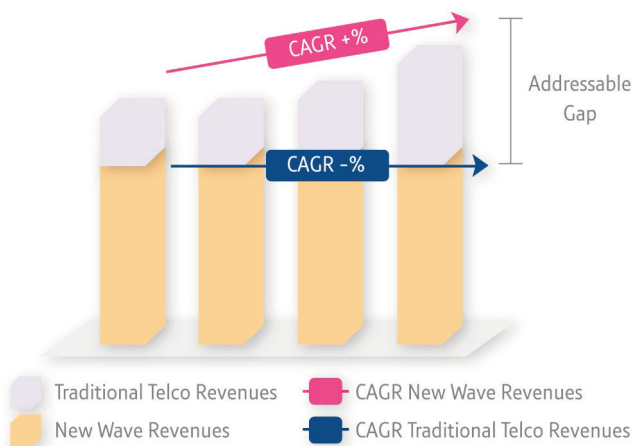


# ICT Portfolio Strategy and Development

## Targeting ICT markets

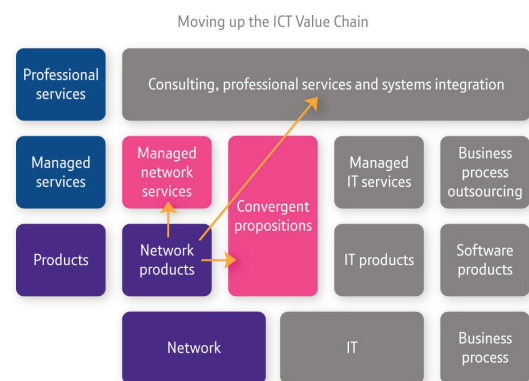
The traditional business environment for communication and IT providers is converging into a consolidated Information and Communication Technology (ICT) marketplace driven by competitive forces. The pace of change in the telecoms industry is catching up with the IT/software industry. Web 2.0 technologies drive telco operators to adopt new business models and speed up product development cycles, and the change to next-generation networks (NGNs) and technologies is becoming a necessity for many operators to secure their long-term future. This is due to a number of underlying factors. A rapid increase in disruptive technology necessitates the creation of new services and associated business models. The competitive landscape is changing as technology evolution lowers entry costs and removes barriers. Voice and data are not providing the necessary growth and revenue. Operators need to transform their services and portfolio, and also reduce Opex and time to market to compete in the Telco 2.0 ecosystem.



## Telco operator challenges

Telco operators across the globe are facing similar challenges to BT which they need to address in order to survive, deliver healthy returns for their shareholders and delight their customers:

- Price erosion within standard commodity products such as voice and data are providing major challenges in defending traditional revenues.
- Digitisation, globalisation and virtualisation are creating the environment for ICT providers to remove the intermediary telcos from their corporate customer base.
- As the telco business model changes, suppliers are also evolving to meet the change in market requirements.
- Rationalising and modernising the organisation, infrastructure, systems, processes and portfolios are necessary to drive cost optimisation and revenue generation through new services.
- Developing high-margin services differentiate, reduce churn and enable long-term relationships.



## Supporting our clients

### Tier 1 Fixed and Mobile Operator in EMEA

Our client was looking to understand its domestic ICT enterprise market and transform its traditional product portfolio to address new market sectors.

Leveraging the capability from within our Sales and Marketing practice, and largely based on BT's success in its own markets, our consultants performed a thorough market analysis which provided a solid foundation for helping our client develop an ICT strategy. Further analysis was conducted on the client portfolio to understand the optimal organisational design for a managed services unit necessary to address the market challenges posed by new sectors.

### Tier 1 Mobile Operator in EMEA

Our client, a successful mobile operator, perceived increasing competition and flattening of revenues. In order to maintain growth, it needed to reduce network costs and support new services and applications more efficiently and cost effectively. To develop a technology strategy required resources and knowledge that the operator did not possess.

BT Telconsult provided experienced consultants who helped our client understand the existing network and products portfolio, develop a set of business drivers for evolution of the network and systems, and develop a technology roadmap to be used to drive new equipment and system introduction, with the client updating it as time progressed.

## Our approach

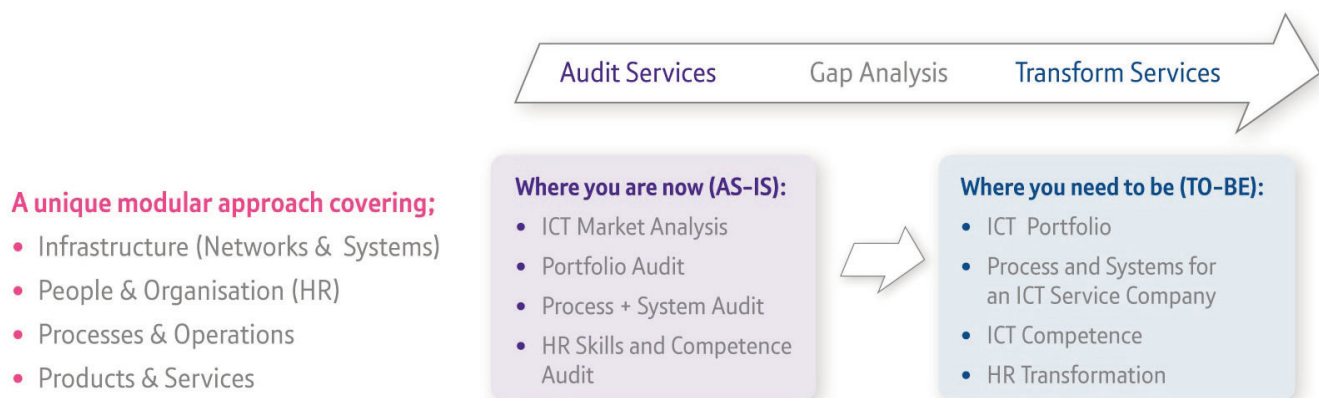
BT Telconsult offers a unique modular approach that commences with an analysis and audit of the AS-IS state of the current portfolio, infrastructure, processes and operations, the organisation and the ICT market landscape. Our methodology for business and technology audits and subsequent market analysis is complemented by a GAP Analysis to understand potential areas for investment. The Audit phase and GAP Analysis form the basis for the roadmap and investment business case to support a recommended TO-BE strategy and transformation. The transformation roadmap highlights the necessary portfolio and organisational changes for the programme and provides recommendations for the subsequent strategy execution.

We believe in strong team work and close collaboration with our clients with focused client involvement in each phase of a project for measurable value generation. We believe in tangible deliverables, not just recommendations and will actively involve subject matter experts across BT through our knowledge network.

## Client benefits

Our ICT Portfolio Strategy and Development approach can help you address the key challenges faced by communications providers globally that BT has already successfully addressed:

- We can help you better understand the ICT market and regulatory landscape, the drivers and essential requirements for customer experience.
- We can advise on commercial imperatives and align them to your current and future capabilities. We can also help you realise the steps required to de-risk your infrastructure, systems and technology investments.
- With BT Telconsult you not only have access to expert resources to make the right strategic decisions, but also experienced practitioners who can support the subsequent transformation of your business.



## Why BT

BT is one of the leading telco operators globally and widely recognised for its innovation and thought leadership. We operate in one of the most competitive and deregulated telco markets, and understand the impact of regulatory changes on telco and ICT transformations from a legacy as well as next-generation technology, portfolio and organisation perspective.

We are undergoing a major transformation in our own right, investing £10 billion in our Next-Generation 21CN (21st Century Network) Programme to move to an NGN infrastructure, portfolio and organisation. We have developed a Techno-Economic Modelling practice to ensure we are making the right investment decisions.

Not only are we taking this leading know-how, experience and best practices to our clients by offering consultancy services, we have also developed a portfolio of 21C Transformation Services to offer a full end-to-end approach across Consult-Build-Manage phases. Finally, being a telecoms operator ourselves, we can evaluate alternative joint business or investment models with you, where we see a fit with BT's overall strategy.

## About BT Telconsult

BT Telconsult is a global telecoms management and technology consulting business with 30 years experience in providing consultancy services to fixed and mobile telco operators in more than 90 countries. We are part of BT Global Services and leverage BT's experience and expertise as a 21C Next-Generation Communication Provider to help our clients overcome the challenges they face. Our consultative practitioners have a deep understanding of how to address end-to-end business, technology and operational challenges, using best practices and methodologies developed by BT to support your business transformation.

For more information please visit  
[www.bt.com/telconsult](http://www.bt.com/telconsult)

## Offices worldwide

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