

CUSTOMER FIRST

24 - 26 SEPTEMBER, 2019 | CASCAIS, PORTUGAL



DAY 3, TODAY'S REALITY

11:15 - 11:45, THURSDAY, SEPT 26

IPX Self Reflection

MNO perceptions of IPX performance, where can we improve to help you better?

Chris Lennartz

VP Mobile Solutions, iBASIS



BE THERE FIRST

Chris Lennartz

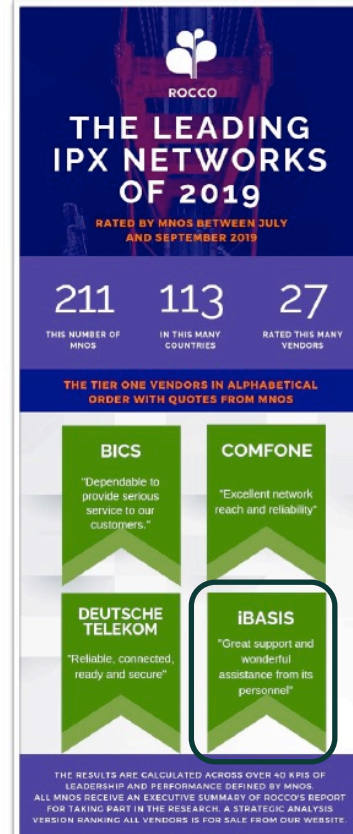
VP Mobile Solutions, iBASIS



- The ROCCO IPX Vendor Performance Survey 2019
- General observations and market needs
- The iBASIS performance
- Conclusion
- We will use slido.com for getting your feedback...



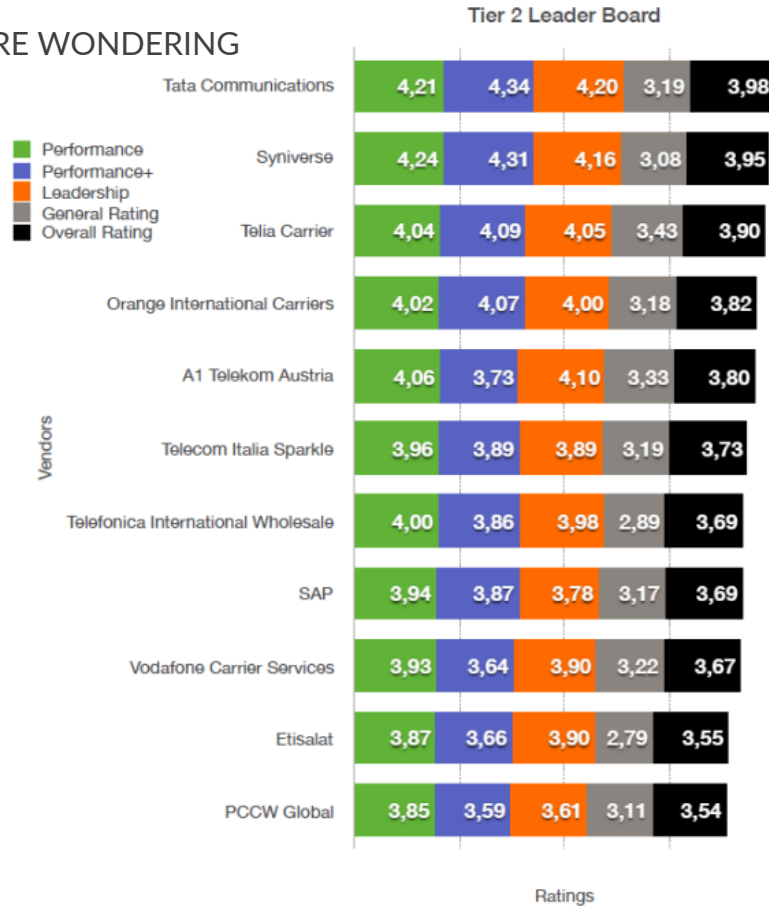
THE ROCCO IPX VENDOR PERFORMANCE SURVEY 2019



- "Great support and wonderful assistance from its personnel"
- "Very good :-)"
- "Very stable"
- "Quite good performance"
- "Good enough"
- "Performance has been improving"
- "Very good and responsive"
- "Reliable partner with great flexibility"
- "Good performance"
- "Customer focussed"
- "Outstanding"
- "Exoellent partner to work with"
- "Exoellent"
- "Good"
- "iBasis is a very strong partner with very good transparency and excellent speed to adjust and to perform necessary changes"

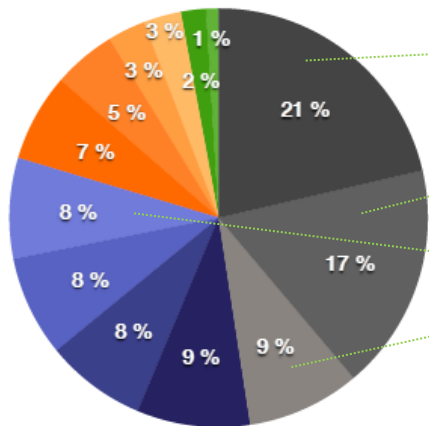
" iBasis have also seen a consistent rise year on year, being one of the first IPX to focus on VoLTE Roaming they are likely to win considerable ground in the coming years as MNOs turn to roll-out considerably more VoLTE Roaming agreements. "

TIER 2 SCORES – IN CASE YOU’RE WONDERING

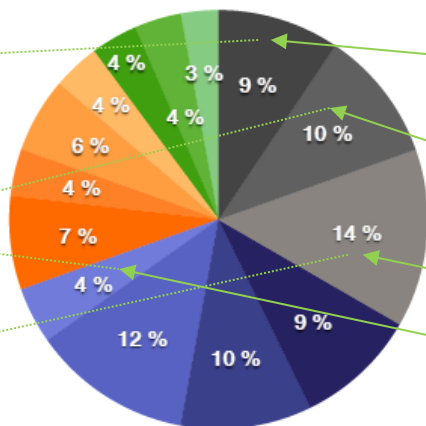


TOP IPX REQUIREMENTS FROM MNOS

The top 3 requirements MNOs have for IPX Networks 2018

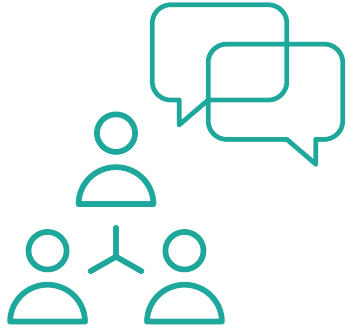


The top 3 requirements MNOs have for IPX Networks 2019



- Is peering less important or have issues been solved?
- Is coverage less important or has it improved?
- Why is Security suddenly so important?
- Isn't VoLTE as important anymore?

- Peering with other IPX relevant to your needs
- Network Coverage (number of IPX access POPs)
- Security of the IPX Network
- Quality of Service: #of Classes of service, SLA
- Intelligence about compatibility issues (with other Operators or IPX)
- Speed of Connection to New Roaming Partners (after initial set up)
- Readiness for VoLTE
- LTE Roaming service reach (on-net coverage and % of on-net vs off-net)
- Offering of Value Added Services (e.g. Roaming, IoT Ecosystem, Security, Fraud Management, Data Clearing)
- Diameter Signalling service reach (on-net coverage and % of on-net vs off-net)
- Support for Local/Regional Breakout and IPX Roaming Hub
- Connectivity Options (Single /dual access, MPLS, IPSec)
- Support for Local / Regional Breakout and IPX Roaming Hub
- Readiness for 5G



What are your 3 most important requirements?

What are your 3 most important requirements?

0 2 4

Peering with other IPXs relevant to your needs



Number of POPs



Security



Quality of Service



Intelligence about compatibility issues



Speed of connection to roaming partners



“Security” x 32 MNOs

“Peering” x 19 MNOs

“Bandwidth” x 9 MNOs

“5G Readiness” x 7 MNOs

“LBO, iX type of provider such as BBIX”

“Cost and direct access (on net)”

“Support and follow up of our needs, and offer innovative solutions”

“Reporting on quality, SLA, expansion flexibility during emergencies”

“That we get good speedy response from iBasis”

“Value for money”

“Virtualization and new commercial strategy for roaming”

“Local Breakout VoLTE 5G”

“VAS”

“Need of a back up”

“Reach-ability and reliability and quick support response when issues arise”

“High availability”

“Network readiness”

“Complexity”

“Hosted services and conversion rules”

“Profit from it”

“Rates”

“Convince the big players for making free peering agreements”

“Bandwidth needs”

- Peering apparently still a challenge...
- Security the most important challenge?
- Why is bandwidth scaling a challenge?
- 5G readiness is a challenge – but it’s not yet a requirement?

“VoLTE Roaming” x 58 MNOs

“5G Roaming” x 21 MNOs

“LTE Roaming” x 14 MNOs

“VoLTE roaming roll out and 5G. Information sharing and fast and efficient deployment”

“5G readiness, quality benchmarks , reporting down to customer experience layer”

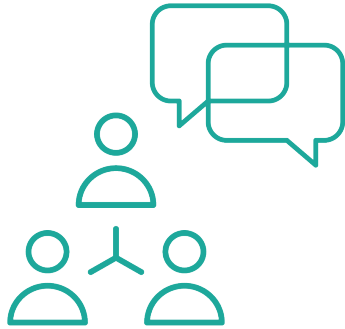
“To peer up regionally with key providers”

“Expansion into South American region”

“Increase LTE & VoLTE roaming partners”

“Our key business focus is to identify missed revenue opportunities and the IPX can help support this with better analytics in predictions and traffic patterns”

- VoLTE less of a requirement but main business focus?
- 5G not really a requirement but a key business focus?



What is your key 2020 IPX business focus?

What is your key 2020 IPX business focus?

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VoLTE Roaming



5G Roaming



LTE roaming roll-out & scaling



Regional expansion

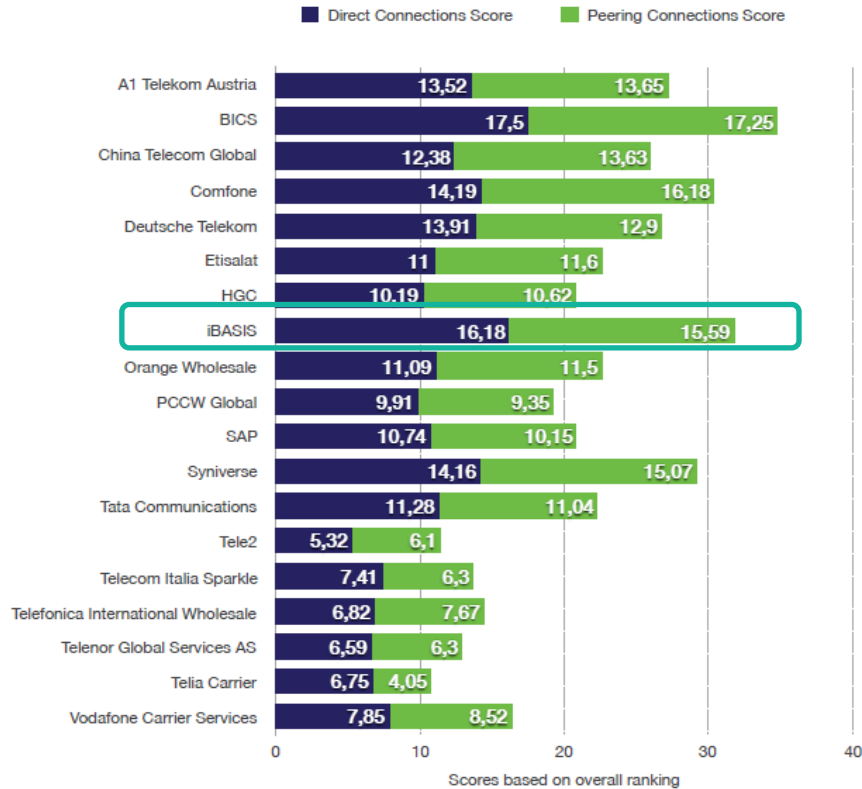


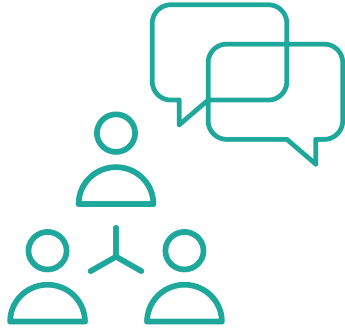
Revenue optimization through analytics



Cost reduction

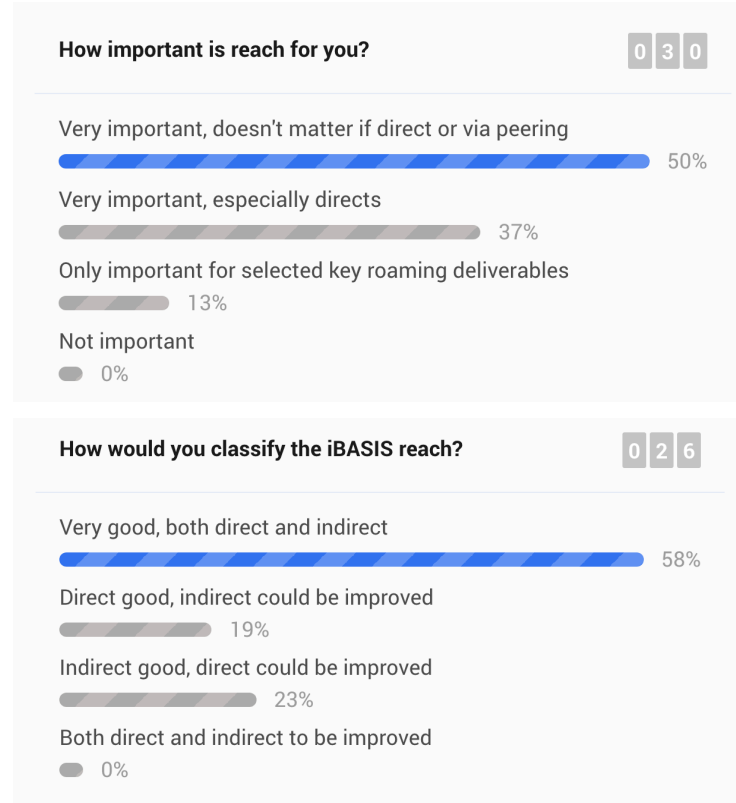




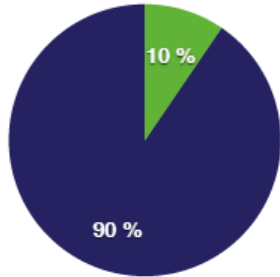


How important is reach for you?

How would you classify the iBASIS reach?

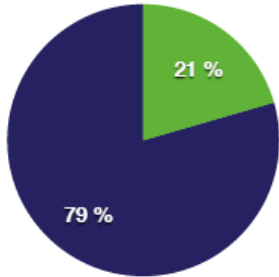


2018: Do you use BI Systems?



● Yes, we use them
● No, we don't use them

2019: Do you use BI Systems?



● Yes, we use them
● No, we don't use them

More MNO feedback...

“Customer experience, down and uplink speed per application”

“Ability to customise swiftly and not have huge development cost to do so”

“Through put monitoring”

“Someone that can use the information for discovering new

opportunities and business innovation”

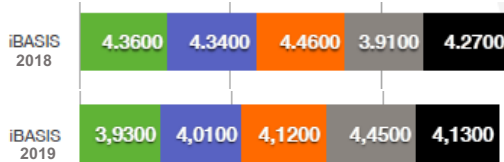
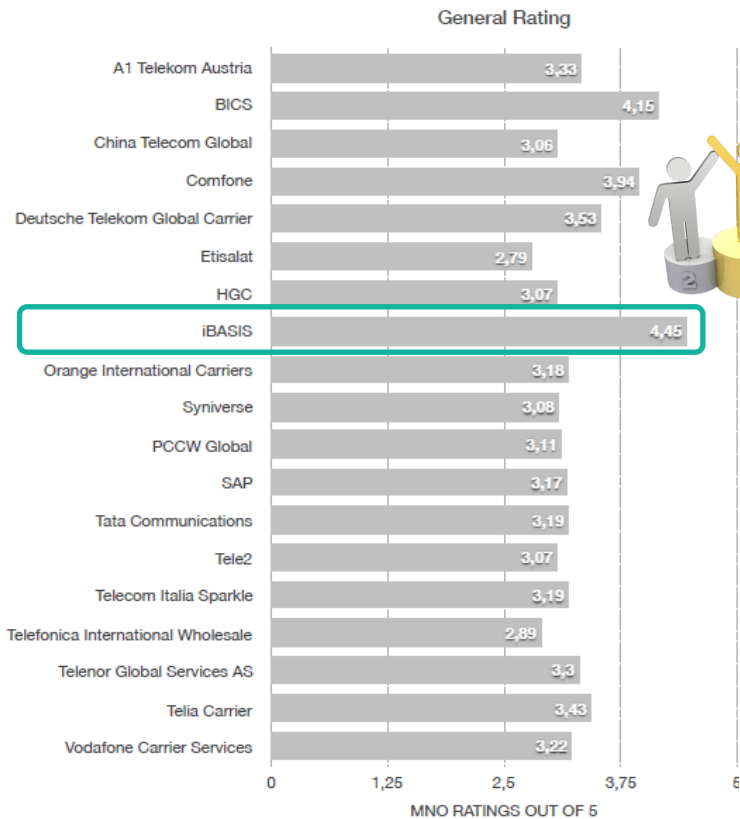
“Speedtest”

“More real time results”

“More granularity in pinpointing the breakage point in trouble shooting”

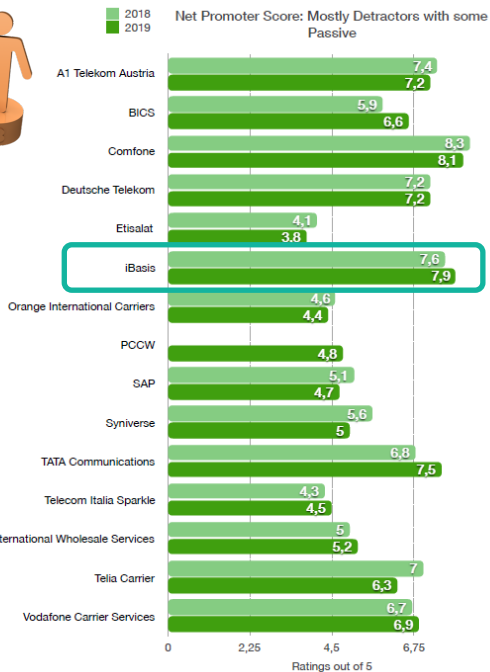
- Important but underused?
- Reporting, analytics, monitoring often mentioned as key – why only 21%?

GENERAL RATING



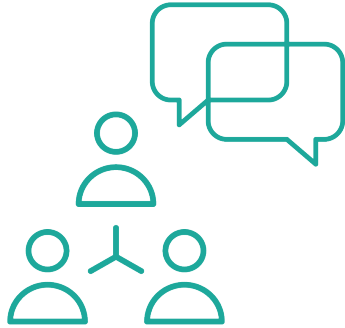
Ratings

- Performance
- Performance+
- Leadership
- General Rating
- Overall Rating

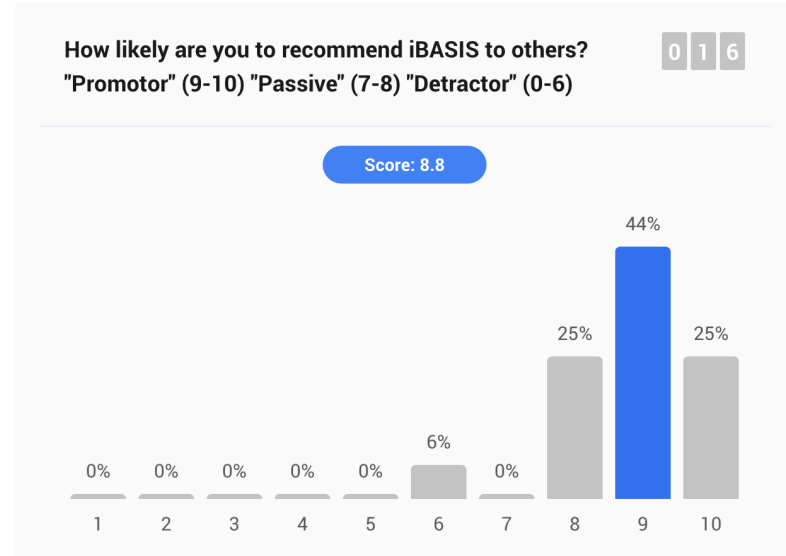


Why is our general rating and Net Promotor Score growing but we score less than last year on individual items?





How likely are you to recommend iBASIS?



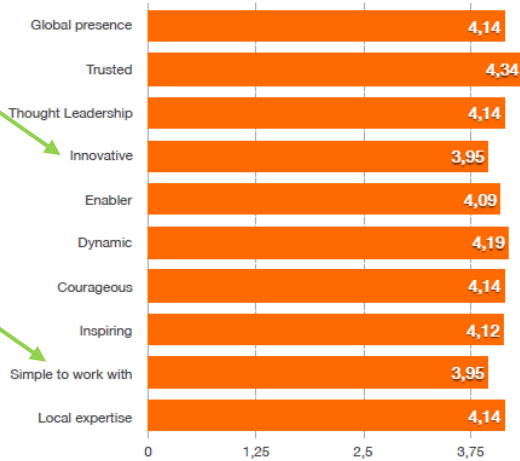
Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fuelling growth.

Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

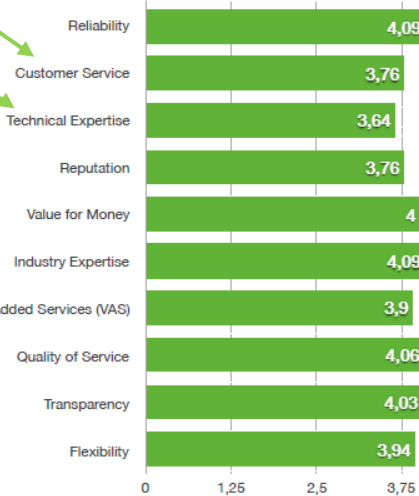
Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

WHERE DO WE NEED TO IMPROVE?

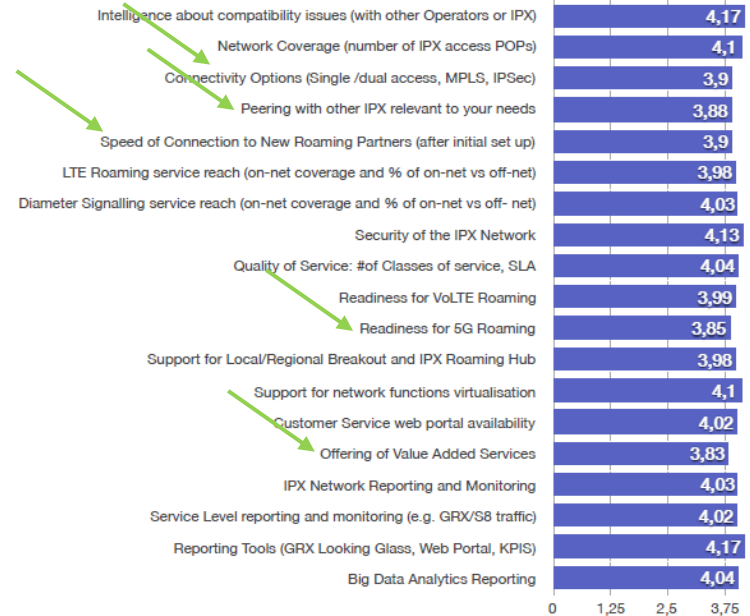
iBASIS Leadership Rating

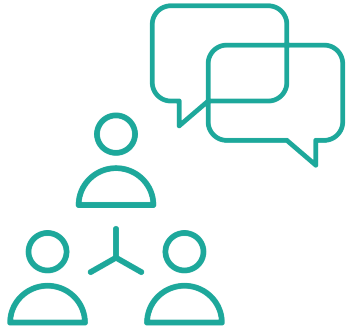


iBASIS Performance Rating



iBASIS Performance + Ratings

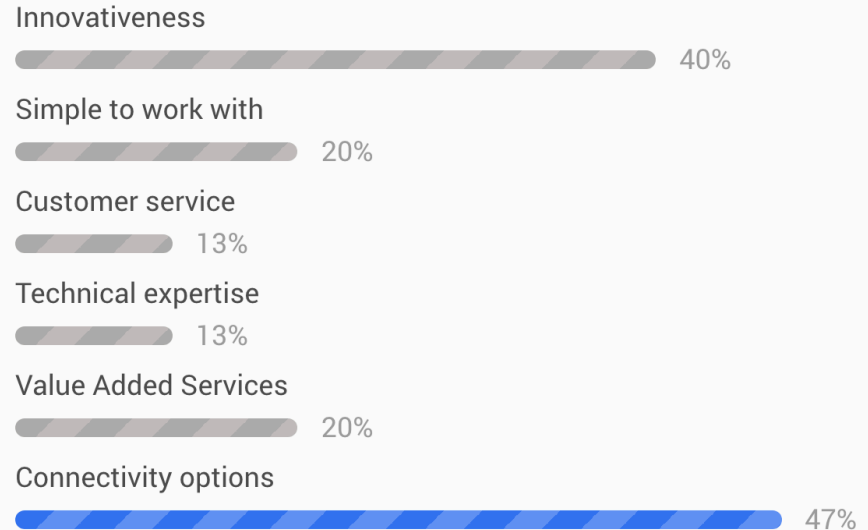




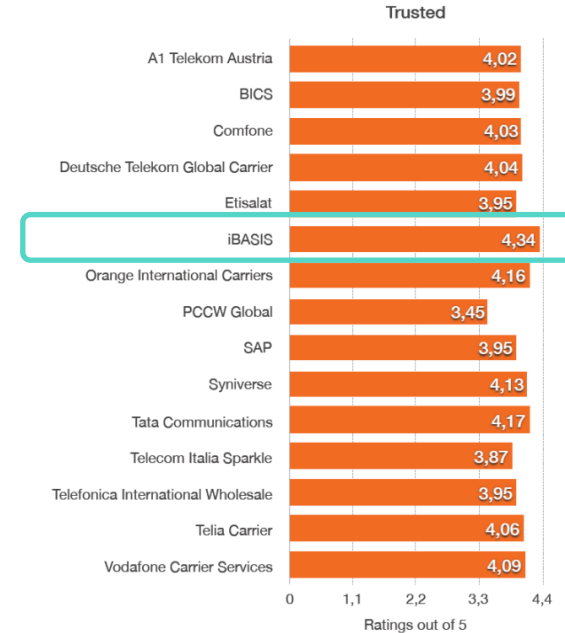
What are the top 3 points where we need to improve?

What the top 3 points where we need to improve?

0 1 5



- Our overall perception seems very good
- But we will need to work on specific items to be your best partner:
 - Value Added Services
 - 5G Roaming
 - Customer service
 - Speed of connecting new partners
 - Simplicity to work with
 - VoLTE roaming help
 - Revenue optimization help
 - Security



“ Trust is hard to accomplish and must be built, but is probably the most important leadership criteria of all, since it typically creates a client-Vendor relationship that grows and grows. “

WAS#10

VOLTE & 5G BREAKFAST ROUNDTABLE

October 28, 2019 | 7h30 AM
Palau de les Arts Reina Sofia | Valencia, Spain

Join the discussion on the LinkedIn Group



THANK YOU

