



# Institutional Briefing Day

September 15, 2016

## Welcome

### Agenda

09:00	Registration	09:30	Breakfast
09:30	Welcome	10:00	Agenda
10:00	Agenda	10:30	Breakfast
10:30	Breakfast	11:00	Agenda
11:00	Agenda	11:30	Breakfast
11:30	Breakfast	12:00	Agenda
12:00	Agenda	12:30	Breakfast
12:30	Breakfast	13:00	Agenda
13:00	Agenda	13:30	Breakfast
13:30	Breakfast	14:00	Agenda
14:00	Agenda	14:30	Breakfast
14:30	Breakfast	15:00	Agenda
15:00	Agenda	15:30	Breakfast
15:30	Breakfast	16:00	Agenda
16:00	Agenda	16:30	Breakfast
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18:00	Agenda	18:30	Breakfast
18:30	Breakfast	19:00	Agenda
19:00	Agenda	19:30	Breakfast
19:30	Breakfast	20:00	Agenda
20:00	Agenda	20:30	Breakfast
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22:00	Agenda	22:30	Breakfast
22:30	Breakfast	23:00	Agenda
23:00	Agenda	23:30	Breakfast
23:30	Breakfast	24:00	Agenda

### MNF Group Executive Team



## MNF Group



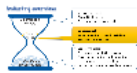
Rene Sugo  
Chief Executive Officer

"Your world connected"

## Products & Network



## Overview



## Future



# MNF Group Executive Team



**Rene Sugo**  
CEO



**Tim Dunning**  
Global Commercial  
President



**Jon Cleaver**  
CCO



**Ritsa Hime**  
COO



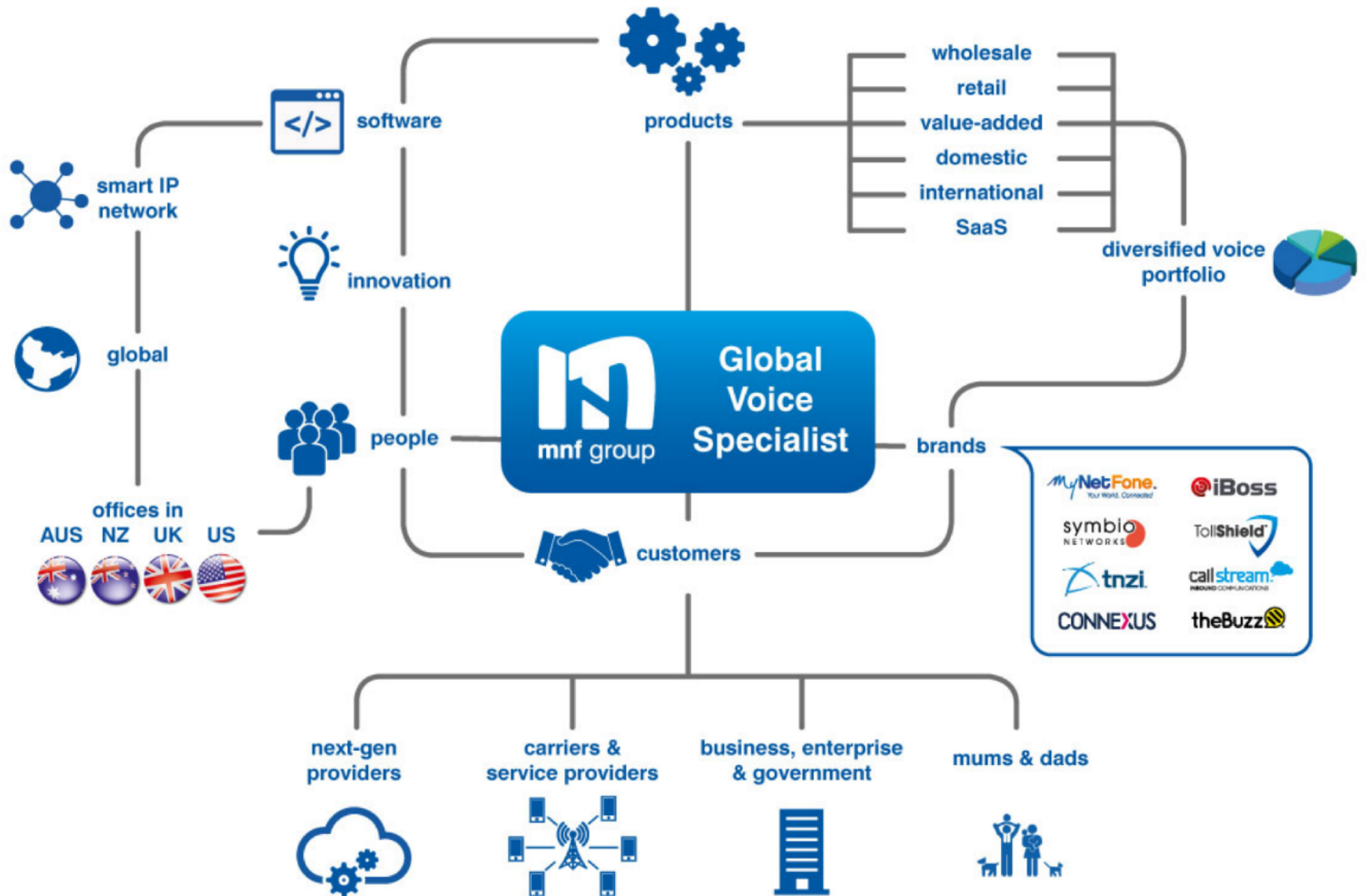
**Indika Nanayakkara**  
CTO



**Matt Gepp**  
CFO

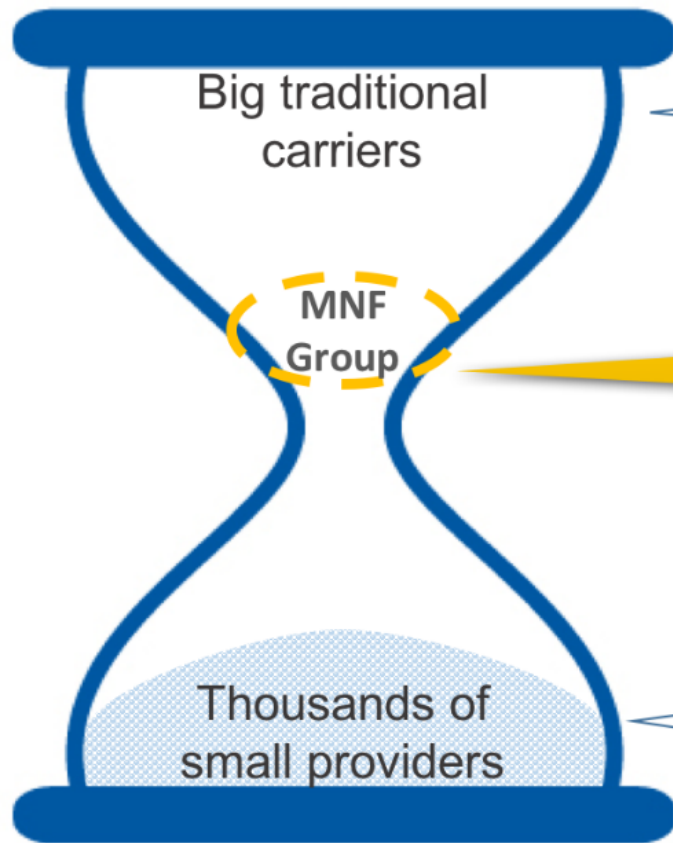


**Helen Fraser**  
General Counsel





# Industry overview



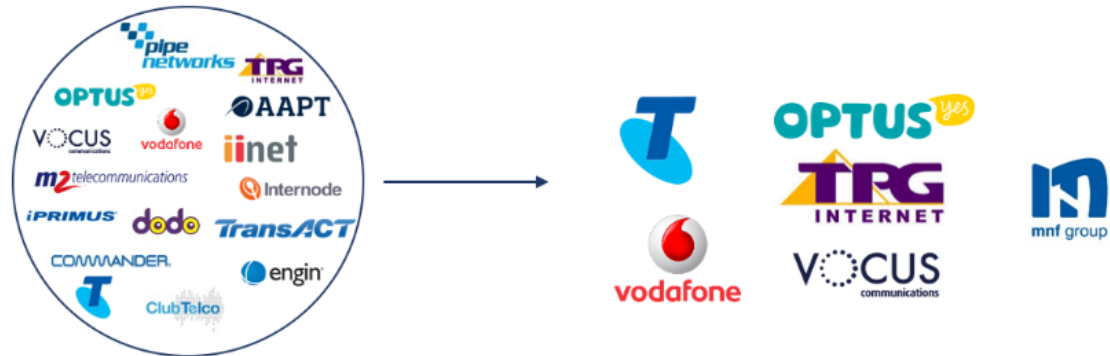
- Vertically integrated
- Diluted in their offers
- Focus internal, not wholesale

- **Opportunity!**
- **Unique position – scale + flexibility**
- **Next-generation network**

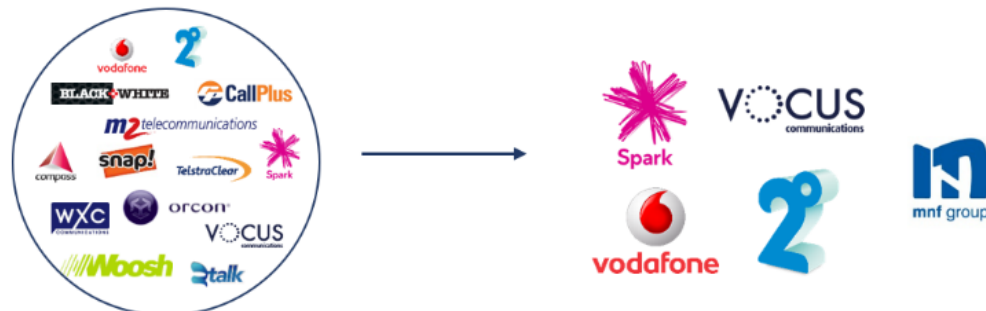
- Big growth sector
- New generation of OTT providers
- Focus on innovation & valued-add services
- Need infrastructure capabilities
- 'Big telcos' don't understand their needs

# Industry Consolidation

- Mergers and acquisitions
  - Australia: Since 2010, market consolidated to top 6 providers



- New Zealand: In the last 3-4 years, top players reduced from 13 to 5



## Why invest in MNF Group



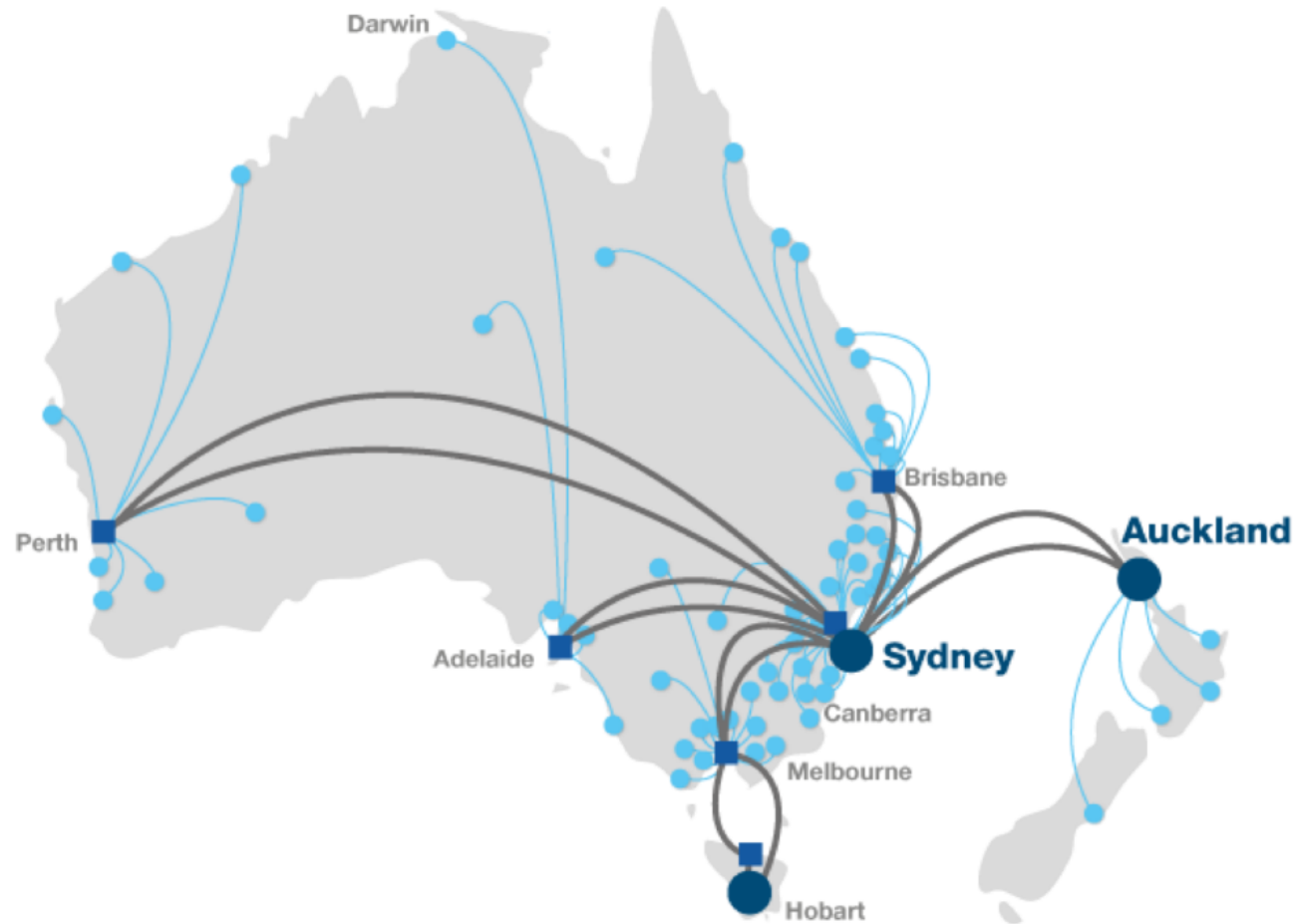
# MNF Group global network



MNF Group domestic network



# MNF Group domestic network





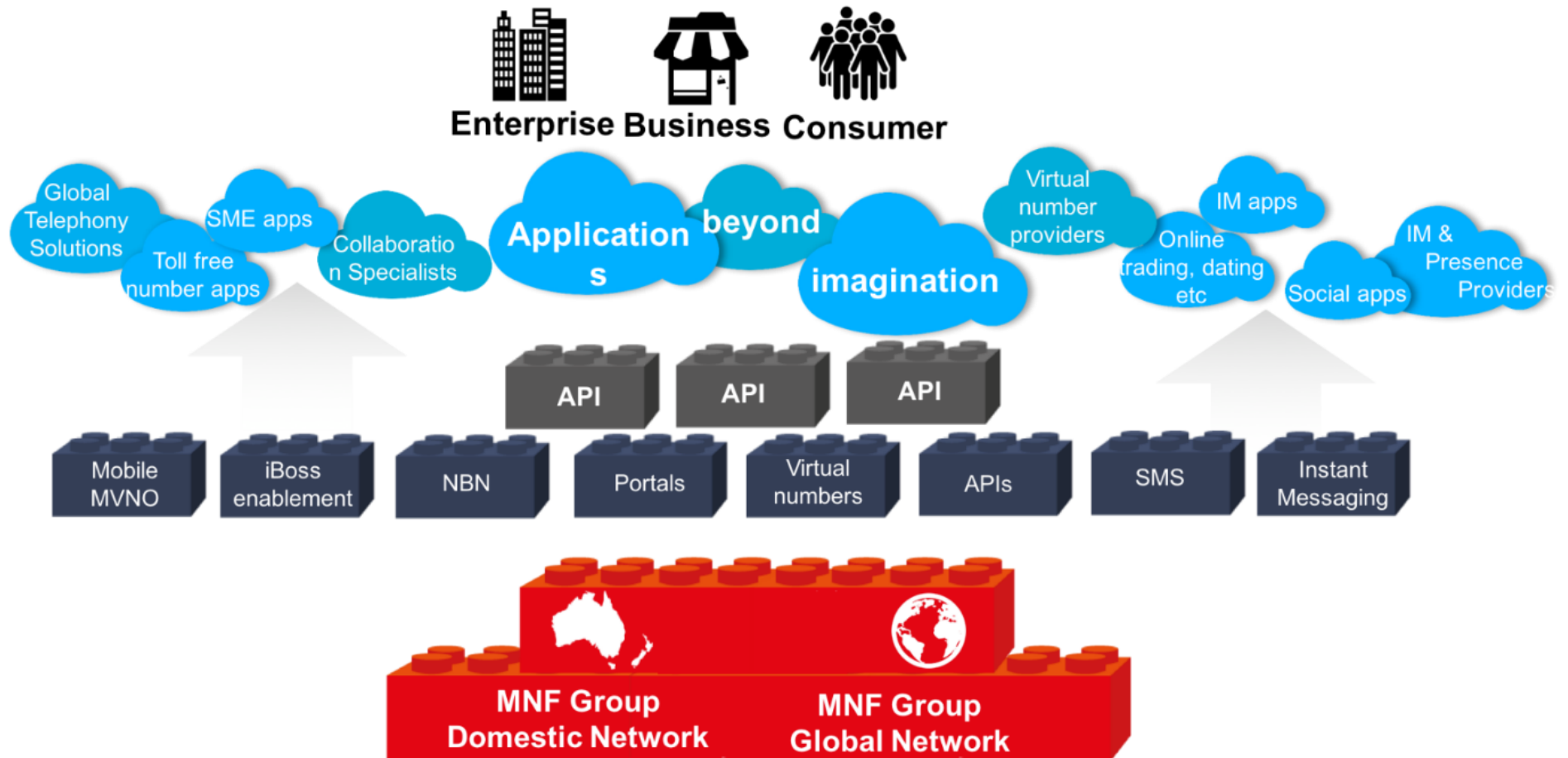
# Innovation Recognition

- Multi-award winning company
- Own intellectual property and R&D capabilities
- Consistent track record of innovation
- Plug & play VoIP, Virtual PBX, number porting
- Embracing new service models to monetise software assets: SaaS toll fraud mitigation, wholesale aggregation, MVNO
- Global export of innovations via TNZI





# MNF view - the new-generation value stack





## Overview

Carrier sales  
Pacific  
Asia  
American  
EMEA

**18**  
Members

Business development  
Next generation  
Emerging markets

Product & process  
Routing

## Global Commercial Business Unit



Tim Dunning  
President Global Commercial

*Global relationships, regional strengths, a trusted partner*

## Brand & Segment



- Globally recognised
- 25 year history
- Industry disruptor
- Innovative pedigree

### Global Customers

- Cable and fixed line operators
- Full service telcos
- ISPs
- MVNOs
- Over-The-Top (OTT) services
- Wholesale

## Responsibilities

**Go-To-Market**

- Sales
- Business development
- Brand management
- Marketing
- Pricing

**Service Delivery**

- Traffic routing
- Quality
- Benchmarking
- Processes

**Product Management**

- Capabilities
- Features
- Lifecycle management
- Market trends
- Strategy
- Processes

## The future



### Drive growth and scale

- Connect voice suite
- Core products
- Network reach
- Market share growth



### Next generation capability

- OTT services & UCaaS
- Modular capability via API
- Cloud numbering
- Toll free services
- Enhanced network



# Overview

Carrier sales

Pacific  
Asia  
Americas  
EMEA

Business development

Next generation  
Emerging markets

**18**  
**Members**

Product & process

Routing

# Responsibilities

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## Product Management

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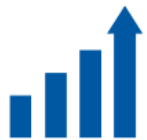
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## Next generation capability

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## Overview

Sales  
Marketing  
Products

  
**52**  
Members

Solutions  
Carrier  
Regulatory

## Domestic Commercial Business Unit



Jon Cleaver  
Chief Commercial Officer

*Building a foundation for rapid and sustainable growth*

## 7 Brands



## Responsibilities

**Go-To-Market**

- Sales
- Branding
- Advertising
- Pricing
- Compliance

**User Experience**

- Portals
- Apps
- APIs
- Self-service

**Product Management**

- Capabilities
- Features
- Lifecycle management
- Market trends
- Strategy

## 2 Market Segments





# Overview

Sales

Solutions



Marketing

Carrier

# 52

Products

# Members

Regulatory



# Responsibilities

## Go-To-Market

- Sales
- Branding
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- Compliance

## User Experience

- Portals
- Apps
- APIs
- Self-service

## Product Management

- Capabilities
  - Features
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- Market trends
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# 7 Brands



# 2 Market Segments

## Domestic Retail

### Residential

- Mobile substitution of home voice services
- NBN roll-out accelerated - backhaul issues resolved
- NBN is a trigger for change

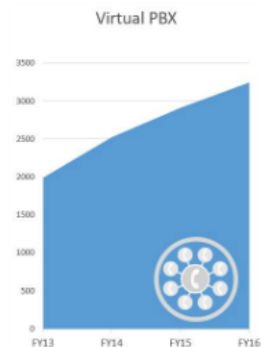
### SMB

- Slower adoption of new technology than residential ('digital divide')
- Continued organic growth in VPBX
- Increasing competition = growing awareness
- Targeting churn through re-contracting / retention

### Enterprise & Government

- Government panels / tenders - Build on success

#### Spotlight: Virtual PBX Refresh



## Domestic Wholesale

### Wholesale growth engine

- Established team of industry experts
- Continued momentum in core products
- Maximise consolidation with major retailers taking eye off the ball

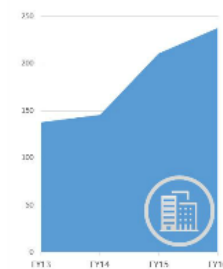
### Increased aggregation portfolio

- Voice
- Data
- Mobile

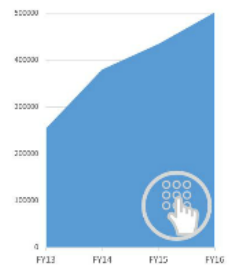
### High value enablement services

- OSS
- Billing

### Wholesale Customers



### Numbers Ported In



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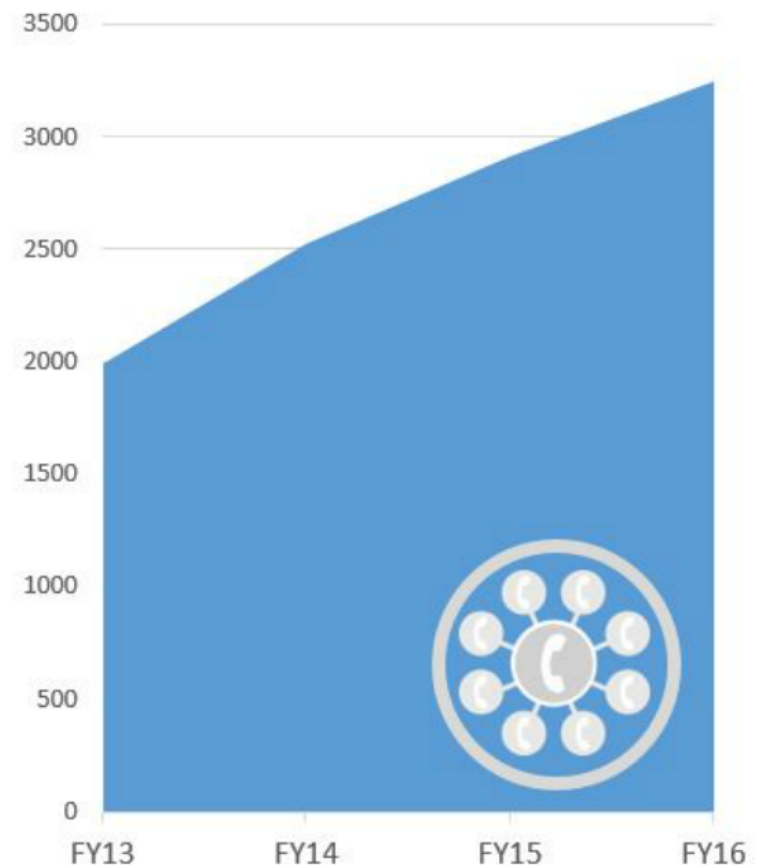
## Enterprise & Government

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### Spotlight : Virtual PBX Refresh



## Virtual PBX





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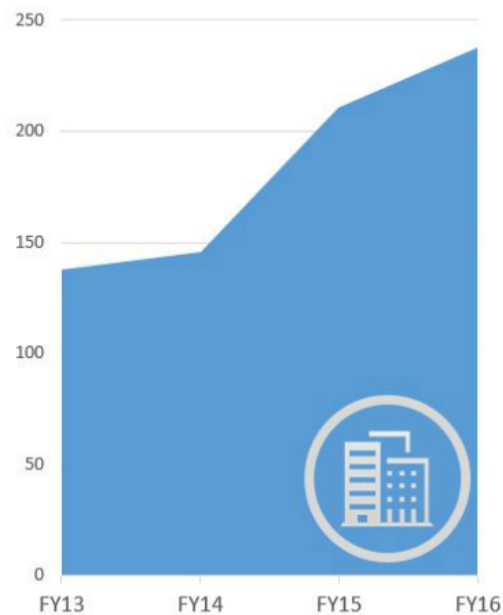
## Increased aggregation portfolio

- Voice
- Data
- Mobile

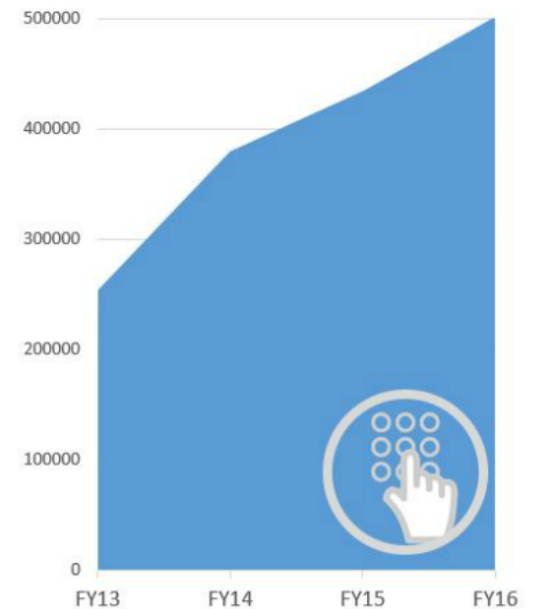
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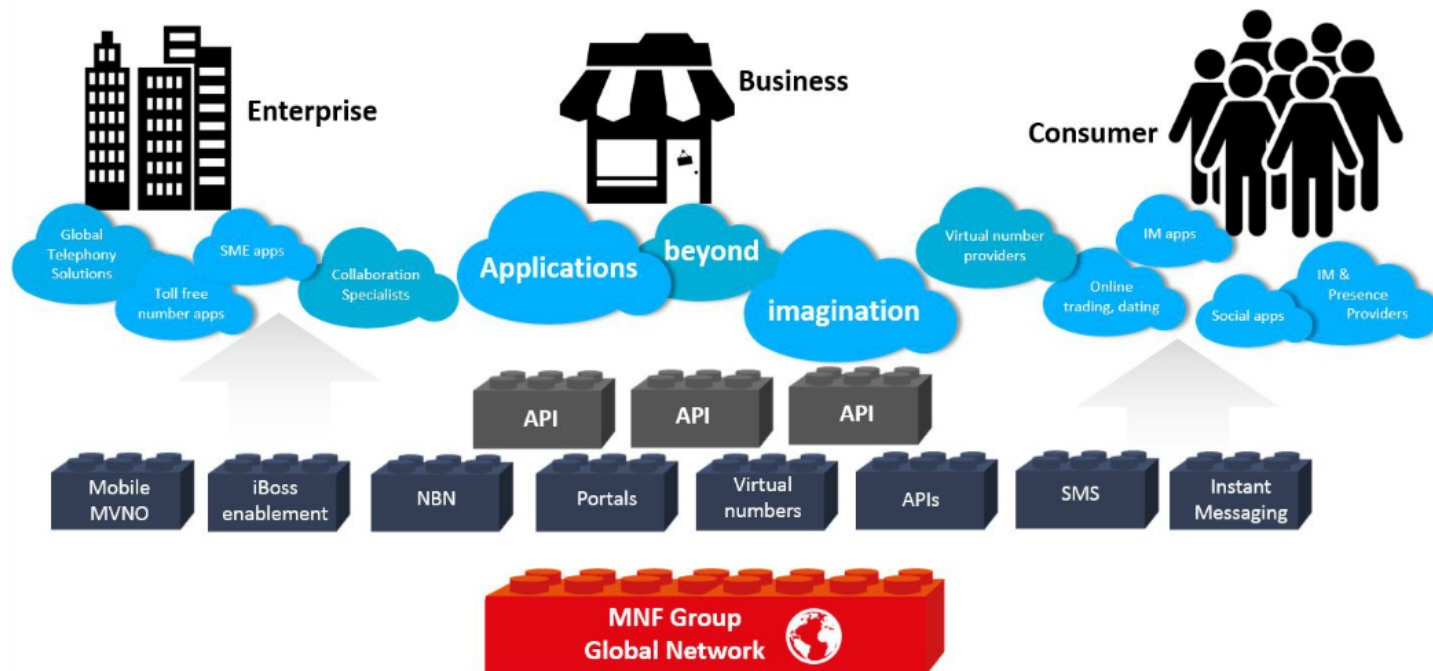
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Numbers Ported In



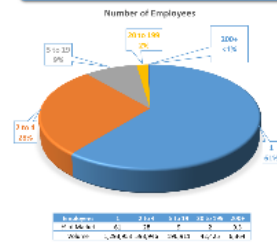
# Future trends



## Spotlight : Virtual PBX Refresh

### Current market

2.12 million businesses in Australia



Source: ABS

### Competition

	MNF	Commander	Engin	TPG / iNet	FaktorTel
Unlimited Local/National	X	✓	✓	✓	X
Unlimited Calls to Mobile	X	X	X	✓	X
VoiceMail to Email	✓	✓	✓	✓	✓
Auto Attendant Included	✓	1	1	1	2
Hunt Groups Included	✓	1	1	1	Unlimited
3 Way Calling	✓	✓	✓	✓	✓
Custom MOH	✓	✓	✓	✓	X
Call Park	✓	✓	✓	✓	✓
Call Waiting / Forward / Transfer	✓	✓	✓	✓	✓
CDR Reporting Included	✓	✓	✓	X	✓
Conference Calling	X	X	X	X	✓
Call Queuing Included	X	\$	\$	\$	3
Call Recording	X	X	X	X	✓
Standard Handset Inc	X	✓	X	✓	X
BLF	X	✓	✓	✓	✓
Users	Unlimited	1	10	1	Unlimited

### Commercial example



#### Customer requests:

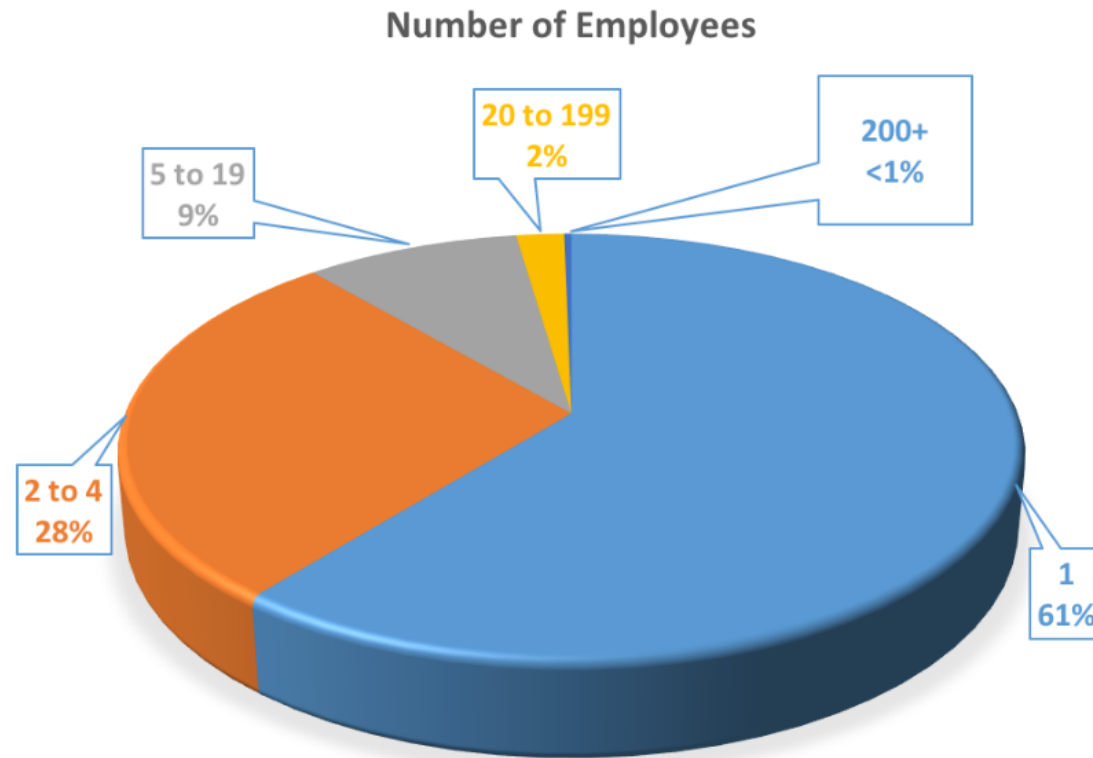
- 10 handsets
- 4 concurrent calls
- 4 hunt groups
- 2 queues
- 3 auto attendants
- Usage: 500 Local/Nationals and 250 Mobile minutes

	MNF	Commander	Engin	TPG / iNet	FaktorTel
Base Plan	VPBX 4 <sup>a</sup>	Big Phone Essentials	Engin Hosted PBX 4 <sup>a</sup>	BigPhone Standard	8 Lines Managed <sup>a</sup>
Base Plan Rate	167	399.50	98.50	299.50	194.95
Users	Unlimited	10	10	10	16
Auto Attendant	Included	19.90	19.90	19.90	Included
Hunt Groups	Included	24.00	24.00	23.85	Included
Queues	Included	9.95	9.95	29.85	Included
DID's (number of inc)	10	10	10	10	20
Local Calls	Included	Included	25.00	Included	22.50
National Calls	Included	Included	25.00	Included	22.50
Mobile Calls	Included	62.50	42.50	Included	44.75
<b>Total MRC</b>	<b>\$167</b>	<b>\$516</b>	<b>\$245</b>	<b>\$373</b>	<b>\$225</b>

<sup>a</sup> does not include handsets

# Current market

2.12 million businesses in Australia



Employees	1	2 to 4	5 to 19	20 to 199	200+
% of Market	61	28	9	2	0.3
Volume	1,293,953	593,946	190,911	42,425	6,364

# Competition

	MNF	Commander	Engin	TPG / iiNet	FaktorTel
Unlimited Local/National	✗	✓	✓	✓	✗
Unlimited Calls to Mobile	✗	✗	✗	✓	✗
Voicemail to Email	✓	✓	✓	✓	✓
Auto Attendant Included	✓	1	1	1	2
Hunt Groups Included	✓	1	1	1	Unlimited
3 Way Calling	✓	✓	✓	✓	✓
Custom MOH	✓	✓	✓	✓	✗
Call Park	✓	✓	✓	✓	✓
Call Waiting / Forward /Transfer	✓	✓	✓	✓	✓
CDR Reporting Included	✓	✓	✓	✗	✓
Conference Calling	✗	✗	✗	✗	✓
Call Queueing Included	✗	\$	\$	\$	3
Call Recording	✗	✗	✗	✗	✓
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BLF	✗	✓	✓	✓	✓
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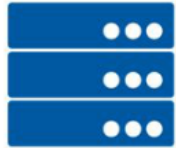
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# Refreshed service

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BLF	✓	✓	✓	✓	✓
Users	Unlimited	1	10	1	Unlimited

# The future

Then



Premise-based

Now



Cloud

Next



App-based



Keystation  
PBX  
ISDN  
POTS



Virtual PBX  
SIP Trunks



Email  
Mobile  
IM



'Private Cloud'



**built on**

Virtual PBX  
Conferencing  
Collaboration  
IM

Email  
Enterprise Apps  
OTT Apps



# First look...



## Operations Business Unit



**Ritsa Hime**  
Chief Operations Officer

*Delivering innovative service and experience that  
will excite our customers, today and beyond*

### Overview

91

Members



### Innovating customer experience



- Telco portals are traditionally restrictive, one-size-fits-all
- MNF Group portals provide self-service control with extensible, white-label capability
  - Online management
  - 'Apps' for advanced capability
- Unique point of difference in the enterprise market

### Responsibilities

Operations BU oversees end-to-end customer experience across **all** brands in **all** segments



# Overview

91  
Members

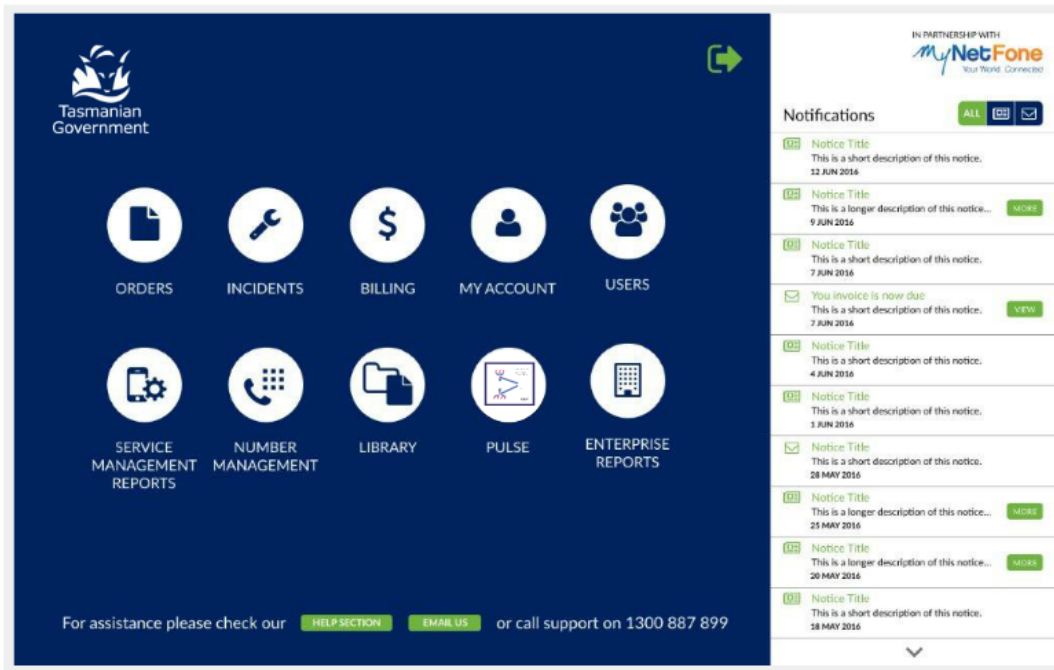


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## Customer Control to enable

- Customer experience
- Business Continuity
- Disaster Recovery Plans

# TollShield<sup>TM</sup>

by Symbio Networks



Rene Sugo - CEO

## Why was TollShield initialised?

- Protect our customers from the rapidly escalating cost of fraud.
- IP telephone systems susceptible to toll fraud - consumers often lax in securing their devices.
- No solution on the market that could detect and block fraud in real-time.

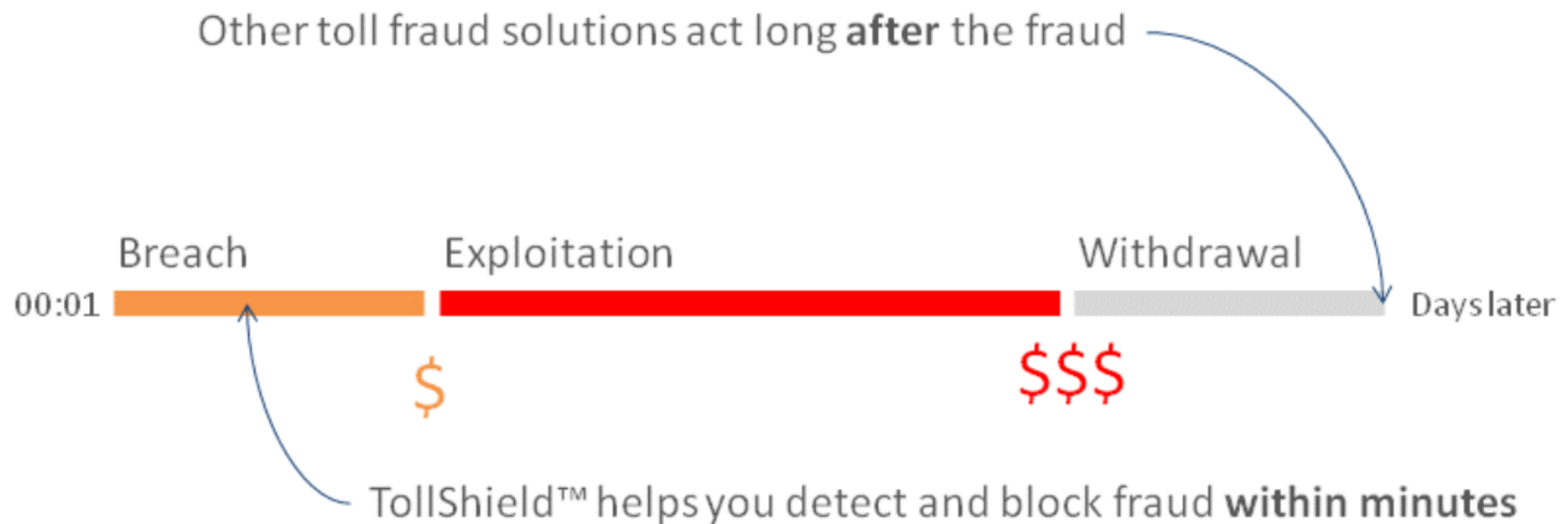


# What is toll fraud?



- Hackers hijack a phone system to make unsolicited calls to high-cost destinations.
- Calls usually terminate in countries with low prosecution rates for fraud.
- Consumers or their provider bear the cost.

# What sets TollShield apart?



# The Command Centre

- Gives your team real-time access to your network activity.
- Access from any device at any location.
- Data is easily arranged to interpret global traffic trends.

Last 24 hours 



Country Latvia

Estimated fraud calls 1,063

## Found 1 Incidents

Fraud to Latvia Suspect Codes-1 fr

Fraudscore®

10

Fraud status

Unknown

Incident status

Unacknowledged



# Current progress

- 250 domestic service providers protected.
- 5 international customers and 4 trials currently underway.
- Improving algorithm to detect new types of fraud.
- Becoming compatible with more vendors. eg, Broadsoft, NetSapiens.



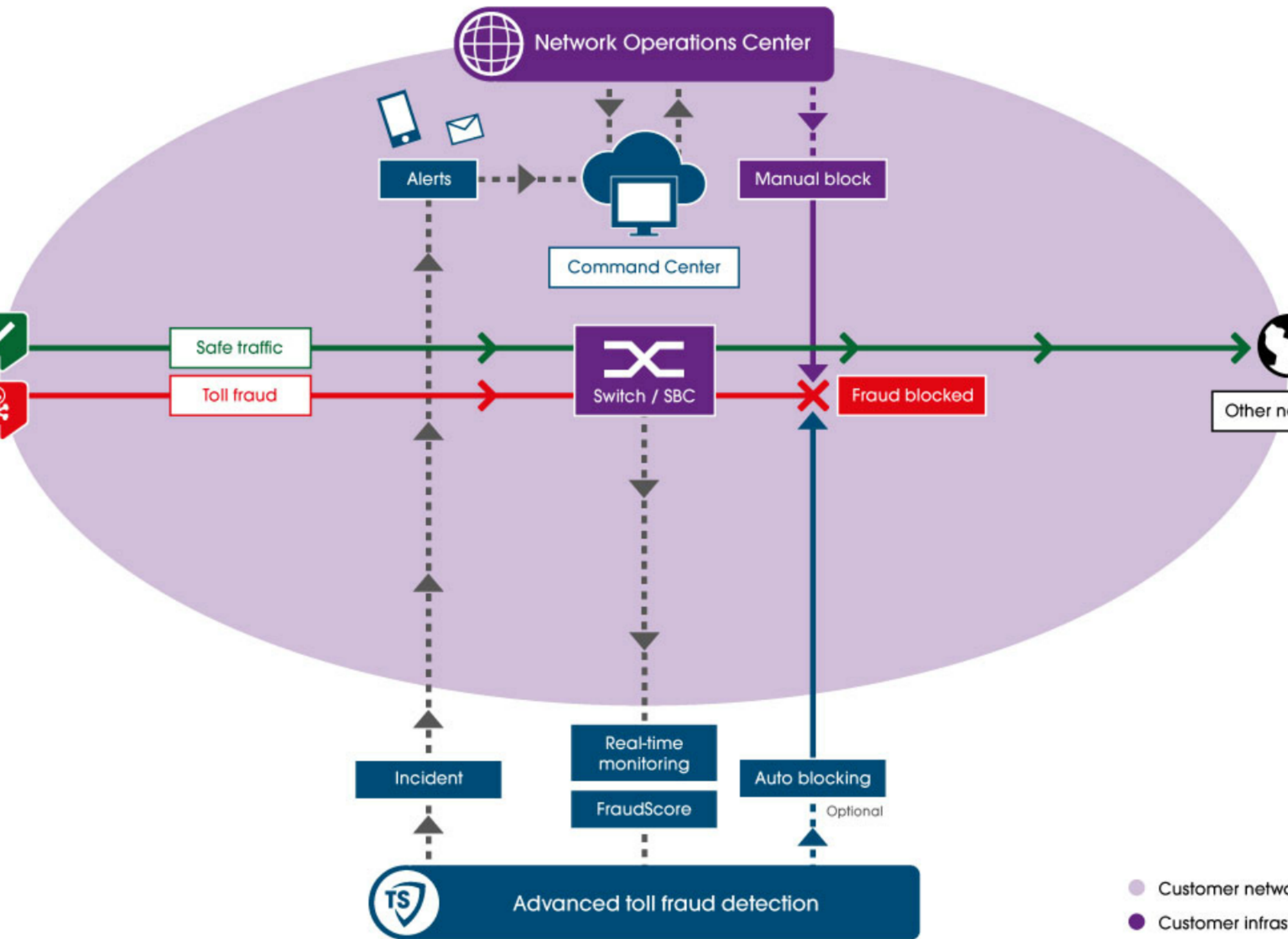
# TollShield: Case study

- TollShield notifies after-hours support at 5am - suspicious spike in voice traffic to Somalia.
- Support team log on to stop calls - TollShield has beat them to it.
- Investigation reveals synchronized global attack on customers with the same router
- Organised crime syndicate hacked the firmware of the popular household router - MyNetFone residential customers protected with TollShield.









# Testimonials

"TollShield caught our attention as an innovative solution to a growing threat. Toll fraud is an ever-present risk, with the potential to cost our network and clients considerable unnecessary expense. TollShield will be our first line of defence against toll fraud by providing a new level of visibility and blocking capacity,"

- Dee Telecom Vice President, John Clark.

"Wholesale transit is always about enabling routing rather than stopping people making calls. Fraud Management is about enabling central network teams to confidently rely upon their partners to exercise controls that their enterprise, corporate and SMB customers can rely upon,"

- Smart IPX CEO, Paul Tindley.

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by Symbio Networks

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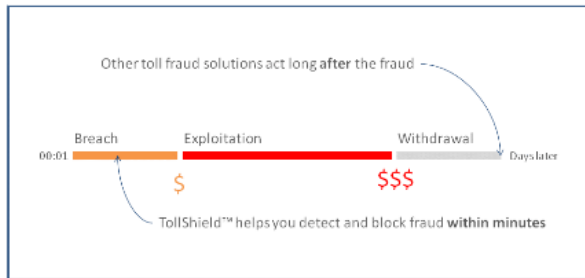
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### The Command Centre

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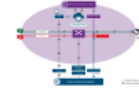
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### How TollShield meets user requirements

- Agile methodology - flexibility to adapt to changing user requirements.
- Analyses call set up information.
- Learns traffic patterns over time.
- Analyses over 15 million calls per day.
- Spots anomalies:  
Sends alerts, Blocks suspicious traffic, Updates Command Centre.



### Testimonials

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## Overview

59  
Members



In-house development  
(development)

Capabilities:  
• Network - Voice carriage  
• Software - Voice applications  
• Data services



Proprietary software  
(Network ecosystem)

## Platforms & Networks Business Unit



Indika Nanayakkara  
Chief Technology Officer

*Building networks and creating software to power  
innovative customer solutions*

## Our differentiators



Proprietary software  
• Independent carrier capability  
• Key technologies sold to the world



Low-cost operation  
• General purpose infrastructure  
• Speed to market with on-board cash



Automation  
• Reduced costs and errors  
• Rapid global scalability



API/Developer facing  
• Simple software integration  
• Industry leading API suite

## Responsibilities



## Case study: ACN Pacific

### Background

- US multinational, based in North Carolina
- World's largest provider of telecommunications
- Fast growing market in Australia and the Pacific



### MNF Group solution

- Voice carriage services (Intra/Inter-IP)
- ACN's internal systems connected to MNF Group network capability
- Able to eliminate the time / complexity of manual interaction with carrier

# Overview

**59**  
Members

**Capabilities:**

- Network - Voice carriage
- Software - Voice applications
- Data services



**In-house development**  
(innovation driver)



**Proprietary software**  
(key value creator)

# Responsibilities

## Global Network



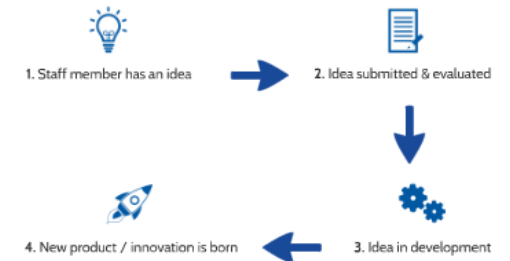
## Software development

### In-house capability:

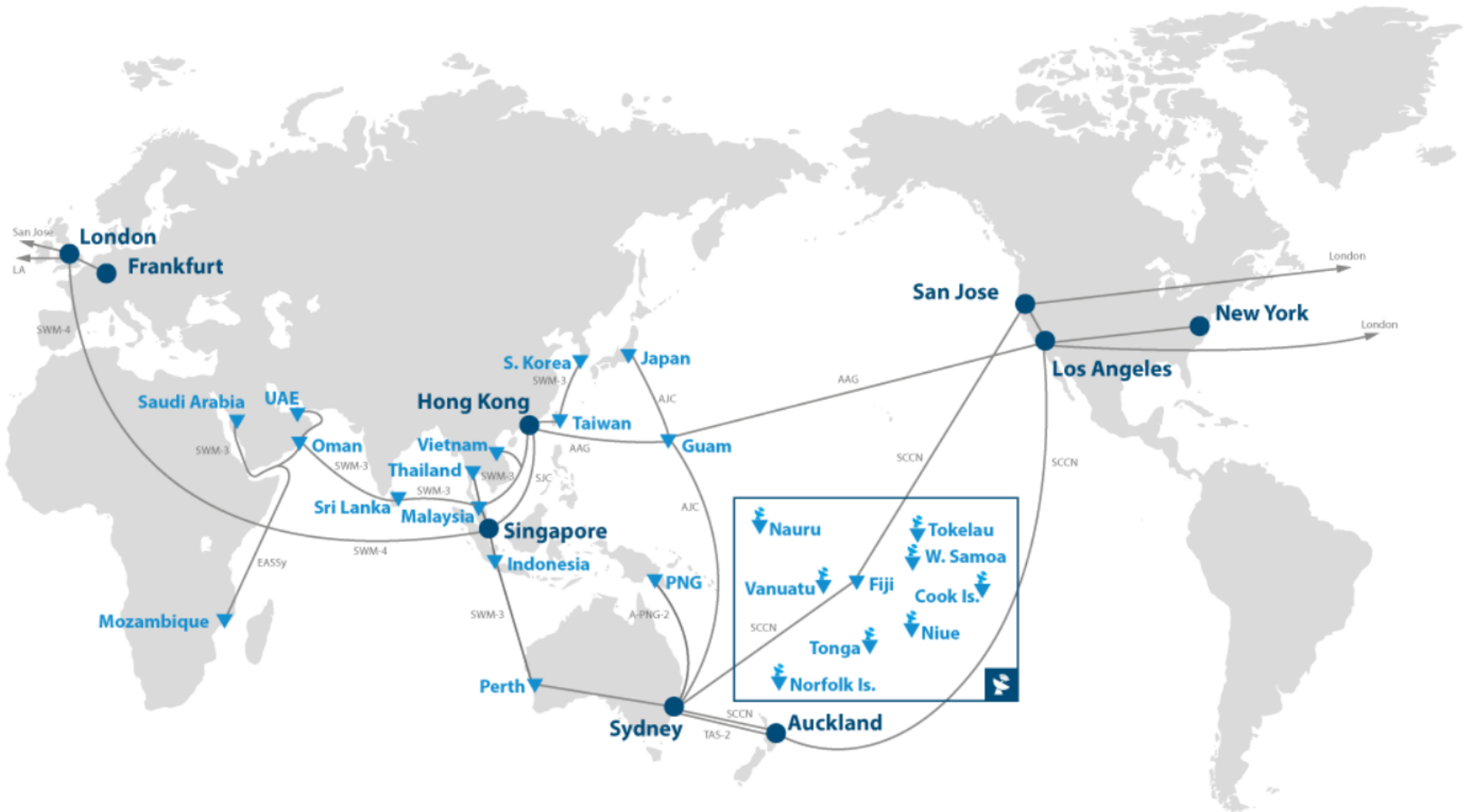
- Cross-functional teams
- Based in Australia / New Zealand
- Leading-edge methodologies
- Expertise to service complex projects



## Internal Innovation



# Global Network





# Software development

## In-house capability:

- Cross-functional teams
- Based in Australia / New Zealand
- Leading-edge methodologies
- Expertise to service complex projects



Pulse



Virtual PBX

# Internal Innovation



1. Staff member has an idea



2. Idea submitted & evaluated



3. Idea in development



4. New product / innovation is born

# Our differentiators



## Proprietary software

- Independent carrier capability
- Key technologies sold to the world



## Automation

- Reduced costs and errors
- Rapid, global scalability



## Low cost operation

- General-purpose infrastructure
- Saved millions with in-house tech



## APIs (customer facing)

- Simple software connectivity
- Industry-leading API suite

# Case study: ACN Pacific

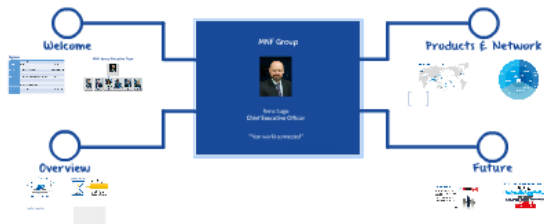
## Background

- US multinational, based in North Carolina
- World's largest direct seller of telecommunications
- Fast-growing market in Australia and the Pacific



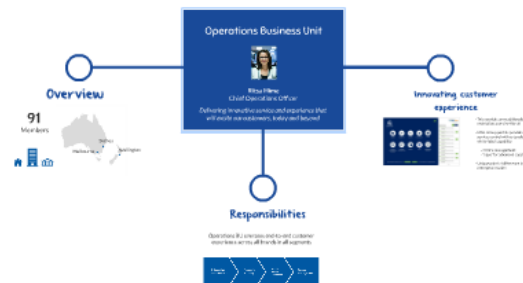
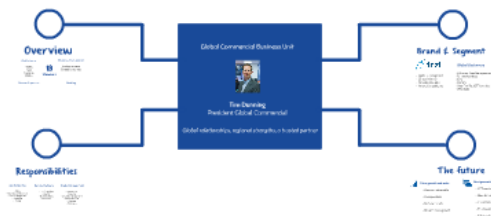
## MNF Group solution

- Voice carriage services 'on tap' via API
- ACN's internal systems connected to MNF Group network capability
- Able to eliminate the time / complexity of manual interaction with carrier



# Institutional Briefing Day

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