Amdocs Business Focus

Shuky Sheffer
President, Amdocs Customer Business Group

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Introduction

25 years within Amdocs

- Yellow Pages...
- ...Division President
- Group President, Customer Business
- CEO, Retalix

1986 2010 2013
Agenda

Market Trends

Amdocs Business Focus
Market trends

North America
- Fierce competition
- Multi-play
- SMB & Enterprise
- Faster time-to-market
- Consolidation
- Pressure on OPEX
- Customer experience as a differentiator

Europe
- Market saturation
- Slow growth
- ARPU pressure
- Multi-play
- Consolidation
- Pressure on OPEX, CAPEX
- Regulatory pressure

Rest of World
- Rising middle class
- Fierce competition
- Multi-play
- Increased complexity
- Move towards higher value customers
## Consolidation

<table>
<thead>
<tr>
<th>In-Market Consolidation</th>
<th>Across Regions</th>
<th>Multi-play/ Across LoBs</th>
<th>For New Digital Technologies</th>
<th>To Prepare for the Connected World/IoT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comcast, Time Warner Cable, Telefonica, GVT, cablecom, Televisa, Sky Italia, Sky, Orange, Jazztel, TDC, Get, Ooyala, Comcast, Telstra, Shopkick, SK Telecom</td>
<td>AT&amp;T, DirecTV, SK Telecom, Telstra, Shopkick</td>
<td>AT&amp;T, DirecTV, SK Telecom, Telstra, Shopkick</td>
<td>AT&amp;T, DirecTV, SK Telecom, Telstra, Shopkick</td>
<td>Comcast, PowerCloud Systems</td>
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</tbody>
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*Consolidation drives dynamic change*
Agenda

Market Trends

Amdocs Business Focus
Amdocs multi-dimensional business focus

Maintain momentum in key accounts

Sales and delivery focus on global groups

Establish position in emerging offerings

Continued expansion in Rest of World
Amdocs multi-dimensional business focus

Maintain momentum in key accounts

Establish position in emerging offerings

Taking our key accounts to the next level

North America
- at&t
- Sprint
- Bell
- TELUS

EMEA
- Telkom
- VimpelCom
- LIBERTY GLOBAL

## Amdocs multi-dimensional business focus

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### Emerging offerings

- Early success—executing our strategy to expand offering
  - Big Data Analytics—first go-live
  - Network Solutions—extensions and new logos
  - Mobile Financial Services
Amdocs multi-dimensional business focus

Continued expansion in Rest of World

BSS transformation

Sales and delivery focus on global groups

Continued expansion in Rest of World

SingTel Singapore and Optus Australia

FAR EASTONE
Amdocs multi-dimensional business focus

Focus on global groups

Managed Services for 7 affiliates

Sales and delivery focus on global groups

Continued expansion in Rest of World

Focus on global groups

Managed Services for 7 affiliates

vodafone

Telefonica

SingTel
Amdocs multi-dimensional business focus

Focus on global groups

Telefonica—BSS transformation success in Argentina led to expansion to Chile and Peru

Sales and delivery focus on global groups

Continued expansion in Rest of World
Summary

Market dynamics create real opportunity

Multi-dimensional business focus provides strategy for continued growth

Quality execution and new offerings allow us to build on the value we deliver, and fuel expansion
Thank You