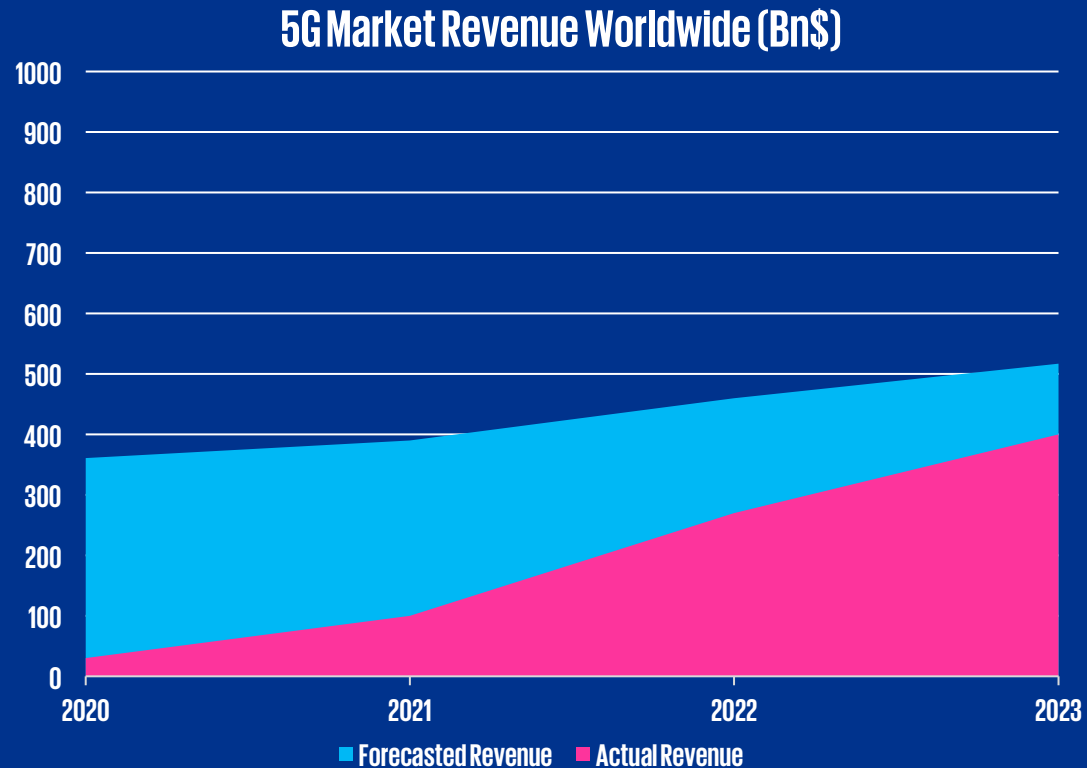




5G market revenue is below initial expectations



Source of Actual Revenue: GSMA Intelligence, "The Mobile Economy 2021" and "The Mobile Economy 2023"

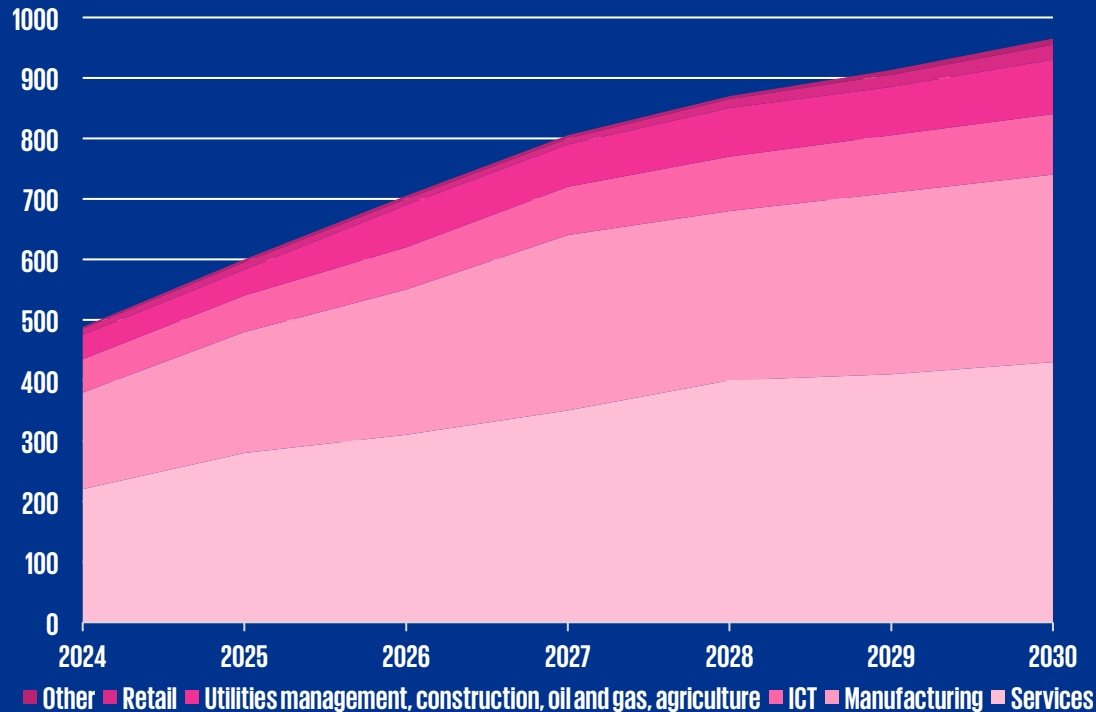
Source of Forecasted Revenue: IDC and KPMG Analysis

What happened?

- Slower market dynamics in both the B2C and B2B
- Industry has been reinforcing the foundations for acceleration:
 - Open Standards development
 - Data privacy regimes
 - Security and Cyber safeguards
 - AI/ML – in process...

Still, 5G is expected to generate \$1Tn by 2030... to unlock this operators should embrace the telco to techco journey

Annual Global 5G Contribution by Industry (Bn\$)



Where are the challenges?

<p>Rapidly implement cloud-based networks</p>	<p>Easily deploy open digital architecture to enhance capex efficiency</p>	<p>Optimize your network dimensioning to match capacity with demand</p>	<p>Utilize APIs to drive network orchestration</p>
<p>Provide real-time streamlined service fulfilment</p>	<p>Integrate applications that require specific usage of network services</p>	<p>Put customer experience at the core of product development</p>	<p>Use AI to help improve CX, develop personalize offers and enhance operations</p>

Source: GSMA Intelligence, "The Mobile Economy 2023"

Source: KPMG Analysis



Compared with followers, future-focused telcos are



4.0x

More likely to harness data, advanced analytics, and actionable insights with a real-time understanding of the customer and the business to help shape integrated business decisions.

Base: 62 future-focused customer-centric strategy decision-makers and 62 followers at telecom organizations
Source: A commissioned study conducted by Forrester consulting, April 2022



**Let's embrace this transformation journey and lead the way to
a new era of connectivity and innovation...**

...Thank you!



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