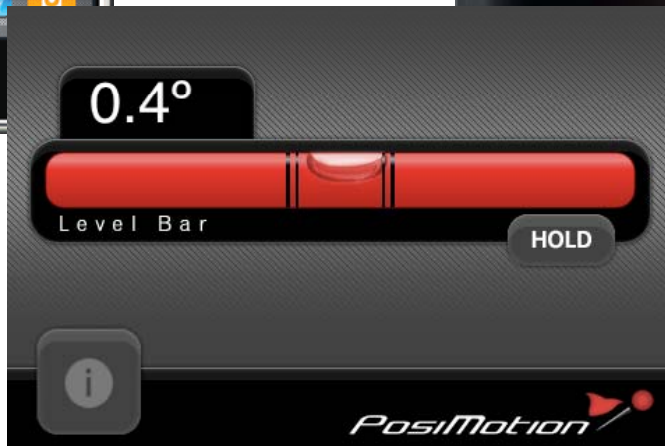
But Let's Make it Real: The Web Evolution

- First: What was Web 1.0?
 - Command-response; passive relationship
- Web 2.0: Set of services designed to make the Web more “participatory” Why? What value?
- Three critical elements:
 - User-Generated Content
 - Widgets and Mashups
 - Online Applications
- You don't own the software - you simply use it
- Web 3.0: The sentient Web

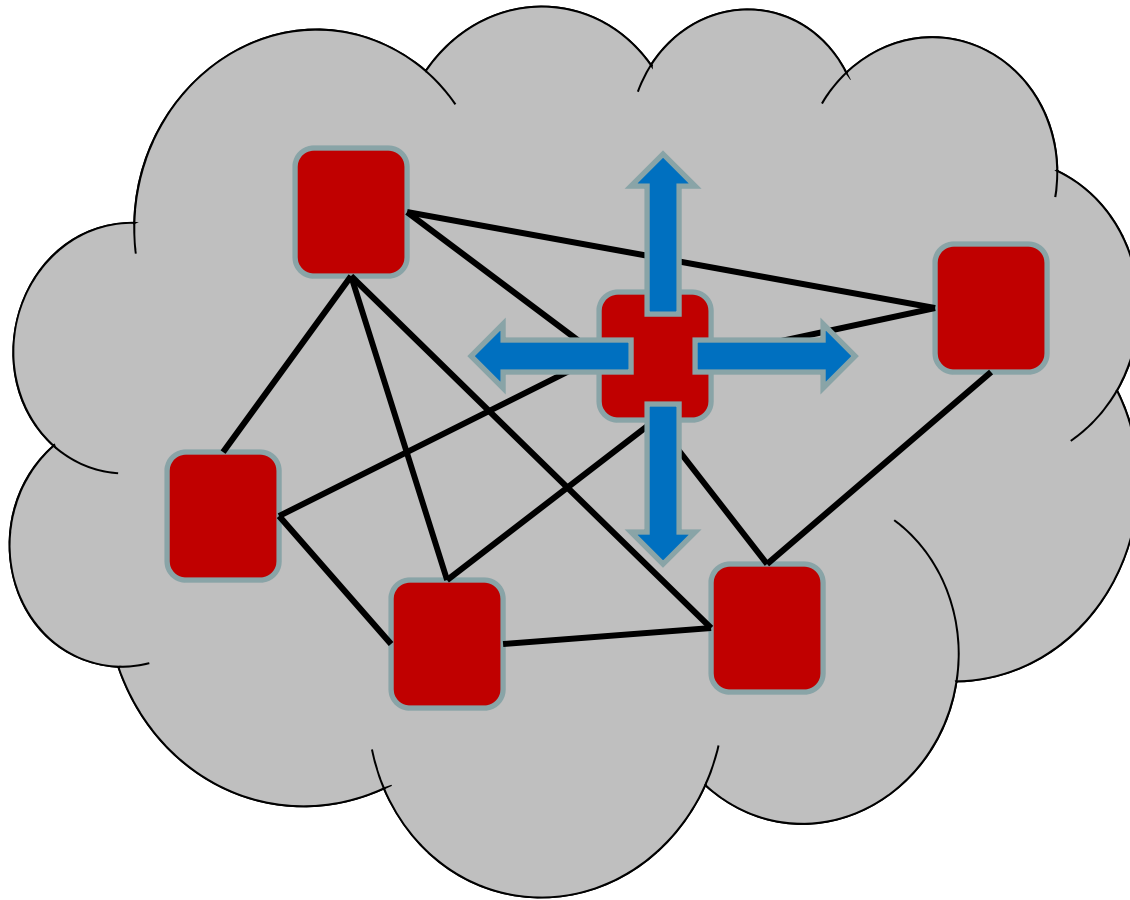
Evolution

- Broadband everywhere
- IP everywhere
- Open development platform for APIs (IMS)
- Value-added services everywhere
- Hosted services
- Revenue enhancement through advertising

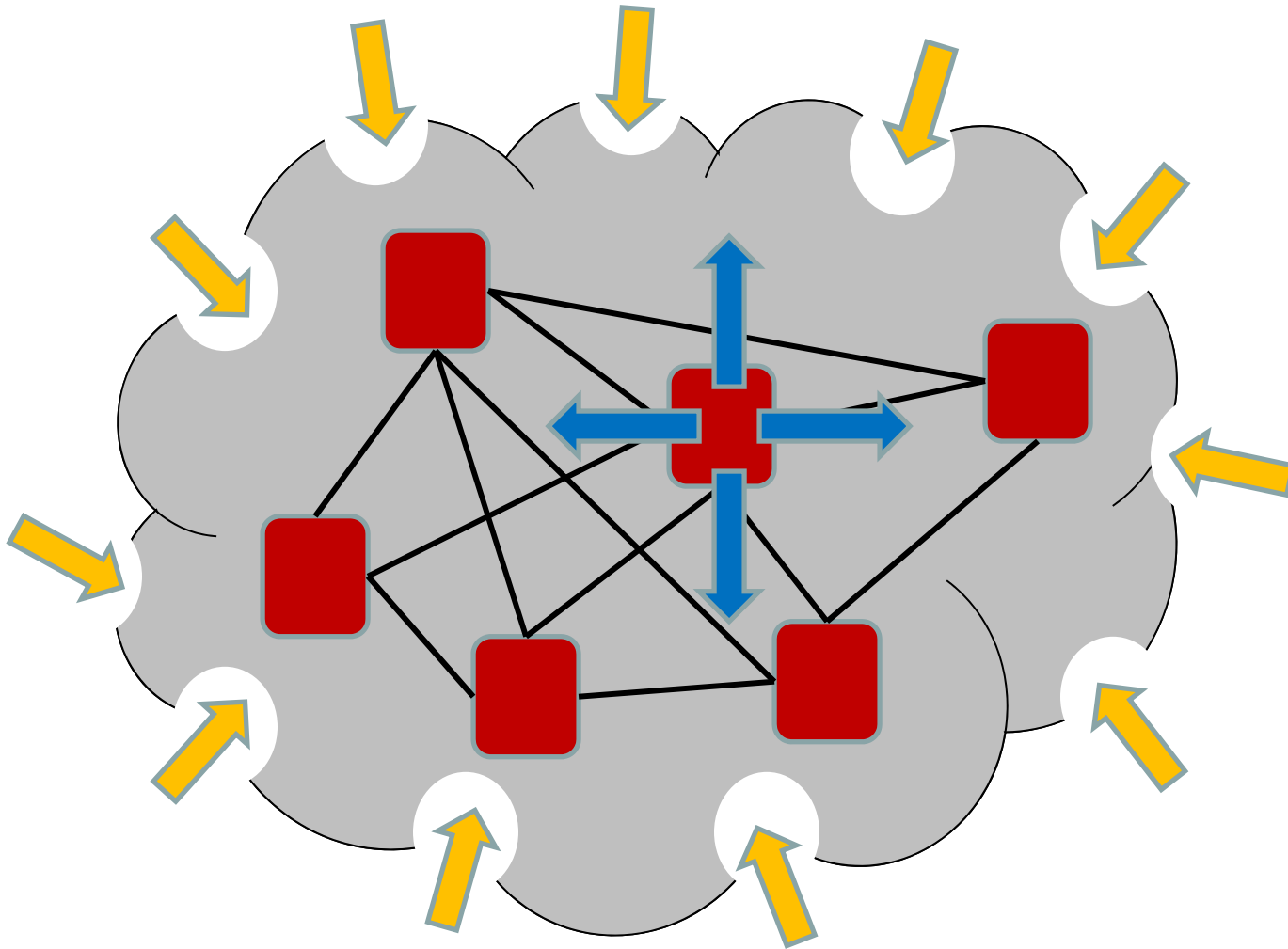




Today: Core-to-Edge Delivery



Tomorrow: Edge-to-Edge Delivery



The Telco Apps Store

- Thanks, Scott McNealy!
- Current challenge: Avoid becoming the Internet plumbing (in face of free access and transport)
- Goal: Take advantage of infrastructure, back-room systems to make the network attractive to third-party developers
- Why: Telco Apps Store would not be device-targeted
 - Compatible with ALL devices

The Telco Apps Store

- How: Three stages
- Automate management of business processes, relationships, subscribers, pricing, billing, etc.
- Create open APIs for developers
- Develop a monetization scheme that will work for everybody
- Consider GSMA's Aepona-driven OneAPI initiative
- *This is what IMS is supposed to do for us!*

The Power of Social Networking





How FaceBook Monetizes its Existence

- 2009 projected revenue:
 - \$125 million from brand ads
 - \$150 million from Facebook's ad deal with Microsoft
 - \$75 million from virtual goods
 - \$200 million from self-service ads
- Total: \$550 Million



Business a la Twitter

- Don't confuse lack of revenue with lack of business model
- Google announces search deal with Twitter; Microsoft announces search deal with Twitter, FaceBook
 - It's all about traffic; Twitter, FaceBook now major referral sites
- Goal: Show search results on the basis of what's going on "right now"

How Twitter Monetizes its Existence

- Online search and adword-like referral (Search.twitter.com)
- Retail sales (@DellOutlet)
- Online help (@TwelpForce)
- Verified Accounts (Third-party validation)
- Twitter 101 (How to use Twitter for business)
- Viral marketing (peer-to-peer messaging)



Concluding Thoughts

- IP lies at the heart of all of these innovations
- Social media, user-generated content are here to stay - and a REQUIRED part of your business!
- A services-centric model is the future of the industry
- Why? The crowd has immense knowledge to draw from: Harness it!
 - Distributed Co-creation
- Example: Goldcorp



Thank You!



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