



DIGITALIZATION EVOLUTION IN TELECOMS

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LIFE IS FOR SHARING.

THE SPEED OF DIGITAL DISRUPTION WE'RE FACING IS EXTRAORDINARY



LIFE IS FOR SHARING.

IT IS EVERYWHERE.....



Uber, the world's largest taxi company.....**owns no vehicles**



Airbnb, the world's largest accommodation provider.....**owns no real estates**



Skype, largest phone company**owns no telco infra**



Facebook, the most popular media owner**creates no content**



Alibaba, the world's most valuable retailer.....**has no inventory**

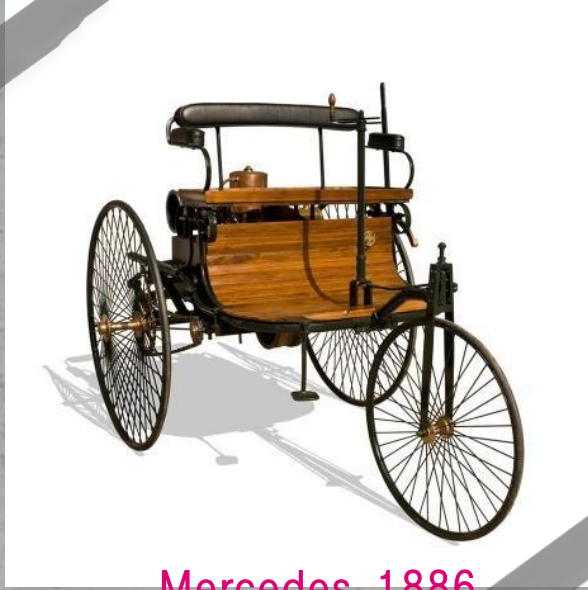


Netflix, the world's largest movie house.....**owns no cinemas**



Apple and Google, the world's largest SW vendors.....**don't develop Apps**





Mercedes 1886



Self-Driving Truck
2015

Travel Pilot IDS 1989



LIFE IS FOR SHARING.



First Credit
Institutes 13th
century



Banking
Roboter 2015

Online
Banking
1983





QR Shopping
2013

Amazon.com
1995



Corner Shop
last century



FROM INDUSTRIALIZED WORKFLOWS TO COMPLETELY DIGITIZED WORKFLOWS – ARE WE PREPARED?

YESTERDAY



Machine support for repetitive tasks

TODAY



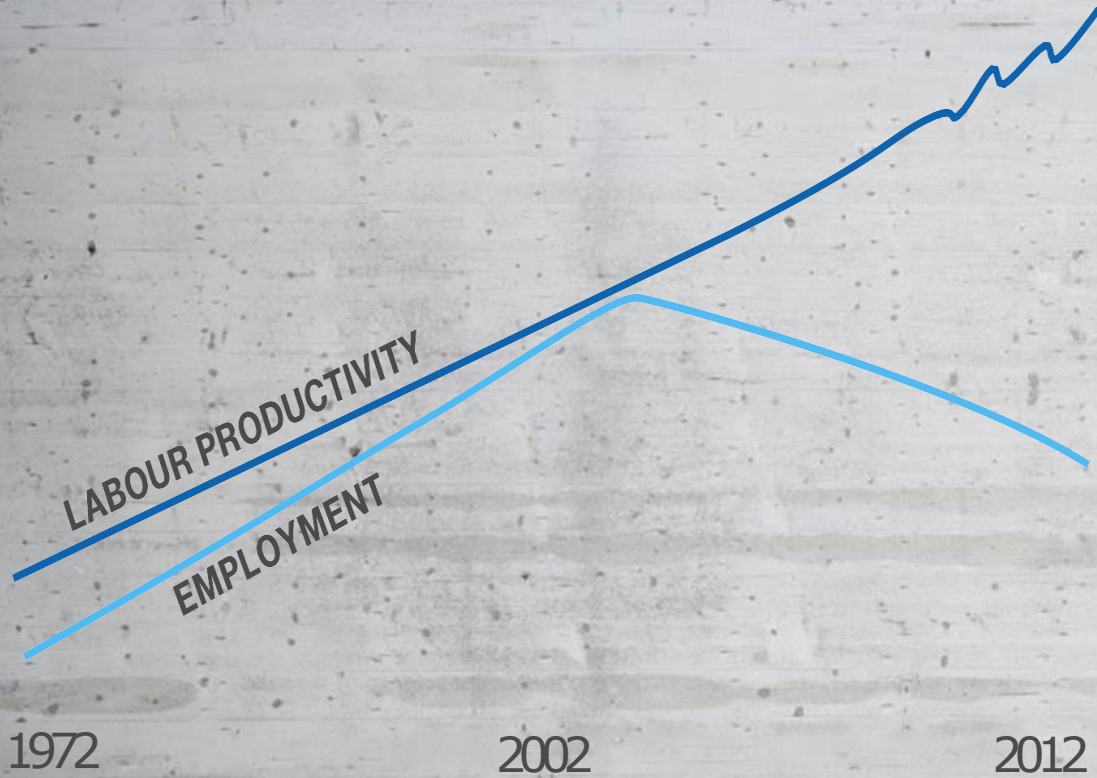
Hard coded workflow automation & decision support

TOMORROW



Autonomous self learning machines taking decisions

MACHINES INSTEAD OF PEOPLE – FULL DIGITALIZATION ALL AROUND

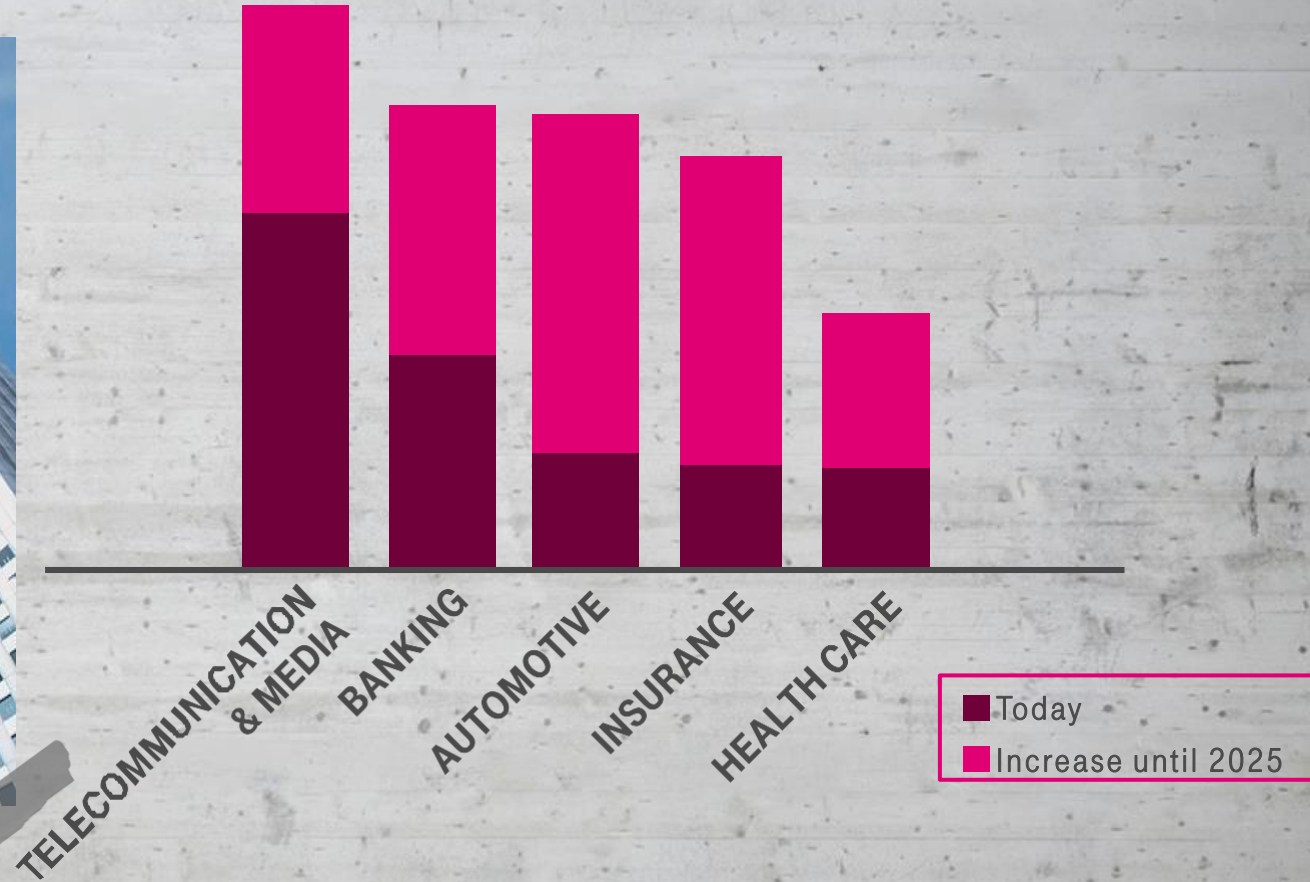


Source: Brynjolfsson/McAfee: „The Second MachineAge“



- 4 out of 10 Companies will be displaced by digital disruption in the next 5 years
- Digital Disruption force is pulling down all industries towards the digital center

WHAT DOES IT MEAN FOR US AS TELEKOMMS?



LIFE IS FOR SHARING.

VOICE IS DEAD?

VOICE

LONG LIVE DATA



LIFE IS FOR SHARING.

WHERE IS OUR FUTURE?

MONETIZE ON FAST DATA WITH Millennial Generation Z

+ 68% teachers consider digital tools make students take shortcuts – they communicate with speedy images and real time video

+ Adora Svitak > 4 mn Ted talk views “what adults can learn from kids – Gen Z”

+ 25% left FB in 2014. afraid of tech stalking, instead use incognito media – Snapchat, Whisper, Secret.....



+ 72% young students want to make own business

+ 52% teens use utube and social media for resarch

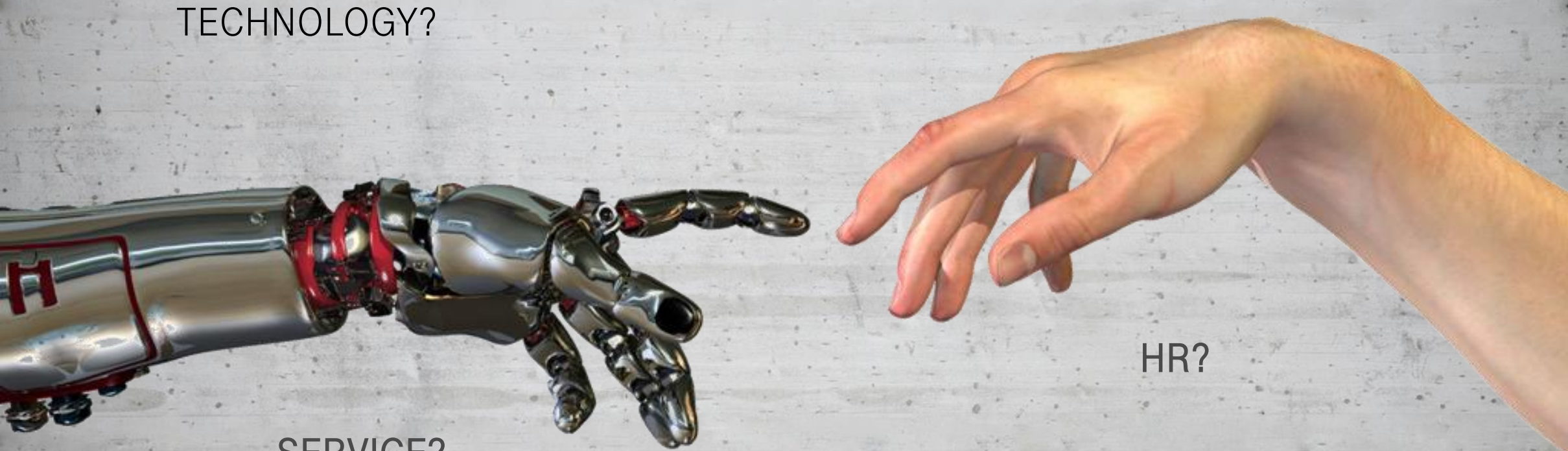
+ 90% teens think in 4D, 3D even printing already outdated

+ Teens multitask across 5 screens



LIFE IS FOR SHARING.

MACHINE CAPABILITIES STILL NEED OUR IDEAS!



TECHNOLOGY?

FINANCE?

HR?

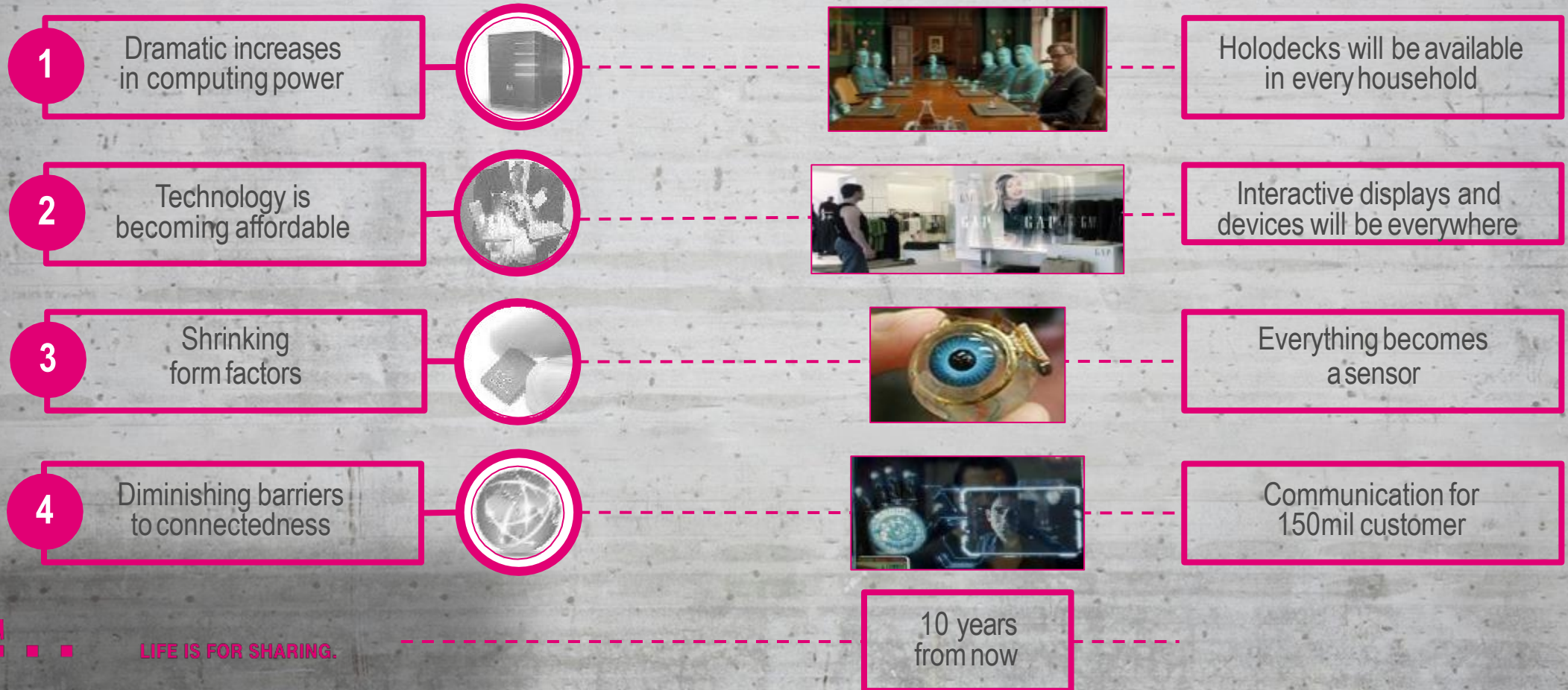
SERVICE?

MARKETING?



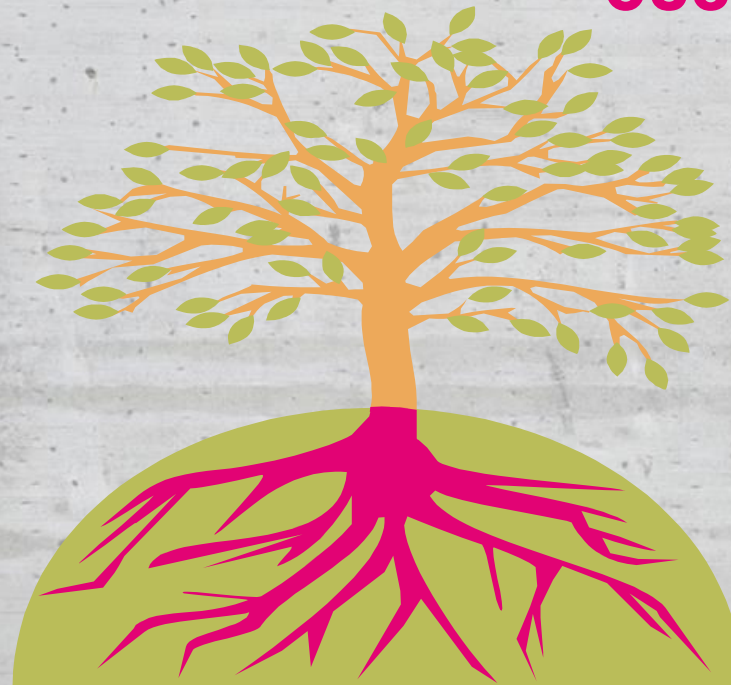
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MONETIZE ON DATA, ADOPT TO DIGITALIZATION WORLD – PREPARE THE FUTURE



OUR COMPETITIVE ADVANTAGE: BEST CUSTOMER EXPERIENCE THROUGH TECHNOLOGY LEADERSHIP

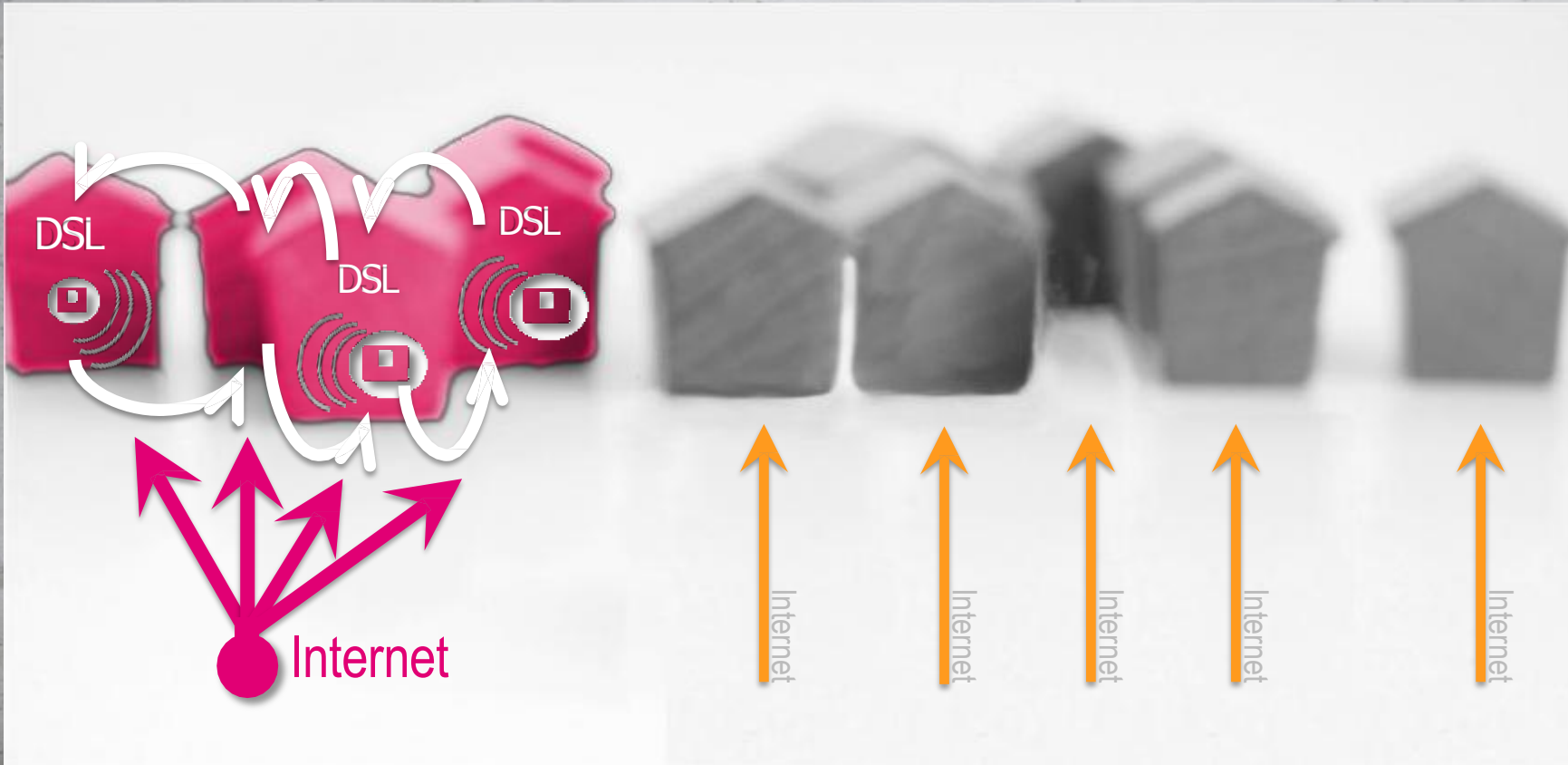
CUSTOMER EXPERIENCE



TECHNOLOGY LEADERSHIP



OUR COMPETITIVE ADVANTAGE: HIGH SPEED BANDWIDTH THROUGH ACCESS BUNDLING



Bottlenecks by simultaneous usage



No bottlenecks by utilizing unused bandwidth



LIFE IS FOR SHARING.

OUR COMPETITIVE ADVANTAGE: HIGHLY ADAPTIVE AT ALL AVAILABLE ACCESS POINTS



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OUR STRATEGY LETS GO DIGITAL

G@ DIGITAL

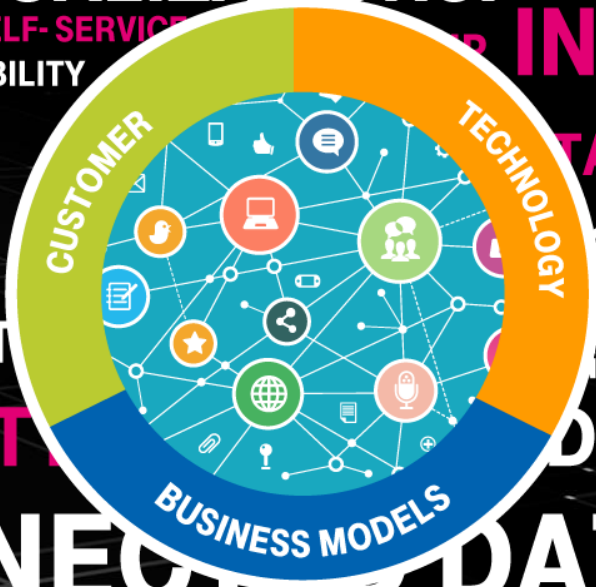
- **DIG-I-TI-ZA-TION /DIJ-I-TAHY-ZĀ-SHəN/**
 - **UNDERSTAND AND SIMPLIFY THE BUSINESS, OPERATIONS AND SECURITY POLICY AND PROCESS**
 - **ORCHESTRATE AND ACCELERATE THE SIMPLIFIED POLICY AND PROCESS THROUGH TECHNOLOGY AUTOMATION**
 - **INSIGHTFUL ANALYTICS THAT DRIVE BUSINESS OUTCOMES, FASTER**
 - **THE EXPERIENCE BECOMES THE PRODUCT**

WHY
INNOVATIONS
ARE SO
IMPORTANT?

WE ARE
TECHNOLOGY
LEADER ...
BUT YET TO
MONETIZE

IN THE PAST BIG ATE SMALL ... TODAY FAST EAT SLOW

INDIVIDUALIZATION
INTERNET OF THINGS
WAITING TIME IN SHOPS
BANDWIDTH
ECOSYSTEM
VIRTUALIZATIONS.
SELF-SERVICE
STABILITY
INTERNET OF T
DATA ANALYTICS
OVERAGE
IS THE RESOURCE
TIME IN SHOPS.
DIGITALIZATION
DATA PLATFORM
OPEN PLATFORMS
CONVENIENCE
DIGITALIZATION

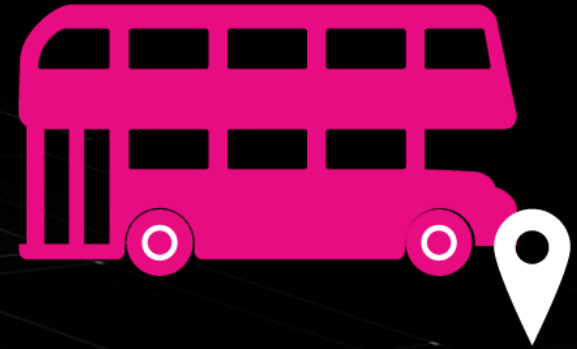


OUR SMART CITY- GROUND FOR DIGITAL SOCIETY

SMART TICKETING

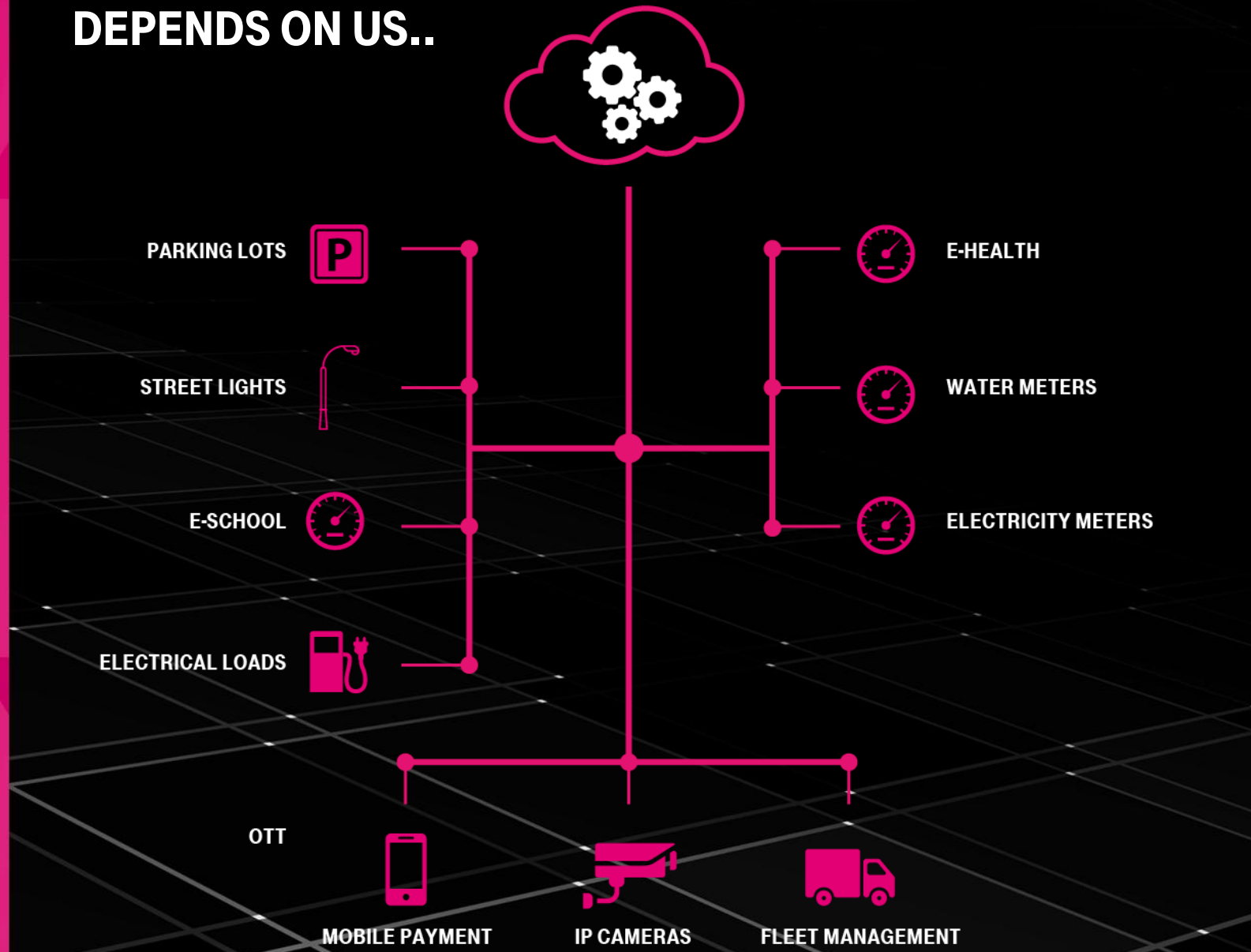


SMART VEHICLE CONTROL



**WE AS
ICT PROVIDER
ARE
SETTING THE
GROUND
FOR THE
DIGITAL
SOCIETY**

**PLENTY OF OPPORTUNITIES OUTSIDE.. FUTURE
DEPENDS ON US..**



**MORE THEN
60% OF
BUSINESS USERS
WILL BE PARTLY
OR WHOLLY
PROVISIONED
IN THE CLOUD
BY 2020**



**WE NEED TO CHANGE AND ADOPT TO IT
MONETIZE ON DATA, CONNECT THE "ISLANDS"**

WITH MANAGED SERVICES



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DT (MKT) CISCO – ROSE PROGRAM

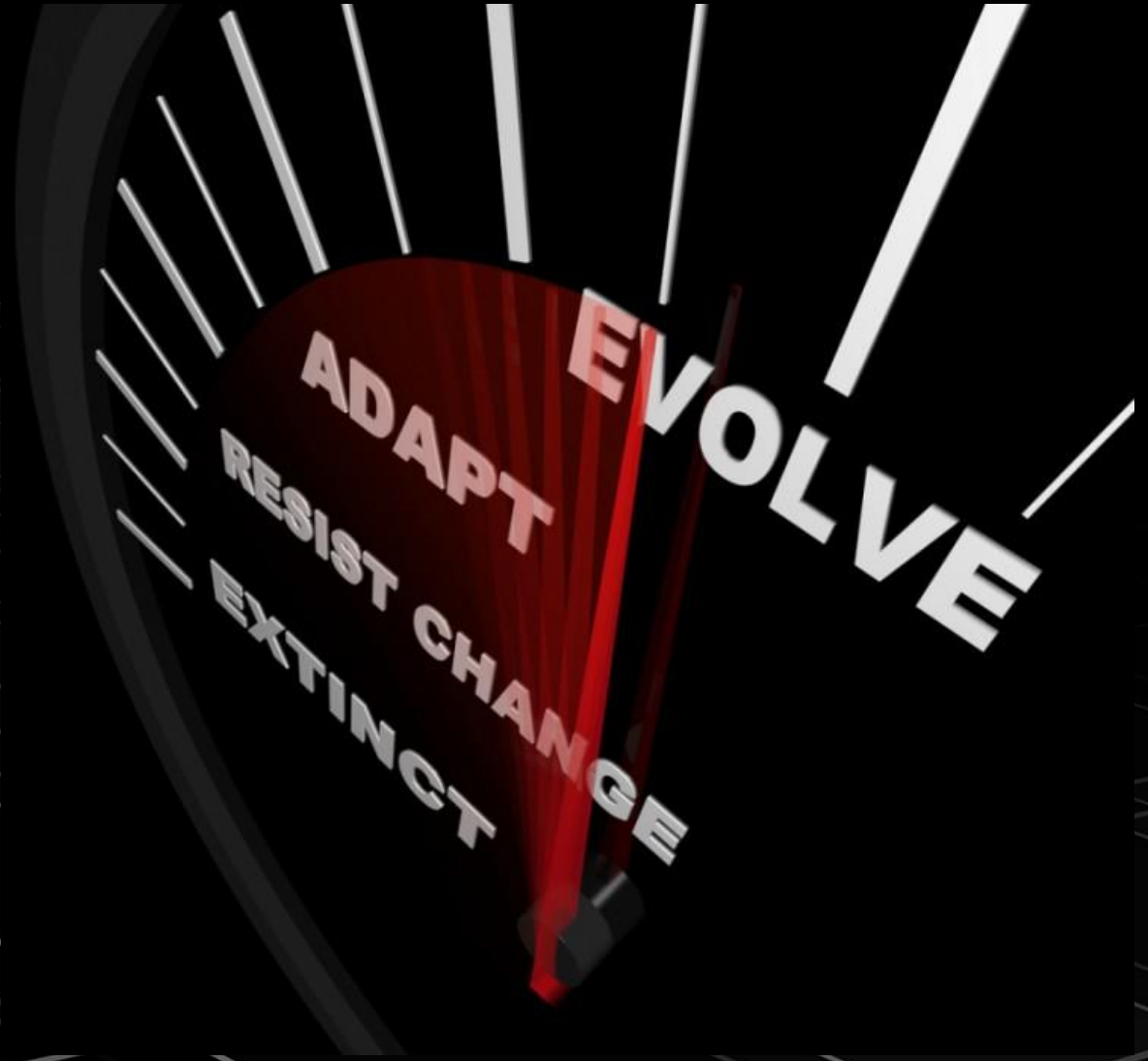
**WE CANT
DO IT ALONE!
WIN WITH
PARTNERS**



TOGETHER WE WILL

ONLY THOSE WHO CHANGE AND ADOPT SURVIVE

**STILL-
WE MUST
BE
FASTER!**



**“THE COST OF DOING
THE SAME OLD THING
IS FAR HIGHER THAN
THE COST OF
CHANGE”**

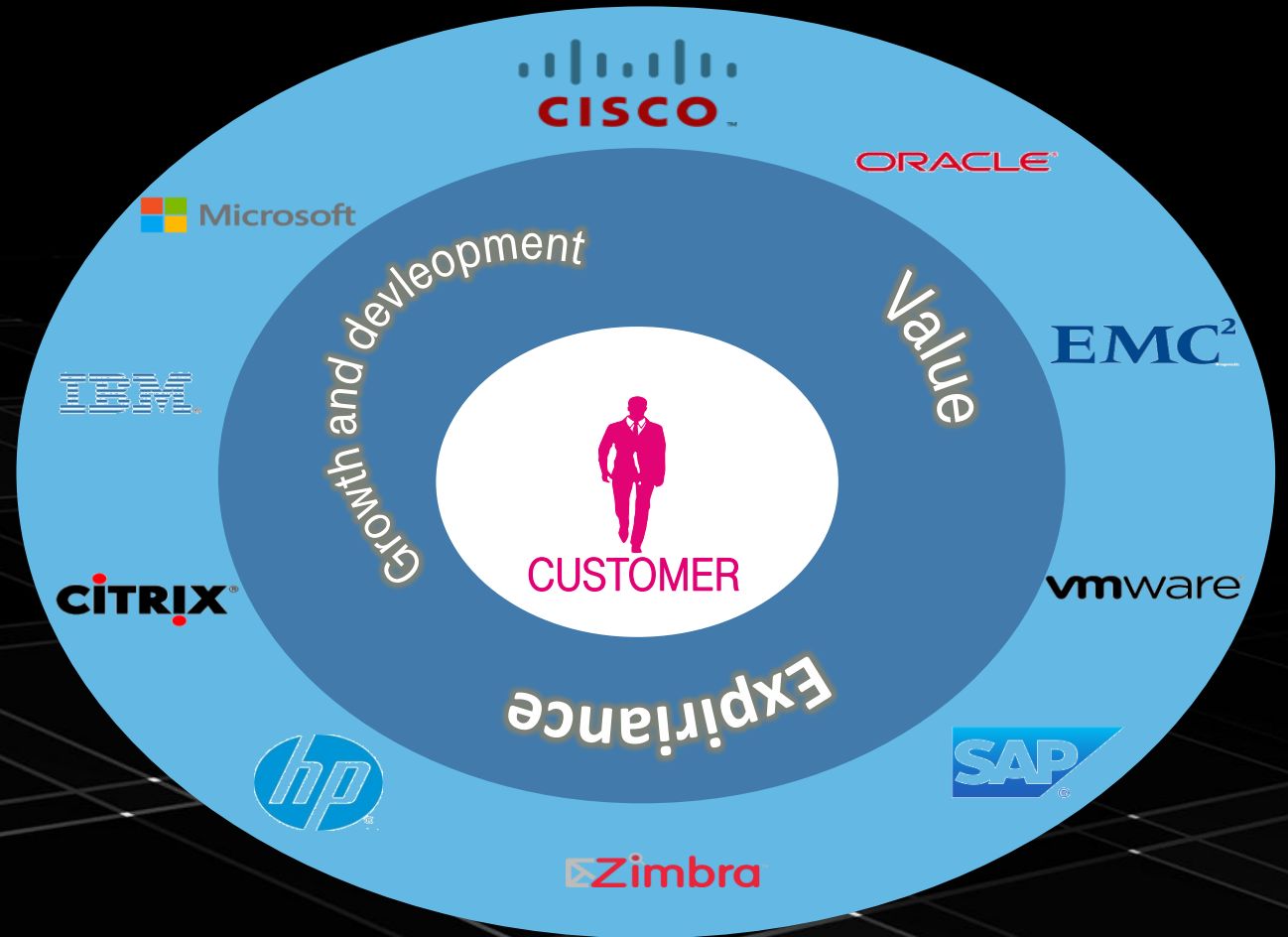
— BILL CLINTON



TOGETHER WITH CISCO:

- WE ARE NUMBER 1 ICT MARKET PLAYER
- WE ARE FIRST CHOICE FOR CLOUD AND MANAGED SERVICES
- WE ADD VALUE FOR OUR CUSTOMERS
- WE ARE PERCEIVED AS COMMON BRAND FOR BEST SERVICE

WINNING WITH OUR PARTNERS – WE FURTHER DEVELOP AND SHAPE THE DIGITAL FUTURE



WINNING WITH PARTNERS - CISCO

JOINT AMBITIONS

FOCUS AREAS

- Joint offer
- Developing managed service
- Developing joint Cloud strategy on Cisco infrastructure
- Developing Cloud services



No 1 partner

No 1 CISCO PARTNER IN CEE REGION

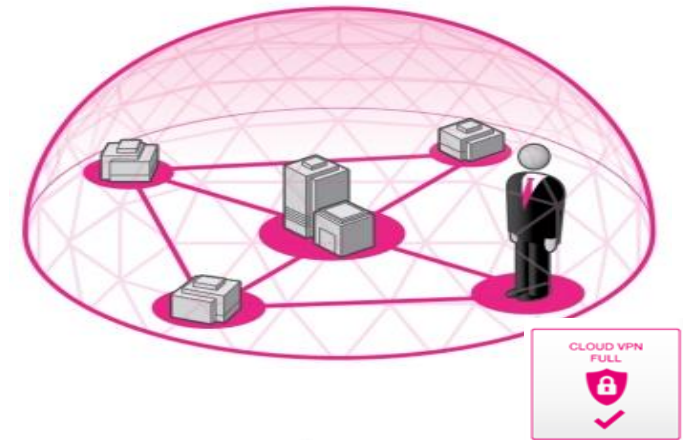
CAGR > 30 %

>30% REVENUE GROWTH BY 2020



CISCO GOLD PARTNER FOR DT NATCOS

JOINT SERVICES UNDER T



LIFE IS FOR SHARING.

WE BUILD SUSTAINABLE BUSINESS TOGETHER

OUR INTEGRATED PORTFOLIO ON SECURE CLOUD



Cloud Network (Meraki)



Infrastructure AA Service



Cloud VPN



Disaster Recovery
AA Service



Cloud UC Suite



G- Cloud



MetaPod



OUR MANAGED SERVICES

COMMUNICATE WITH NO MEDIA INCOMPATIBILITIES

COMMUNICATION

IP telephony



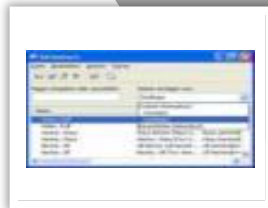
Mobile devices



Notebook



Corporate directory



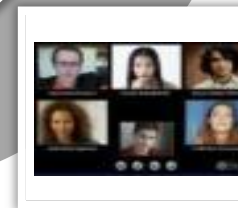
Fax



E-mail



Instant messaging & presence



Web and video conferences



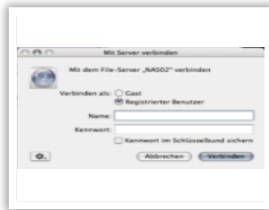
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OUR MANAGED SERVICES

COLLABORATE IN REAL TIME

COLLABORATE

Identity/ rights management



Versioning



Communities/ Social media



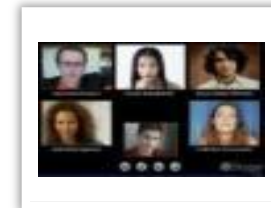
Secure document storage



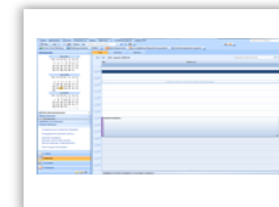
Real-time communication



Web & video conferencing



Calendar



Business processes

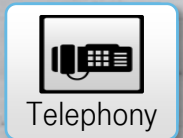


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OUR MANAGED SERVICES

INTEGRATED SERVICES FROM THE SECURE CLOUD

End user / client



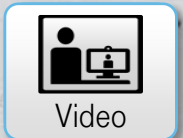
Telephony



Fax

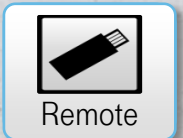


Computer

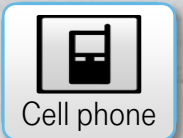


Video

Devices



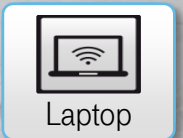
Remote



Cell phone



Tablet



Laptop

Transport



Homogeneous ICT platform



Production

MKT Private/Public Cloud



Communications & collaboration

- | | | | | | |
|------------------|--------------|------------------------|-----------|---------------|------------|
| Voice | Fax | Video | E-mail | Intranet | |
| Mobile telephony | Ad-hoc conf. | Chat / Inst. messaging | Directory | Presence info | Doc. mgmt. |

End-to-end service levels



LIFE IS FOR SHARING.

MAKEDONSKI TELECOM AS CISCO GOLD PARTNER AND CISCO ARE YOUR PARTNER FOR THE DIGITALIZATION ERA



GLOBAL CAPACITIES AND INTEGRATED ICT

FMCC (FIX, MOBILE, CLOUD CONVERGED) INTEGRATED FROM SINGLE SOURCE



STRONG CLOUD AND SECURITY EXPERTS

ENGINEERING MADE IN MACEDONIA, KNOW HOW SYNERGIES MADE IN CISCO and DT FOOTPRINT



WE ARE EXPERTS FOR ICT TRANSFORMATION SIMPLICITY AS BASIS



LIFE IS FOR SHARING.

SHARING OUR STRATEGIES – WE CREATE VALUES SHAPING THE FUTURE IN THE DIGITAL WORLD

1

Simple products and services under one brand, letting customers to care only for their core business – fully outsource their technology needs to us

2

Optimum pricing for service, no direct investments, letting customers invest into their core businesses and bring technology TCO at least 20% lower

3

Success based on **building trusted partnering** – global international innovations with local implementations and customization

PARTNERING CISCO, WE
MANAGE TO DELIVER OUR
STRATEGY BECOMING
LEADING TELCO AND ICT
SERVICE PROVIDER IN
EUROPE



Lets join forces and
tackle the challenges
together!

