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WELCOME

Graham Trickey,
GSMA

Agenda

Rich Communications - the key to remaining competitive and retaining customer relevance	Alex Sinclair - CTO & CSO, GSMA
joyn and its strategic importance for operator business	Kobus Smit - Deutsche Telekom & RCE Project Leader
Operator and industry commitment to Rich Communications	Philippe Lucas - Senior Vice-President, Standardisation & Ecosystems Development, Orange
The operator journey to a service launch - joyn launched in Spain	Graham Trickey Rogelio Martinez - Vodafone Juan Jose Lozano - Head of Services Development for Rich Communication Services, Telefonica Jorge de los Rios Medina - Manager New Generation Network Development, Telefonica Vincent Trocmé - Program Director RCS
Q&A on the Spanish experience	
joyn as a platform for service innovation	Enrique Marti del Omo – Vodafone Craig Marshall Nicholls - Jibe Mobile
Global standard and roadmap for joyn	European perspective: Phil Carter – Vodafone US perspective: Gerry Flynn - Verizon Wireless
Facilitated Panel Session	Philippe Lucas – Facilitator Jaeseong Jang – SKT Gerry Flynn - Verizon Wireless Enrique Marti del Olmo – Vodafone





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The key to remaining competitive
and retaining customer relevance

Alex Sinclair

CTO & CSO, GSMA



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vodafone



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joyn and its strategic importance for operator business

Kobus Smit

Deutsche Telekom, Chair RCE project

RCS Seminar, MWC 2012



Life is for sharing.

Why “strategic importance” in the context of joyn?



Definition:

strat·e·gy/'stratəjē/ Noun:

A plan of action or policy designed to achieve a major or overall aim.

- Google

„A satisfied customer is the best business strategy of all.“

- Michael LeBoeuf

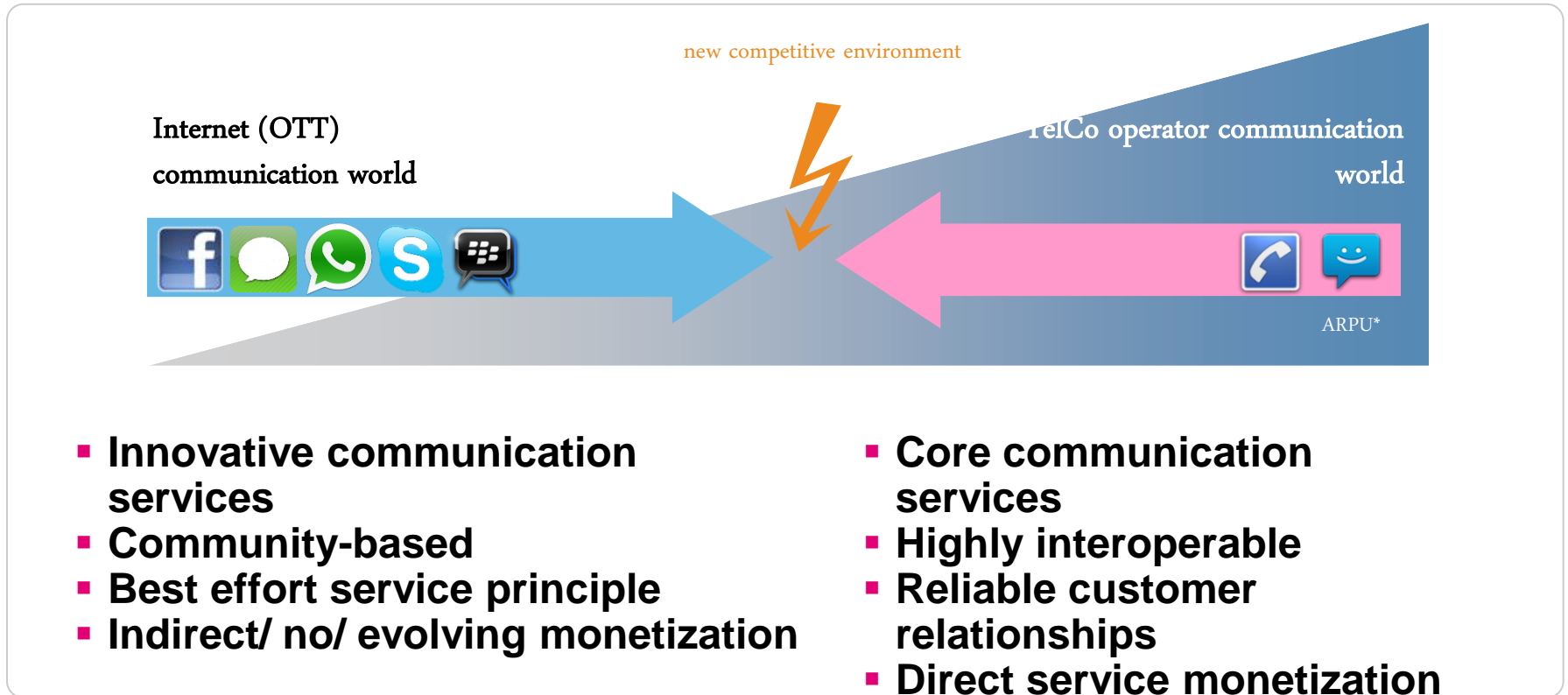


„The problem with quotes on the Internet is that it is hard to verify their authenticity“

- Abraham Lincoln



The communications landscape is changing: joyn provides a durable operator positioning in the new reality



joyn is built to **retain relevance** for the operator as core communications provider and to compensate revenue decline by increasing customer value



*Indicative – not to scale

Back to our topic of “strategic importance” of joyn:



Definition:

strat·e·gy/‘stratəjē/ Noun:

A plan of action or policy designed to achieve a major or overall aim.

- Google

In this context, Operators’ overall aim must be:

- 1. to have satisfied customers***
- 2. to remain “the communication provider”***
- 3. to achieve a sustainable position in IP Communication***



Strategic options for addressing the OTT challenge and achieving the overall aim:



1. Declare it irrelevant

"I don't see the problem / not that many smartphones in my market"

- Danger of being too late.. what if the wave is a tsunami?
- Opportunity for feature phones

2. Go eye-to-eye

"Meet the challenge head-on with own OTT offering"

- Compete on features (difficult)
- Operators not naturally well positioned to compete with OTT's on their terms (fast innovation cycles, quick decision-making, agile business structures)
- Scale will be a problem...
- Revenue model?

3. Leverage your strengths

"Utilise Operator strengths (reach, quality, ubiquity) to meet the challenge... and go beyond"

- Innovative new communication services customers want
- presented in the easiest way imaginable
- Industry standard
- Service in all devices across all networks*



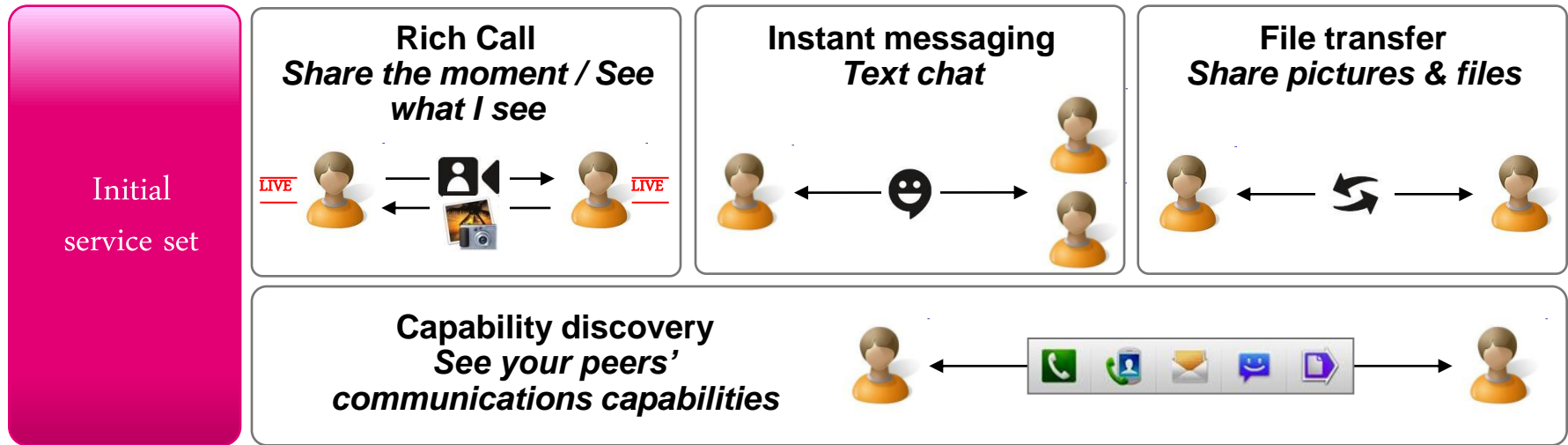
*Stated ambition

Let's recap - What is RCS/joyn?



RCS new cross-operator standardized communication services

joyn customer-facing brand to identify and promote the RCS services



Benefits: joyn delivers a maximum of convenience and joy of use for its users.



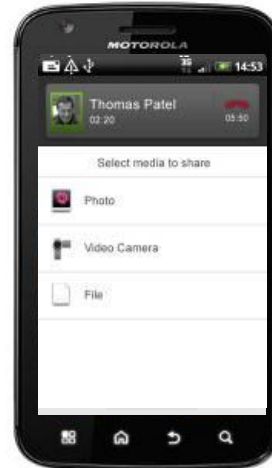
Rich Call

See what I see while on call



File Transfer

Send & receive
any type of file



Chat

One-to-one chat

One-to-many chat

Customer benefits

- New communication services natively within the device
- Maximum **reach** - potential to reach anyone on any network and any device
- Intuitive use, seamless integration and easy discoverability – just like voice & SMS
- No need to install or set up:
it's just there – it just works.

Business benefits

- Strengthens the Operator core communication competency
- The initial feature set delivers substantial customer value
- Provides a sustainable **operator positioning in IP communication** as it will become a universal, interoperable service

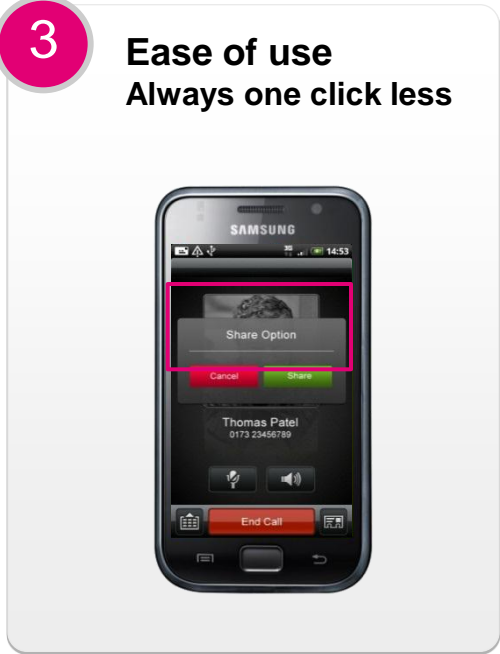
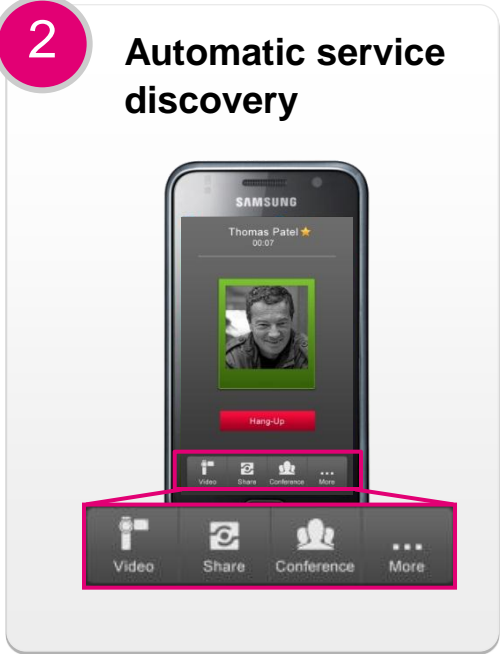
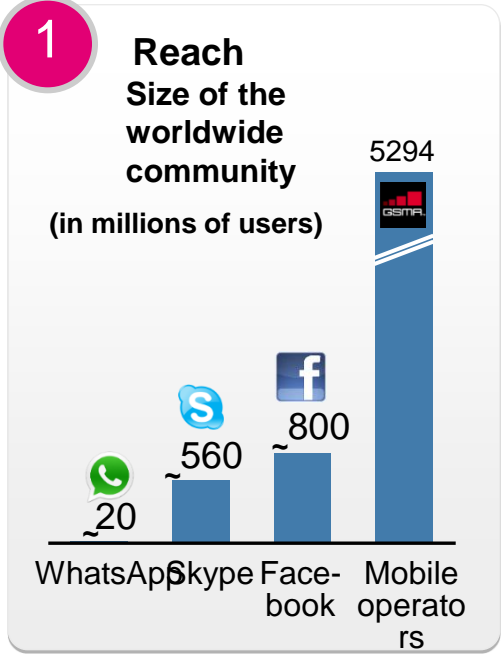


joyn services will maximize uptake to catch up and overtake WhatsApp, Skype, Facebook and others



User benefits driving Service uptake

Uptake levers



- Maximum achievable penetration , native integration in all* handsets
- OTA updates of installed base
- Downloadable apps (iPhone, Android)



* stated ambition

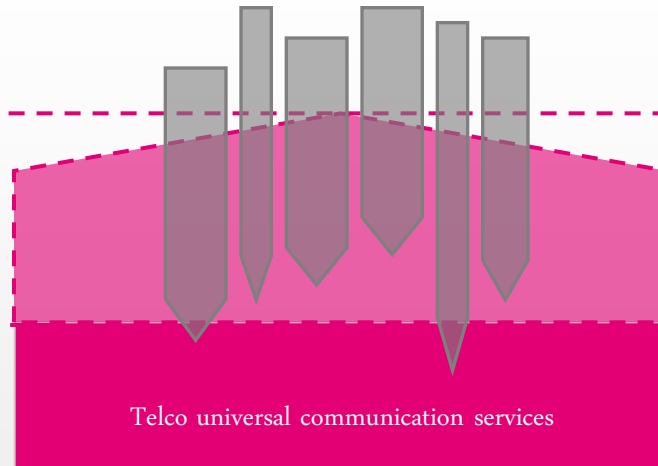
joyn is raising the bar - and will continue to do so by closing the innovation gap & limiting arbitrage



- Further advanced / related features

- Rich Call
- Chat
- File share

- Voice
- SMS



- carrier grade **quality**
- **trusted** partnership
- global scale, local **jurisdiction**
- largest **enabling** platform by far
- **all segments**

joyn services



So how does joyn measure up in terms of “strategic importance”?



Operators' overall aim must be:

✓ ***to have satisfied customers***

✓ ***to remain “the communication provider”***

✓ ***to achieve a sustainable position in IP Communication***



Join



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Orange's commitment to RCS



Philippe Lucas

Senior Vice-President,

Standardisation & Ecosystems Development

Orange

Orange is delivering RCS to the market

- **Orange** is committed to launch RCS services:
 - **Spain** in Q2 2012 
 - **France** in H2 2012 
 - Targeting a launch across its **European market footprint** by the end of 2013 at the latest.

- **Orange** considers RCS as:
 - A natural evolution of its current suite of messaging services
 - Coupled with **HD voice** (now launched in #15 **Orange** markets), RCS provides a compelling suite of enhanced interpersonal communications services.



Ecosystem is growing fast

MWC announcements	2011	2012
Handset makers committed	e.g. Nokia, Samsung	Including: HTC, Huawei, LG, Nokia, Research In Motion, Samsung, Sony, ZTE
Device Availability regarding RCS today announced by top handset makers!		
Operators supporting RCS standards	<ul style="list-style-type: none"> ▪ Europe: Deutsche Telekom, Orange, Telecom Italia, Telefonica, Vodafone ▪ Other markets (e.g. SK Telecom in South Korea) 	<ul style="list-style-type: none"> ▪ Europe: e.g. Deutsche Telekom, KPN, Orange, SFR, Telecom Italia, Telefonica, TeliaSonera, Vodafone ▪ North America: e.g. AT&T, Bell Mobility, Rogers Communications, Telus, Verizon ▪ Asia: e.g. KT, LGU+, SK Telecom ▪ Other Markets (e.g. India, Africa): e.g. Bharti Airtel, Orascom Telecom
RCS reachable market footprint is exceeding one billion customers!		

Orange's contribution towards the ecosystem

- **Orange** has developed an RCS Android stack
 - has made it available to all device vendors for integration into their (worldwide not just **Orange**) devices
 - the stack still ensures vendors can add their own User Interface (UI)
 - open source-based available at:
 - <http://code.google.com/p/android-rcs-ims-stack/>
- The **Orange** stack has been already adopted by several device makers (e.g. HTC, Sony)
- Hence, **Orange** facilitates RCS device ecosystem development:
 - By encouraging device vendors and chipset vendors to commit to RCS
 - By speeding-up vendors' time to market of their RCS native devices
- **Orange** contributes in leveraging and fastening the GSMA interoperability testing between devices



Orange's vision on the future of RCS



Today:

- RCS is an IMS-based **interoperable** interpersonal communications service offering, by **operator** community

Tomorrow:

- RCS is an important stepping stone towards a future where all communications will be **IP based** (in many cases will be first such step)
- RCS will be a platform enabling a myriad of **new services and applications**, through **network** and **devices APIs** which will enable third parties to develop a range of services running over RCS.





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The operator journey to a service launch **joyn launched in Spain**

**Rogelio
Martinez**

Manager of
Innovation



**Juan Jose
Lozano**

Head of Services
Development for Rich
Communication Services



**Jorge
de los Rios Medina**

Manager New
Generation Network
Development



**Vincent
Trocmé**
Program
Director RCS





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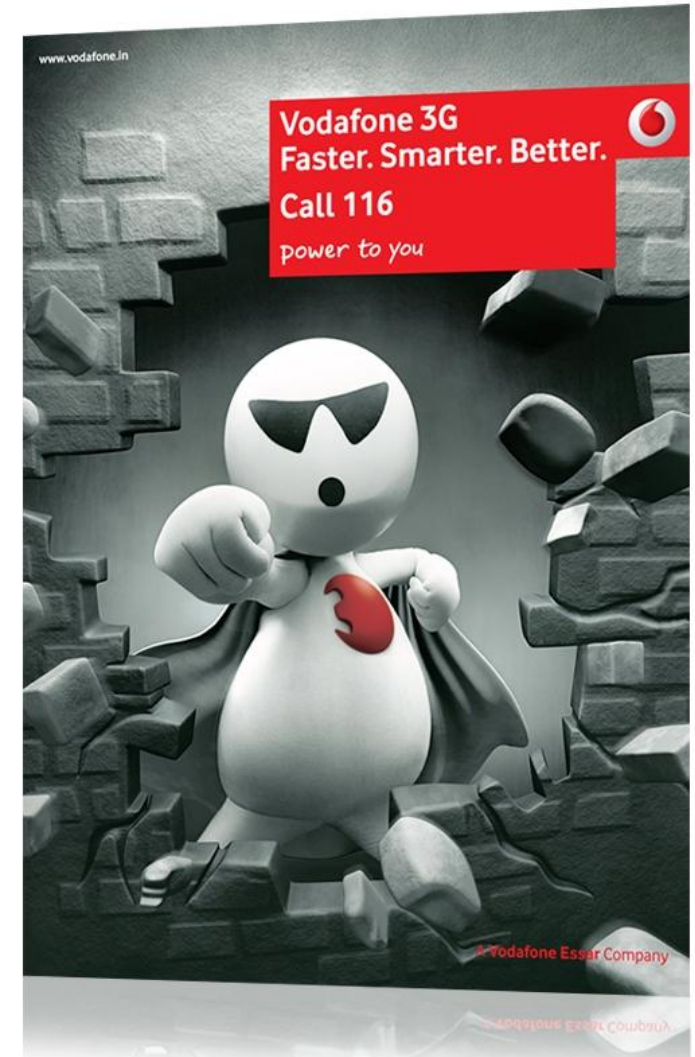


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joyn as a platform for
service innovation

Enrique Marti del Olmo



Future product and service portfolio that can evolve from joyn



- joyn third party developer API's: introduces a **new and easy way** for app developers to **add rich communication** into their **apps**
- Attractive platform for third party innovation:
 - All **based on the phone number** and **capability discovery**, leveraging the **“no-registration, it just works”** principles of joyn
 - Telco grade quality with QoS
- As a developer easy to add **app-to-app comms** features, no need to maintain a comms backend but enrich apps with **multiplayer** or **comms features**, including **chat, video and file share**
- joyn enabled **address book is the community** for apps, no need to connect via social networks or try to build own community



How to use joyn for your in-app or app-to-app communication?



- Easy to use APIs in the making which will make inclusion of joyn comms easy to existing apps
- Potential to unleash completely new types of apps and services and create new business models
- joyn enabled **address book is the community** to connect your apps
 - Address book integration allows to **see who else has the same app**
 - Enables **peer-to-peer promotion, distribution** and **app-to-app comms**



How to use joyn for your in-app or app-to-app communication?



- Easy to use APIs in the making which will make inclusion of joyn comms easy to existing apps
- Potential to unleash completely new types of apps and services and create new business models
- **joyn enabled multiplayer gaming**



How to use joyn for your in-app or app-to-app communication?



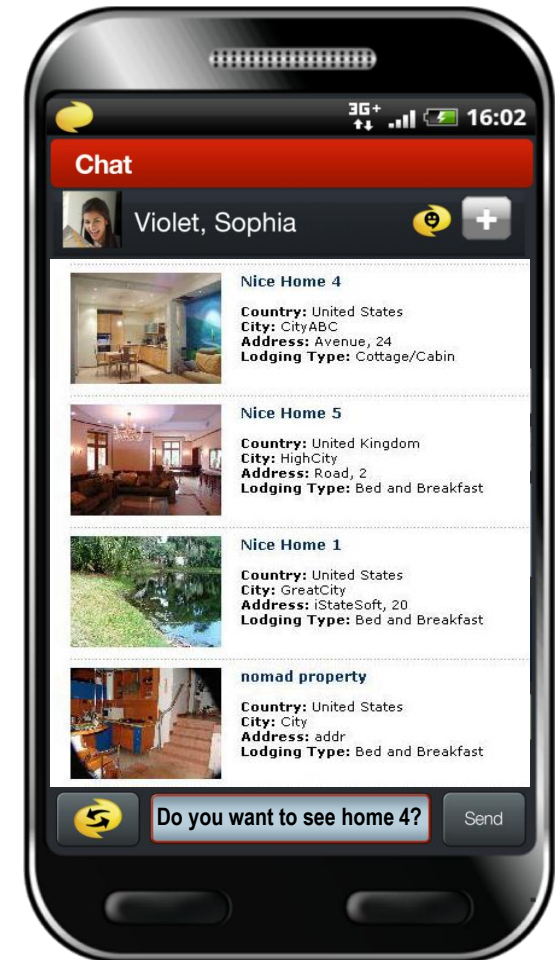
- Easy to use APIs in the making which will make inclusion of joyn comms easy to existing apps
- Potential to unleash completely new types of apps and services and create new business models
- **Add video to customer care calls**



How to use joyn for your in-app or app-to-app communication?



- Easy to use APIs in the making which will make inclusion of joyn comms easy to existing apps
- Potential to unleash completely new types of apps and services and create new business models
- **Add chat capabilities to apps without having to maintain a communication service backend**



How to use joyn for your in-app or app-to-app communication?



- Easy to use APIs in the making which will make inclusion of joyn comms easy to existing apps
- Potential to unleash completely new types of apps and services and create new business models
- **Group collaboration**





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power to you



vodafone



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New Global Specification for Rich Communications Services **RCS 5.0**

Gerry Flynn and Phil Carter



RCS Development

- **GSMA Strategy Committee Formed Task Force**
 - Define direction for RCS evolution
 - Enable Regional Market opportunities
 - Support Global interoperability
 - Over 30 GSMA companies participating

- **RCS 5.0 User Network Interface (UNI) Draft completed**
 - Formal Review cycle started
 - Draft placed on GSMA InfoCentre (Final Spec may contain changes)
 - Final Approval & Publication expect by 2Q

RCS 5.0 Overview

- **“Umbrella” contains RCSe 1.2 and RCS 4.0 +**
- **Supports Mobile and Fixed Networks**
- **Features supported include:**
 - High quality IP based Voice (VOLTE)
 - Video calling / Live Video chat with Video sharing
 - Geo-location sharing
 - Message storage with secure access
 - Chat sessions
- **Next Steps to complete by mid year:**
 - Complete RCS 5.0 NNI spec and API Spec
 - Incorporate new features in RCS 5.1 – 5 requested features

GSMA Rich Communication Services

RCS ensures voice, video, messaging and future personal communications services will continue to be available over existing and all IP LTE Networks

- Creates feature roadmap
- Keeps Rich Communications competitive
- Helps Operators retain customer relevance
- Global Interoperability is core strength

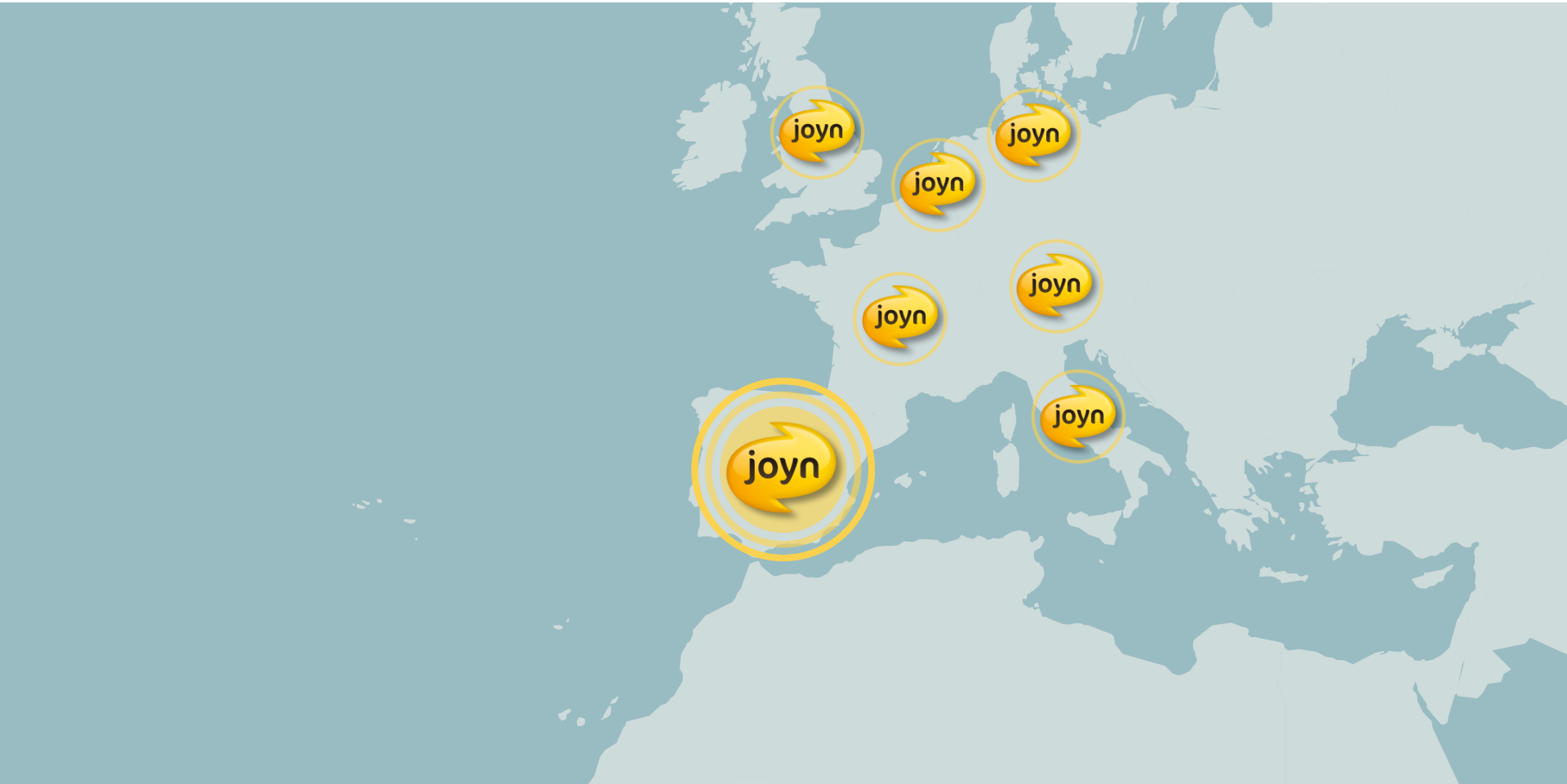
joyn - announced in Spain



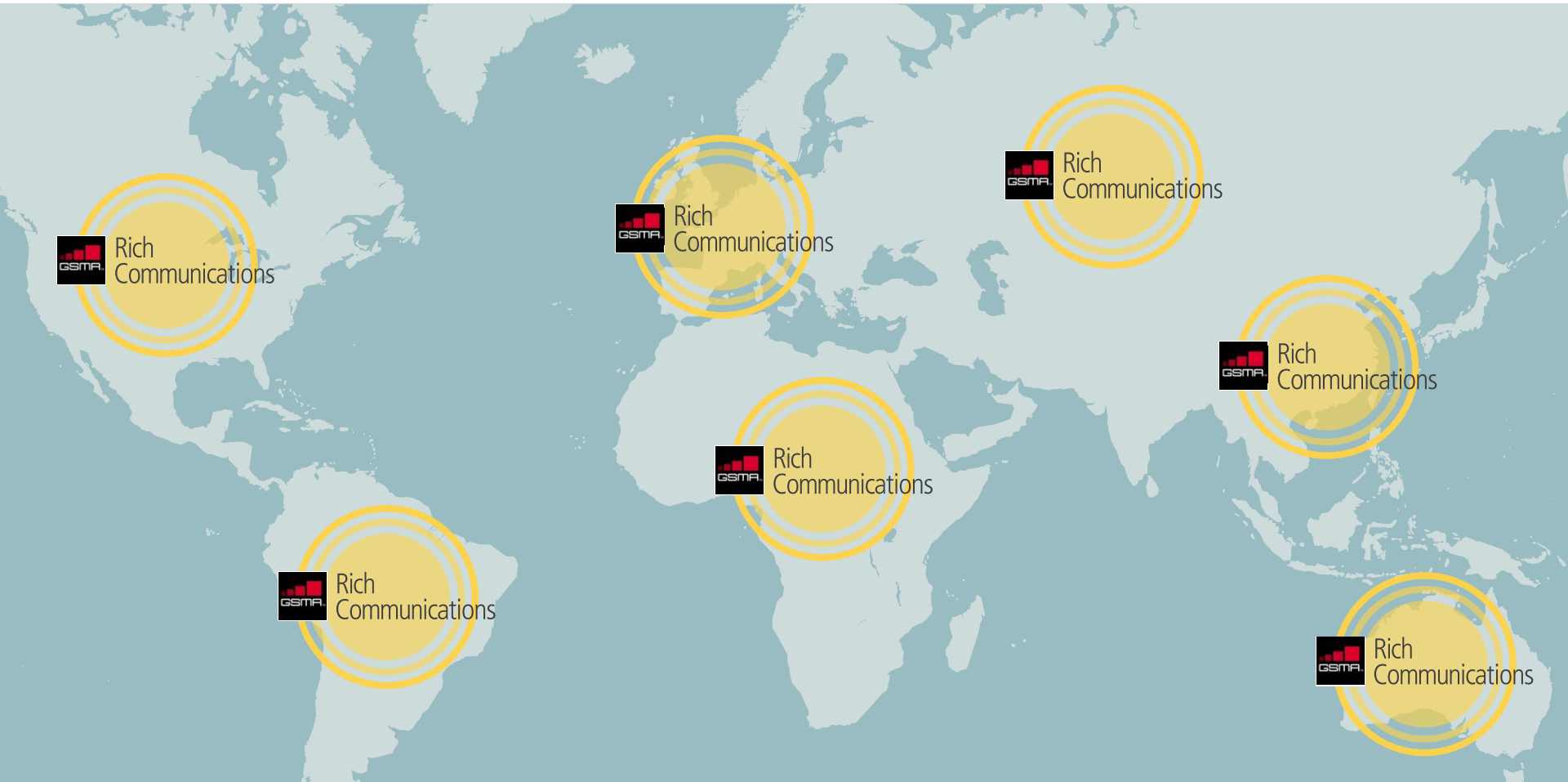
joyn - connecting across operators



joyn - connecting across Europe



RCS 5.0 - bridging and converging with other regions around the world



RCS 5.0 - extending the service set and delivering high quality



RCS 5.0 - integration into any application



INTERCONNECTED COMMUNICATIONS PLATFORM



RCS 5.0 - integration into any application



RCS 5.0 - super connected world





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Facilitated panel session



**Philippe
Lucas**
Facilitator



**Jaeseong
Jang**
SKT



**Gerry
Flynn**
Verizon
Wireless



**Enrique
Marti del Olmo**
Vodafone



**Javier
Arenzenariaas**
Project LT Rep

Facilitated panel session



**Philippe
Lucas**
Facilitator



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**Gerry
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Verizon
Wireless



**Enrique
Marti del Olmo**
Vodafone



**Javier
Arenzenariaas**
Project LT Rep



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Concluding Remarks

Graham Trickey,
GSMA



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