



From networks to ecosystems: The 5G Monetization Journey

Presentation by **Blanca Cavaleiro**
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Why 5G Monetization Matters Now for Telcos

**The Industry Is at
a Turning Point**

**5G and 5G-Advanced
Unlock New Value
Pools**

**Traditional
Connectivity Models
are facing challenges**

**Ecosystem
Monetization Is the
Path Forward**



The Industry Consensus: Monetization Is the Next Frontier of 5G

65% of TMT CEOs believe their company will *not be economically viable in ten years or less if it continues its current path*

PwC, Annual Global CEO Survey, January 2025

...it's important to remember that we're still early in the 5G journey. There's a lot to be done in terms of rollout, building networks, and—critically—monetising them

President and CEO, Ericsson, April 2025

Telecom is the centerpiece of our era now. All innovations need strong telecom infrastructure

Mckinsey & Co., December 2024

Winning the 5G Game: From provider to orchestrator



Connectivity Provider



Ecosystem Orchestrator Partner

What It Means

Compete on **network quality, speed, and flexibility**

Build and orchestrate digital solutions for industries — using 5G, APIs, edge and partnerships — to create recurring, outcome-based revenue

Key Enablers

Network efficiency, tiered pricing agility

Open APIs, ecosystem co-creation, vertical expertise, product innovation

Stage message

“This is about doing what we do best but doing it smarter and faster.”

“This is where telcos shift from selling connectivity to solving real business problems — together with the ecosystem.”

Unlocking recurring revenue through digital logistics infrastructure



Ports are becoming digital ecosystems – not just physical assets



GCC ports aspire to be regional logistics hubs



Competing on efficiency, visibility, and automation, not only location



5G is the backbone to digitize operations end-to-end



Fragmented systems limit operational performance



Multiple, siloed connectivity systems (Wi-Fi, 4G, TETRA)



Limited real-time visibility of operations



Heavy CAPEX dependency by port authorities



Safety and efficiency constrained by legacy infrastructure

5G as the enabler of real-time, automated port operations

What 5G enables



**Automated
yard operations**



**Smart safety &
video analytics**



**Asset tracking
& orchestration**

The impact in numbers

+25% yard throughput

-40% downtime from safety incidents

-15% turnaround time for ships/trucks

+10% energy efficiency

Multiple recurring revenue streams beyond connectivity



Premium connectivity

- Private 5G / slicing
- SLA-based OPEX
- High margin profile

Edge & Platform

- Hosting analytics & apps
- Subscription
- Very High margin profile

Managed Services

- Network ops, OT cyber
- Monthly retainer
- Medium margin profile

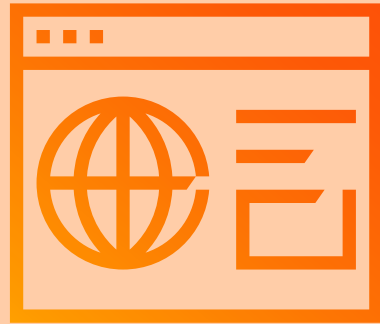
ISV Revenue Share

- Logistics / AI apps
- % of contract
- Scalable margin profile

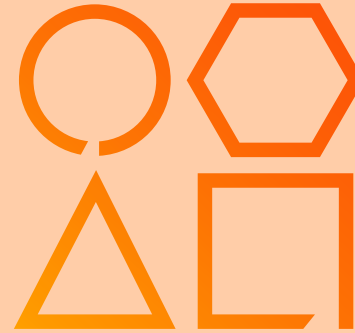
What's next for the region's telcos - From bandwidth to business outcomes: monetizing 5G where it matters most



**Define your
beyond
connectivity
playbook**



**Build strategic
alliances**



**Invest in deep
industry knowledge**



Thank you

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