

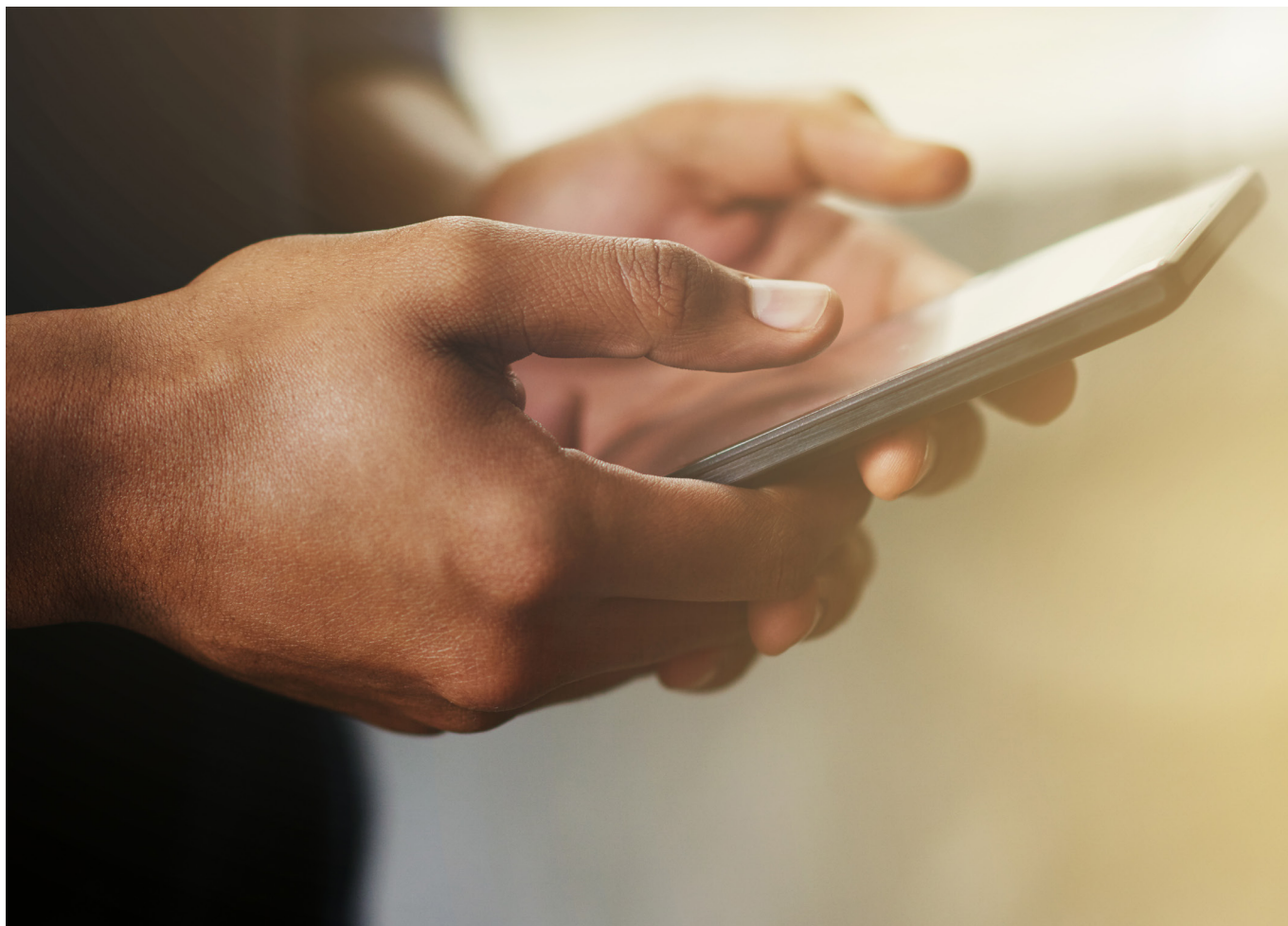


THE TELSTRA WHOLESALE MOBILE STORY

WHOLESALE



BUILD AND GROW WITH YOU



Australia's MVNO market is thriving, growing four times faster than the average rate for the mobile industry. As demand increases, so too does the expectation for quality experiences and services delivered on mobile devices.

Great customer experiences are about communicating the value of your powerful brand with an underlying, complementary world-class network supporting it. This creates a highly compelling proposition for your customers, empowering them to do more of the things they love.

We're passionate about helping you deliver this promise through mobile products that offer high download speeds across a large proportion of the population. This gives your customers coverage in the right places, when they need it.

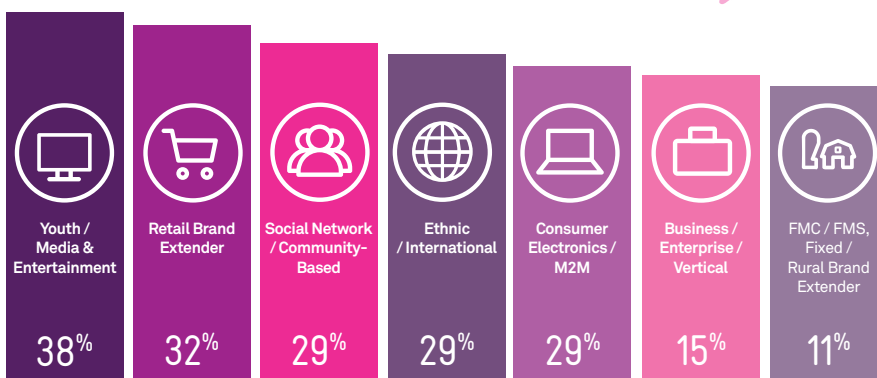
As the mobile market transforms and takes shape, you can be confident that our business will flex and scale with you.

GROWTH SEGMENTS FOR MVNOs

Shared by global MVNOs for 2016/17

WHOLESALE 

Survey respondents chose multiple answers



Insight: Focus on your segment: Tailor and target

Telstra Wholesale Powering Possibilities with Mobility
Visit: www.telstrawholesale.com.au/mobile

Source: Ovum, MVNOs Business Development Survey, 2015 (n=440)

YOUR OPPORTUNITY



Australia is one of the leading MVNO growth countries in Asia. Our market accounts for 7.9% of total mobile connections, only second highest in the Asian region after Hong Kong. Data demand is also set to triple by 2018, driven by mobile take up in the youth, media and entertainment sectors particularly.

Big changes in consumer spending patterns, particularly in these sectors, have made people far more receptive to MVNO value propositions. The greater availability of LTE wholesale products, including the launch of our own 4G services, has also helped boost demand. Now has never been a better time to be involved in our industry.

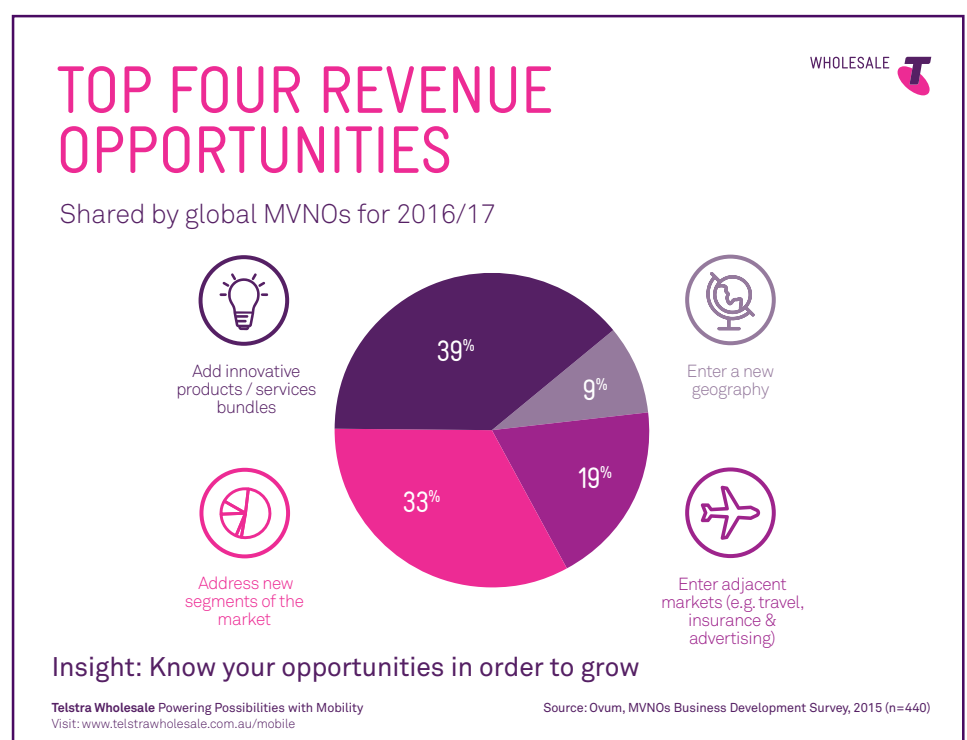
But with opportunity comes challenges too. Device and consumer electronics companies with massive brand awareness are gradually turning themselves into global MVNOs. They've changed the dynamics of the market by providing customers the option of 'out of the box' operation of network devices. Critically, their brand power is raising the level of competition in the MVNO market.

Brand and distribution capabilities are now increasingly the difference between success and failure.

We're seeing a number of differentiation strategies being employed by MNVOs. Some add innovative products and services, particularly through bundling; others are entering into new market segments as well as into adjacent markets like travel, insurance or advertising. Finally, some are expanding internationally.

We can help you discover your point of differentiation, showcasing the power of your brand, supported by a high quality network that delivers a great customer experiences.

This powerful combination will enable your customers to do more of the things they love, and stay connected in more places across the country.



DELIVERING GREAT EXPERIENCES



While a great network is important towards delivering the kind of experiences your customers want, it's only as good as the people that support it to help you become a leader and grow your business. The talent in our business is passionate about supporting your quest to deliver excellence to your customers.


1. DRIVE, ADAPT AND GROW

Working together, we're passionate about helping you deliver the best mobile experiences to your customers through our quality network, support and services.

As your business flexes to the fast-paced, changing demands of the Australian consumer, we will adapt too. We can help you drive excellence through the development of customised value propositions that meet the needs of different target customer segments.

We offer a range of insights, plan structures and wholesale pricing options that help you serve not only existing customers, but also identify emerging niche markets and customer trends.

Together, we manage your customers and their accounts in real time. This helps you to grow your business with immediate marketing opportunities, such as offering plan upgrades to customers based on their usage.

WHOLESALE 

THE ADAPTING MVNO MARKETPLACE: THEN & NOW

Shared by global MVNOs for 2016/17

← THEN		NOW →
Budget conscious users	→	Value-conscious users
Selling PAYG & airtime	→	Selling monthly, flat-rate, recurring services
Low maintenance / Low touch customer service	→	High maintenance / High touch customer service
No serious competition from MNOs	→	Increasing competition from MNOs
Lowering prices to compete	→	Adding services to compete
Premise-based, standalone service delivery platforms	→	Cloud services

Insight: New products, services & bundles are needed

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Source: Ovum, MVNOs Business Development Survey, 2015 (n=440)

DELIVERING GREAT EXPERIENCES



2. THE BEST NETWORK, SUPPORT AND SERVICES

Telstra Wholesale's mobile portfolio includes 4G, providing fast and reliable coverage over a quality network.

Our mobile services offer high download speeds across a large proportion of the population and in more places, reaching more than 98.8% of the Australian population across our entire portfolio. This means your customers experience better network performance as they move around the country.

Supporting our high quality network, we have the industry's largest team of talented, skilled and experienced people in network management, operational support and account management.

Combined with a range of plans that are designed to suit what your customers need, we offer a range of plan structures and wholesale pricing options including usage-based and/or fixed plan pricing. We'll help you to choose the mobile plan and pricing structure that best suit your market segments and your customers' needs.

OUR CUSTOMER PROMISE



We abide by our customer promise and look after the network infrastructure so that you can spend more time focused on your customers and growing your business.

1. PERSONALISED SERVICE

We listen and respond to you through our dedicated service managers, building strong relationships based on mutual respect and shared ambitions that address your unique needs.

2. TOTAL CONFIDENCE

We deliver high quality networks because we know performance and reliability is critical to your business. We also remove complexity and keep you and your customers informed with consistent communications and access to our 24x7 customer portal.

3. THE BEST WHOLESALE PRODUCTS AND SERVICES

We continually invest in our portfolios to create world-class products and services that deliver great customer experiences.



THE TECH BEHIND THE SPECS



We look after the network infrastructure and support so that you can spend more time focused servicing your customers and growing your business.

Network

- Telstra Wholesale 4G uses a combination of 1800MHz /700MHz for coverage with 2600MHz added for capacity in selected areas.
- 4G Carrier Aggregation, when supported by the appropriate device, will be available to combine frequency bands to maximise download speed
- Extensive high capacity backhaul covering at least 92% of the population.
- 4G devices will enjoy typical speeds of 2-50Mbps and upload speeds of 1 to 10 Mbps in 4G coverage areas.
- Utilising the 4G 700 MHz frequency bands provides better in-building penetration compared to higher frequency spectrum
- Your customers have access to a maximum download limit of 100Mbps on 4G across 96.5% of the population.
- Typical 3G download speeds of 1.1 – 20Mbps across more than 85% of the population, 550kbps to 8Mbps across more than 95% of the population and 550kbps to 3Mbps in remaining coverage areas (reaching more than 98.8% of the population).
- Typical 3G upload speeds of 300kbps-3Mbps across more than 93% of population and in remaining coverage areas 300kbps-1Mbps.

Support

Your brand can benefit from efficient, real time customer management:

- You can minimise your costs by integrating important operations with us. Working in conjunction with Ericsson, we have developed one of the world's leading mobile platforms that integrates fully with your own internal systems.
- This state-of-the-art platform helps deliver not only increased productivity benefits to your business, but helps you better manage your customers with real time billing, charging and account balance management in real time.
- We can help you with customised branding and elements of the service delivery for your target market.
- We offer a range of wholesale billing options to support your retail pricing plans.
- 24x7x365 network health monitoring and proactive capacity management.

To find out more about your mobile opportunity, visit: www.telstrawholesale.com.au