

the Art of connecting

is realising the possibilities
in the cloud



EIF Delegation visit in BT
Settimo Milanese, 17 October

Connections are our business



Our vision

BT Global Services is a global leader in managed networked IT services, operating globally and delivering locally to help our customers thrive in a changing world.

What makes us different?

- A global team of around 19,900* people, with one of the largest professional services capabilities in our industry
- Bringing together a broad portfolio of services
- With a track record of delivering for customers globally in more than 170 countries
- Underpinned with a unique breadth of scope, reach and capability
- Recognised as market leading for customer service and innovation

“BT has developed a strong IT business, with a core portfolio that includes consulting and professional services, as well as a centralized core of global account management team and supporting specialists that is perhaps the best in the business.”

IDC MarketScape: Worldwide Telecom Service Provider 2013 Vendor Assessment, February 2014

“BT will be the first provider in Europe to deliver Microsoft Azure ExpressRoute, gaining a regional advantage in securing workloads for enterprises seeking a more secure public cloud service. Customers will benefit from private connections from their premises to Microsoft’s Azure data centers in Dublin and Amsterdam, leveraging BT’s global IP Connect VPN service and bypassing the public Internet.”

BT to Get Piece of Microsoft Public Cloud as First Azure ExpressRoute Provider in Europe, Current Analysis, John Marcus, April 2014

“BT Global Services is very strong in comparison to other global data centre and cloud services providers, because it has taken an evolutionary approach to its portfolio development which mirrors the range of market readiness for virtualized IT services”

Global Data Center and Cloud Services product assessment, Current Analysis, John Marcus, May 2014

*These reflect the full-time equivalent of full and part-time employees

We are part of BT



BT is one of the world's leading communications services companies, servicing the needs of customers in the UK and more than 170 countries worldwide.

- Providing high quality telecommunications services since 1846
- Revenues of more than £18bn in 2013/14
- 87,800* employees globally
- £530m investment in global research and development in 2013/14
- Relationships with 25 universities globally, including Cambridge, MIT and Tsinghua



*These reflect the full-time equivalent of full and part-time employees

Investment in global research and development



Innovating with customers, partners and universities

- One of the largest technology investors in R&D in the UK
- A total worldwide portfolio of 4,300+ patents and applications
- BT has invested more than £3.8bn in R&D over the last five years
- More than 14,000 scientists and technologists
- Global development centres in the UK, India, Malaysia
- R&D and innovation centres in the UK, US, Israel, UAE, India and China
- Dedicated innovation-scanning teams covering the US, Asia, Europe and the Middle East

BT Showcases

The BT Showcases provide an interactive experience which takes customers on a journey helping them through their business challenges.

BT enables Showcases visitors not only to hear about BTGS capabilities but to see, touch and feel them through live personalised demonstrations. This really does help them understand how they work and how they can be useful to their own organisations.

Universities

- University of Cambridge
- MIT
- Khalife University (EBTIC)
- Tsinghua University, Beijing

Government

- Research Councils UK
- Department for Business Enterprise and Regulatory Reform
- Broadband Forum
- Seventh Framework Programme
- Technology Strategy Board



Our ambition to be a responsible and sustainable business leader



Connected Society

To help improve society globally through the power of digital connections

2020 Goal

9/10

“More than 9 out of 10 people in the UK will have access to fibre based products and services.”

Net Good

To help society live within the constraints of our planet's resources through our products and people

2020 Goal

3:1

“We will help customers reduce carbon emissions by at least three times the end to end carbon impact of our business.”

Improving Lives

To help improve hundreds of millions of lives globally through our products and people

2020 Goal

£1bn

“To use our skills and technology to help generate more than £1bn for good causes.”

BT people power Better Future in their work and volunteering.

Our aspiration is to encourage and support 50 per cent of BT people to join in and volunteer for communities and good causes by 2015/16

Who are our customers?



Experience and track record of delivery with a wide range of customers globally

A global leader in managed networked IT services

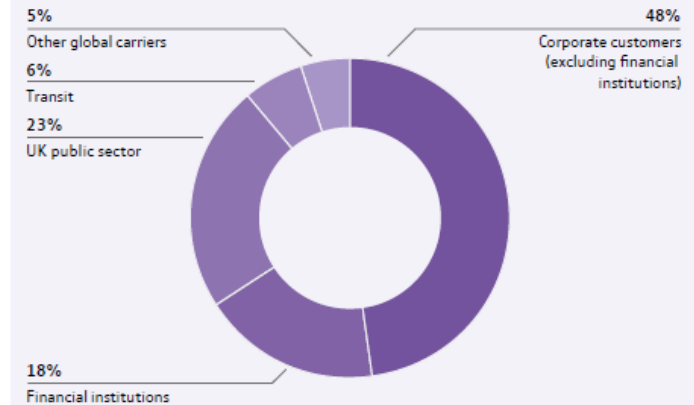
We serve:

- 100% of the FTSE100 companies
- 84% of the Fortune 500 companies
- 86% of Interbrand's top 50 annual ranking of the world's most valuable brands
- The world's top stock exchanges, leading broker-dealers and biggest banks
- National and local government organisations and other public sector bodies in the UK and in 24 countries around the world

Experience and a track record

- More than 6,500 corporate and public sector customers across more than 170 countries.
- Widely recognised as market leader by industry watchers

BTGS revenue by sector 2013/14



N.1 in BTGS outside UK for revenues, infrastructure excellence and breadth and scope of competencies

BT in Italy is the leading supplier of services and integrated IT and communications solutions dedicated to Enterprise and Government organisations

- “State of the art” network infrastructure : 14.000+ Km across the national territory (cables and optical fiber)
- Data Centre (DC) infrastructure of excellence: 5 DC, total space 13.000 sqm (2 Tier II, 2 Tier III, 1 Tier IV)
- The most relevant Security & IT Services practice within BTGS : Business Continuity Control Centre with ICT experts (IP networking, IT Services, SAP) operating H24.
- Recognised & certified expertise: ISO9001, ISO27001, ISO14001, OHSAS 18001, ITIL Service Mgmt. compliance
- Professional Services team of excellence in the areas of UCC, Security, CRM, SAP, Mobility, Sustainability and IT Services
- First Business-only MVNO in Italy, we have a complete offer in the Mobility area
- Customer base: 1.000+ Large organisations (Enterprise and Government) and 80.000+ SMEs; turnover 800+M€

Headquartered
in Milan, with
regional
offices in Turin
and Rome

Commercial
offices in main
Italian cities.



Customer needs drive our global and local offer



Our industry expertise enables us to meet customer needs across a range of sectors



Media



Transportation



Fashion and Retail



Government



Technology



Mining Oil and Gas,
Utilities



Manufacturing



Finance



Automotive

- Our customers: multi-site businesses with complex supply chains and covering a wide geographical area - a typical pan-European corporate client has a range of demands, both in terms of its own use of communications services, but also in terms of capacity demands and geographic location
 - **Large sites**, such as headquarters, are provided on very high capacity and demand business grade performance. That means fibre-based connections, with a strong preference for Ethernet.
 - **Headquarters** tend to be located in major city centres, where in some instances competitive fiber supply can be available
 - **Factories, warehouses, data centres** also require very high capacity and business grade services but tend to be located far outside city centres where there is no competitive network supply — just the incumbent
 - **Smaller sites** — small offices or home workers — sometimes need less bandwidth and may prioritise a less costly service over the business performance offered by dedicated fibre. That means a mix between low bandwidth fixed fibre access — Ethernet — often outside major city centres and DSL. Client focus here is the ability to offer flexibility to suit their local needs, fibre or DSL, wherever they need to go.
 - **Other uses** — based on mobility or no network coverage — may need 3/4G services or VSAT.
- All these sites are increasingly spread across Europe. They may not even be a single entity but independent companies that form part of the same value chain.

So what is required to ensure we can serve our customers?



- **Availability of essential wholesale access products**, suitable for business needs - Ethernet / leased lines, bitstream
- Regulatory safeguards to ensure **accounting transparency, non-discrimination** etc - Regulated access on truly effective terms
- **Consistency across Member States** in EU- Availability, approach and outcome
- **SMP access bottlenecks must be remedied** - Pan-EU operators do not have the scale to invest throughout whole EU28

Key component for Cloud and other ICT services over Managed IP/VPNs

- **Remove regulatory asymmetries between EU and third countries** in international trade negotiations – strong ICT chapters with pro-competitive whole sale access rules, particularly in TTIP, TiSA

The solutions we provide



Bringing together a broad portfolio of services into an integrated solution

