

Which services and applications will be the first to benefit from the 5G transition

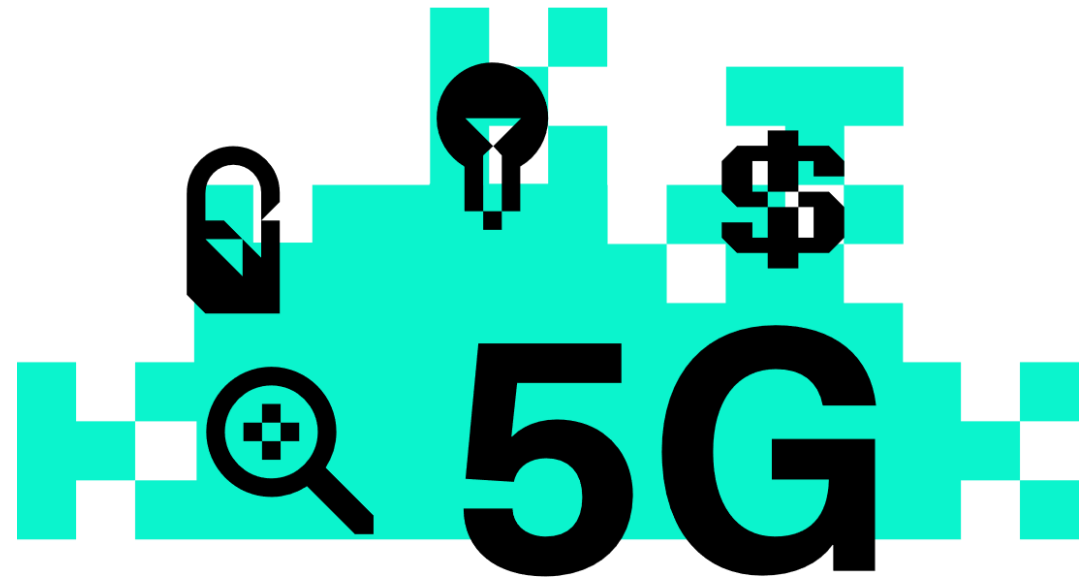
Hitesh Jain
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syniverse[®]

5G – Transition, It is here and now, reinventing business model

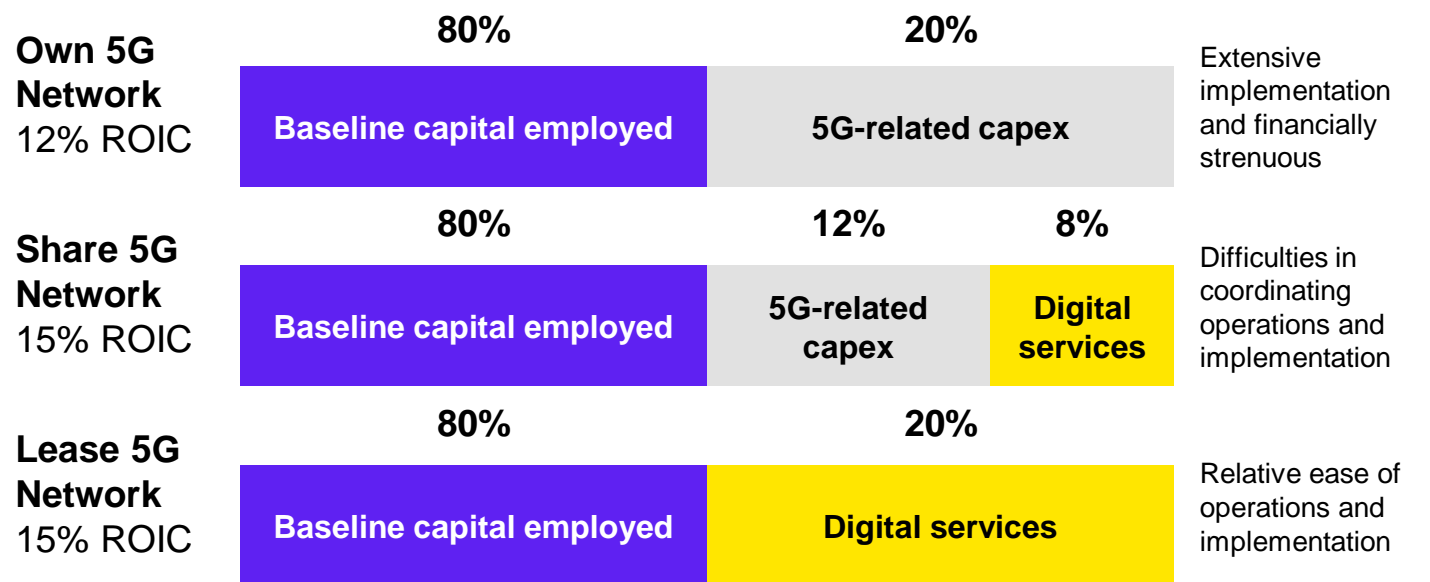
- 5G, unique Mobile Subscribers estimated to be **1.5B + 25 Billion IoT connections.**
– GSMA
with Annual revenue of **\$300B**
- 5G Investments on Capex alone would reach to **48B\$ + Opex (200B\$)**



5G – Transition, It is here and now, reinventing business model

- High Capex investment– Pressure on Financial returns
 - Current ROIC of the operator 17% , projected to reduce to 12% by 2020
 - 64% of the Operators say that Capex planning is driven by technology and not by business case - PWC
- Business case + Commercial Strategy**
- Scope for 20% Improvement on ROIC
- Open-ness :
 - Any to Any Partnership
 - Redefining Competition , Collaboration with Competitors
 - 5G private networks may be built by enterprises looking to upgrade their networks - Gartner

Asset-light telcos under the leasing model to differentiate themselves in digital services



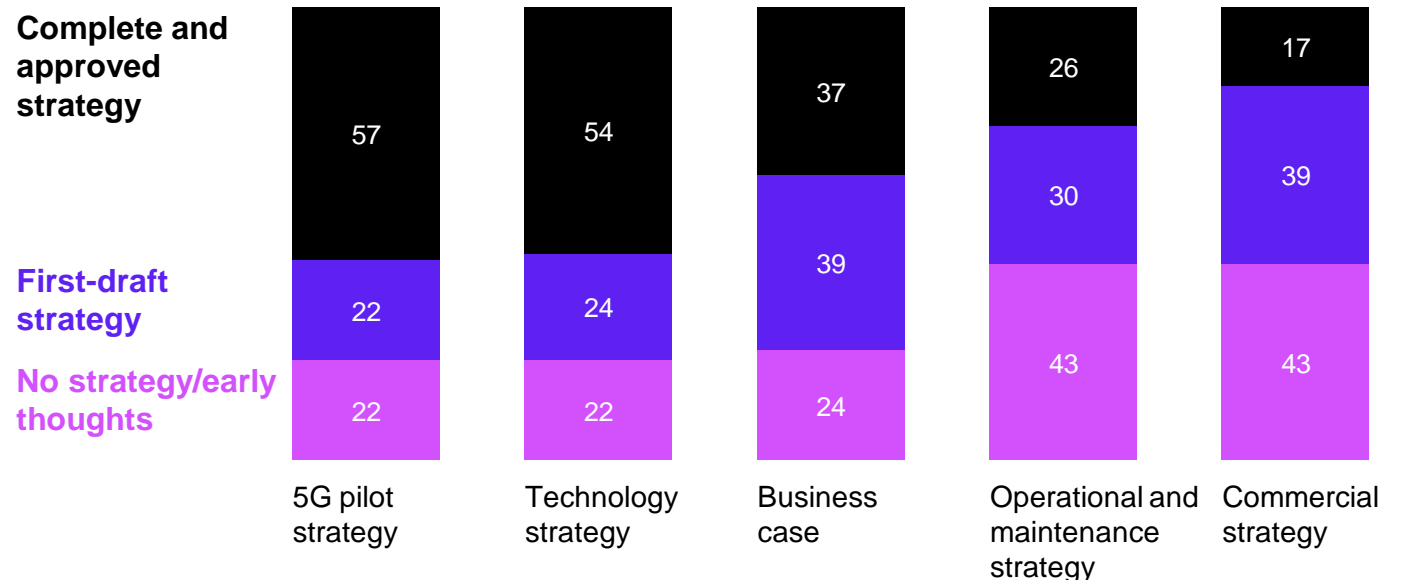
Source: DBS Bank

5G – Transition, It is here and now, reinventing business model

- A sharp right turn along the value chain is needed to emerge a long-term winner.
- **The technology strategy is mature for most operators, while commercial strategy and business case remains immature for most**
- In the near Future: 5G will rely heavily on 4G LTE for ubiquitous and seamless coverage everywhere in the network

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Current status of 5G strategy development,¹ %



¹100% = 46 operators. Figures may not sum to 100%, because of rounding

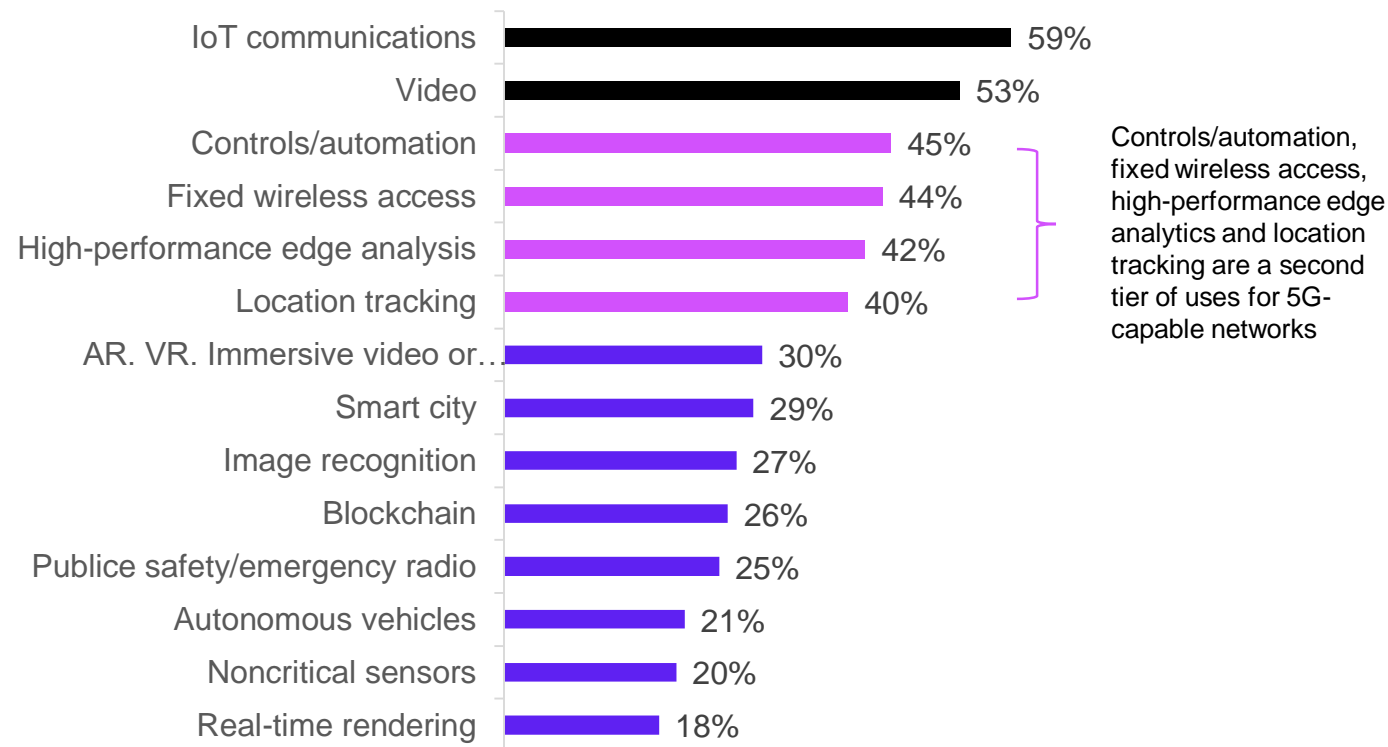
Source : McKinsey & Co.

The early phase / transition phase

Application and services would be the one which supports and enables commercial ready collaboration

Expected use for 5G capable networks

Percentage of Respondents



Source : Gartner

- The global 5G applications and services market:
 - Value 132B\$ in 2020 and is expected to reach 663B\$ by 2027
 - CAGR of 25.8% between 2020 and 2027

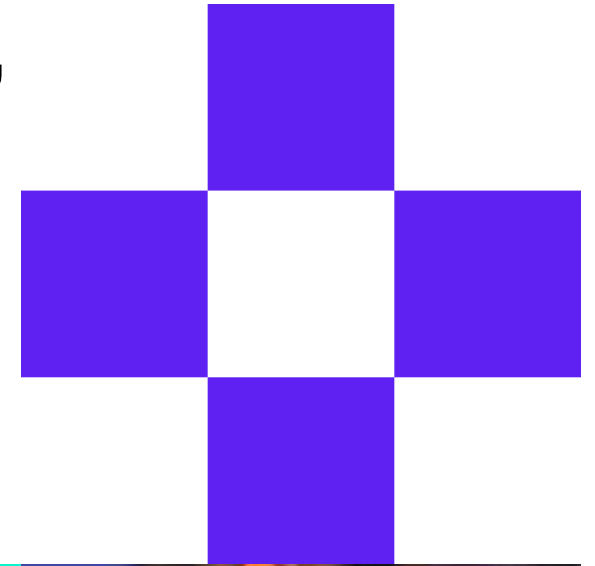
Source : Zion Market Research.

Services and applications during early phase, focus on quick monetization

The hyper-connected approach: Mobile operators would create a blend of pre-existing technologies covering 2G, 3G, 4G, Wi-fi and others to allow higher coverage and availability, with the key differentiator being greater connectivity

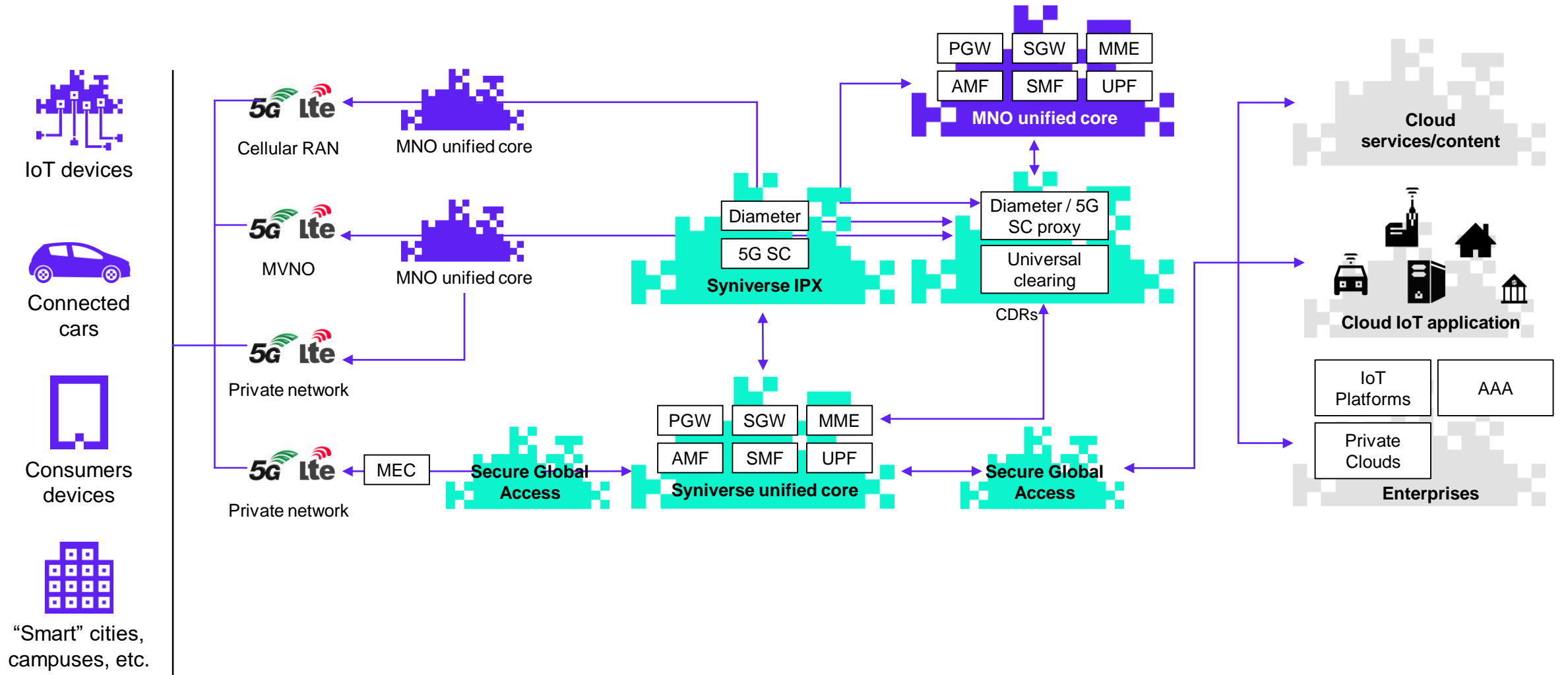
Attributes –

- Open & Secure Architecture:
- Collaborative, secure, decentralize
- Enables continuous growth of business and infrastructure & Commercial Models



Connected everything in a 5G World

3GPP Access Options

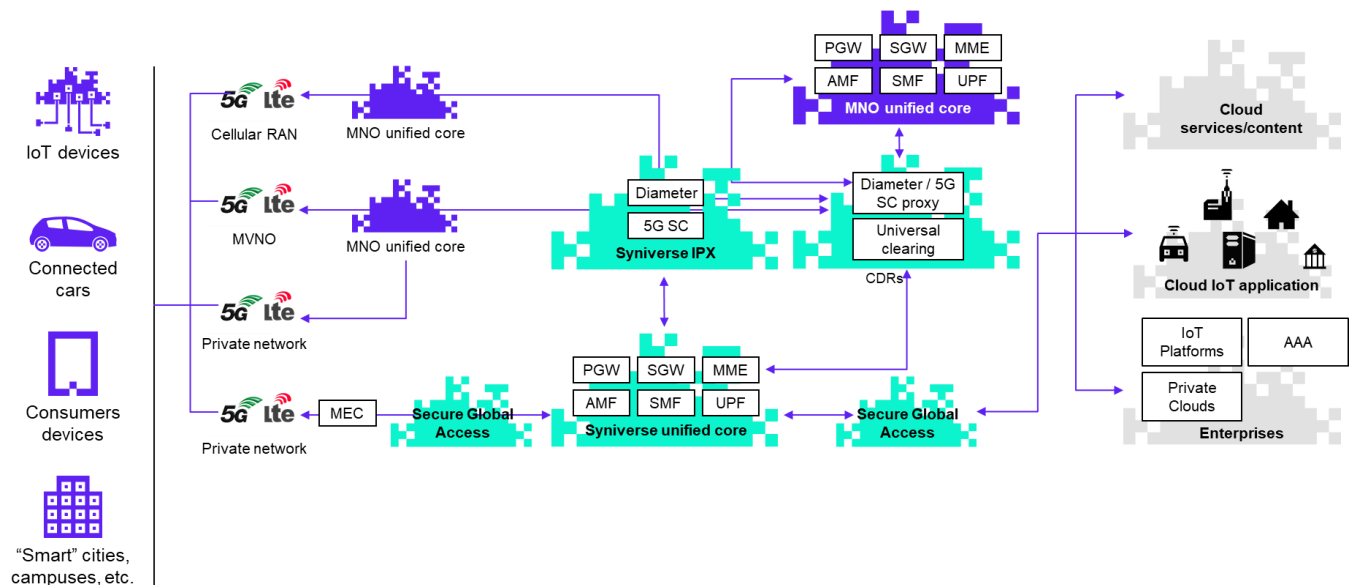


Creating secure interconnections and commercial models

Syniverse is uniquely positioned to provide device connectivity and also create and monetize public network interconnections for enterprises and service providers

- Provide device connectivity to Enterprise and IoT applications
 - MNO 5G Core for traditional mobile access
 - Syniverse Unified Core for private networks and MVNOs
- Create, authenticate and secure connections between networks and service providers
 - Syniverse IPX and 5G Signaling Controller (HTTP/2)
 - Syniverse Secure global access
- Facilitate commercial agreements between customers, service providers, and MNOs
 - Syniverse Marketplace
 - Syniverse Universal Clearing and Settlement

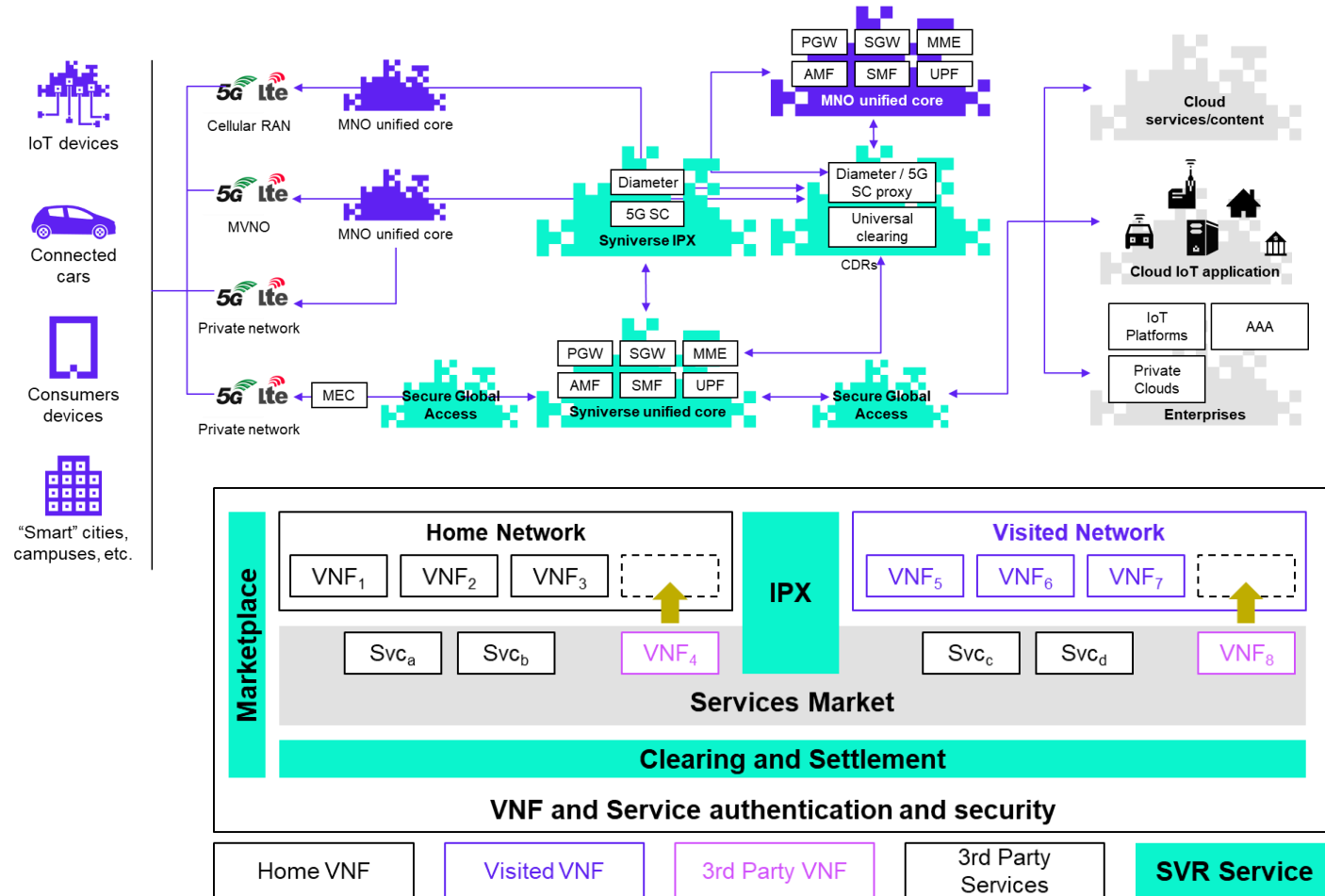
3GPP Access Options



Enabling the evolving mobile market community

The capabilities of 5G to deliver new network solutions (eMBB, mMTC, URLLC) will impact the market ecosystem and encourage new ways of providing and consuming services

- Marketplace to enable secure service exchange and monetize commercial models
- Universal clearing and settlement based on exchange of universal data records
 - Multi-party billing arrangement
 - Non-traditional service elements
 - Enterprise participation
 - Non-traditional service providers
 - Flexible billing cycles
- Interconnectivity infrastructure required to facilitate Enterprise and Consumer connections to applications and services



Source for above Information:

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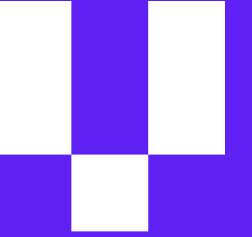
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