

# BT's worst kept secret will change your business forever!

**Nick Thompson, CEO**  
The Phone Co-op

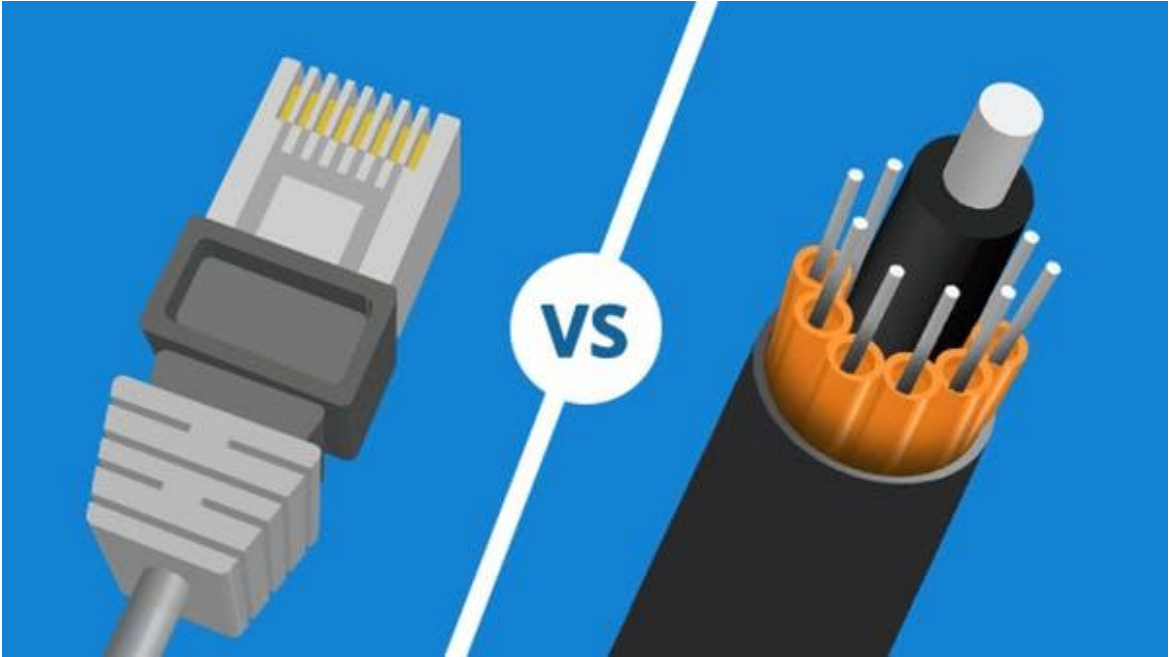


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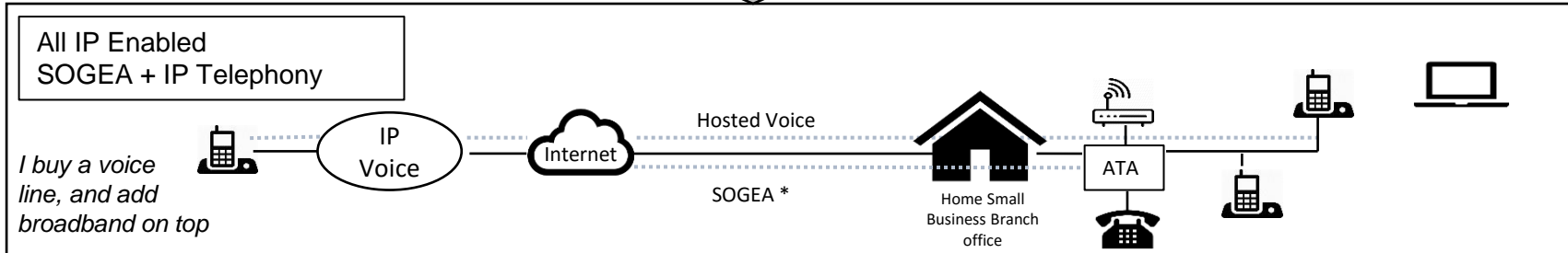
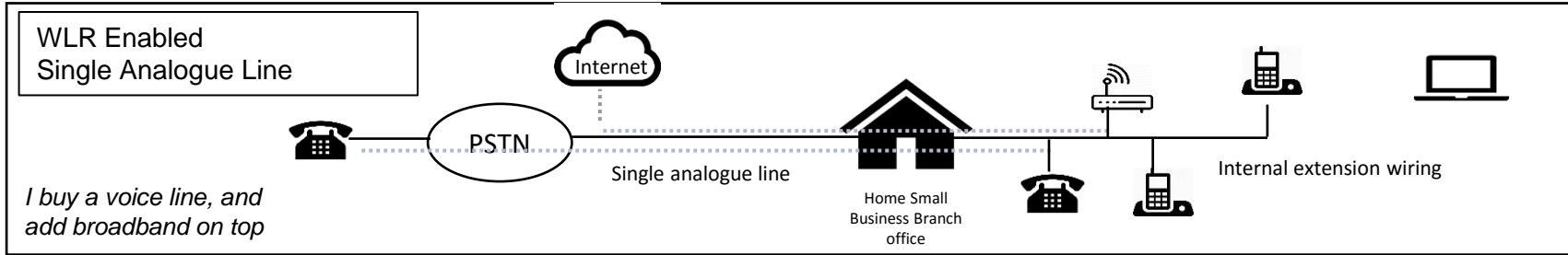
# 1: Copper V Fibre



# 2: Fibre & Telephone Connectivity

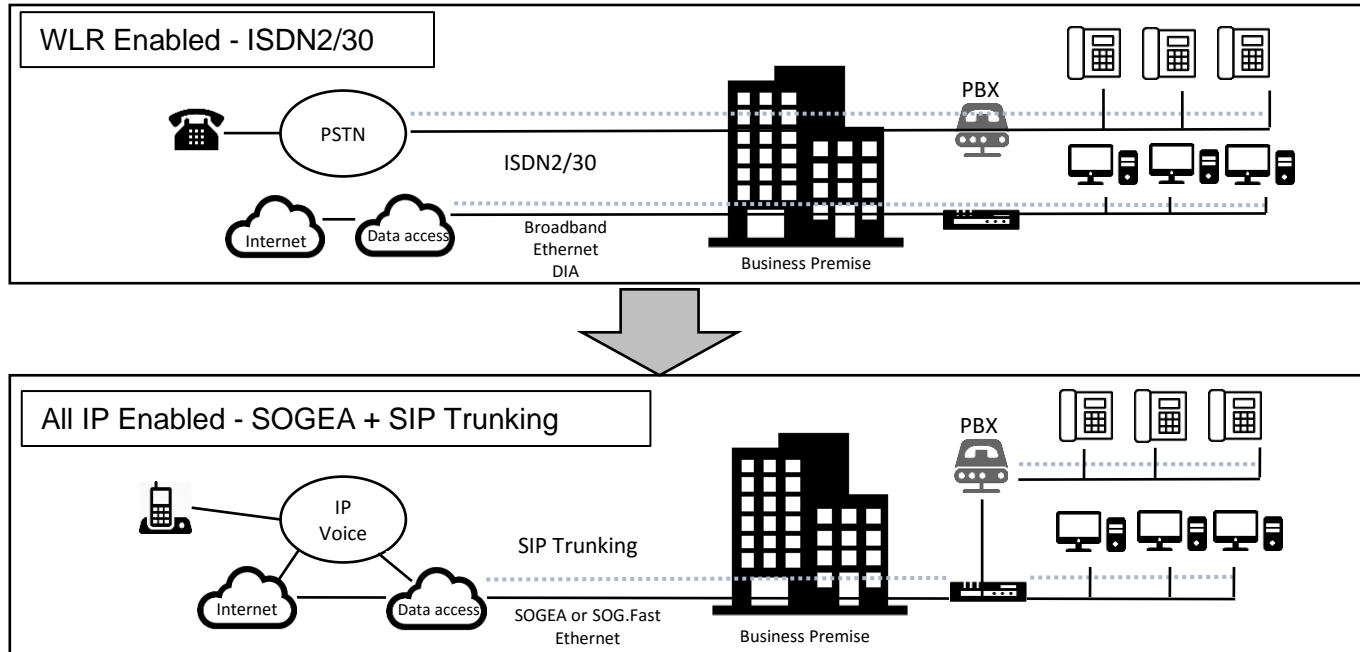


# 3a: Single Line market; moving from traditional to All IP



\* Or ADSL over SOTAP in future as alternative access option over which single line voice can be provided

# 3b: Multi Line market; moving from traditional to All IP



\* Many business 'skip' SIP and go straight to full hosted communications to remove the on-prem PBX as well



# 4: UK Communications market: The move to IP is already well underway



ISDN double digit declines

*1m+ reduction of lines in last 5 years*

100+ IP Comms Operators

*Diverse supply landscape already in place*

4G penetration exceeds 70%

*5G Services are coming soon*

Over 3m Hosted Telephony seats deployed

*Growth rate: 500k seats added last year*

Over 2.5m SIP channels deployed

*Growth rate: 300k channels added last year*

Over 50% Business IP comms penetration



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# 5: Systems X

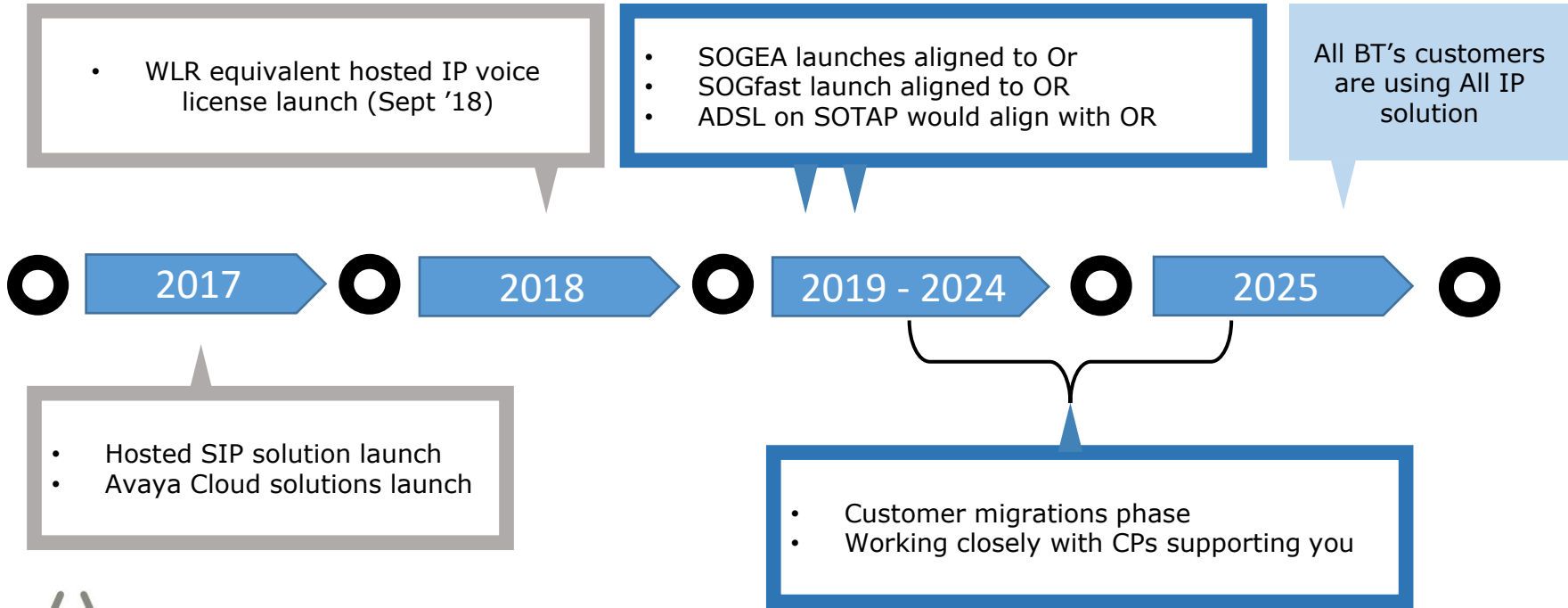


# 6: Fibre Data Centre





# 7: BT Wholesale: All IP Transformation Timelines



## 8: 26m NTE to change



# 9: Some of the key challenges we need to overcome working together

Migration service experience and scalability  
(inc. Porting)

Commercial Practicalities

Broadband not-spots

Non-standard use-cases

Impact on other markets/products  
(e.g. Interconnect, Wholesale Calls, CPS)



# Questions



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