

Rethink Content: An Open, Integrated View

March 3, Budapest

Eric H. Loeb



New Content on Open, Integrated Platforms

- Seamless Access to Your Content across Ecosystem
- Enabled by Cloud, 4G, and Fiber
- Agnostic to OS, Device, Network Platform
- Expand the Concept of “Content”
- Expand the Opportunity





Bringing it Together

Better TV Sells Fiber

Connected Devices Sell Mobility

Seamlessly Connect All in the Cloud



Why IPTV

Internet Protocol Television

- **Two-way interactivity**
versus traditional, one-way cable/satellite broadcast network
- **Integration**
TV, PC, home phone and wireless devices all work together
- **Customer experience**
Unmatched features, control and personalization

*AT&T is the **only national (U.S.) service provider**
to offer a **100% IP-based TV service***



U-verse Multi-Screen Innovation

Unique Apps & Content Across Devices

U-verse Mobile

Available on 4 major OSs, +10 handsets... and growing

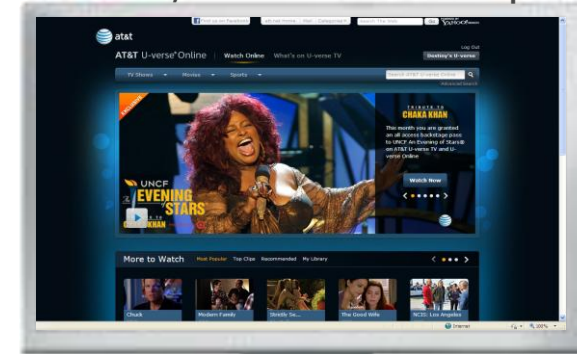


U-verse TV

+155 HD channels, Total Home DVR, and interactive apps that enhance, differentiate, engage

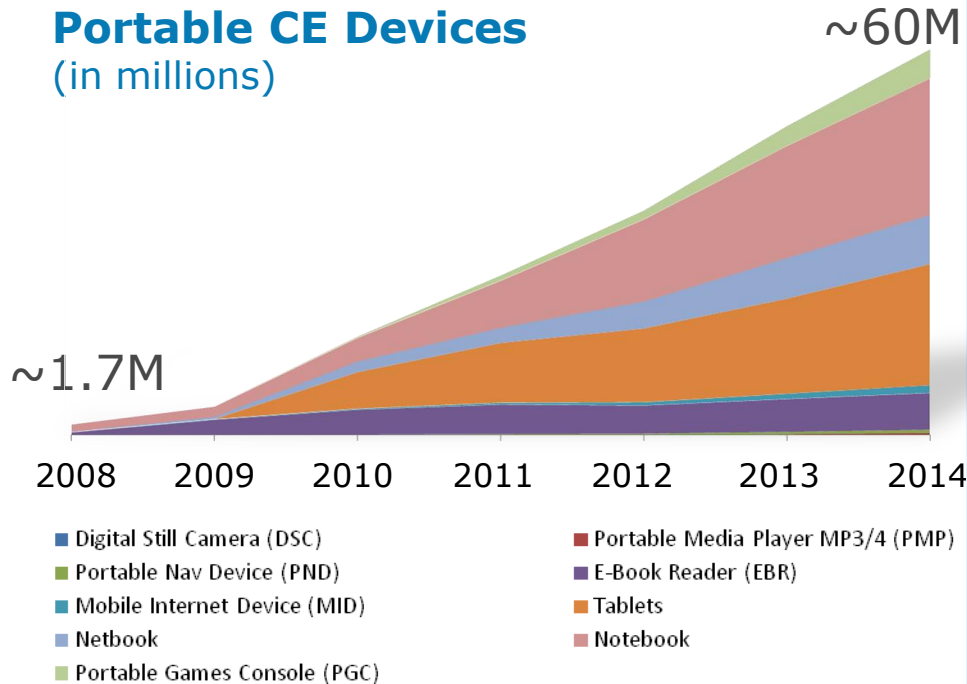
U-verse Online

More than 100,000 TV shows, movies and clips



Rapid Growth of Connected Devices

U.S. Sales of WWAN Embedded Portable CE Devices (in millions)



*Source: Strategy Analytics, WAN Enabled CE Devices US Market Forecast, Sept. 2010

Our vision is that by 2020, we will have **50 billion connected devices**

- Ericsson CEO, Mar 2010

There will be **1 trillion devices connected** to the Internet by 2013

- Cisco CTO, Mar 2010

20 Billion connected devices by 2020

- telecomseurope.net, Feb 2010

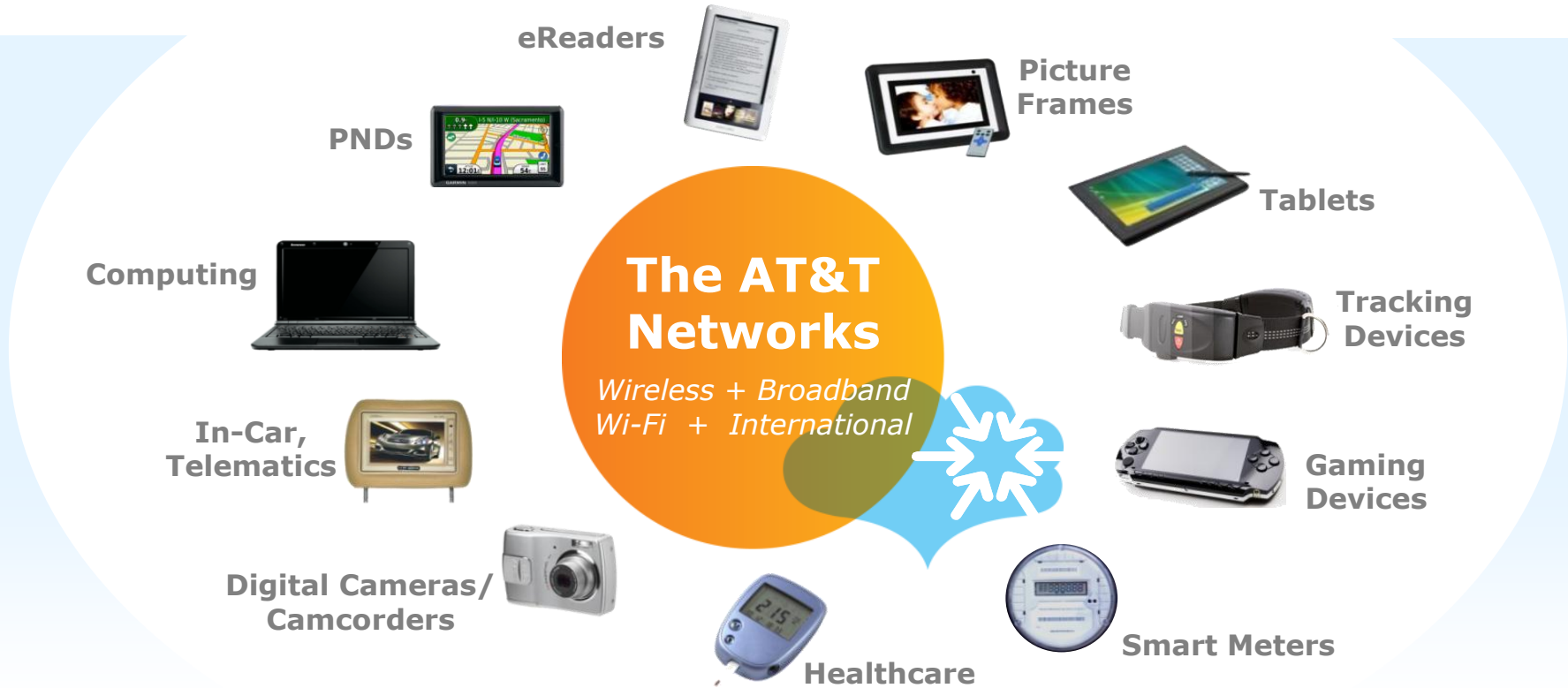
Non-Handset Devices to Account for **\$90 Billion in Operator Revenue** by 2013

- Rethink Wireless, Sep 2008

The total available market for embedded CE devices is projected to grow at a **41% compound annual growth rate (CAGR)** in the US, through 2014.

- Strategy Analytics, Sep 2010

A New Generation of Connected Devices



Healthcare

••••• AT&T's vision: To encourage **health** and **wellness** through **wireless connectivity**

- Support the ecosystem to provide constant and timely access to data anytime, anywhere
- Improve healthcare productivity and efficacy
- Find opportunities to reduce costs in our healthcare systems
- Enable opportunities to promote wellness and healthy lifestyles

Disease Management



Wellness & Healthy Lifestyle



Automotive

....❖ AT&T's vision: Engage **all auto makers** to integrate wireless into the vehicle for **safety, diagnostics** and **entertainment**

- Establish a market share lead in embedded vehicle connectivity
- Bring connectivity through AT&T's broad portfolio of wireless networks and technology, including WAN, Wi-Fi, and Bluetooth
- Engage chip makers to provide low cost, automotive grade 3G modules

Embedded



Tethered



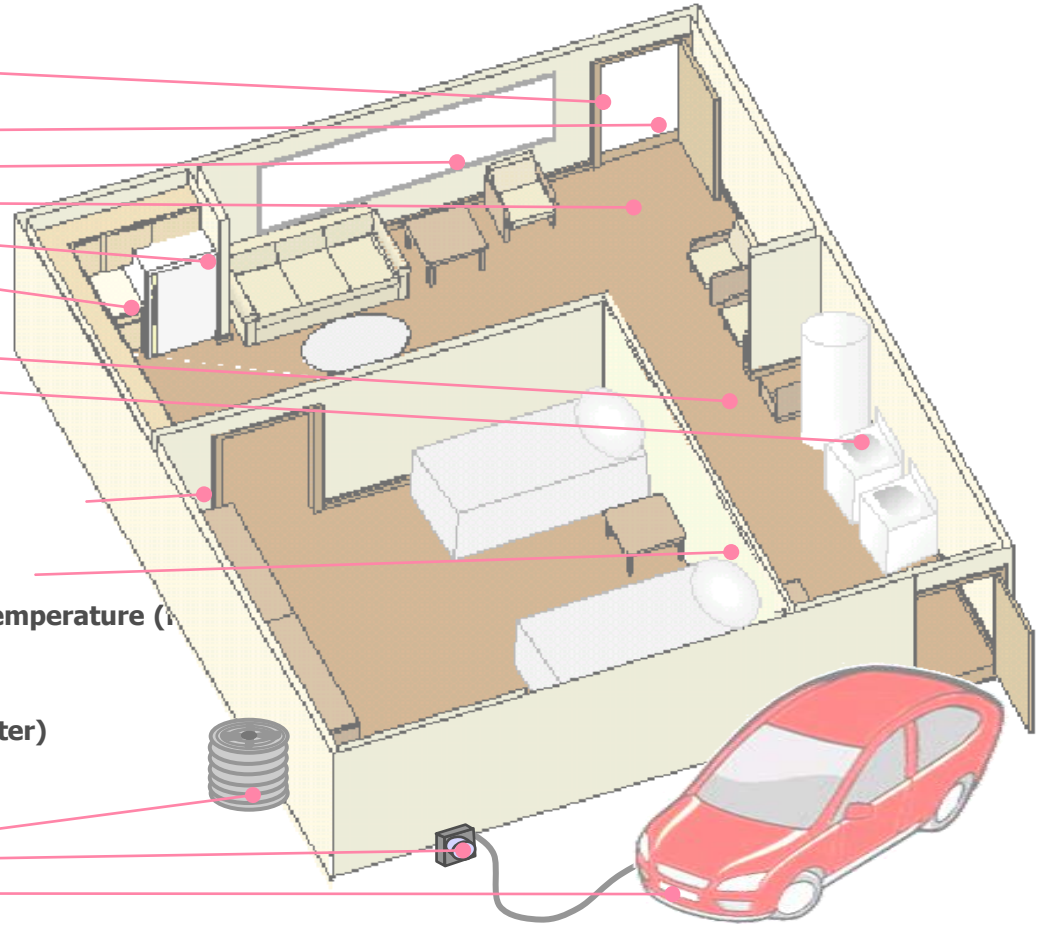
3G Chips



Envisioning a "Sensorized" Home

M2M throughout the home to help with...

- Doorbell
- Intrusion/Break-In
 - Door ajar/unlock detector
 - Window breakage detector
 - Motion detector
- Refrigerator/Freezer trouble
- Oven/Stove/Coffeepot Monitor
- Water Detection
 - Basement flooding
 - Broken hot water heater
 - Washing machine/dishwasher leak
 - Unauthorized swimming pool access
- Carbon Monoxide/Smoke/Radon Detector
- Temperature
 - Remote home temperature reading
 - Detector triggers above/under a certain temperature (i
- Medical monitoring/emergency detection
- Electrical service failure
- Remote Controls (*e.g.* light, entertainment center)
- **Medical Monitoring/Emergency Detection**
- **Energy Conservation /Usage Management**
 - Smart appliance programming
 - Utility meter reading
 - Electric vehicle recharging



**Not just sensors, but a smart, easy-to-set-up,
fully-integrated, Peace of Mind environment**



World Internet Topology

Brought to you by AT&T Labs
powered by LINUMATA

This visualization represents the topology of the Internet as it existed in 2008. It was created using data from the Internet Mapping Project, a project of the Internet Society. The data was collected from a variety of sources, including the Internet Service Providers (ISPs) and the Internet Service Providers' (ISPs) customers. The data was then processed and visualized using the LINUMATA software.

AT&T's Network by the Numbers.

9.81

Percentage of total bandwidth carried by AT&T's network as of the end of 2008. (Source: AT&T Intellectual Property.)

1

AT&T's network is the largest in the world.

12.9 Million

AT&T's network is the largest in the world.

540,000

AT&T's network is the largest in the world.

56 Billion

AT&T's network is the largest in the world.

36

AT&T's network is the largest in the world.

301,760

AT&T's network is the largest in the world.

97%

Percentage of the world's content hosted by AT&T's network.

99.998%

AT&T's network is the largest in the world.

49,000

AT&T's network is the largest in the world.

166

AT&T's network is the largest in the world.

3 Million

AT&T's network is the largest in the world.

160%

AT&T's network is the largest in the world.

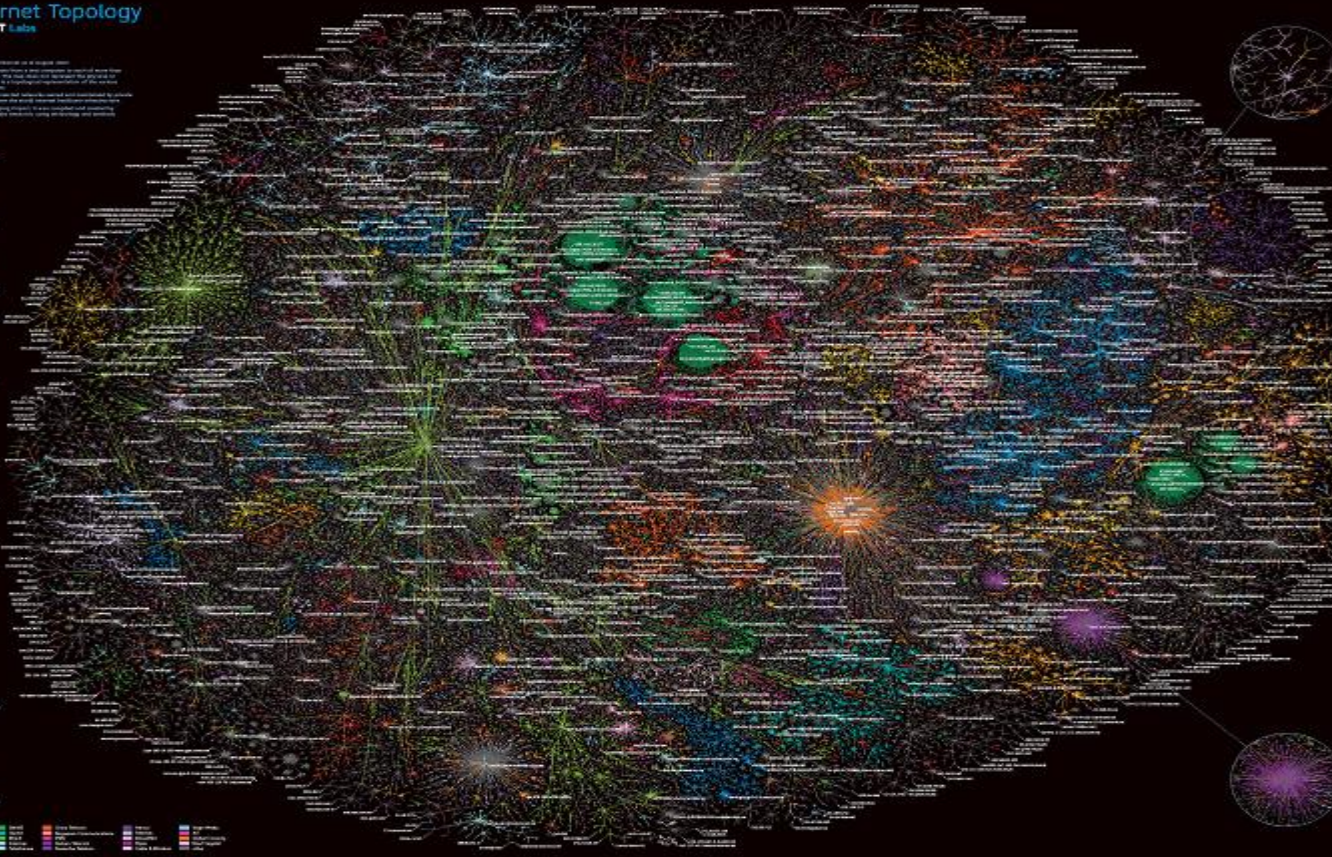
7

AT&T's network is the largest in the world.

2

AT&T's network is the largest in the world.

Legend: AT&T Network, Other Networks, etc.



World Internet by the Numbers.

320,000

Total number of IP addresses in the world.

48 Million

Total number of IP addresses in the world.

1.133 Billion

Total number of IP addresses in the world.

6.4 Million

Total number of IP addresses in the world.

1.6 Billion

Total number of IP addresses in the world.

40 Million

Total number of IP addresses in the world.

35,000

Total number of IP addresses in the world.

100 Million

Total number of IP addresses in the world.

161

Total number of IP addresses in the world.

12 Million

Total number of IP addresses in the world.

15 Million

Total number of IP addresses in the world.

\$72.5 Billion

Total number of IP addresses in the world.



Thank You!

