

**The Future Digital Economy
Digital Content – Creation, Distribution and Access**

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**Presentation by Arndt Rautenberg, Chief Strategy Officer, Deutsche Telekom
30 January 2006
Session 4a: New platforms and content delivery opportunities**

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Session 4a: New platforms and content delivery opportunities

- A new telco industry is forming with alternative business models from both portal players and VoIP attackers entering the field. Whereas telcos have developed deep network and communication services competencies over time, new players are IP service centered.
- Four types of strategic moves by IP based players push VoIP and IP based multi-access services: VoIP and IM integration, telco partnering, multi-access IP services development and VoIP players partnering. These moves lead to an expansion of formerly "pure play" value chain positions to increasingly complete service offering portfolios.
- As a result, a certain value movement is induced. Whereas the IP service layer is a source of significant future value creation for telcos, the traditional telco business is experiencing a value shift towards the IP layer.
- The strategic imperative for telcos, therefore, is twofold. Conquering new business in the IP layer, and defending traditional telco core businesses.