

Analysys Mason acquires OSS Observer

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- Analysys Mason has acquired OSS Observer to make it the Global Telecom Software practice of Analysys Mason
- OSS Observer is a subsidiary company of Analysys Mason Limited and will continue to operate as before in the near future

Agenda

The basics

Background on OSS Observer

Background on Analysys Mason

What will change

Value for OSS Observer clients

Value for Analysys Mason clients

Research, custom work, admin

The future

The basics

- OSS Observer will operate as the Global Telecom Software practice of Analysys Mason
- OSS Observer founders Patrick Kelly and Larry Goldman have made multi-year commitments to stay with Analysys Mason
- The rest of our research and sales team will join Analysys Mason as well
- We will continue to offer the same products and services in our modular product and pricing structure
- The OSS Observer team will take responsibility for the Analysys Mason resources delivering telecom software research

Background on OSS Observer

- Founded in 2003 by Patrick Kelly, Larry Goldman and Mark Basham (Mark left the business in 2004 for personal reasons)
- Peter Mottishaw and Roz Roseboro joined in research, Jan Feaster in sales
- Now have over 50 subscription clients, mostly vendors
- Strong base of research into service assurance, service fulfilment, billing, customer care, network management, service delivery platforms and CSP business
- Focus on telecom software forecast, market share and trends

Background on Analysys Mason

- Analysys Mason's primary business is providing strategy advice, operations support and market intelligence for communications service providers and related parties, such as investors, suppliers and regulators
- Historically strong in Western Europe but recently strong growth in Eastern Europe, Middle East and Asia
- Offices in Europe, Middle East, Asia and North America
- Customers include over 100 of the world's network operators

What will change

- Short term
 - Simply – not a lot immediately
 - OSS Observer will refer to our role as an Analysys Mason company
 - We will look for ways to better serve both customer bases with our combined resources
- Long term
 - OSS Observer admin functions shift to Analysys Mason corporate
 - Analysys Mason CSP research, access and expertise will strongly influence the Global Telecom Software practice
 - Analysys Mason Web site will offer our customers more flexible access to existing research
 - We will offer more extensive custom project support
 - We will look for ways to expand OSS Observer subscription research by leveraging Analysys Mason resources

Value for OSS Observer clients

- All the same value OSS Observer was providing before will continue
- Analysys Mason adds significant new capabilities:
 - Experienced research staff
 - A base of market research in CSP services
 - Recognised industry leadership in telecom strategy
 - Web site with extensive company and contracts data
 - Access to a wide range of CSPs globally
 - Skills in strategy consulting and operations analysis
 - Custom research capacity to support needs that OSS Observer could not handle itself

Value for Analysys Mason clients

- All the same value Analysys Mason was providing before will continue
- OSS Observer adds significant new capabilities
 - Large team of experienced, telecom software analysts
 - Strong base of research in telecom software
 - Greater emphasis on numbers – forecast and market share
 - A more global perspective on telecom software and IT

Research

- Same OSS Observer research modules will continue with same deliverable structure. All our current analysts stay in their same roles
- We will meet existing commitments for Analysys Mason subscription customers. OSS Observer leadership team will take responsibility for delivering these commitments and working with the Analysys Mason research team in doing so

Custom work

- OSS Observer will continue to offer strategy briefings to our subscription customers
- We will greatly expand our ability to offer custom projects:
 - Large research and analysis
 - Business and operations consulting
 - Surveys
 - Other custom work, such as white papers
- We will continue our lead analyst approach in providing our inquiry service and taking the lead on custom work

Admin

- Existing Analysys Mason customers will see no change
- In the short term, admin functions for existing OSS Observer clients stay with OSS Observer; this includes offers, contracts, invoicing and receivables
- Over the next year, we will shift admin support to Analysys Mason corporate functions. We will work with our customers individually to ensure this works smoothly

The future

- OSS Observer will fully integrate into Analysys Mason as the Global Telecom Software practice, just like other research practices
- Report distribution, access and purchasing will improve for both customer bases with Analysys Mason's new customer support Web site
- Analysys Mason will be the leading provider of subscription and custom research for the global telecom software industry

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