



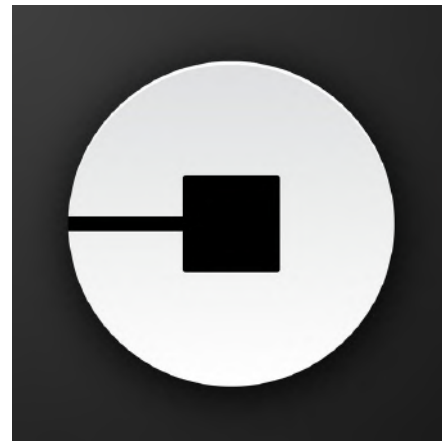
How Carriers Must Evolve to Harness Digital 2.0 Opportunities

Pankaj Miglani

DIGITAL DISRUPTION HAS CREATED A WORLD

...where

THE WORLD'S LARGEST TAXI COMPANY...



UBER

...owns no cars

THE MOST POPULAR MEDIA OWNER...



...creates no content

THE WORLD'S MOST VALUABLE RETAILER...



...has no inventory

THE LARGEST ACCOMMODATION PROVIDER...



...owns no real estate

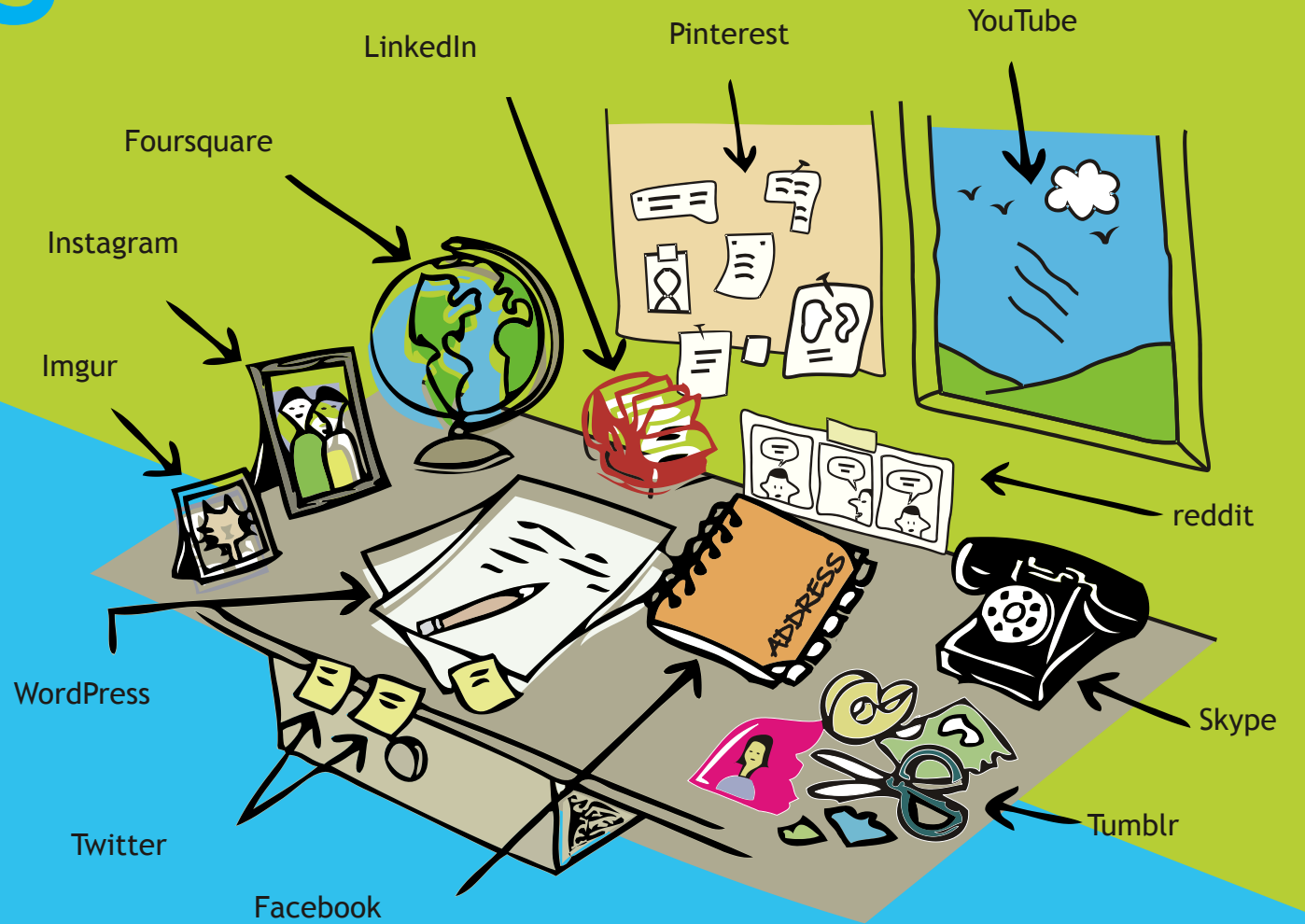
THE BIGGEST COMMUNICATIONS PROVIDER..



not
...is [^] a telco

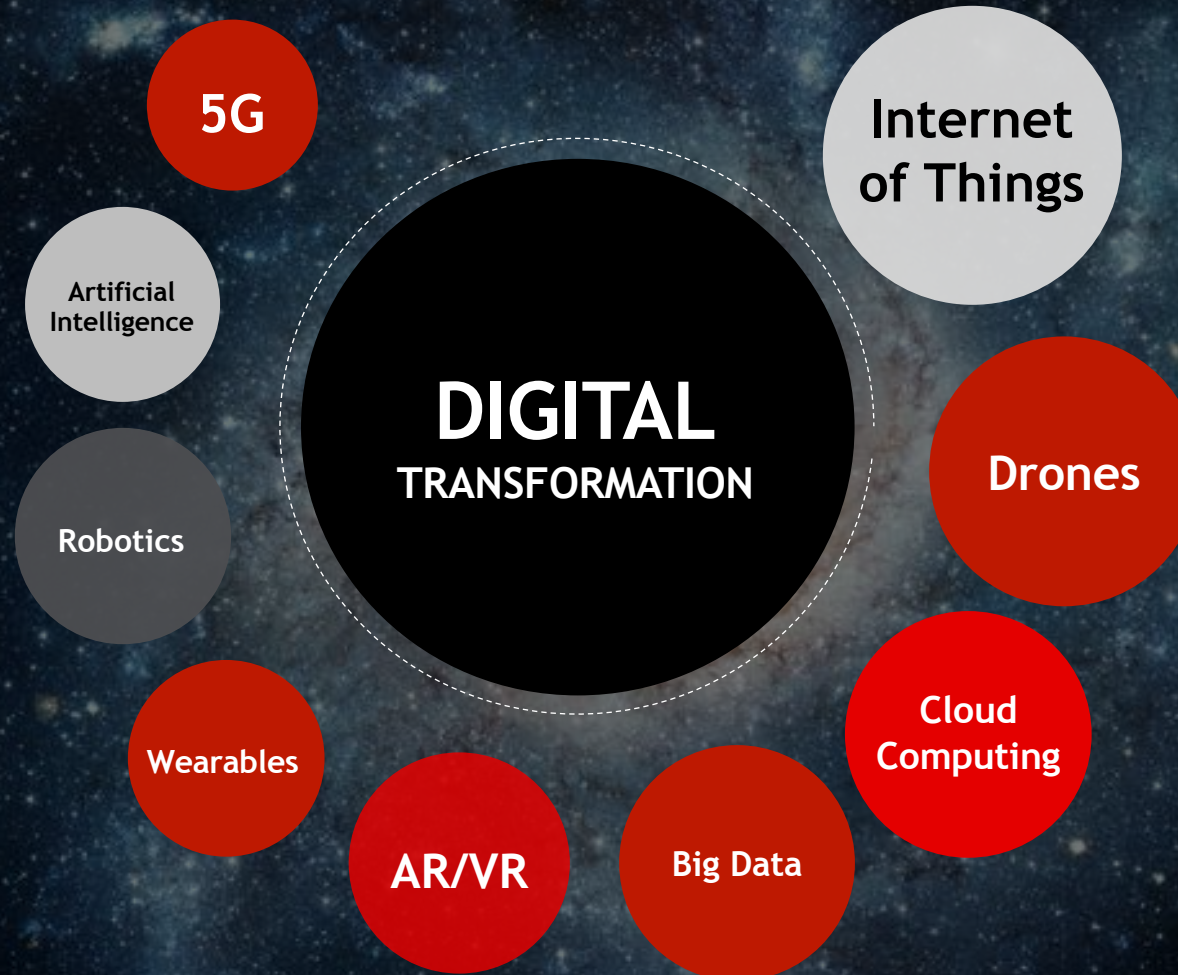
DISRUPTIONS

erupting everywhere



A Brave New World - Digital 2.0

TELECOM NETWORK & CONNECTIVITY - KEY ENABLER OF THIS DIGITAL TRANSFORMATION



Global Telecom Outlook - 2025

UNIQUE MOBILE
USERS



5.9 BILLION

PENETRATION

71%

SMARTPHONE
USERS



4.5 BILLION

PENETRATION

77%

MOBILE INTERNET
USERS

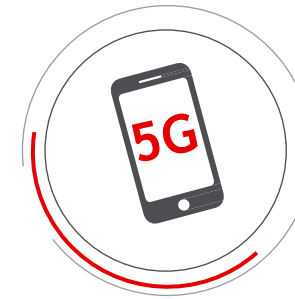


5.0 BILLION

PENETRATION

61%

5G
USERS



1.2 BILLION

PENETRATION

24%

ACTIVE IOT
DEVICES



100 BILLION

CONNECTIONS

25bn

EXPLOSION IN DATA USAGE - **500X** usage per user

India Telecom Outlook - 2025

TOTAL POPULATION



1.4 BILLION

UNIQUE MOBILE
USERS



1.2 BILLION

PENETRATION

86%

BROADBAND
USERS

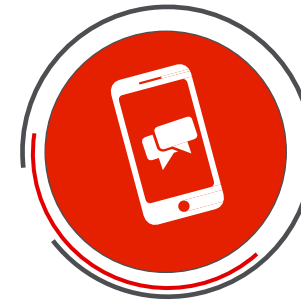


850 MILLION

PENETRATION

60%

SMARTPHONE
USERS



540 MILLION

PENETRATION

45%

DIGITAL
PAYMENTS



\$1 TRILLION

What does it mean for telco

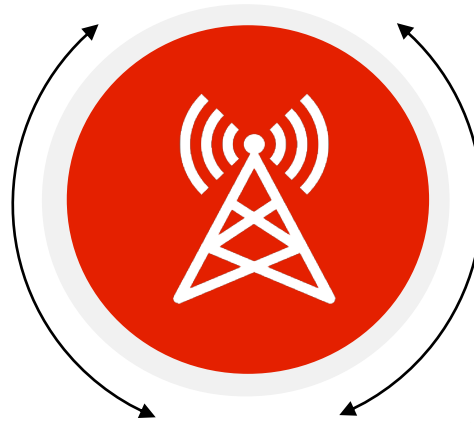
Pressure on Profitability
Focus on adjacent
revenue streams



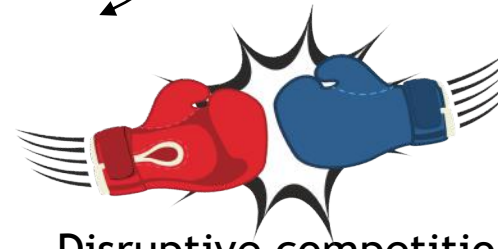
Increase in
Capex



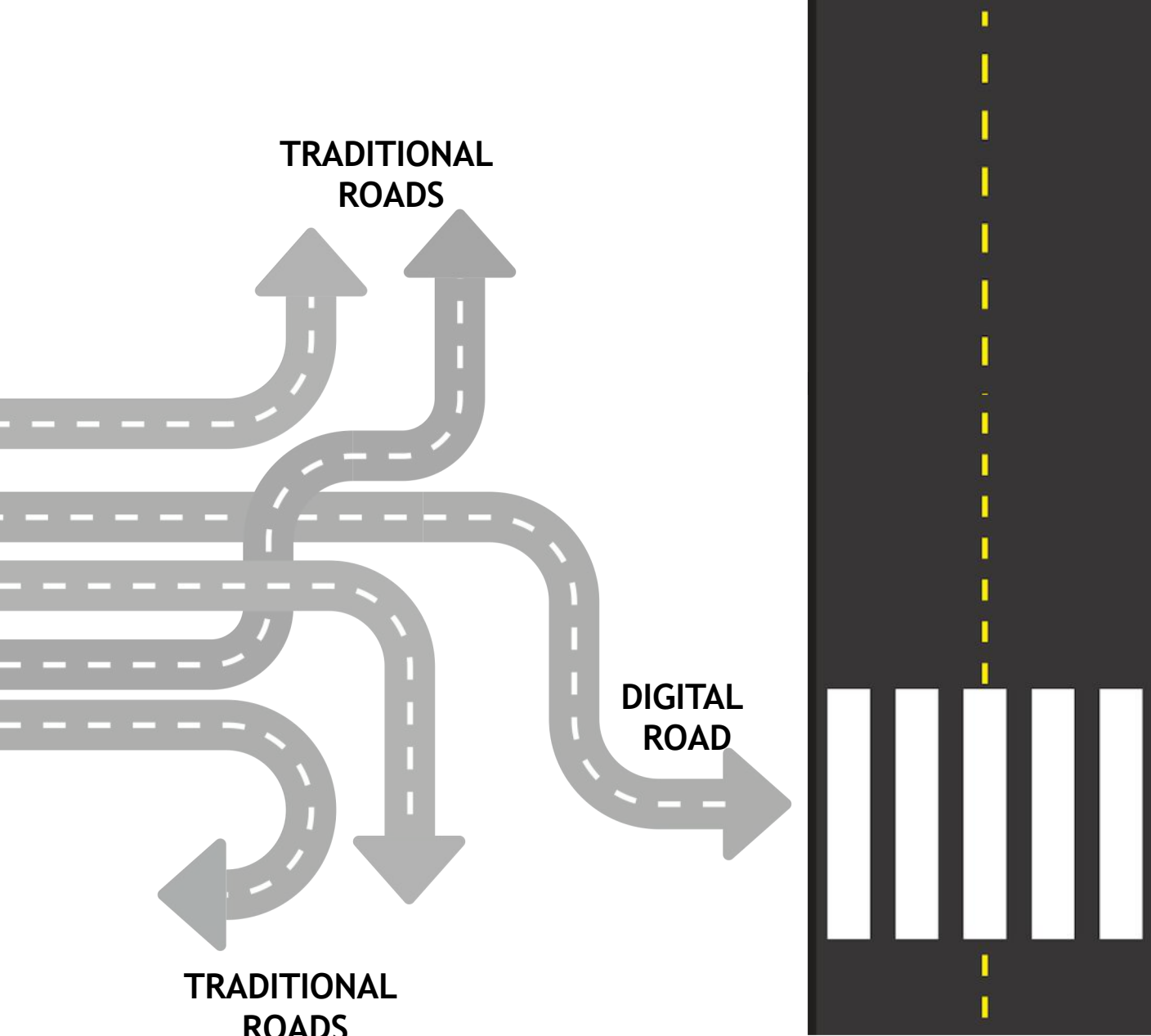
Legacy Network & IT Systems



Changing Consumer
Behavior



Disruptive competition



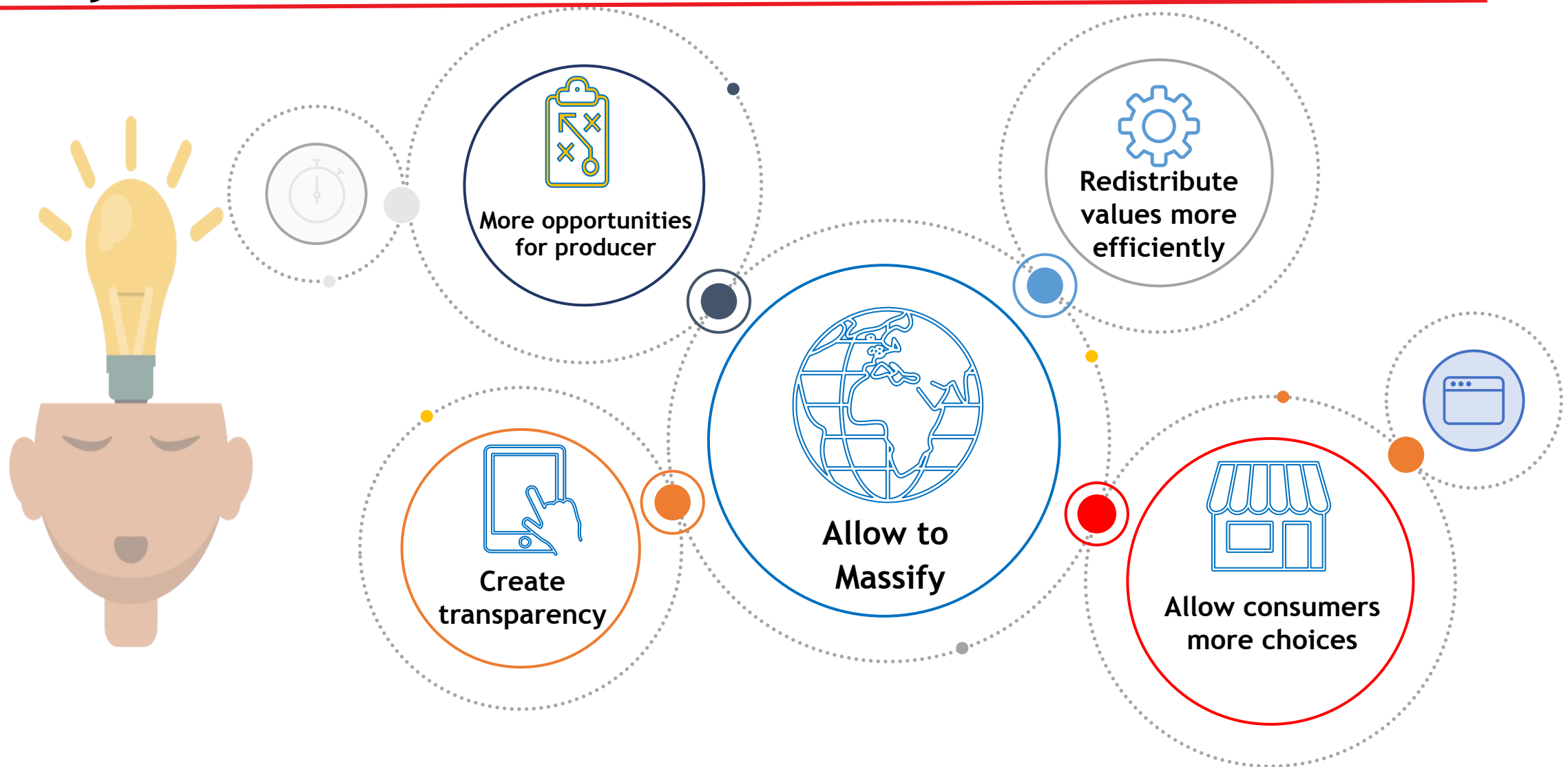
Choose the digital road to travel **this shift**

Business Model Digital Transformation

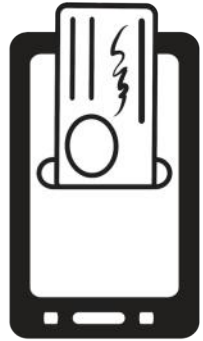


It's all about Platforms

Why Platform?



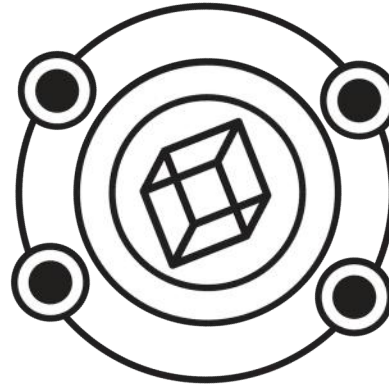
Platforms | Revenue Opportunities



MOBILE BANKING



DIGITAL SERVICES



UCC



SECURITY SERVICES



DIGITAL ADVERTISING

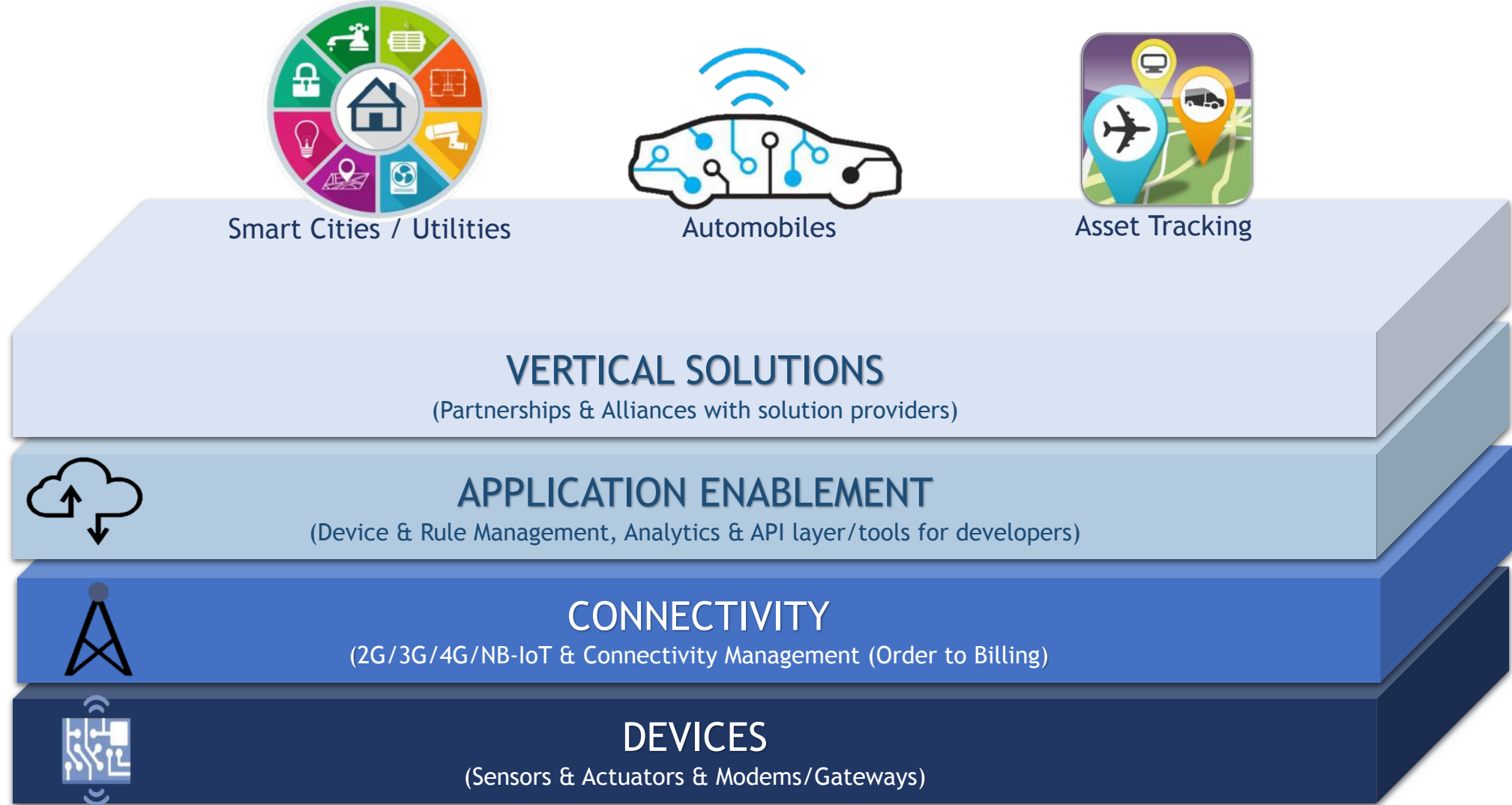
CONTENT
CONTENT SELLING



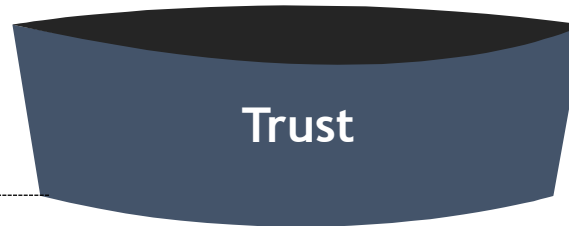
CLOUD BASED SOLUTIONS



Simplified “Full Stack” - IOT

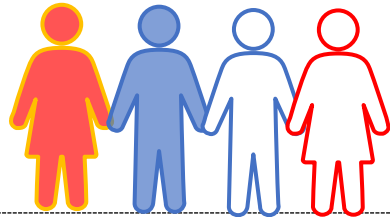


TELCO's Competitive Edge In IOT



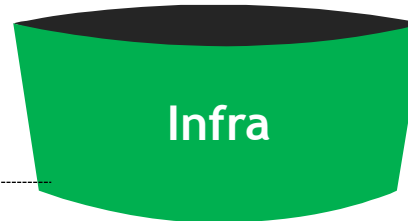
Trust

Have our trusted brand



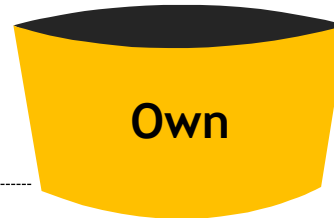
Experience

Have decades of experience of handling scale



Infra

Have systems and IT infra in place



Own

Own the network

Changing Operating Models

airtel PROPOSE RATES

Voice Products

Try our products with few easy steps!

1. Fill Org. Info → 2. Add Service → 3. Recharge

Hot Deals

India gold+	All	\$ 0.0048	Voice
Australia silver+	Telstra-Mobile	\$ 0.0168	Voice
Bangladesh silver+	All	\$ 0.0237	Voice
Oman silver+	OmanTel-Mobile	\$ 0.2150	Voice
Palau silver+	All	\$ 0.1850	Voice
Sudan silver+	Sudatel-Mobile	\$ 0.1060	Voice
Nepal silver+	N Mobile-Mobile	\$ 0.1190	Voice
Sudan gold+		\$ 0.1180	

Latest at Airtel

Unlock the business potential in emerging markets.

Airtel Carrier Digital Platform

300+ Signups
75+ Interconnects and counting
Do wholesale voice business with Airtel at the click of a button

VOICE PORTAL



OFFICE PLATFORM

airtel PAY & RECHARGE BUY BANK WITH US OUR NETWORK GET HELP

Get iPhone 7 at Rs. 5,500 only with Airtel Postpaid plan of Rs. 2,499

GET IT NOW →

Airtel Postpaid plan of Rs. 2,499/month gets you

DEVICE PLATFORM

Redefine Customer Experience

Personalized Interactions

Lightening Speed

Transparency

Advocacy

Self Service



Seamless Experience Across Channels

Anytime, Anywhere

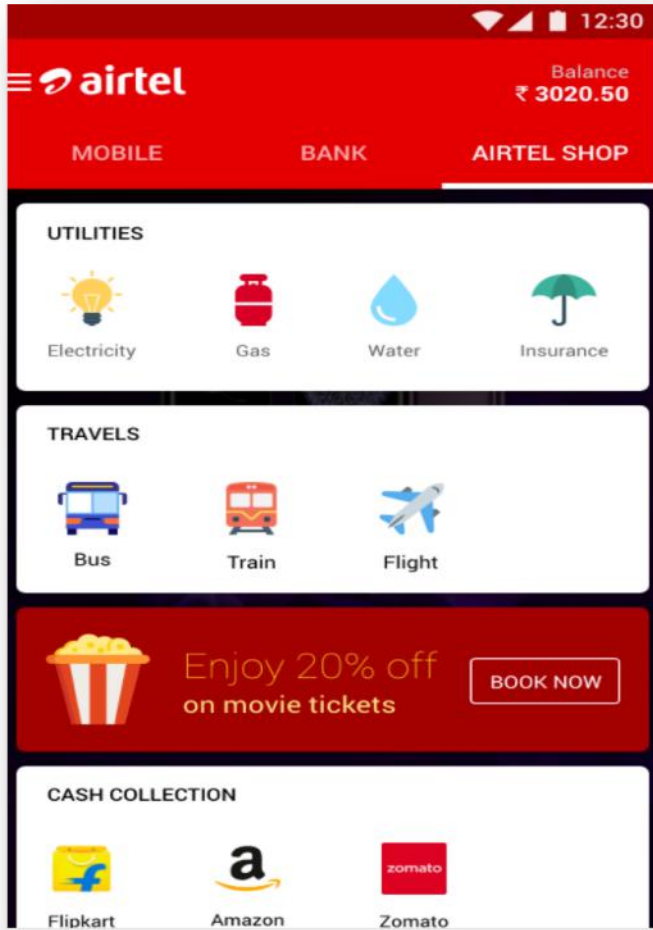
Virtual Reality

Chatbots

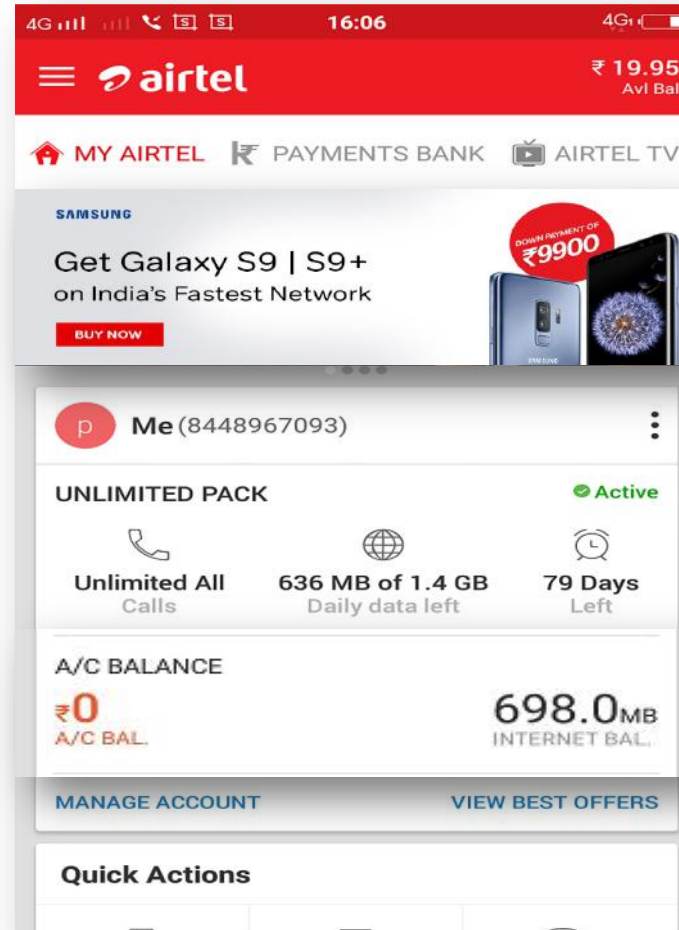
Agile

Delight Customer Digitally

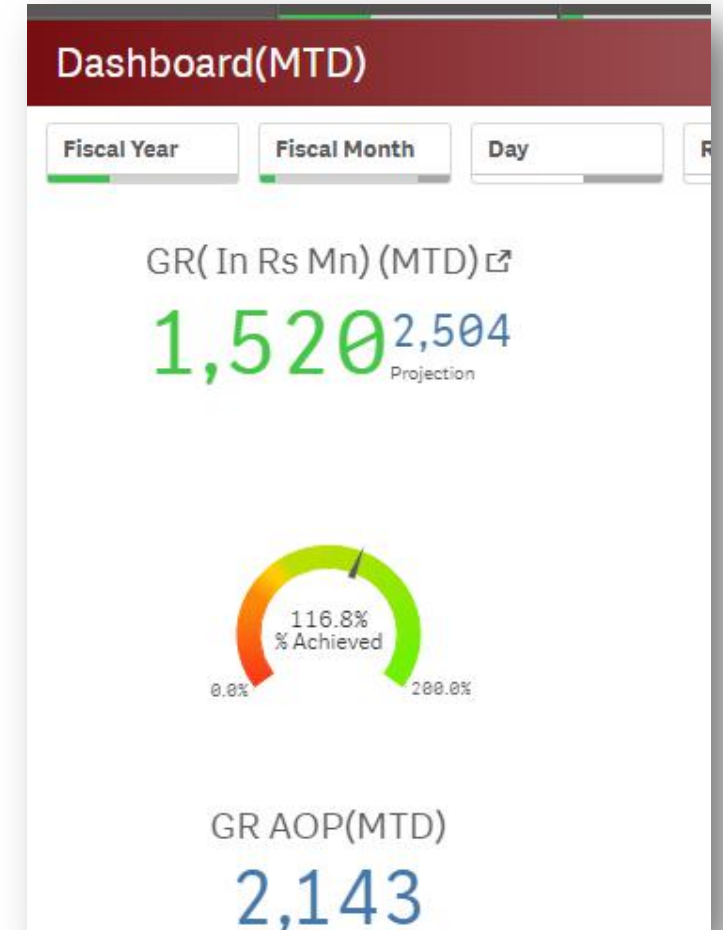
Customer Platforms



MITRA - RETAILER APP



CUSTOMER APP



SALES TEAM APP



**YOU CAN CHOOSE TO BE
VERY PROFITABLE VERY QUICKLY
IF YOU DON'T WANT TO GROW**

~ Sunil Bharti Mittal