



#4: Models for Monetising 5G & Edge Computing Investments

Live: Wednesday, 15 July 2020 at 15:00 BST



5G Live Webinar Series

Webinar starts at:

15:00 (BST)

10:00 (EDT)

16:00 (CEST)

22:00 (CST)



Andrew Milne

Senior Marketing Manager GSMA

Andrew started his marketing career in telecommunications at EE and Virgin Media before joining the GSMA in 2017. With a natural interest and passion in new technologies, Andrew has focused on growing the 5G ecosystem within the GSMA through initiatives such as the Cloud XR Forum, Beta Labs and 5G Operator Platform groups.

In his time at the GSMA, Andrew has led the Future Networks strategic video-first marketing approach, creating and editing content for our diverse global audiences.



Welcome

#4: Models for Monetising 5G & Edge Computing Investments

Live: Now



5G Live Webinar Series



Agenda

Time	Topic	Speaker
15.00	5G Live Overview & Global Stats	Andrew Milne, Senior Marketing Manager, GSMA
15:05	5G Update	Michele Zarri, Technical Director, GSMA
15.15	Models for Monetising 5G & Edge Computing Investments	Dalia Adib, Principal Consultant & Edge Computing Practice Lead, STL Partners Chris Barraclough, Partner, STL Partners
15.45	Q&A	STL Partners
15:55	Closing Statement	GSMA



Global 5G Update

July 2020

81



5G
COMMERCIAL
LAUNCHES

+200



5G
DEVICES

7%



POPULATION
PENETRATION



STL PARTNERS



Source: GSMAi (July 2020)

Michele Zarri

Technical Director GSMA

Michele Zarri is a Technical Director at the GSMA where he works on advanced technologies and 5G.

Michele graduated in telecommunications engineering at University of Pisa (Italy) and completed his studies at King's College of London (UK).

Before joining the GSMA, Michele worked for Deutsche Telekom where he accrued more than 15 years of experience in the standardisation of mobile technologies. Michele served as chairman of working groups both in 3GPP and GSMA.





Operator Platform

Creating a service enablement layer for MNOs



Operator Platform – Problem statement

4G Service layer disintermediation

- In 4G the Operator offered best effort mobile broadband connectivity collecting fees from users for data usage

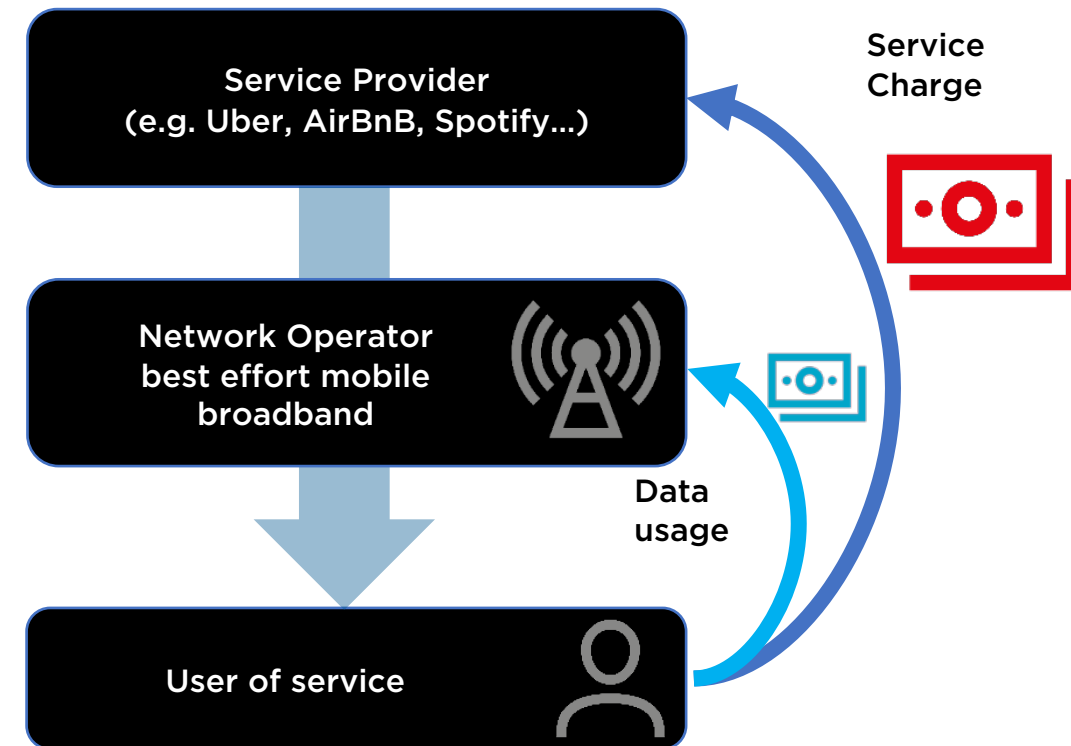
- Consumer services were provided by 3rd parties

In the 5G Era operators can use their 5G capabilities to:

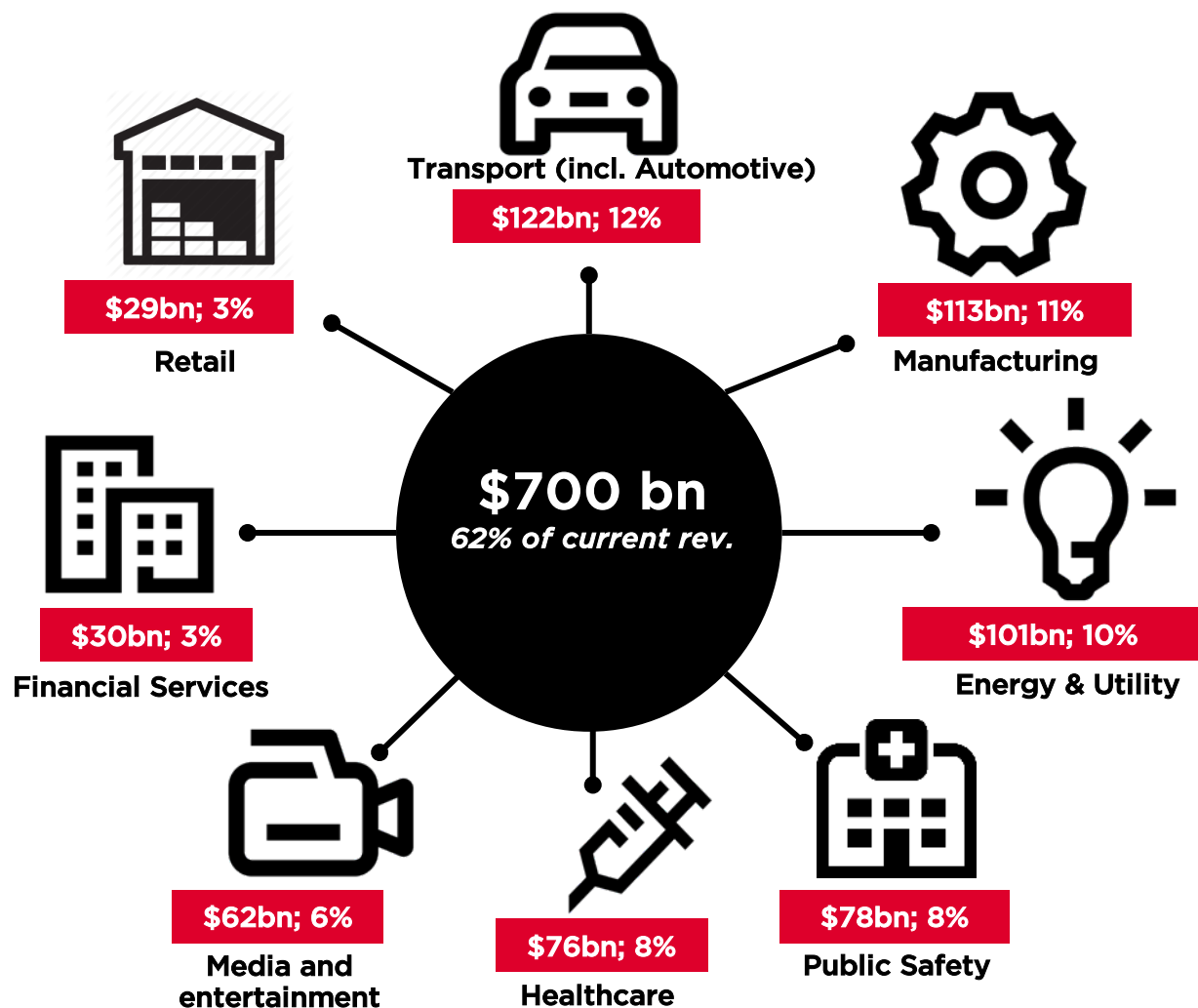
- Provide basic capabilities such as compute storage connectivity (IaaS)
- Package advanced capabilities and open them to 3rd party service developers while participating in the service value chain (PaaS)

Note

Future operators will be able to compete with cloud providers that today offer compute, storage (IaaS), capabilities (PaaS) and appliances (SaaS)



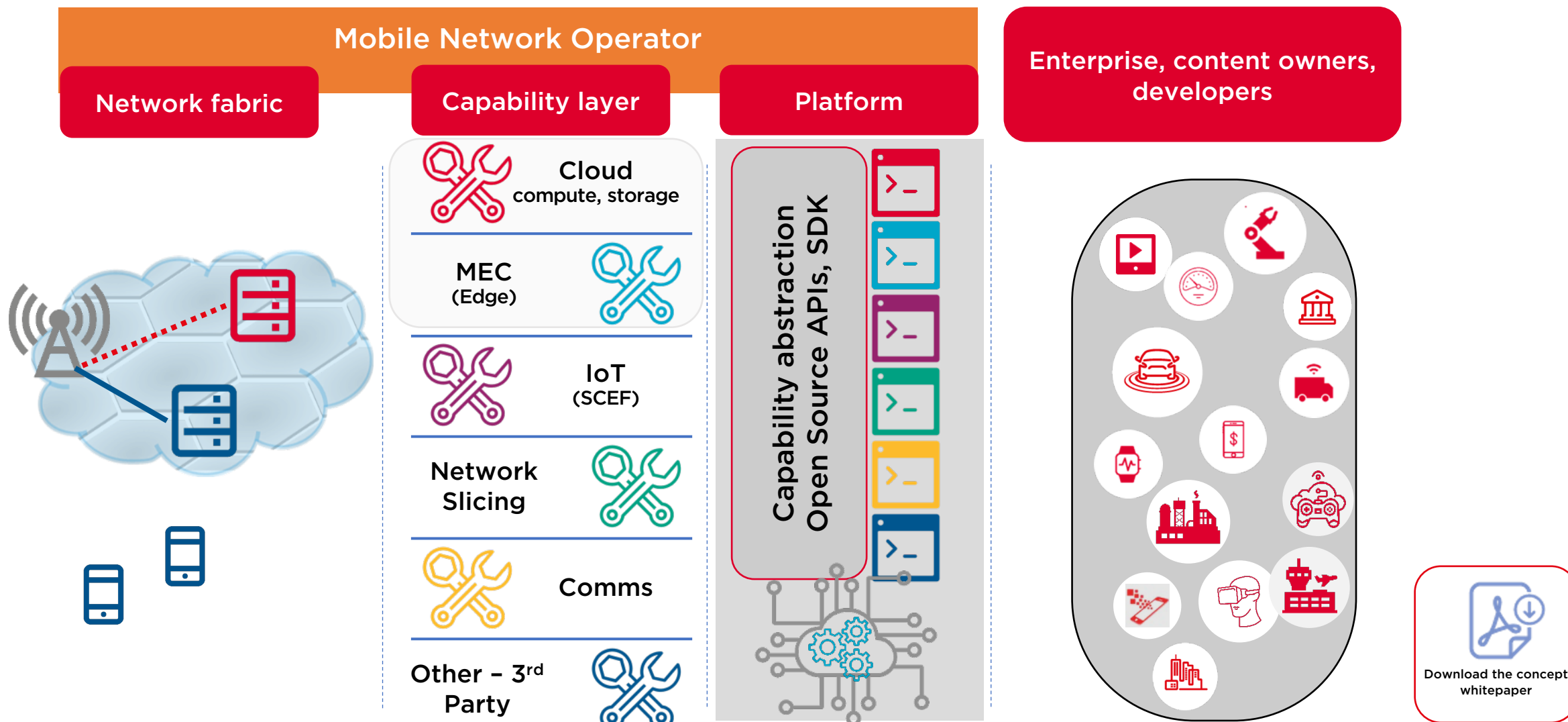
Size of the opportunity



From providing services to enabling services

- Operators can tap into the \$620bn revenue opportunity from the enterprise segment
- Mix of B2B (about 60%) and B2B2C relationships
 - Public Safety opportunity is mostly B2B
 - Media and entertainment is mostly B2B2C
- Engaging with Enterprise requires a change of mind-set and refresh of business processes
- If Operators do not adapt, the opportunity will be provided by others or developed by themselves (e.g. Ocado)

Operator Platform – conceptual diagram



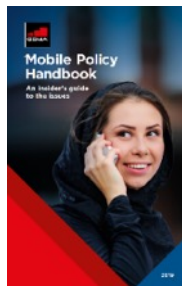
Why GSMA?

Types of Business relationships

B2B → business served by only one operator
B2B Multi-operator → business served by multiple operators
B2B2C → business' customers served by any operator

Three activity areas

- Technical: produce a set of guidelines for a technical solution to enable operators to compete with global scale players in the provision of B2B, B2B(MO), B2B2C services capturing the value of 5G
- Commercial: Leverage expertise in creating industry templates for facilitating commercial relationships
 - Roaming templates, charging principles PRDs
- Regulatory: leverage relationship with regulators to remove barriers and foster level playing field



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Dalia Adib

Principal Consultant
& Edge Computing
Practice Lead
STL Partners

Dalia is a Principal Consultant and the Edge Computing Practice Lead at STL Partners. She has led major consulting projects with technology companies in North America, Europe and Asia Pacific on 5G and edge computing strategies, use cases and commercial models.

She co-authored the research report “5G’s impact on manufacturing: \$740Bn of benefits in 2030” and “What edge developers want from telcos now”. Outside of 5G and edge computing, she supports clients in areas such as blockchain, digital transformation and IoT.



Chris Barraclough

Partner
STL Partners

Chris is a key contributor to both consulting and research activities at STL Partners and has previously led the Telco 2.0 Transformation stream. He has over 25 years’ experience in strategy and business — 18 of which are in the TMT sector working for operators such as Verizon Business and Orange.

Chris has particular interests in strategic analysis, proposition development and the use of financial and operational metrics to manage and govern change. Recently, Chris authored the research reports “5G regulation: Ensuring successful industrial transformation” and “Why CFOs must start to drive telecoms business model change”. Chris holds a MA in English Language and Literature from Oxford.

Q&A

STL Partners



Thank you

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