Convergence: Winning with Wireless in a Wired World

Moderator:
Jim Patterson, President – Sprint Wholesale
Wireless Industry Continues to Grow

Mobility has become an integral part of everyday business and personal life.

Wireless Penetration

Growth in Text Msg. Subs and Revenue

Wireless-only Households

Aircards/Laptop Modems

Wireless-only HH (M)

% of HH Wireless-only

Subs in Millions

Subs

Revenue ($B)

Subs (M)

Revenue ($B)

Subs

Revenue

CompTel Plus

Spring 2009 Convention + Expo
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Fedor Smith, President – Atlantic-ACM
Monitor wireless trends/products/features
- Forecast realistic growth expectations and uptake
  - Evaluate primary revenue potential
  - Evaluate secondary revenue opportunities
  - Evaluate direct/indirect demand generation

Key drivers of wireless convergence:
- Mobile only customers
- Data growth/4G
- Smart phones
- Mobile application explosion
- Growth in mobile for business
- Multi mode handsets/VoIP
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Jim Geiger, President & CEO – Cbeyond
Cbeyond at a Glance…

- Serving +42,000 small businesses in 12 major U.S. cities
- VoIP provider since late 1999; MVNO since early 2006
- BeyondVoice package integrates voice, broadband and mobile
- 30 productivity enhancing applications (SaaS focus)
- 2009 Revenue Guidance = $420 - $440M
- Strong Organic Growth (+20% YoY)
- Profitable, +$40M in Cash and No Debt

Small Business Focused

Managed Services Provider

Strong Financials

Winning with Wireless…

Simple Packaging

Integrated Applications

Consultative Sales Force

Back-Office Investments

Technology Partners
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Mike Roudi, Group Vice President of Wireless Services – Time Warner Cable
Mobility as a Feature

Differentiate thru Seamless Integration

Second largest cable company in the U.S.

Serving more than 14 million customers with over 24 million Revenue Generating Units (RGUs)

Customers concentrated in 5 clusters: New York State (including NYC), Southern CA (including LA), the Carolinas, Ohio, & Texas

Time Warner Cable

Video

High Speed Internet

Communications

Winning with Wireless...

Inside Out

Mobility as a Feature

Leverage WiMax

Differentiate thru Seamless Integration

Convergence Applications
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Scott Foote, President & CEO – NetWolves
Simplifying the management and use of telecommunications services for our customers

- Managed Services Provider
- Over 1,000 customers, representing 6,000+ end locations including:
  - Barnes & Noble, Boston Markets, Goodyear, McLane Company, Spacenet, Suburban Propane, & Sbarro’s
- Diversified growth strategy: Award winning Channel/Agent Program, Enterprise, & Strategic
- Service concentrations include:
  - Inclusive project management; from design to install to billing
  - Consolidated Broadband Internet Access utilizing DSL, cable, wireless mobile broadband, & Wi-Max
  - Redundant Wire-line telecommunication services including Dedicated Internet, MPLS, Private Line, & Voice
  - Integrated security based solutions including managed firewall & managed router
  - Proactive 24/7 network monitoring utilizing our patented Security Remote Monitoring System (SRM2)
- Contracts with 120+ providers including: Sprint, AT&T, Verizon, Comcast, Time Warner, Cisco, & Clearwire

Winning with Wireless...

Managed Services Drivers

Wireless Mobile Broadband Solutions

Customer Apps Driving Need for Bigger Pipes

Fixed (Primary) Mobile Broadband Solutions

No “Real” National Broadband Providers

Disaster Recovery & Failover
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Eliot Feldstein, Vice President & General Manager of Channels and Alliances – DriveCam
• DriveCam at a Glance
  – Privately held. HQ in San Diego, CA
  – Innovation leader in Driver Risk Management
  – Better driving = fewer collisions & lower operational costs = saves $$ for clients
  – Subscription/recurring revenue based SaaS model
  – Over 100,000 fleet vehicles deployed + rapidly growing
  – Reduce total cost of fleet risk by 50%

• Why Wireless Matters
  – DriveCam depends on M2M connectivity to vehicles
    • Access to fully mobile client fleets across national footprint
  – High bandwidth requirements for video file transmission
  – Real-time data availability for vehicle data upload
  – Firmware & configuration download capabilities to vehicles
  – Avoid operational and IT related obstacles of WLAN
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Jim Patterson, President – Sprint Wholesale
Q & A
Contact Information

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