



Cloud services @ Romtelecom

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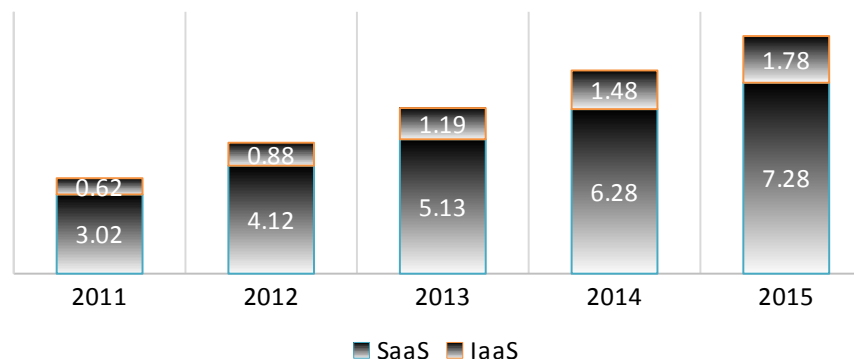
AGENDA

- 1. Cloud market overview**
- 2. Cloud Services @ Romtelecom**
- 3. ICT portfolio beyond Cloud**

Public Cloud Romanian market

IaaS (Infrastructure as a Service)

- IaaS accounts for 20% of total Cloud market
- 65% of IaaS - system infrastructure Software (e.g. VPS, VDI)



SaaS (Software as a Service)

- Communication and collaboration tools account for more than 70%
- Top 5 in SaaS application represent CRM, ERP, Communication and collaboration tools, security tools, Business Intelligence



RO Cloud Market

- Total public cloud market est. to 9M EUR in 2015
- SaaS represents more than 80% from public cloud market
- Growth rates: SaaS – 25% | IaaS – 33%

Source: IDC, 2012



ICT Market Evolution

Main areas of ICT development to address customers' needs

Upcoming ICT solutions enable enterprises to be more flexible, mobile and collaborative

Cloud Computing



- 51% of ICT executives expect **cloud computing** to become the **dominant sourcing**;
- SaaS is becoming known as the **most flexible cost effective alternative** solution to traditional in-house software;
- Cloud computing industry is estimated to reach **\$300 Billion by 2014 world wide**

Managed Services



- Managed services will become a **major revenue generator**: **value of managed services** forecasted to **increase from \$10bn in 2011 to \$40bn until 2014**;
- Compatible with **existing business models** and customers needs to decrease TCO

FMC



- **Increasing flexibility** of working environment as **main driver** shift **towards rising fixed / mobile convergence**;
- Enterprise convergent communication spend is **expected to double by 2014** compared to 2011.

M2M



M2M demand profits from sustainability trend as M2M systems allow M2M benefits:

- M2M "**Monitor**" - Know what's going on.
- M2M "**Localize**" – Know where assets are located
- M2M "**Control**" – Take control regardless of location.
- M2M "**Maintain**" – Keep things running smoothly, remotely.

Source: Gartner Data Quest Insight, 2012

Customer needs & expectations

Overarching needs to reduce cost, increase competitiveness with secure solutions are enabled by flexible, mobile, collaborative work environment

Overachieving customer needs

- **Cost reduction:** 71% of ICT executives believe that companies will try to **keep fixed IT costs as low as possible** (CAPEX → OPEX)
- **Increased competitiveness:** 67% of ICT executives believe that ICT will influence their **future competitiveness** through “Innovation”
- **Security and control / governance:** by 54% of ICT executives perceived as a **pre-condition to establish ICT** in their company

Flexibility

- **67%** of ICT executives state that significance of “**Flexibility**” is **very high**;
- **61%** state that their company’s **ICT is partially or fully outsourced**;
- **Flexible ICT outsourcing** (e.g. via Outsourcing or Cloud) can dramatically **reduce company’s reaction times and ICT costs**.

Mobility

- For **54%** of IT users it is important to **have access** to business applications and data **anytime** and **everywhere**;
- Almost **67%** of executives believe that ICT plays a key economic role as an enabler of **new business models**;
- **66%** of ICT deciders are interested in concepts that support **role-based access**

Collaboration

- **70%** of ICT executives believe that **virtual cooperation** will be important for businesses in the future;
- Virtual **collaboration reduces**:
 - **development costs (62%);**
 - **time-to-market (60%);**
- Virtual collaboration drives **innovation development**.

Source: Gartner Data Quest Insight, 2012

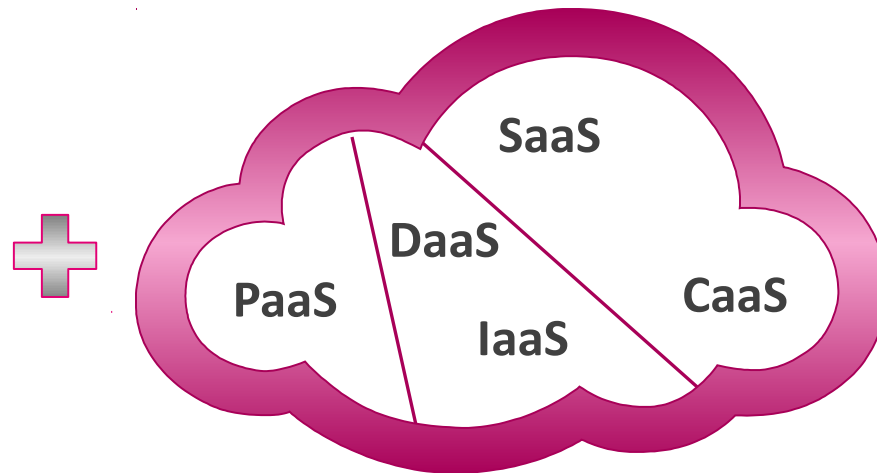


Next steps for TELCO

TELCO services



Cloud Services



Devices



Support



Romtelecom steps-up to ICT / Cloud

Over 5 years of **Telco** and **ICT experience** make us the right partner

One Stop Shop

The
Telecommunication
specialist in Romania

5+ years experience in
Managed Services

More than 95%
companies trust us
with their IT needs

- The **widest** fixed line telephone and data **network in Romania**
- Over **95% of corporate customers** trust **Romtelecom** with their communication needs
- **More than 400 IT professionals** in a unique mix of advanced skills and qualifications on Romanian market

- Romtelecom manages IT operations for customers since 5+ years
- **Widest and most advanced portfolio** of TELCO services in the Romanian market
- **Cooperation between Romtelecom and IT integrators** assure an international coverage for Managed Office Automation solution

- **More than 95% of Romanian companies** trust **Romtelecom** with their needs
- Romtelecom **successfully supports companies** from 10 to 40,000 employees

Romtelecom steps-up to ICT / Cloud

...and specialized personnel

ICT specialized Sales Force

Certified Project Managers & ICT solutions designers

High trained IT & NOC engineers



50+ ICT specialized sales representatives / account managers



400+ certified engineers:

- Cisco: 8 x CCIE + 220 x CCNP / CCNA / CCDA
- Microsoft
- Alcatel
- Siemens



Many project managers, ICT solutions designers, ICT product managers



Business Apps as Service

Basic apps portfolio to be complemented by the partner apps (revenue share model) and community apps (e.g. eHealth).

Basic Apps



Virtual Desktop



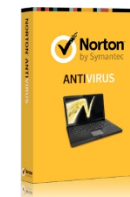
eShop



Office 365



Hosted Exchange



Licenses

Advanced Apps.



Cloud Storage



Cloud ERP



Cloud CRM



Fleet Management



HR Apps.

Other Apps.

Other B2B apps available on the international Group's marketplace



VDI – Virtual Desktop Infrastructure





Business Apps as Service

Cloud ERP – Enterprise Resource Planning



- ERP – Enterprise Resource planning
- Accessible via Web Portal
- Modules: Accounting, Partners Management, Stock Management, Fix Assets, Personnel & Salaries
- Pay only what you use and how long you use it

9.9 EUR / month / user



Cloud CRM – Customer Relationship Manager



- CRM – Customer relationship management
- Accessible via Web Portal
- Modules: Sales Automation, Marketing, Customer Support, Calendar, Analysis / reports
- Pay only what you use and how long you use it

6.9 EUR / month / user

Sales Force Automation

Optimize process and increase sales



Business Apps as Service

Spanning Account Management

Sales Opportunity Insight

Sales Commissioning

Products & Pricing



Sales Quotas and Proposals

New Order Entry

Order Tracking

25 EUR / month / user



IP Centrex Hosted PBX

All IP transformation



[Easy to use]

[Secure]

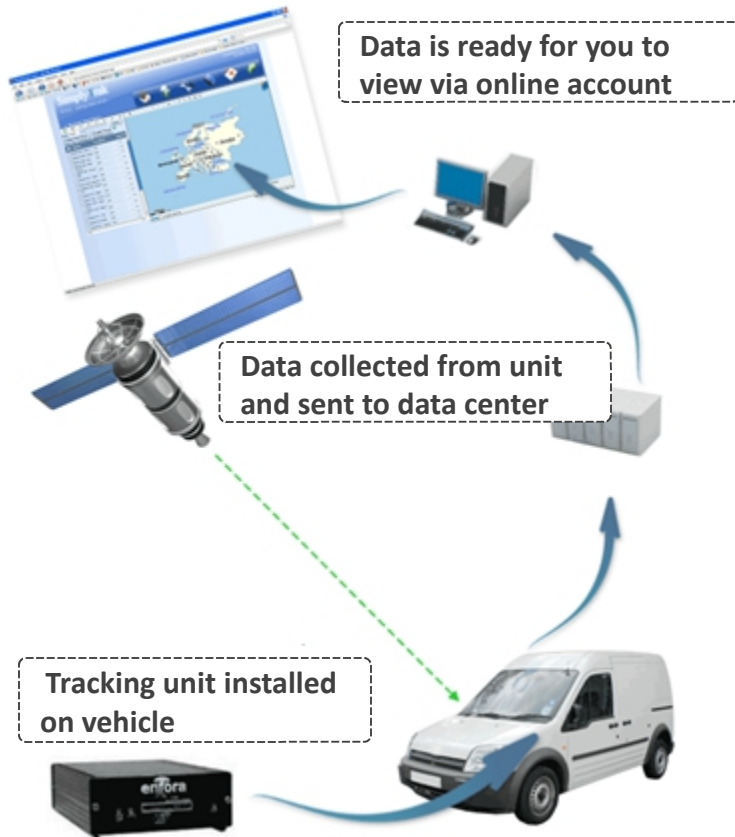
[Flexible]



Fleet management service

Cloud and M2M

How it works?



Product features

VEHICLE LOCATION:

- Where one or more vehicle is located
- What route did they use
- Advanced routing capabilities

REPORTING:

- Stop / start engine, Speed reports
- Fleet reports
- Activities detailed report
- Fleet state / alerts report
- Fuel consumption reports

ALERTS:

- Arrive / depart location
- In / out of zone
- Movement / Speeding

DISPATCH:

- Closest vehicle to a location
- Messages module

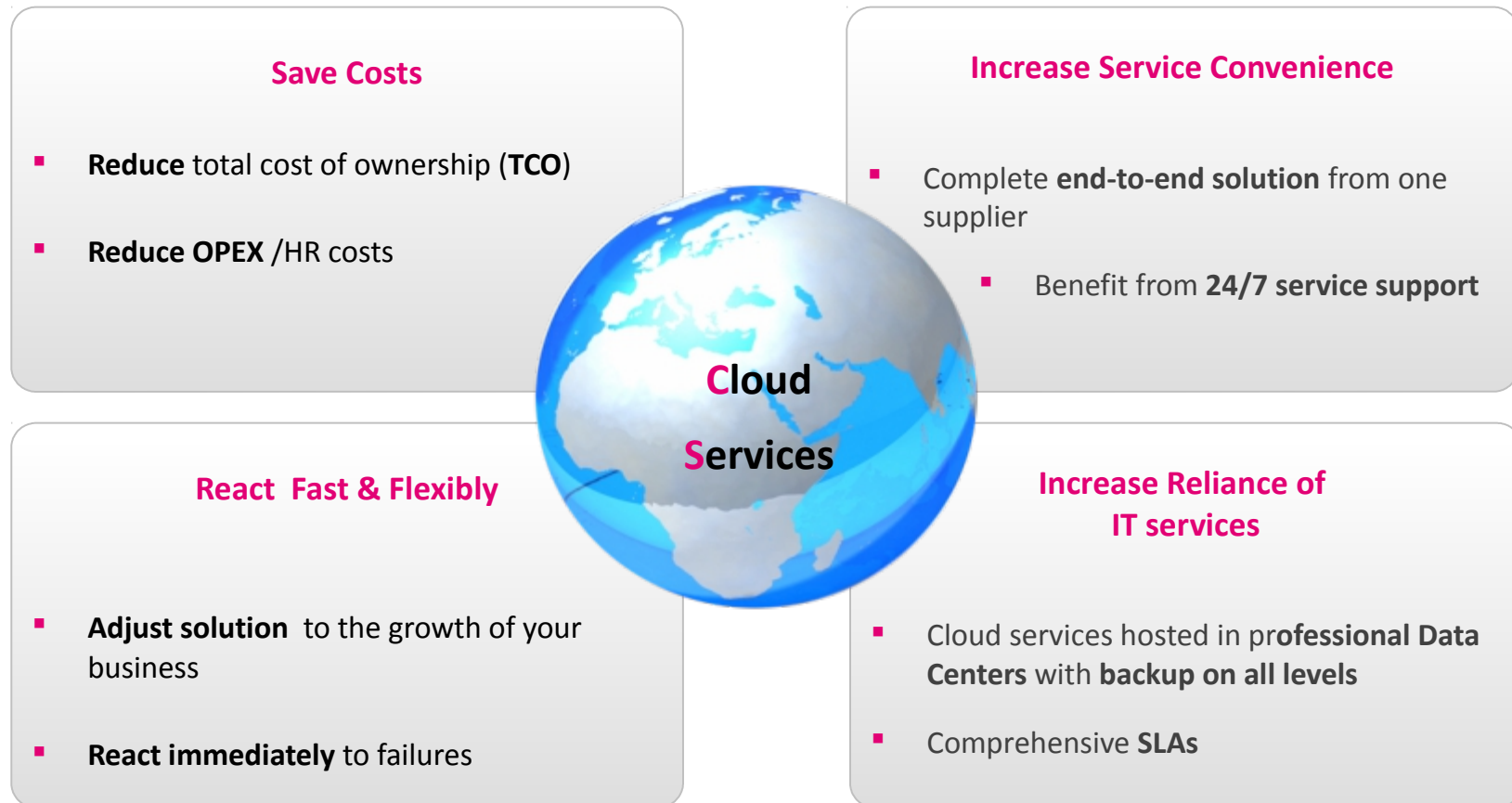
MAINTENANCE:

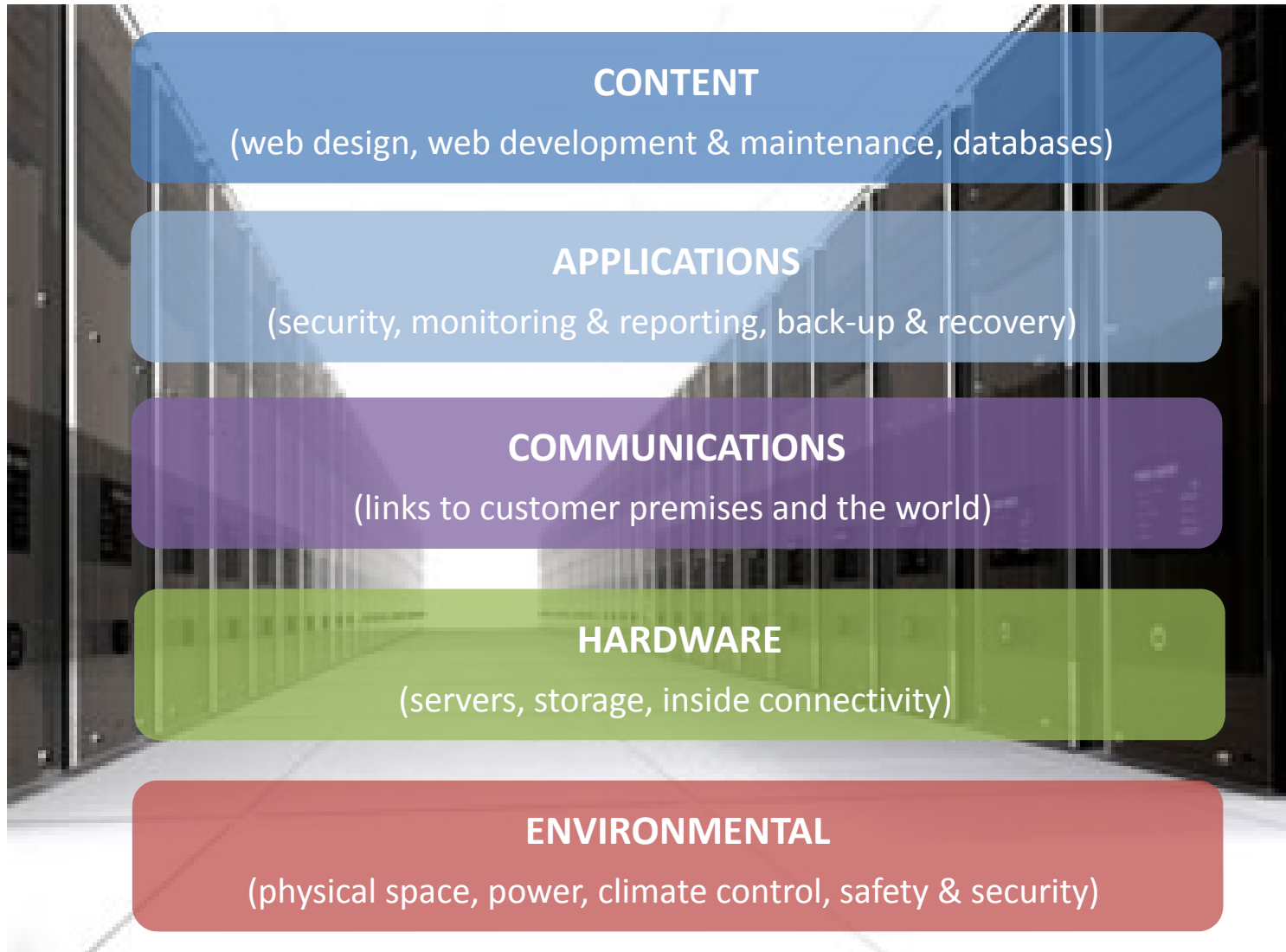
- Define service / maintenance alerts based on no. of km or time



Why Cloud Services?

Boost Your Company's IT & Communications





Cloud services work best with connectivity from Romtelecom



Cloud services are the future of IT&C, and...

...connectivity is one of the key components



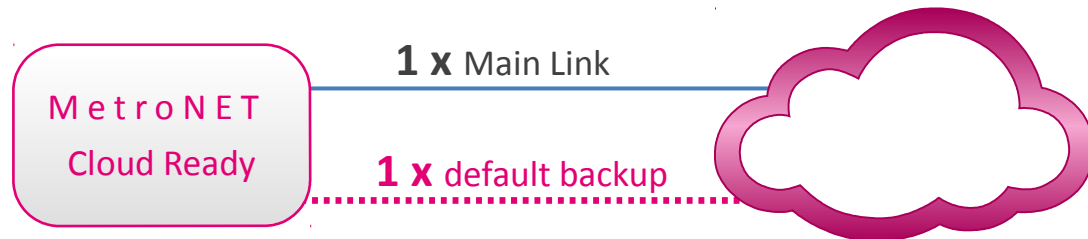
Cloud means moving from a local IT environment to a hosted one while optimizing performance and lowering costs

From local environment



To hosted environment

Key adoption barrier: What if my connection fails and my critical information is out of reach?



With **MetroNET Cloud Ready**



your data is **ALWAYS** in reach

Conclusions

- 1 Cloud services are the future in ITC as they offer our clients flexibility and scalability they need while optimizing costs;
- 2 Cloud services market has the highest growth potential in the next years, based on current predictions;
- 3 Romtelecom is present on cloud services market with new products, services bundled with the best connectivity available for maximum availability;
- 4 Romtelecom will launch new and innovative cloud products in 2014 in partnership with top software / IT providers.



Thank you

