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...

...owns no cars
THE MOST POPULAR MEDIA OWNER...

...creates no content
THE WORLD’S MOST VALUABLE RETAILER...

[Alibaba.com logo]

...has no inventory
THE LARGEST ACCOMMODATION PROVIDER...

...owns no real estate
THE BIGGEST COMMUNICATIONS PROVIDER...

...is not a telco

not

...is a telco
DISRUPTIONS erupting everywhere
A Brave New World - Digital 2.0

TELECOM NETWORK & CONNECTIVITY - KEY ENABLER OF THIS DIGITAL TRANSFORMATION

DIGITAL TRANSFORMATION

- 5G
- Internet of Things
- Artificial Intelligence
- Robotics
- Wearables
- AR/VR
- Cloud Computing
- Drones
- Big Data
- Cloud Computing

TELECOM NETWORK & CONNECTIVITY - KEY ENABLER OF THIS DIGITAL TRANSFORMATION
## Global Telecom Outlook - 2025

<table>
<thead>
<tr>
<th>Category</th>
<th>Users</th>
<th>Penetration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique Mobile Users</td>
<td>5.9 Billion</td>
<td>71%</td>
</tr>
<tr>
<td>Smartphone Users</td>
<td>4.5 Billion</td>
<td>77%</td>
</tr>
<tr>
<td>Mobile Internet Users</td>
<td>5.0 Billion</td>
<td>61%</td>
</tr>
<tr>
<td>5G Users</td>
<td>1.2 Billion</td>
<td>24%</td>
</tr>
<tr>
<td>Active IoT Devices</td>
<td>100 Billion</td>
<td></td>
</tr>
</tbody>
</table>

**Explosion in Data Usage** - 500X usage per user

India Telecom Outlook - 2025

- **TOTAL POPULATION**: 1.4 BILLION
- **UNIQUE MOBILE USERS**: 1.2 BILLION
- **BROADBAND USERS**: 850 MILLION
- **SMARTPHONE USERS**: 540 MILLION
- **DIGITAL PAYMENTS**: $1 TRILLION

**PENETRATION**
- **TOTAL POPULATION**: 86%
- **UNIQUE MOBILE USERS**: 60%
- **BROADBAND USERS**: 45%

Sources: eMarketer, Ericsson, UN estimates, BCG research, Credit Suisse, IBM, Kalaricapital.
What does it mean for telco

Pressure on Profitability
Focus on adjacent revenue streams

Legacy Network & IT Systems

Changing Consumer Behavior

Increase in Capex

Disruptive competition

Increase

Choose the digital road to travel *this shift*
It’s all about Platforms
Why Platform?

- Allow to Massify
- More opportunities for producer
- Allow consumers more choices
- Create transparency
- Redistribute values more efficiently
- More opportunities for producer
Platforms | Revenue Opportunities

- Mobile Banking
- Digital Services
- UCC
- White Labeling
- Security Services
- Content Selling
- Digital Advertising
- Cloud Based Solutions

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Simplified “Full Stack” - IOT

VERTICAL SOLUTIONS
(Partnerships & Alliances with solution providers)

APPLICATION ENABLEMENT
(Device & Rule Management, Analytics & API layer/tools for developers)

CONNECTIVITY
(2G/3G/4G/NB-IoT & Connectivity Management (Order to Billing))

DEVICES
(Sensors & Actuators & Modems/Gateways)

Smart Cities / Utilities
Automobiles
Asset Tracking
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

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Changing Operating Models

VOICE PORTAL

OFFICE PLATFORM

DEVICE PLATFORM

Airtel Carrier Digital Platform
300+ Signups
70+ Interconnects and
counting
On wholesale voice business with Airtel at the click of a
button

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

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Redefine Customer Experience

Personalized Interactions
Lightening Speed
Transparency
Advocacy
Self Service

Seamless Experience Across Channels
Anytime, Anywhere
Virtual Reality
Chatbots
Agile

Delight Customer Digitally

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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