

21CN Global Vision

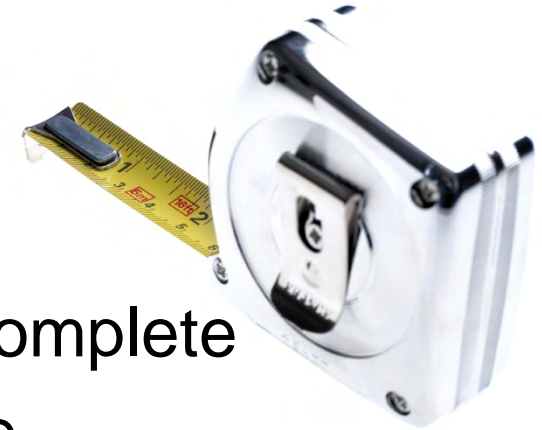
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# Agenda

- BT's 21CN and Superfast Broadband
- BT's philosophy
- Industry consultation
- An approach to risk
- Questions?

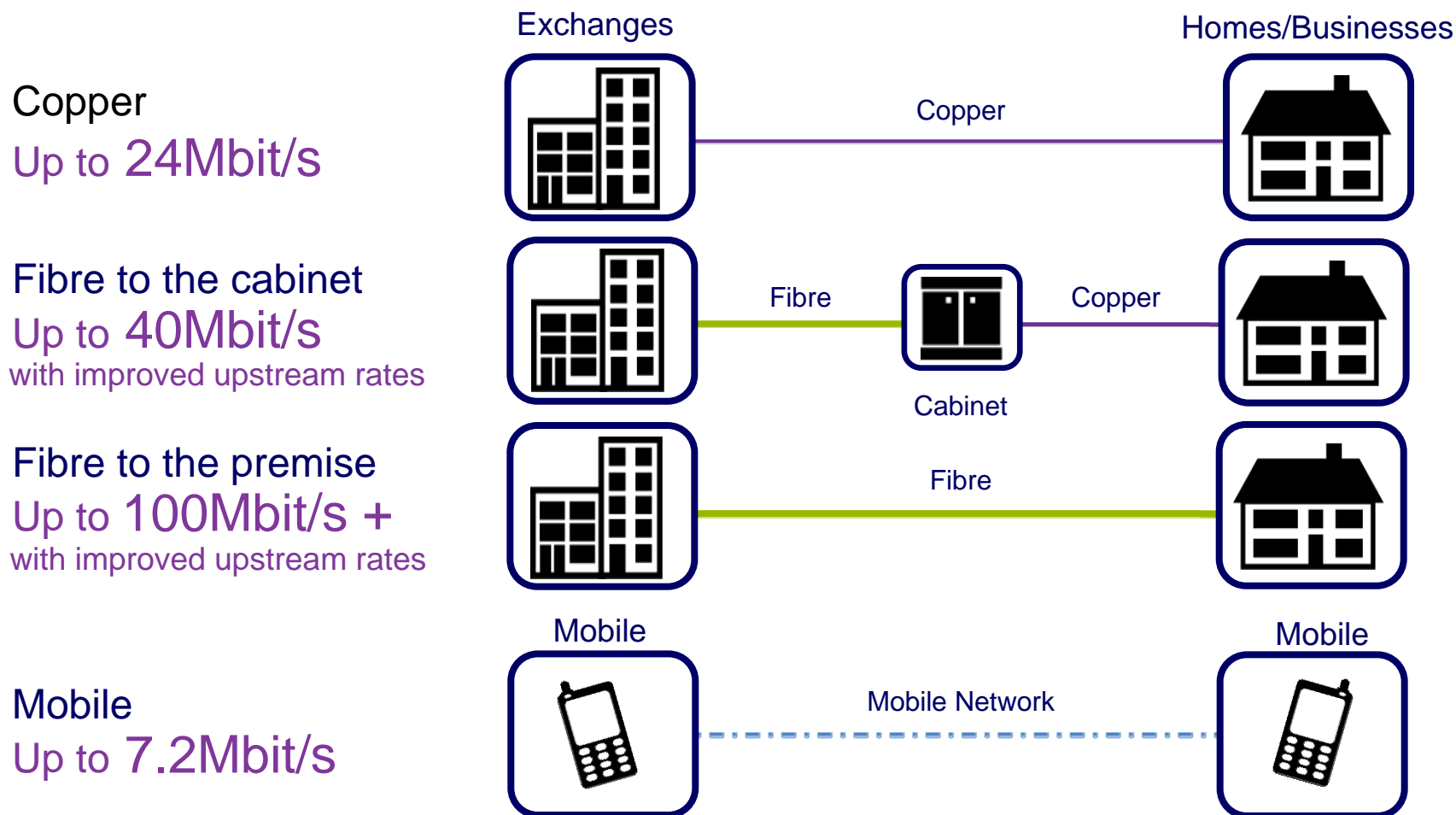


# BT's 21st Century Network - Progress to date

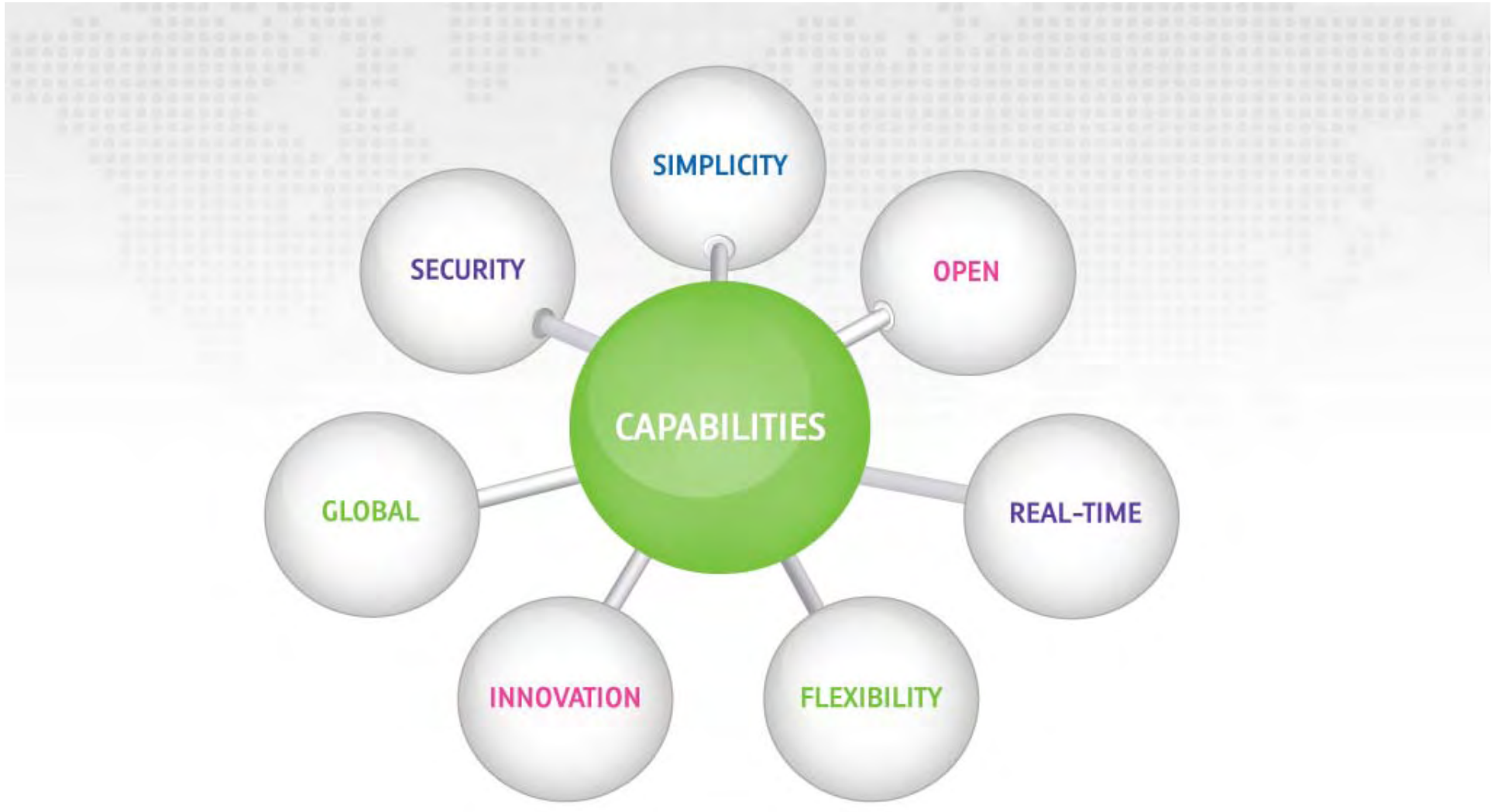


- 21CN UK core infrastructure is 100% complete
- 21CN global platform is 100% complete
- End users receiving next generation services including Wholesale Broadband Connect, Ethernet
  - Next generation broadband introduced in April 2008 from exchanges serving over 1m homes
  - 21CN Ethernet available to ~20% of UK business market - rollout continues
- First end users receiving 'super-fast broadband' over access fibre
- Substantial cost savings already achieved

# Next generation access - 'mixed economy'



# Meeting the requirements of 21C organisations





## BT's 21st Century Network

### - A platform for open innovation

- Delivered by putting software tools and capabilities into the hands of our customers and partners
- Giving customers the ability to rapidly customise, differentiate and develop new applications
- And the ability to link applications with other open platforms – including Google Maps, Salesforce.com, iPhone...
- Web 2.0 application trials underway with leading UK corporations



## NGN - Consultation

### - Key messages

- The next generation platforms are wholesale platforms
- BT began consultation with the industry from the beginning of its planning: 21 Consult
- NGNUK is an industry body co-ordinating opinion and research across the whole industry



## An approach to risk

### Many variables

- Willingness to pay
- Take-up
- Applications
- Competing networks: multiple fibre?
- Competing technologies: mobile cable satellite

### Response

- Regulatory holiday?
- Co-investment?
- Reciprocal oligopoly?
- Drive retail and wholesale service innovation



Thank you

Questions?