

Business and Marketing Driving Factors

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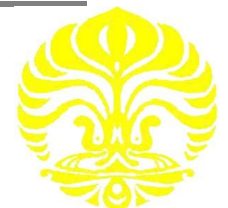
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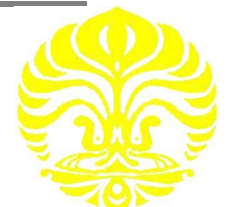
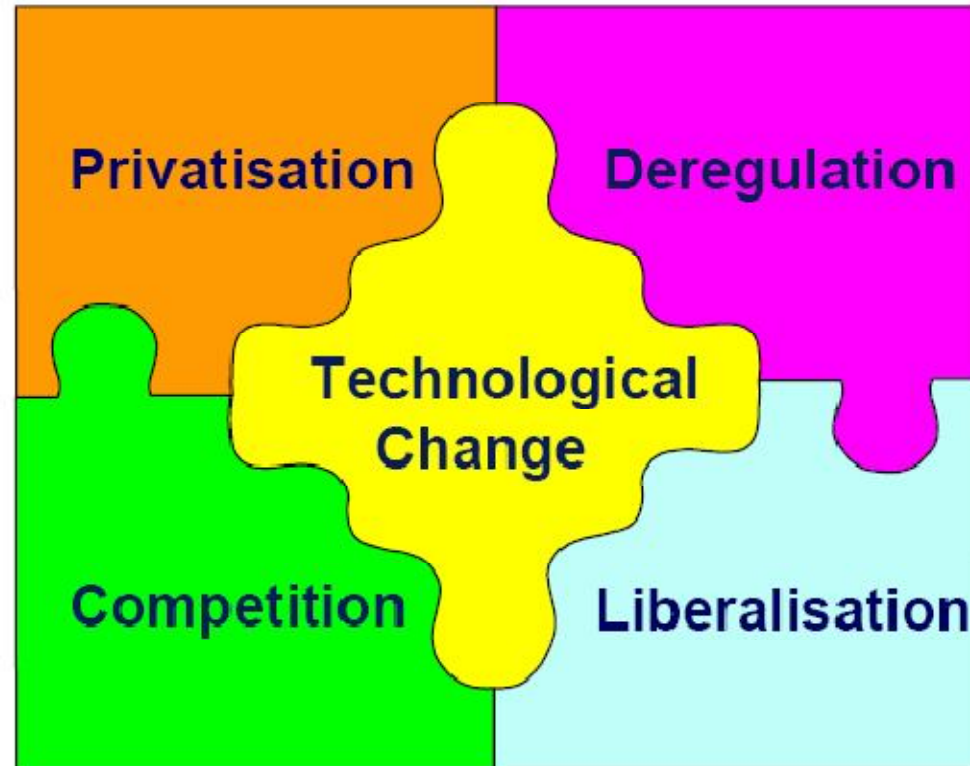
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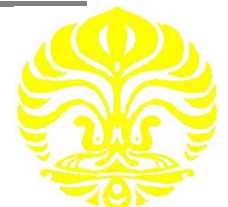


The inter-locking pieces



The world is changing...

- Everyone wants more for less – businesses and consumers
- Global market and 24x7 society creates new challenges and opportunities
- Technology pervades almost every interaction
- Customers want faster, higher quality, broader range of services
- Convergence – ICT
- Global competition is intensifying: new economic and political orders are evolving, e.g. India and China
- ICT investment, supported by process change and skills enhancement, is a key driver of productivity gains
- ICT critical to efficiency in energy, transport, health, security, retail and services sectors
- These challenges can't be met doing what has always been done!
Competition is needed to drive the efficiency and innovation required.



- **Technology**

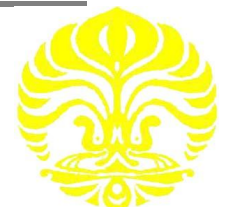
Are risks within reason and does it meet security and other performance requirements?

- **Functional capabilities & features**

Does it have the required features and the flexibility to accommodate new needs?

- **Business issues**

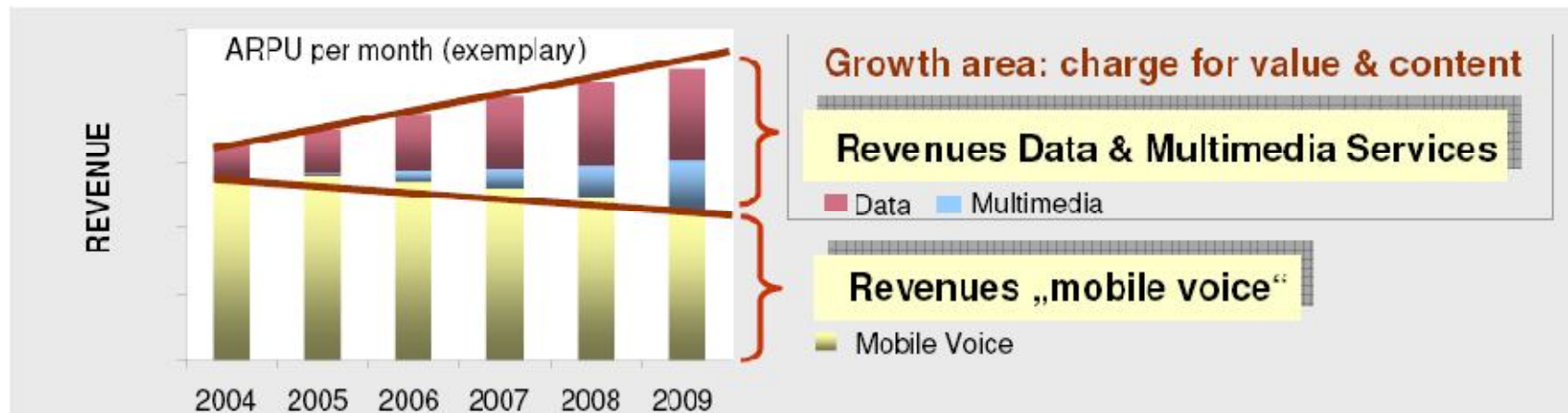
Does it support the business models and concerns for each of the stakeholders?



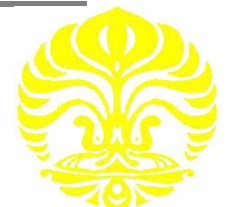
Market Trends

Due to intense competition, operators have drastically forced to decrease mobile tariffs and exercise aggressive marketing promotion in their bid to maximize market share by tapping into the low income segment and expanding the prepaid subscriber base.

As a result, subscribers have become very **price sensitive** and **tend to change operators more frequently**, thus causing high churn. The Average Revenue Per User (ARPU) is also slowing down, especially on Voice ARPU.

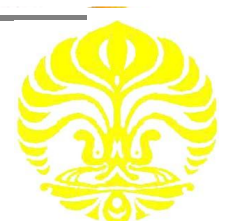
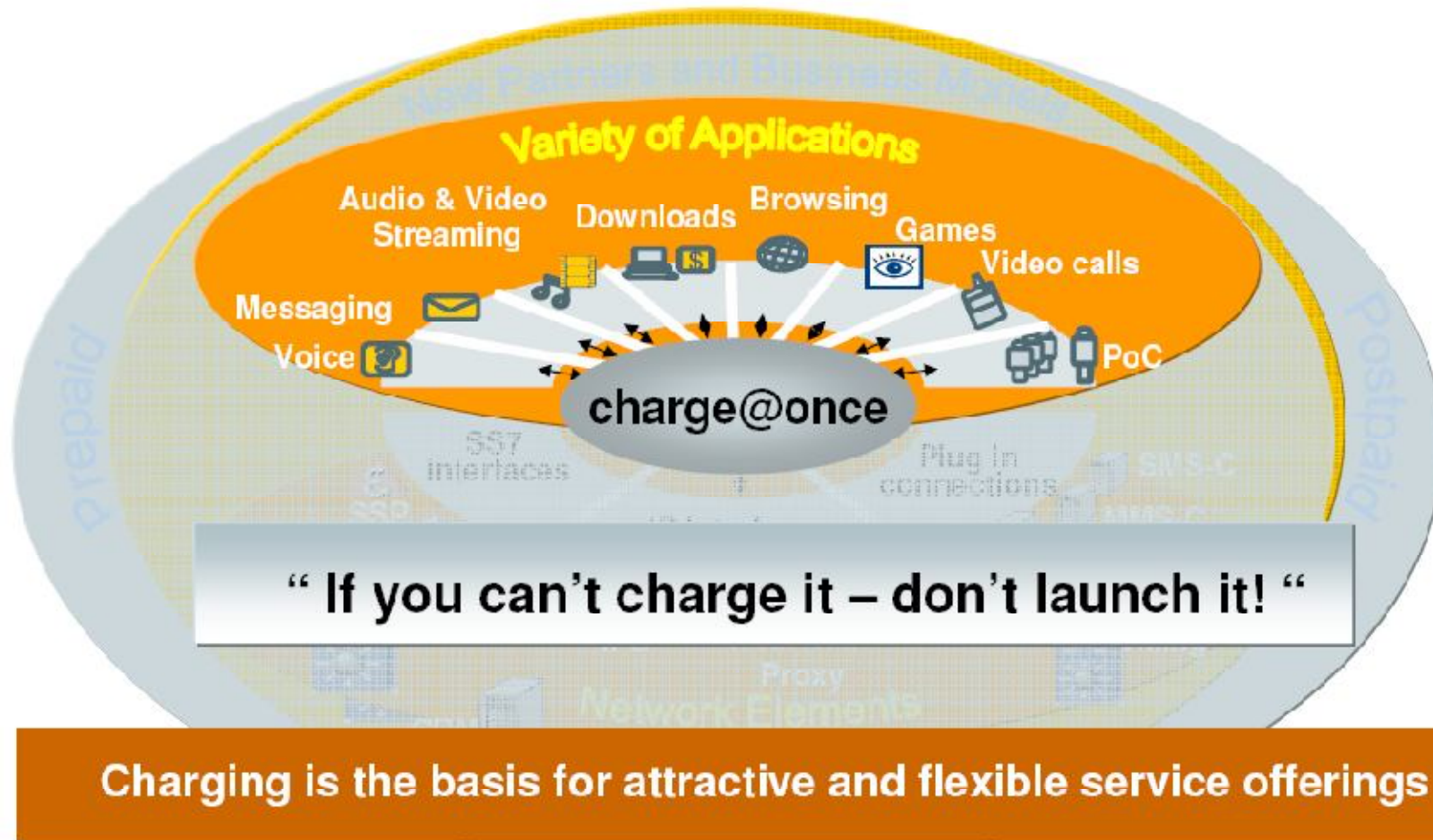


Based on graph above, **3G** network is starting to grow in the Market. It opens opportunities in Data and Multimedia Services.



Operator needs

Flexibility to meet the versatile market needs & requirements of the diversity of applications & services

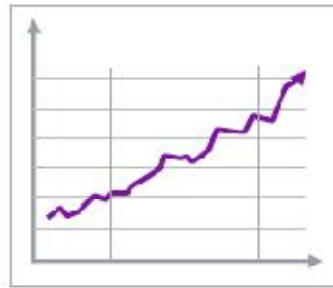


Market Trends



All IP Trends

- I&C industry observes a growing trend towards an all-IP architecture



Wireless Data

- Operators observe increase in wireless data usage



Device Capabilities

- Ever increasing device capabilities are moving away from network capabilities



Services / Applications

- Services and Applications are moving towards the network/internet



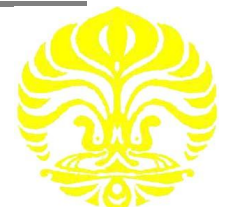
Spectrum

- Wireless industry faces spectrum liberalization, yet they are scarce



Flat Rates

- Subscribers go for predictable communication costs



Subscribers demand Seamless Communication ...

Convenience

Same look and feel on various devices

Availability

when and how to be contacted



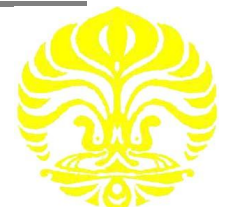
Individual services for users

Personalized services

Any access, device, location or time

Independence

End-users go for most attractive service bundles supported by multiple access



An operator can be environmentally friendly – while saving costs

- Operators are increasingly cost conscious
 - An easy assumption is that being environmentally friendly always means extra costs - but this is not the case
- Example: Energy Usage
 - Energy efficiency sets the environmental performance
 - For a mobile operator, major part of environmental impact is the CO2 emissions caused by energy consumption of the network
 - Energy cost also a major part of OPEX

Saving energy means saving the environment – while saving OPEX!



Site solutions for Networks address operator challenges

Operator challenge:

How to find new sites and expand capacity on existing sites faster?

How to decrease costs under increasing pressure on operational efficiency?

How to ensure power availability and maintenance in rural areas?

Solutions:

Simplify site acquisition with compact site solutions

Slash number of sites

Cut site deployment CAPEX & OPEX with complete site solutions

Reduce site Total Cost of Ownership by using renewable energy sources

Smart Sites allow expanding the network profitably



Thank you.



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