



**Building critical connections.  
Enabling better possibilities.**

**Ellie Sweeney – Vocus CEO**

Tuesday 30 April 2024

**VOCUS**



Investment and competition in digital infrastructure is critical for Australia's future

# Megatrends: Artificial Intelligence

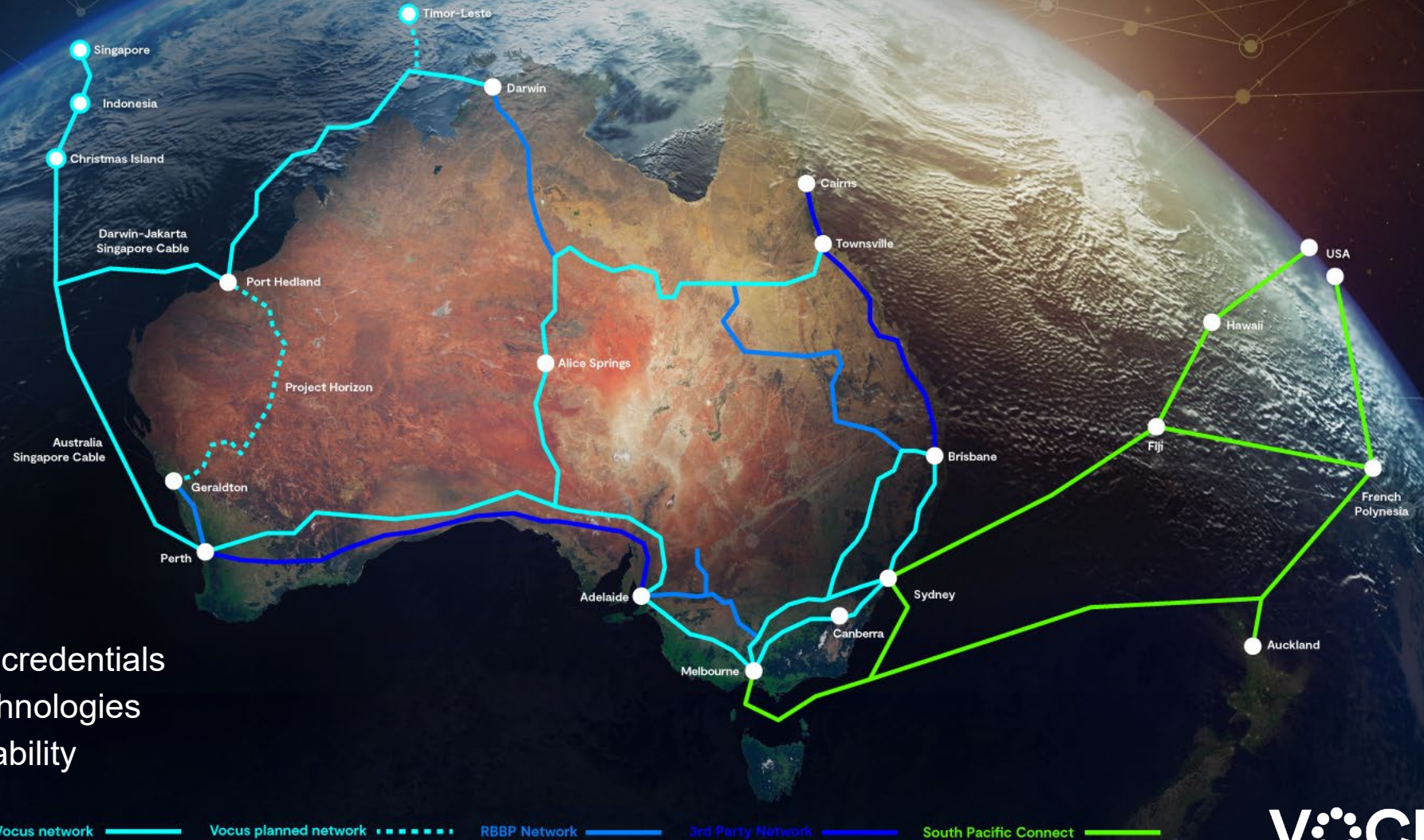
AI



# Megatrends: Sovereignty & Security

# Megatrends: LEO satellites

# Vocus' \$1 billion investment strategy



1. Extend our reach
2. Upgrade our capacity
3. Enhance our security credentials
4. Capitalise on new technologies
5. Enrich our digital capability

# Pacific Connect



A new subsea fibre-optic cable system connecting diverse Australian landings to Fiji and French Polynesia, both of which will connect to USA via diverse paths.

\*Routes are indicative only

# Project Horizon



Fibre-optic cable route through Australia's resources region, closing the final gap in our national fibre backbone.

Total length: 2,000 km  
Capacity: up to 38Tbps



# Darwin - Jakarta - Singapore Cable



First international fibre-optic cable system connecting Australia's north to Asia.

Total length: 7700km  
New cable segment: 1000km  
Depth: up to 2.5km  
Capacity: up to 40Tbps

# Timor-Leste Extension



Extending our North - West Cable System to Timor - Leste, creating new pathways between Timor - Leste, Indonesia, Australia, and Singapore.



# Upgrading our capacity

# Enhancing our security credentials

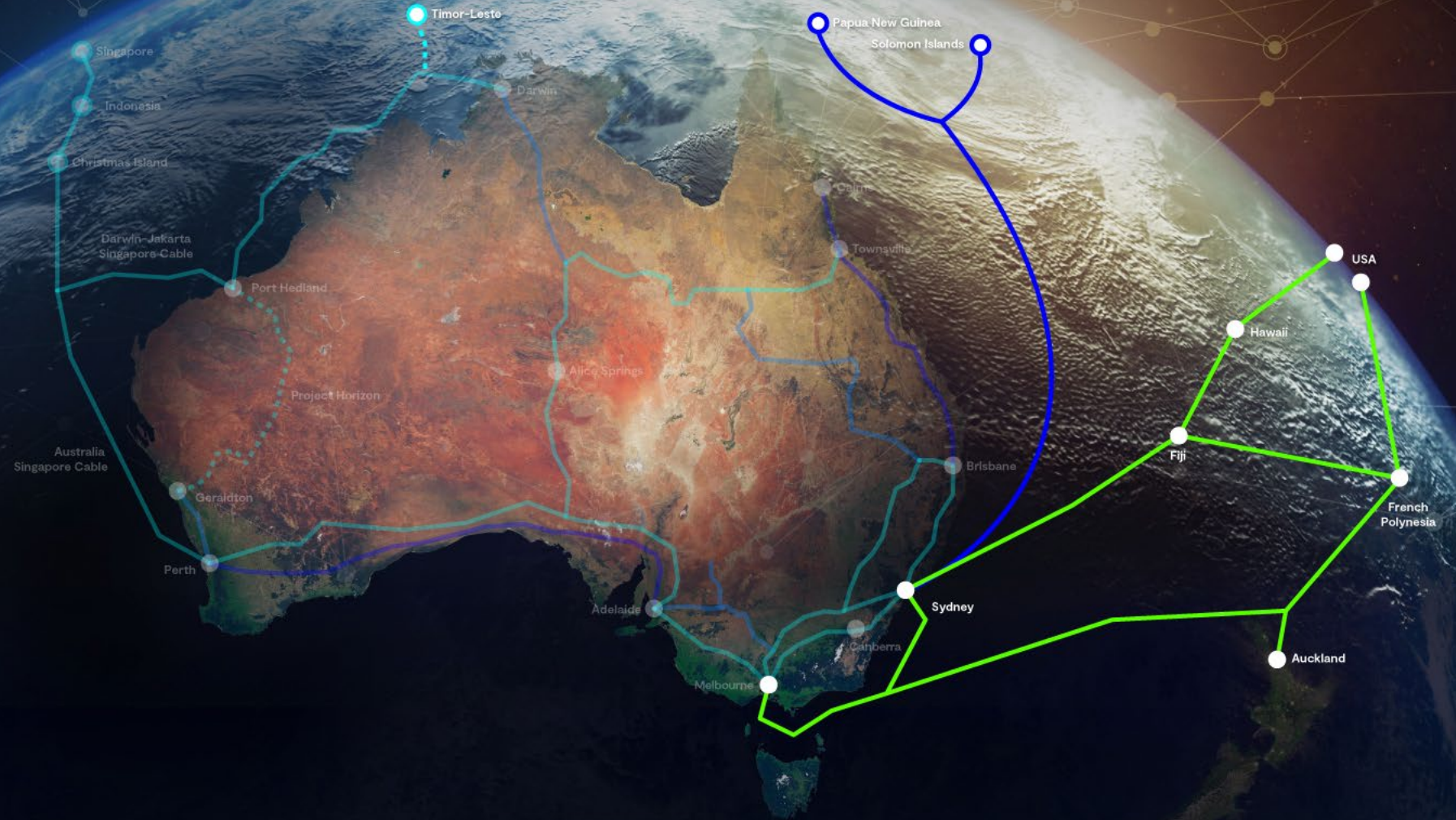


# Capitalising on new technologies

A hand is shown connecting network cables to a patch panel in a server room. The patch panel is labeled 'CODECOM' and 'DH1G18 11RU43'. The cables are blue and yellow. A colorful, semi-transparent mesh graphic is overlaid on the left side of the image.

# Enriching our digital capability

# Digital Infrastructure in the Indo-Pacific



\*Routes are indicative only

**Building critical connections.  
Enabling better possibilities.**

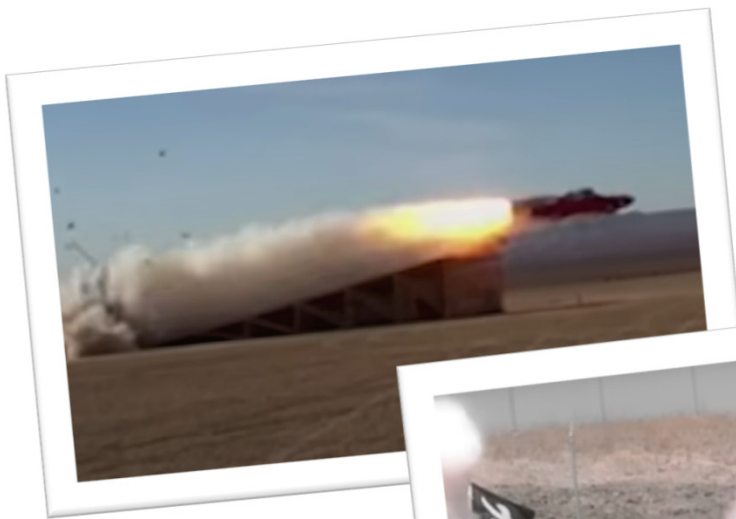
VOCUS



# Jamie & Adam

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## The MythBusters



Myth on  
cutting



# Network Native Security Myths



**Security for the Mass Market.**

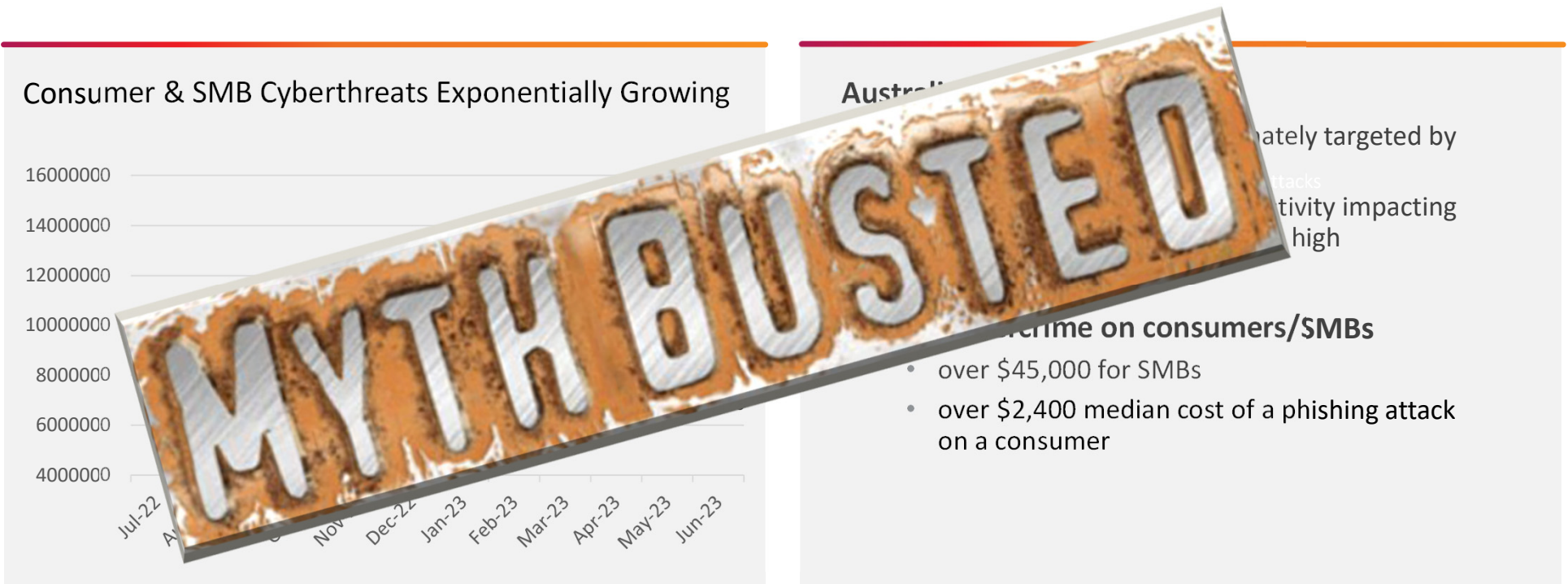
To protect consumers and SMBs from threats such as Phishing, Ransomware and Malware

**Network Native Security.**

To protect consumers and SMBs from threats such as Phishing, Ransomware and Malware from the network itself as pure zero touch, clientless service

## Myth 01

# Security is for business. Consumers & SMBs are not at risk.



Fact 01

**Consumers and SMBs are indeed  
at risk.**

## Myth 02

# Danger exists, but SMBs don't care about security

63%

Say that the likelihood of their business falling victim to cyber-attack is high

79%

cyber security is very important



11%

Of SMBs who were victims of cybercrime suffered from one or more cyber attack in the past year

39%

Of SMBs who were victims of cybercrime suffered from at least one impact on the business, incl. disruption to everyday business and additional expenses

Fact 02

**SMBs care very much  
about security.**



## Myth 03

# Maybe SMBs care, but consumers don't care about security



77%

Feel it's important to be protected from cyber-attacks on their mobile device



94%

\$2,400  
The median reported cost of a Phishing attack that resulted with financial loss

1/3



1/3  
Phishing attacks at home



Fact 03

**Consumers care very much  
about security**

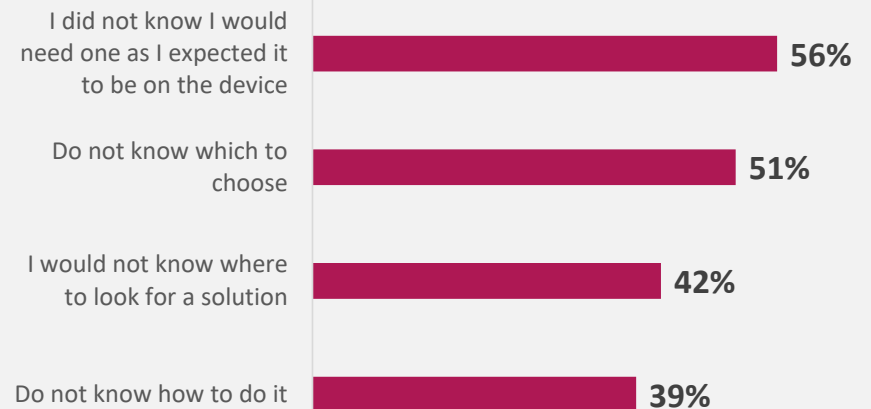
## Myth 04

# Best way to provide security is using an APP

- Globally, less than 5% of consumers download security apps to their mobile
- Almost nobody does anything on connected devices at home
- In Japan, reps install apps on phones in stores - still 50% of customers don't activate the app



### What prevents you from securing your mobile devices and investing in a solution?



## Myth 04

# Best way to provide security is using an APP



Simple on-boarding provides a 1st factor as customers can receive immediate help



own CISO

Fact 04

**Apps are not a practical solution  
to protect the mass market**

## Myth 05

# Nobody expects CSPs to provide security from the network



This offering paves the way for a network-based security portfolio that will simplify the customer experience and help providers manage risk today.



Australia  
as part  
the CSP

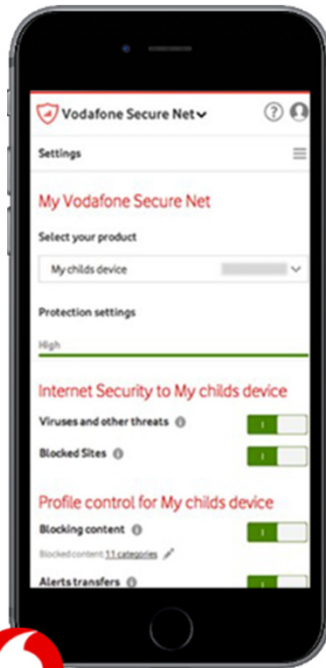
also share the view that **“It is the responsibility of my Internet provider/CSP to provide secure traffic”**.

Fact 05

**Consumers & SMBs expect the network to be safe and expect CSPs to protect them.**

# Myth 06 Security cannot generate revenues

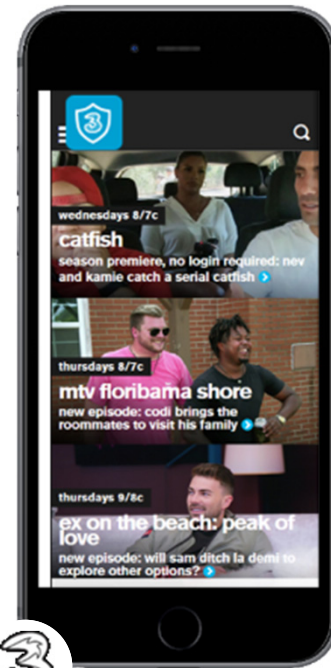
Consumer



**0.99€/m**

~5% of average price plan  
*"...Vodafone Secure Net is a unique service that protects you simply and safely on your Vodafone connected devices."*

Consumer



**1.5€/m**

~8% of average price plan  
*"...The Drei Internet Protection protects Drei customers regardless of device..."*

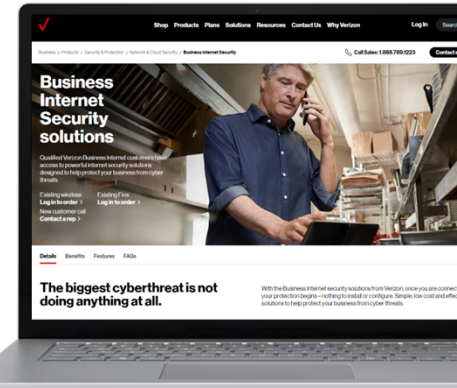
SMB



Telefonía SMB

**10€/m**

~20% of average price plan  
*"...Browse with complete peace of mind and configure the service according to your business needs"*

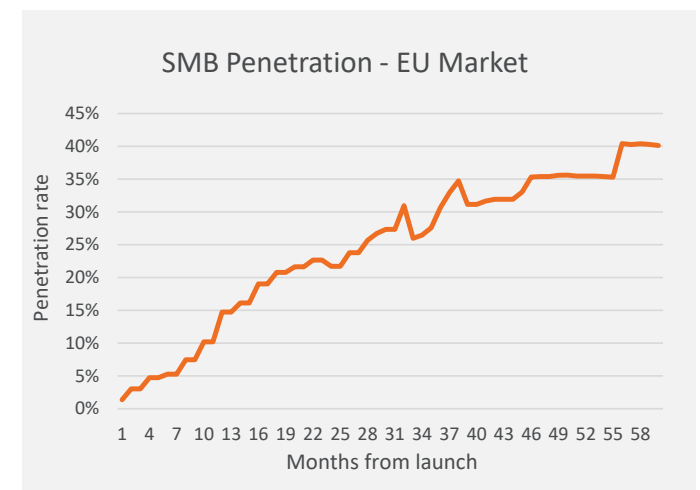
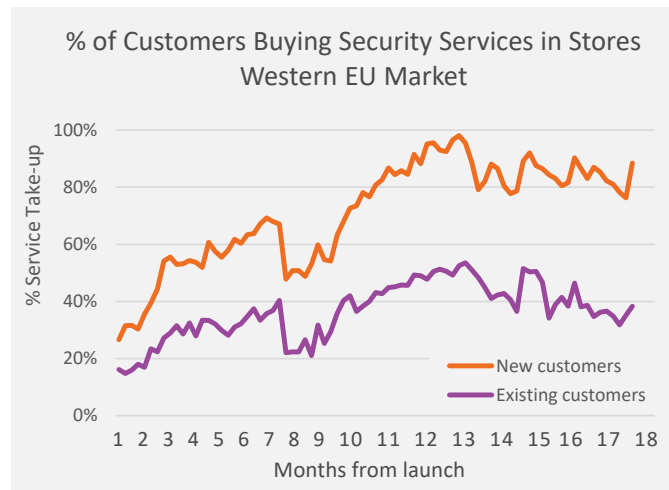
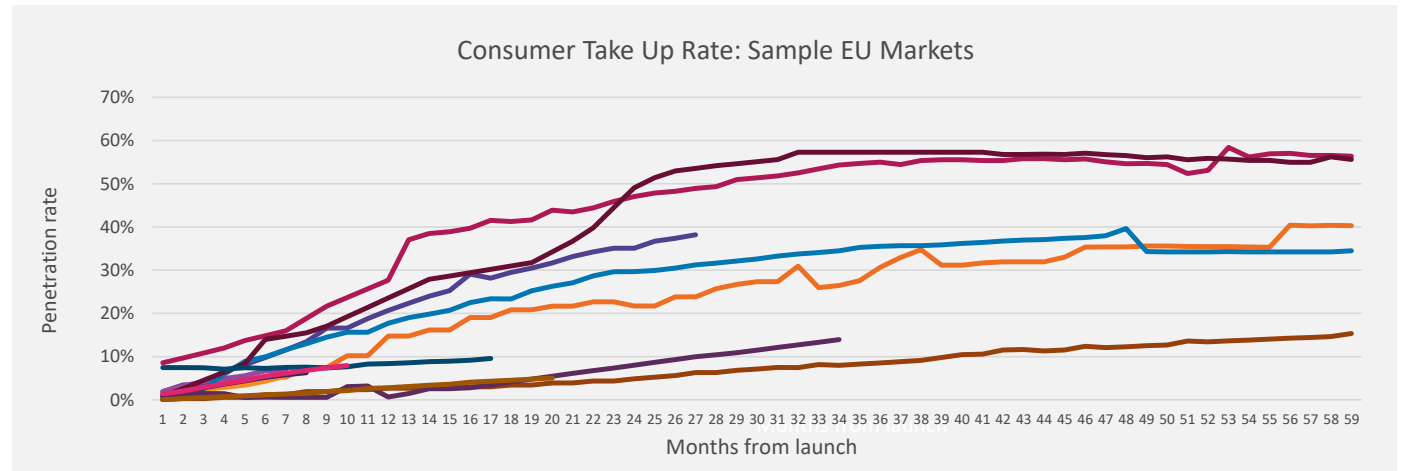


**\$10-20/m**

Two price plans  
*"...nothing to install or configure. Simple, low cost and effective solutions to help protect your business from cyber threats"*



# Extraordinary Take Up Rate by Consumers & SMBs



# High attach rates for consumers and SMBs



45% Attach Rate of the Service\*  
\*SMB service

**Alexis Hostos**  
Global Head, SMB & B2C Telefonica



We are facing attach rates of up to 80% of new customers.\*

\*Consumer service

**Martin Westhoff**  
Strategy and Marketing Home  
at Hutchison Drei Österreich





Our Secure Net product is already €160 million in revenue... We plan to continue leveraging Secure Net. (May 2018)

**Vittorio Colao**  
Vodafone CEO



4.4pp Reduction in Churn in Subs with Security\*

\* Vodafone Spain mobile churn rate is 26.6% annually

**Teresa Bujalance**  
Head of Products & Services  
Vodafone Spain



With approximately  
12% annual churn in  
Australia, customers  
with security may  
churn less than 10%

## Australian market is similar

**94%** of Australian consumers are willing to pay for a security solution

Between A\$3 and A\$5 per month

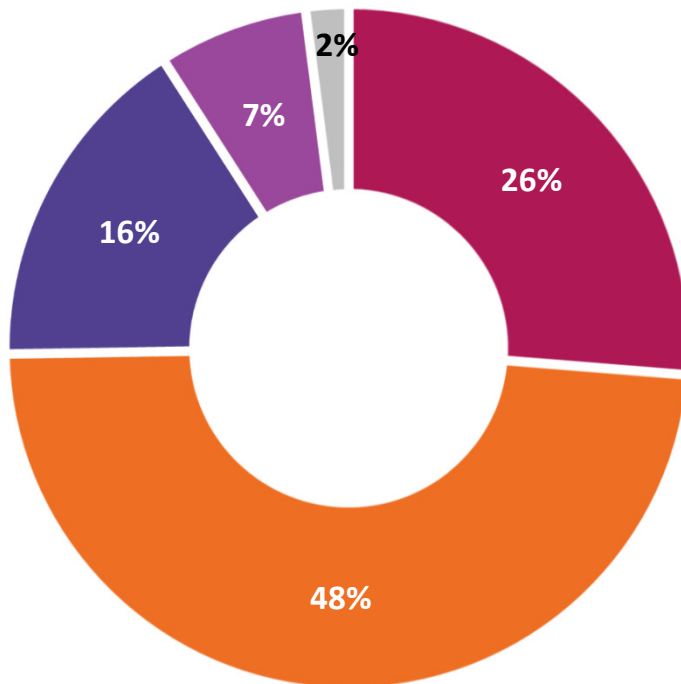
**29%**

Less than A\$3 per month

**41%**

Australian SMBs would be willing to pay on average \$7.5 per month per site to protect their network from malware, phishing, ransomware and inappropriate content.

## Australian market is similar



Would you be likely to switch to a new mobile service provider if they offered a security service?

- Yes, definitely it's really important to me and I would switch
- Yes, probably, it's quite important to me
- No, probably not, it's not that important to me
- No, definitely not, it's not at all important to me
- Don't know

# Network Native Security is the only real solution for the mass market



## Consumers and SMBs

- Are under attack
- Care about Security
- Apps are not sufficient
- Expect CSPs to protect them
- They are willing to pay



## CSP

- Can provide great network native protection
- Zero touch, clientless security for all devices
- Generate revenues
- Reduce churn



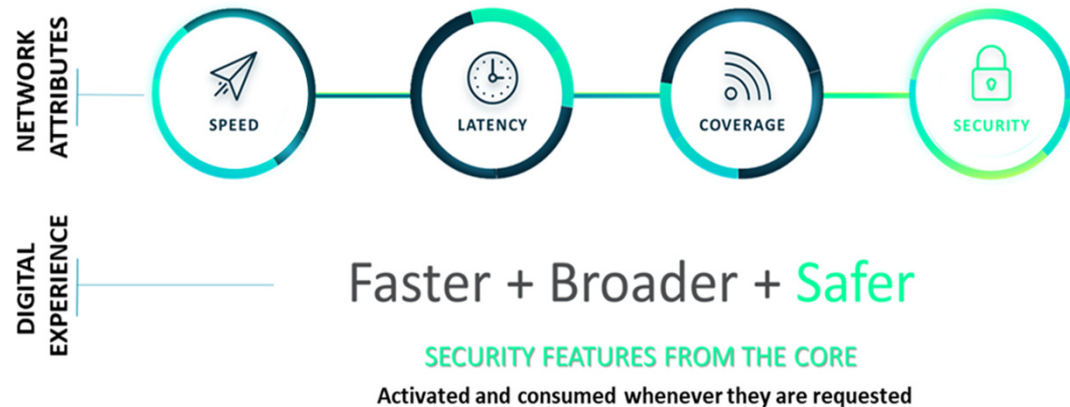
**FAANG cannot provide network native security. Only CSPs can**

# Coverage, Speed, Quality are commoditized

Network-Based Cybersecurity is the “Next Big Differentiator” for CSPs

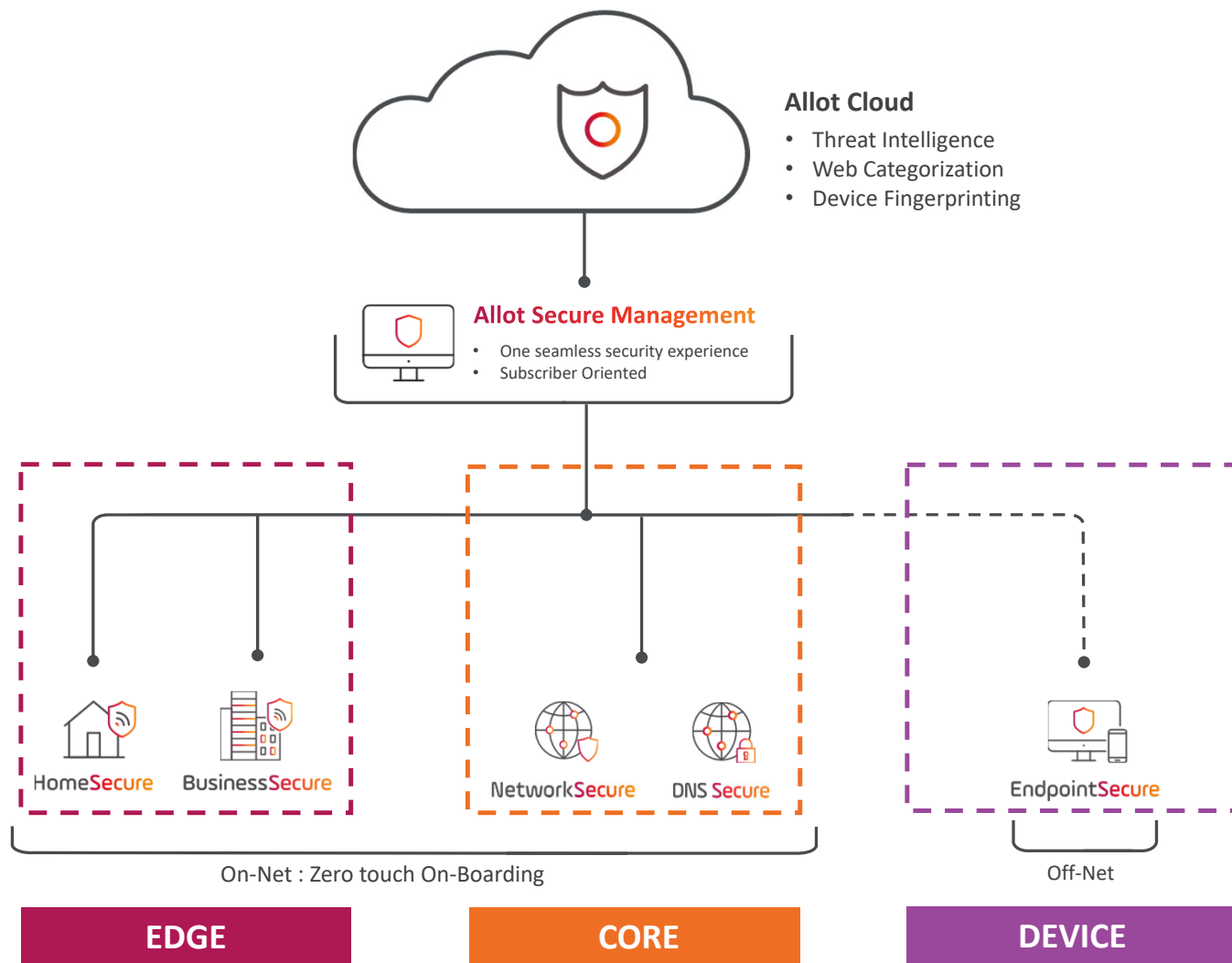


Security is the 4th network attribute



## Allot Network Native Protection

- Anti Threat
- Anti Malware
- Anti Phishing
- Anti Ransomware
  
- Device agnostic
- Zero touch
- Clientless





All CSPs will eventually provide network native security.

# Lead or Follow?



**MEN. WOMEN. BABIES. ELDERLY.**  
**ARE STILL HELD HOSTAGE BY HAMAS**  
**#BringThemHomeNow**

**מטה המשפחות להחזרת החטופים והנעדרים**

# Energy Resiliency

Brendon Riley

CEO Telstra InfraCo

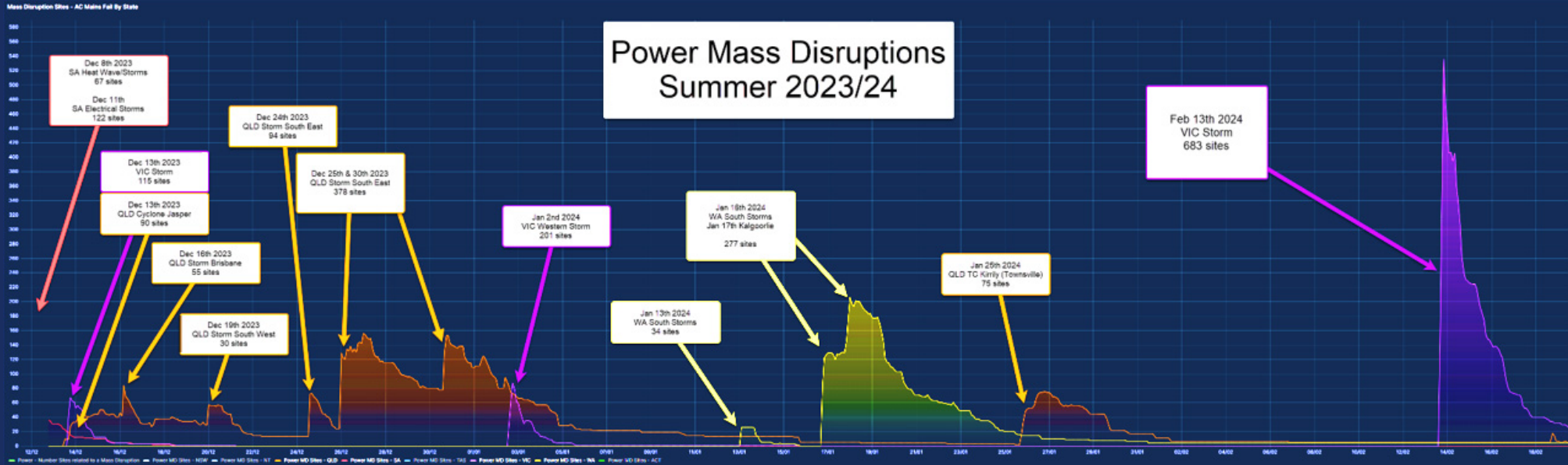
CommsDay Congress, 30 April 2024





# Mass Disruption 2023-24

## Telstra sites with loss of AC Mains

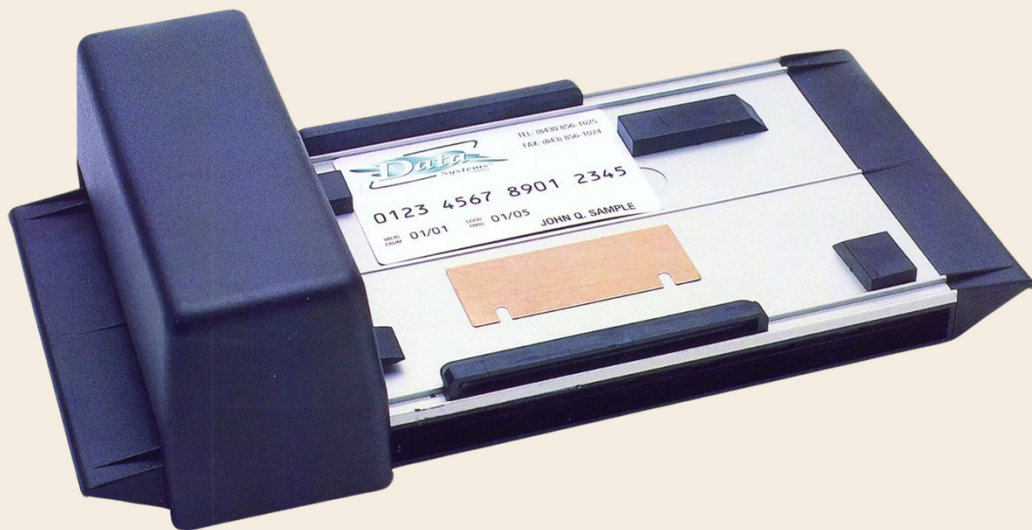


This chart illustrates the Telstra sites that experienced a Mains Power outage, which were associated with a Mass Disruption (MD) event and subsequently recorded in Telstra's incident management system.



Above is an AI generated image

No worries, I can still *grab a Chiko Roll!*



# Industry Collaboration?



Source: Decon Corporation



Source: Ventia





“

The reality is everyone relies on their mobile phone. Very few people have a landline. This has really emerged strongly out of this event this week as something that needs much greater focus and attention at both levels of government, but also the **telecommunications companies have to come to the table with solutions.**

”

Jacinta Allan, Victorian Premier

# Telecommunications sites rely on power



1,200,000  
MWh pa



17th largest user  
of energy in Australia

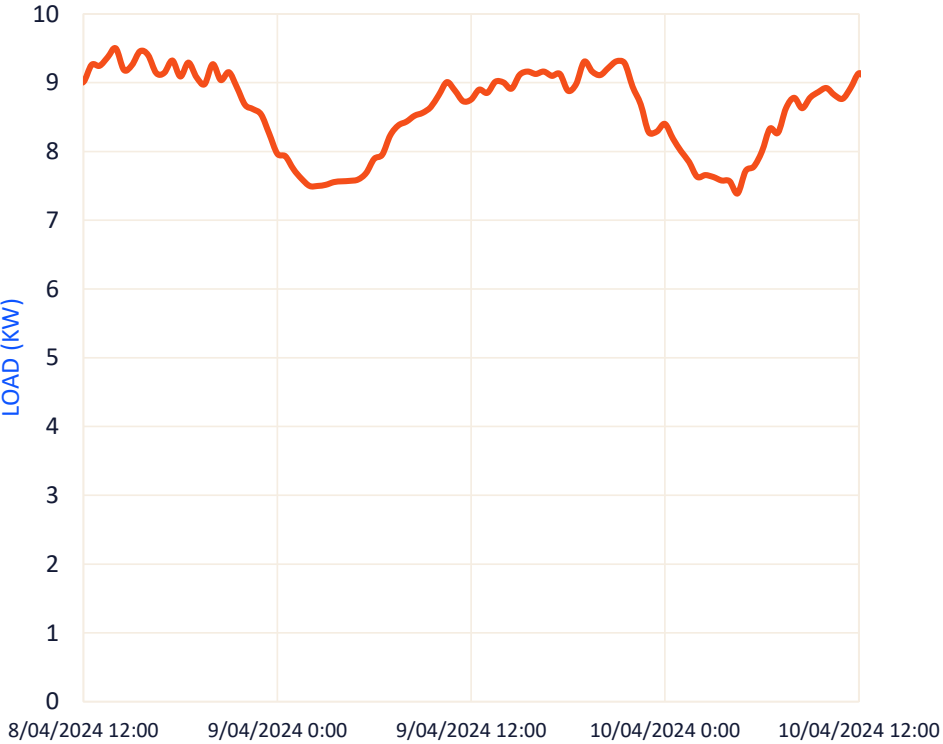


>7,000  
Fixed Network Sites

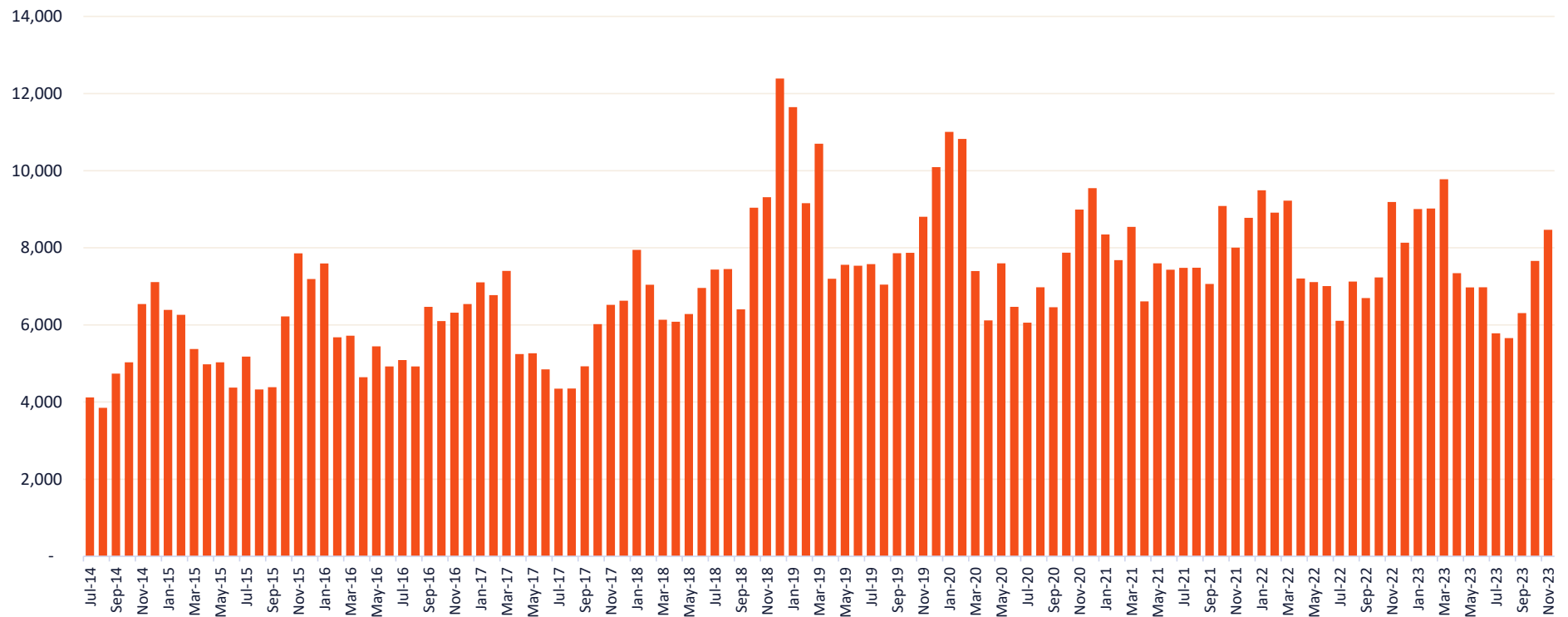


>12,000  
Mobiles Sites

### Example Mobiles Site Power

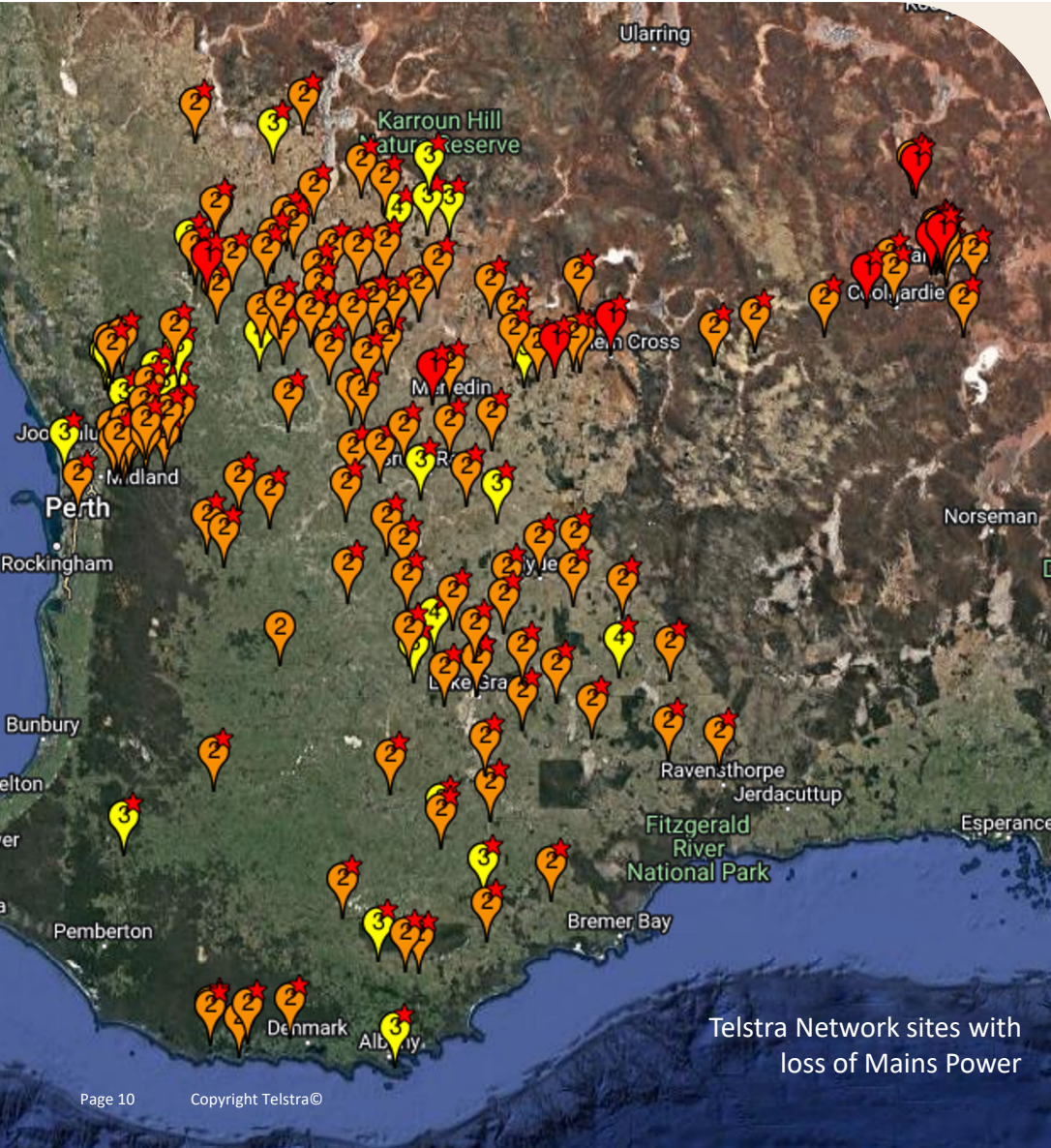


# Power outages experienced by Telstra's network

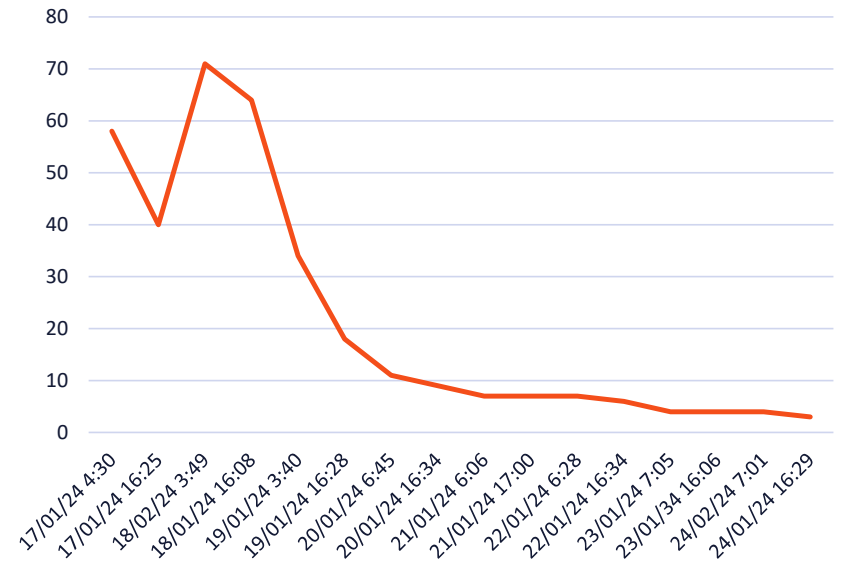




# WA Storm Event



## Mobile Base Stations with Customer Service Impact

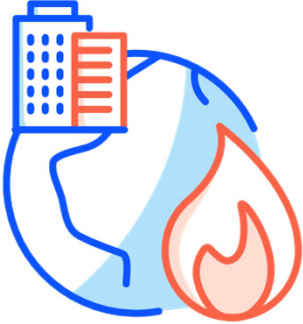


# Telstra's climate scenarios



Accelerated Action

Less than 2°C



Divided World

2 - 3°C



Changed Climate

Greater than 4°C

# Transition to renewable energy

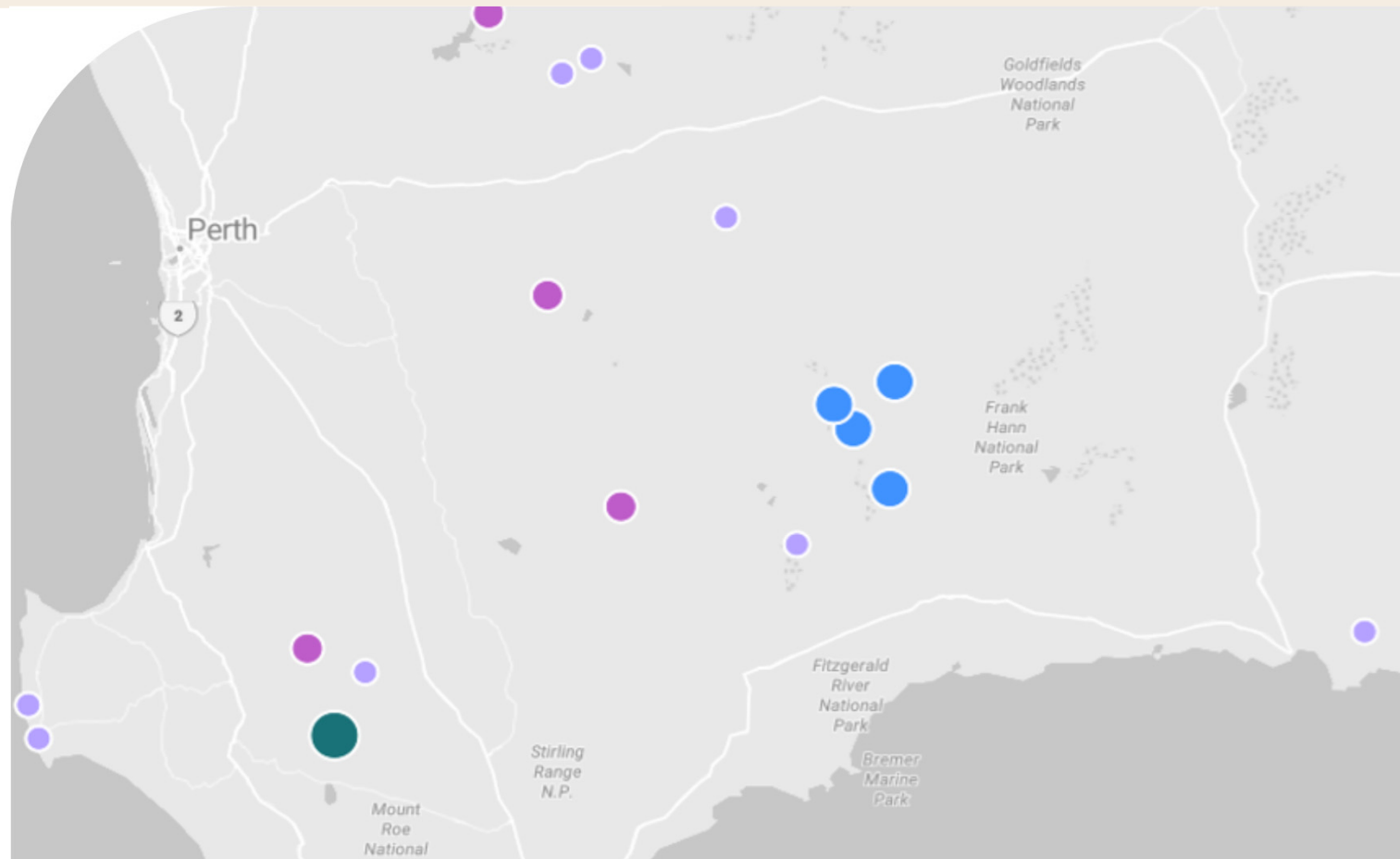


# Mobile network architecture



## Dependent Site count

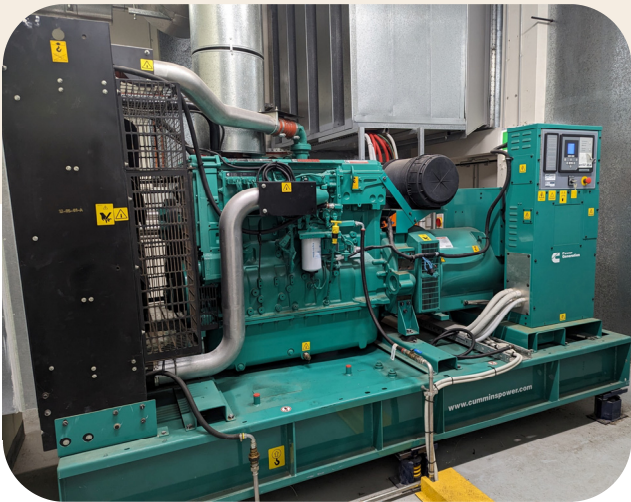
- 14
- 11
- 10
- 9
- 8
- 7



# Asset Response



Batteries



Diesel Generators



Hydrogen Fuel Cells



# Getting Connected



Timing of connection by state –  
average from application to connection:

WA 501 days (~16 months)

NSW 396 days (~13 months)

SA 396 days (~13 months)

VIC 310 days (~10 months)

QLD 308 days (~10 months)

TAS 242 days (~8 months)



# Responding to Power Outages





Automatic Transfer Unit (ATU)



Standalone Power Systems (SAPS)

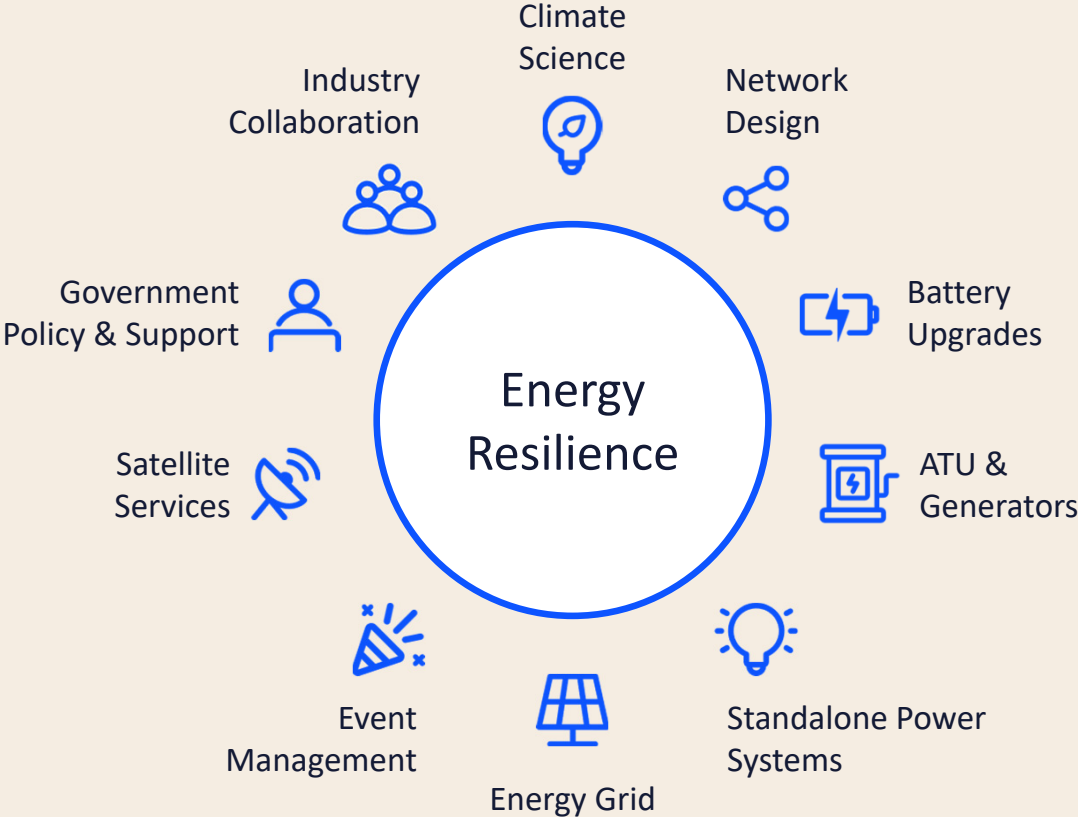


From space  
to your place

New Satellite  
Home Internet



# Improving energy resilience



Thank you



# BAI Communications

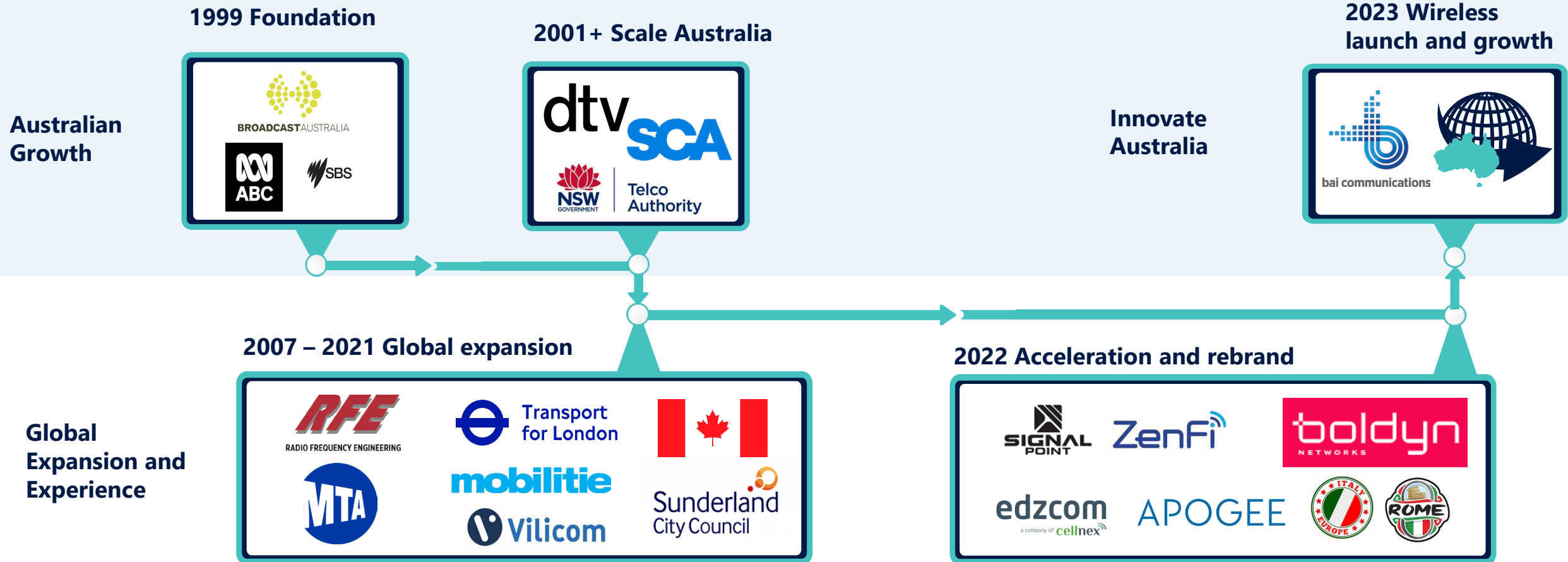
Disrupting and Innovating  
public and private  
wireless in Australia

Nick Gurney

CommsDay Summit 2024



# Who is BAI Communications?



CPP Investments



Broadcast



IBC/ DAS  
(Distributed  
Antenna Systems)



PMN 5G/ LTE



CoLo



Smart Cities



Public WiFi



Critical Comms



# There is reason to be excited



**Customers demand  
better outcomes**



**Transport  
for London**

Not-spot to best in class, seamless customer experience and service throughout the network

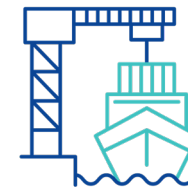
**LinkNYC**



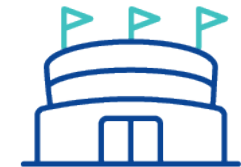
**The Industry is embracing technology advancements**



IBC/DAS connectivity in Australia is patchy – from just under 2000 implementations, less than 20% have all three MNOs, for strategic locations, it is less than 40%



Highly secure, high capacity low latency to power autonomous infrastructure, accelerate digital transformation of OT



An amazing fan digital experience

**Government and regulators driving change**

# There is reason to be excited



Customers demanding better outcomes

The Industry is embracing technology advancements

Government and regulators driving change



AT&T and Ericsson + others to roll out ORAN to 70% traffic by 2026



Vodafone UK and Samsung currently deploying ORAN to 2500 sites



AT&T, T-Mobile interconnect to PMN with MOCN



ORAN % of RAN revenue up to 20% to 30% in 4 years



5G PMN starting to outpace LTE PMN in Europe



Integrated PMN and DAS convergence



5G PMN pricing, flexibility and scale becoming more attractive

# There is reason to be excited



Customers demanding better outcomes

The Industry is embracing technology advancements

Government and regulators driving change



ACMA process for acquisition in play for 3.8GHz spectrum for 5G PMN



Huge focus on public safety and resilience



Regional coverage and blackspot programs trending towards active sharing



Mobile UK specifies neutral host models and shared active RAN infrastructure for IBC

# Fan experience has come a long way



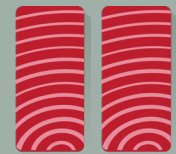
# We will succeed together as an ecosystem



**Sakizuke  
Appetiser**



**Wanmono  
Soup**



**Mukozuke  
Sashimi**



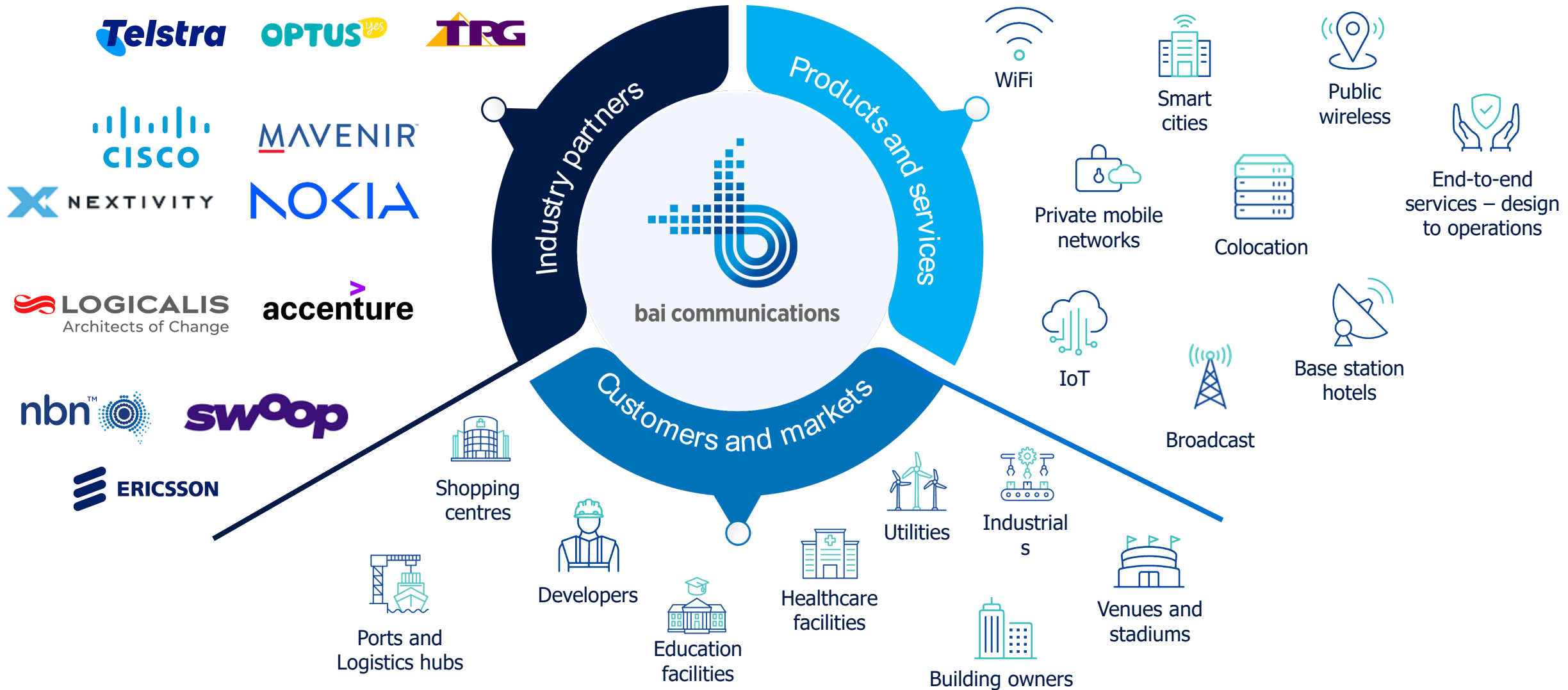
**Hassun  
Seasonal**



**Mizumono**



# We will succeed together as an ecosystem





# Thank you Arigato goziamasu

Connect on LinkedIn [linkedin.com/in/nickgurney](https://www.linkedin.com/in/nickgurney)

# Matt Williams

Managing Director, Customer Solutions

Optus







**Network**  
**Australia's  
fastest 5G**

**mobile network for  
download speeds,  
as awarded by  
Opensignal.**



**Value**  
**Price Match  
Guarantee**



**Features**  
**Mobile  
Turbocharge**



**It starts  
with yes**

5G: Available in selected areas and on select plans. Actual download speeds may vary by area. Check website for coverage. Opensignal Awards – Australia: Mobile Network Experience Report, April 2023. Price Match: T&Cs and exclusions apply. Check website for offer details. Mobile Turbocharge: T&Cs and eligibility criteria apply. Actual performance and experience may vary. Operates for 1 hour from activation.

**yes** **OPTUS**







**Network**  
**Australia's  
fastest 5G**

**mobile network for  
download speeds,  
as awarded by  
Opensignal.**



**Value**  
**Price Match  
Guarantee**



**Features**  
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**yes** **OPTUS**





**OPTUS | SPACEX**

**Together we plan to cover**

**100% of Australia**

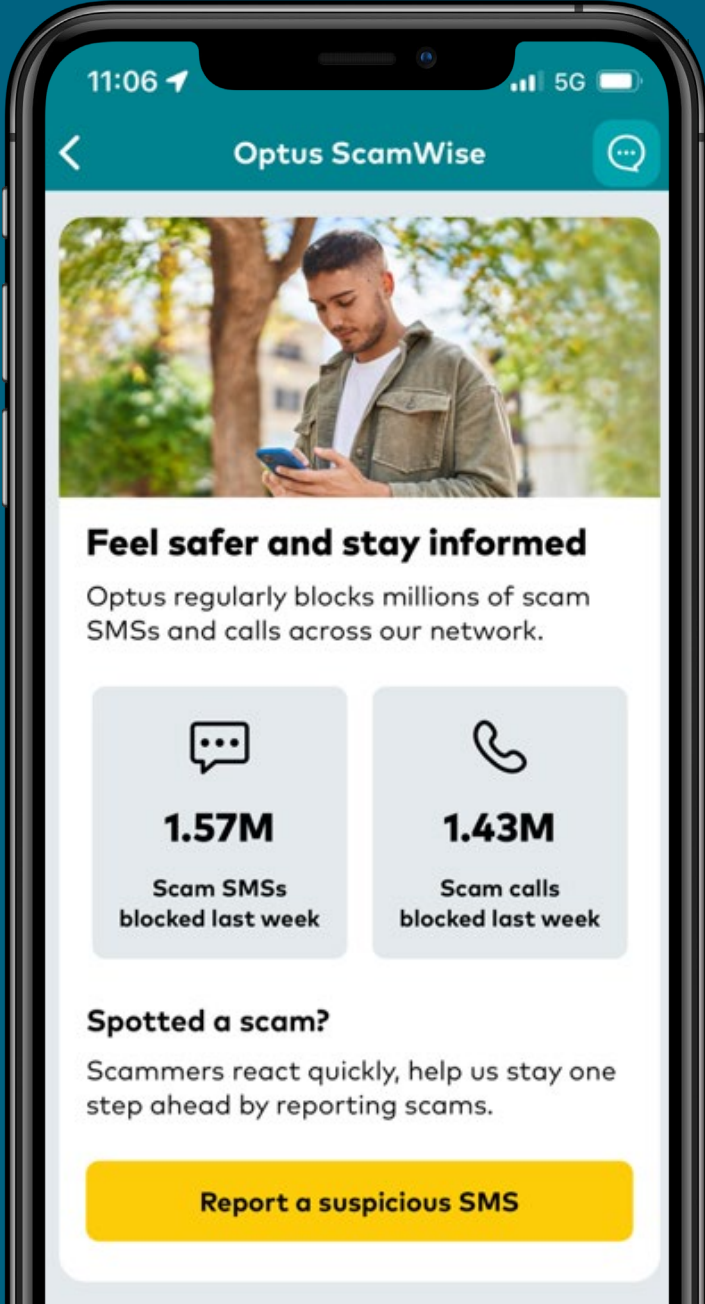
**It starts with yes**

**SMS from late 2024, voice and data from late 2025**

**Find out more at [optus.com.au/SpaceX](https://optus.com.au/SpaceX)**

**yes OPTUS**





11:06

5G



Optus ScamWise



### Feel safer and stay informed

Optus regularly blocks millions of scam SMSs and calls across our network.



**1.57M**

Scam SMSs  
blocked last week



**1.43M**

Scam calls  
blocked last week

### Spotted a scam?

Scammers react quickly, help us stay one step ahead by reporting scams.

**Report a suspicious SMS**





# Meeting Community Needs for Wireless Connectivity For Both Coverage and Capacity



# Ever Evolving Wireless Market



Continuous data growth



Connectivity that delivers coverage and capacity



Recognition of essential service



MNOs outsourcing site ownership and operation

Community demand for both coverage and capacity require Mobile Infrastructure Providers to evolve

3000096 Barley's Hill Reservoir  
End of Massey's St, Ascot QLD





Spring Lane  
Chatswood

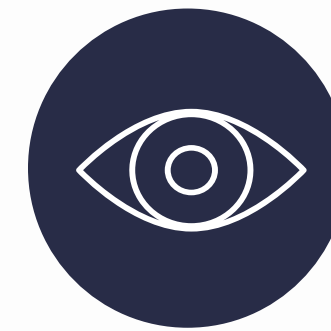
# About Indara

We are Australia's leading owner and operator of shared digital infrastructure



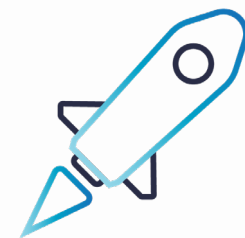
## Our Purpose

To accelerate a digitised future for our communities



## Our Vision

To be the leading provider of digital infrastructure



23+ Years Experience



Over 250 Employees



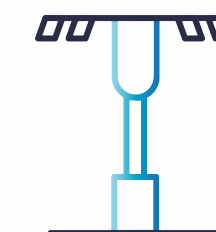
Over 90% Connected



Australian Super (82%) & Singtel (18%) Owned



4,750+ Macro Sites



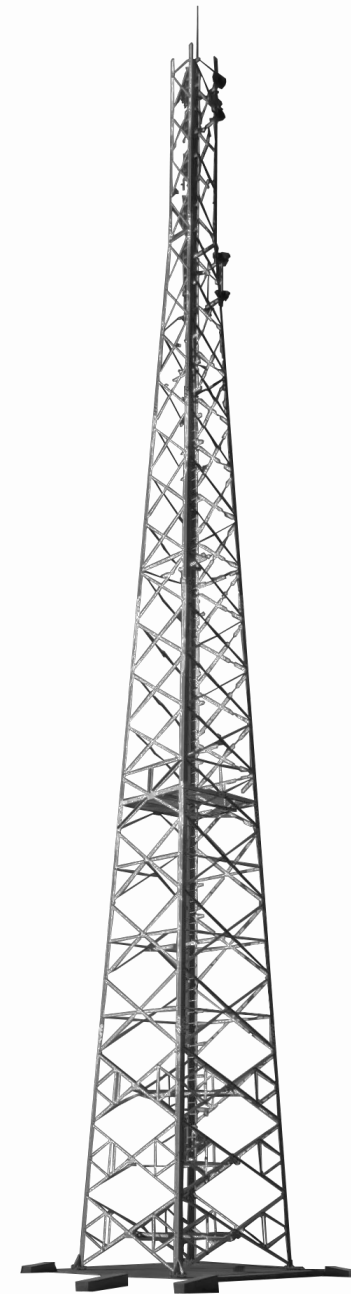
5,500+ Micro Sites

# Our Structures that Enable Connectivity

Macro, micro, IBC as shared infrastructure that's fit-for-purpose and delivers connectivity across Australian communities



INDOOR &  
IN-BUILDING



LATTICE TOWER &  
GUYED MASTS



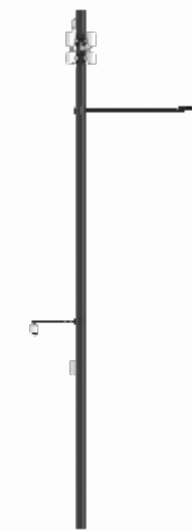
MONOPOLE



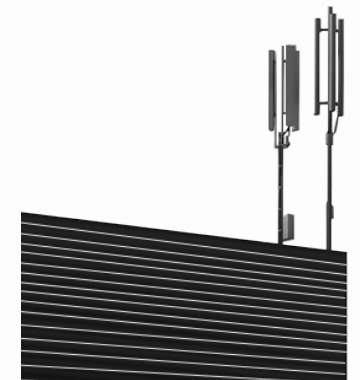
TOWER.NODE



SMART.NODE™



MFP  
SMART.HUB &  
SMART.POLE



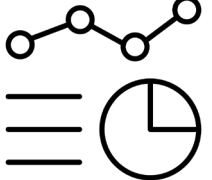
ROOFTOPS

# Our Services Accelerating Connectivity

A range of services for fast deployment in locations where connectivity is needed most

Deployment Services  Turnkey Build to Suit  Site Acquisition (SAED)

Engineering Services  Tower & Rooftop Upgrades  Portfolio Health

Data Services & Analytics  Digital Services  Data & Analytics

Site Operations  24/7 Site Management Centre  Site Maintenance



Hendy Street Reserve  
City of Greater Geelong

# Optimising deployment with Digital Twin

Accurate, detailed information interconnected and synchronised with Indara's secure systems

Delivering exceptional customer experience



Accurate,  
Detailed Data



Cost  
Predictability



Fast Access  
to Sites



Reduced  
Carbon Footprint



Forestville  
Melwood Ave, Forestville NSW

# A New Approach to Delivering Connectivity

LGA-wide collaborative planning with local government

 **planning for  
connectivity.**

## Planned Infrastructure

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ROADS



WATER



POWER

## Unplanned Infrastructure

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CONNECTIVITY



# Summary

- Planning for Connectivity
- We have bold ambitions
- Full set of site connectivity options
- Complementary suite of site solutions
- Accelerating deployment and scale
- Indara, empowering your digital future



Thank you

Jason Horley  
Executive Director,  
Customer & Property

[jason.horley@indara.com](mailto:jason.horley@indara.com)

04 18 615 854

