



TRIPLE PLAY: The role of the Vendor

July 14, 2005

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Everyone can offer Basic Triple play, but ...



$$1+1+1 = 2.7^*$$

* User expects 10% discount

... true value is in convergent applications



$$1+1+1=7$$

The traditional approach: Network Centric

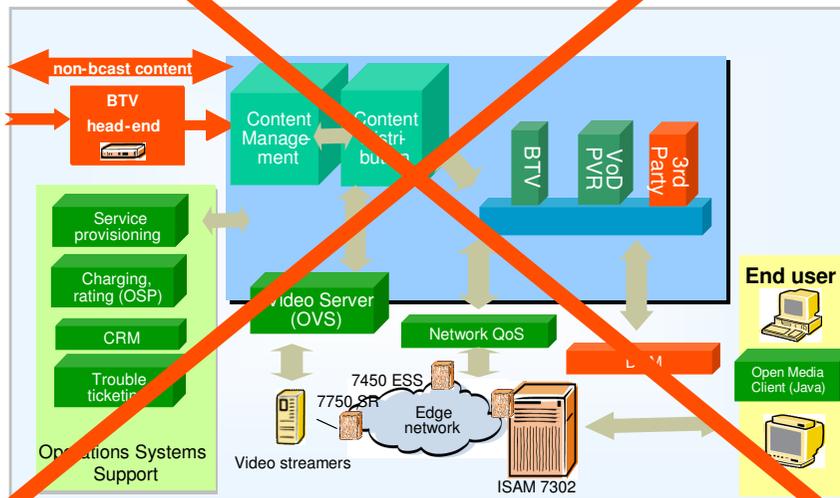


**Issue: different vendors for each segment,
Complex integration to be done by the telco**

The New Approach: User Centric

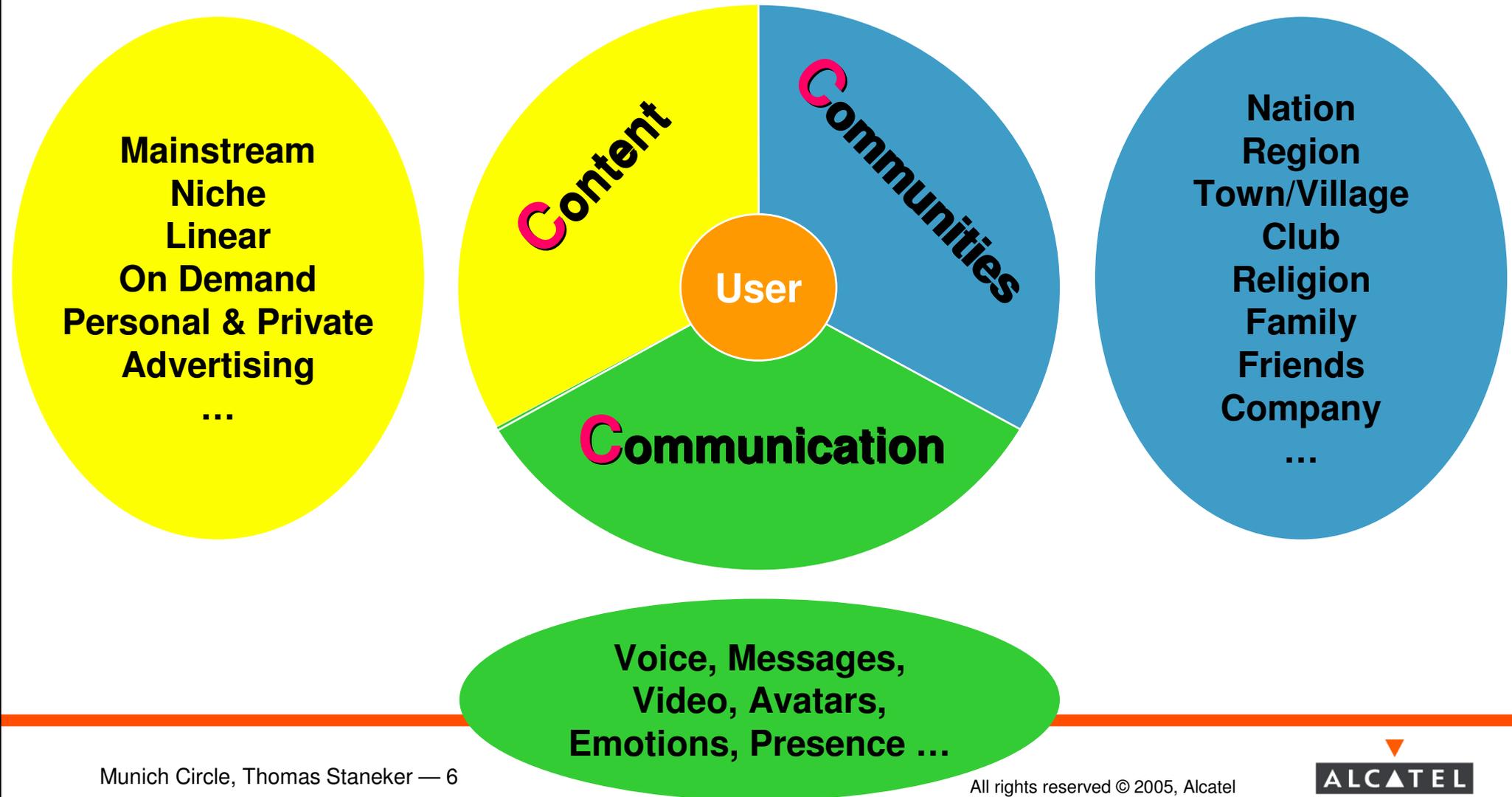
**Centered
around
products**

**Centered
around
the user**

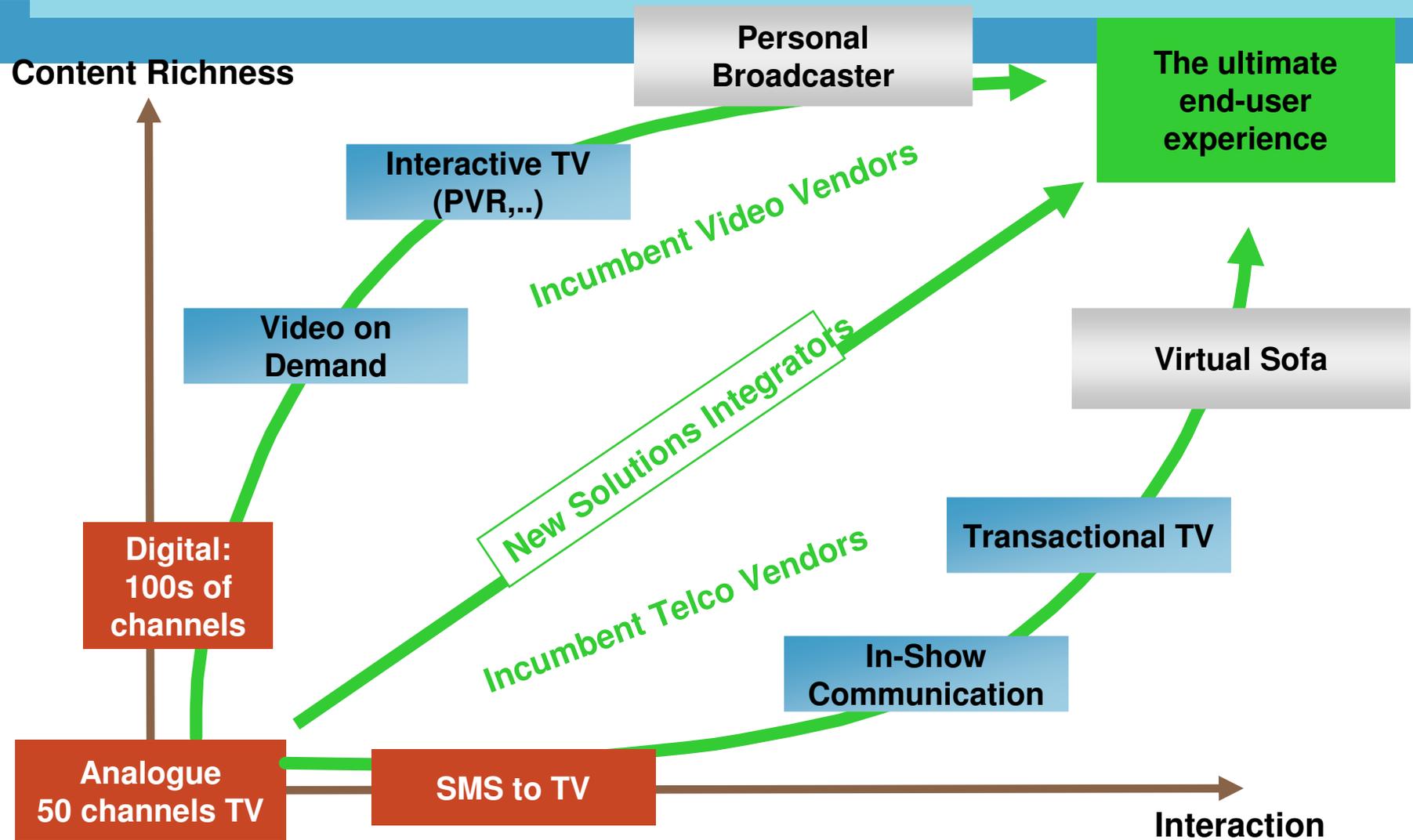


**“I couldn’t care less
about networks,
software or cables.
I care about what really
matters for me”**

The three **C**s that matter for the user ...



Two ways to Heaven (preferably both)



Challenges for Vendors

**Overall
Complexity**

**Local
Presence**

**Consumer
Understanding**

**Small vendors are typically good for trials only
Large Vendors need to team up with specialists**

**Special
Skills**

Creativity

**Time to
Market**

How to fill the Skills Gap

Consolidation

Acquisition of specific skills

- Video unknown to Telco
- Networking unknown to Software
- Communication unknown to video

Examples

- iMagicTV and thirdspace by Alcatel
- Myrio by Siemens

Challenges

- Time to multiply internally
- Cultural shock

Alliances

Deal with multiple partners

- Security
- Head Ends
- Terminals

Examples

- Alcatel with Microsoft
- NDS, Nagra, Irdeto with various vendors

Challenges

- Stability and Complexity
- Shared Vision, One Voice to the customer

Who will win the “Race for the Future”

- ... the ones who understand the user
- ... the ones who can deal with multiple partners
- ... the ones who are locally present
- ... the ones who acquire the right skills
- ... the ones with the best product

Conclusion



Triple Play is all about **the user**, not about technology

Added value comes from applications which cross borders

Integration of **complex platforms and networks** require one-stop shopping offer from large service integrators

Only vendors who can build up **skills and partnerships** will be successful