“We Make Data Make Money”

- Evolve faster & more flexible Business Software Solutions systems
  - Enable real-time monetization of network activity
  - Deliver functionality for rapidly evolving future business needs
- Top tier customer base
  - 3 of 4 US Tier 1 Telco’s
  - 15 international customers with > 10m subscribers
- Attractive, ‘pay-as-you-grow’ recurring revenue model

- Founded 1999
- 850+ FTE
- 42 customer deployments in 32 countries
- Offices in Ireland (HQ), US, Brazil, & Malaysia
- 2013 revenue: ~$135m
- 59 Patents & Applications

- Monitor and control network resources
- Subscription-based real-time charging
- Deliver business insight

[Logos of various telecommunications companies]
Why We Win

Openet competes against the likes of Ericsson, Huawei, Cisco, Oracle and Amdocs and wins due to:

- Technology
- Scalability – Industry leading TPS
- Faster Time to Market
- Lower Total Cost of Ownership
- Tier 1 Pedigree – Billions of TXNS / day
Growth Strategy Summary

• Improve existing Communications Service Provider capabilities:
  • High performance solutions for key strategic “choke points” – most valuable parts of CSP systems
    • Facilitate evolution of legacy systems by extending their economic life
    • Not “Rip & Replace” BUT – opens door to implementation of full scale, Openet systems
  • Better BSS systems to generate incremental revenues and reduce costs
  • New, real time, interactive service offerings
  • Big data and analytics revenue opportunities

• Virtualisation opportunities:
  • Provide virtualized BSS software / services / managed services
  • Orchestration and network automation

• Service enablement for new addressable customers and verticals / markets

ALL OF THESE STRATEGIES ARE ALREADY UNDERWAY

Key challenge is scale of Openet’s business – Openet + CTC unleashes huge potential for current and new market success
Service Providers Face an Increasingly Complex Environment

New threats and opportunities require flexible real-time solutions

- Avoid relegation to dumb pipe by OTT Services
- Recover heavy network investment
- Monetize premium service offerings
- Capture revenue opportunity from new rapidly growing mobile applications (e.g. payments, advertising, in-app purchases)
- Manage massive and unstructured data sources – social media mashed up with EDR’s

Openet enables

- Rapid response to competitive threats from Google, Apple, Facebook, other OTT players
- Extract appropriate economics from heavy network users (such as Netflix, YouTube)
- New revenue sources to broaden base of customers and services
- Automated network functions (NFV / SDN) to reduce costs and make new service roll-outs fast and cheap
Existing Business Systems Not Up to the Task

- Difficult to change
- Proprietary
- Built for “utility” style businesses

- Fragmented data
- Expensive to maintain
- Difficult to configure

World of content and services
Multiple access networks
Near infinite variety of devices

Billing System
IN System
Service Catalog
Policy PCRF

(Adjunct)

Billing System
Openet Allows User Experience Differentiation

Powerful benefits
- Service differentiation
- Monetization
- Network optimization
- Business intelligence
- Business model evolution

Industry leading technology
- Comprehensive functional library
- Modular architecture
- Flexible configuration
- Virtualized deployment support

Openet Ecosystem Enablement

World of content and services
Multiple access networks
Near infinite variety of devices

Convergent Mediation
Evolved Charging
Policy Manager
Interaction Gateway
Openet Service Innovation Platform
*Enables operators to address the demands of an uncertain and dynamic marketplace*

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**Introduction of service bundles.**

**Rapid growth of subscribers, including prepaid.**

**iPhone introduced.**

**iPad introduced.**

**“Over the top” messaging and voice services.**

**Service evolution:**
- Subscription based pricing
- Digital lifestyle
- Enterprise
- Retail services
- QoS
- Identity Management

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**2000**
- 5%

**2002**
- 15%

**2007**
- 25%
- 2G
- 3G
- Cable audience measurement
- Real-Time Rating
- Balance Manager

**2010**
- 40%
- 4G
- Analytics
- Service Catalog
- App (Rx) support
- Sponsored Data

**2013**
- 60%
- Transaction Management
  - Gather and reconcile usage data

**2014**
- 80%
- Evolved Charging
- Policy Manager
- Convergent Mediation
- Interaction Gateway

**2015**
- 95%
- Real-Time Charging Management
  - Real-time charging, rating and balance management
- Real-Time Network Policy
  - Network optimization, Fair Usage, Tiered Plans
- Dynamic Services
  - Real-time on-device purchases of data, roaming passes, application passes

**2020**

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*Source: Sharma Consulting*
Openet Straddles both Network & IT Ecosystem

**Network Systems**
- High availability, low latency
- Application capabilities
- Functions in “call path”

**IT Systems**
- Low availability, highly configurable
- Ordering, provisioning, billing

**User Devices**
- User engagement / interaction
- Dynamic services / offers

**Ecosystem Enablement**
- Makes usage information from the network valuable
- Operates in real-time
- High availability and performance
- Configurable business rules

**Network Systems**
- Coordinate network policies with user devices
- Enables next-gen policies with subscriber engagement, handset controls, and network protection

**IT Systems**
- Real-time account information, balances, and notifications
- Services can be viewed and purchased directly by the subscriber
Managed Services – Form and Function

- **Compelling value proposition:** domain expertise & sophisticated Managed Services toolbox results in
- Efforts focused on **displacing** large, or **augmenting**, costly, reactive NOC engagements
- **43 incumbent Support accounts** targeted via Sales “Whitespace” initiatives
- RFx process integration – led to AMX, ONO, INWI, and Charter wins **so far** in 2014
New ‘Customers’ – Service Enablement

Enterprises (acting like MVNO’s on all Networks)

MVNE’s for SMB’s and M2M Clearing Houses

MVNO

Content Provider/3rd Party
Data Orchestration Platform for Internet of Things

Openet Data Orchestration Platform
(Real-time Collection, Aggregation and Correlation)

- Ingest
- Validate
- Parse
- Aggregate
- Correlate
- Enrichment
- Format

Industry Data Collectors / APIs

Industry Data Distributors / APIs

Application Agnostic Presentation Layer or Skins

Device and App Agnostic Industry Standards-Compliant Data

Connected car and public transport

Wearable devices, sensors & fitness apps

Connected home and smart devices

Healthcare provider, lab and pharmacy

Connected City
Key Focus Areas and Evolutionary Paths

Openet Virtualised Solutions
Deliver scale, cost efficiency and configurability for adaptive and versatile subscriber-focused networks

Real Time Analytics
To provide continuous intelligence of fresh data, deriving insight to propel real time decisioning and action

Evolved Billing Solutions
To support multiple diverse and adaptive services to feed the specific and personalised demands of end consumers

Agile Service Enablement Solutions
To provide a commercial enterprise hub with complete self service controls and features for end users, developers & enterprises