

Telco strategies in edge computing and private networks

STL Partners

16 September 2021

In partnership with:

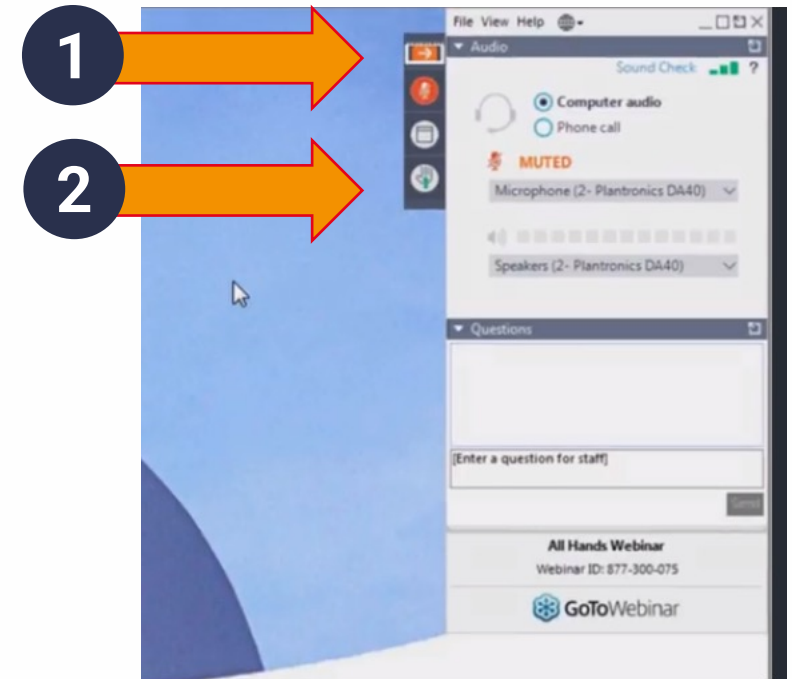


Agenda

- | | | |
|---|--|---------|
| 1 | Introduction and housekeeping | 5 mins |
| 2 | Presentation - Telco strategies in edge computing and private networks | 15 mins |
| 3 | Panel discussion and Q&A | 40 mins |

GoToWebinar

- You're in listen only mode
- If you need us, please type a comment
- Feel free to type questions throughout the session for Q&A at the end
- We'll send you the slides and a recording shortly after the session - do share with colleagues
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Webinar agenda

15 mins

**Telco strategies
in edge and
private networks**



40 mins

Panel discussion and Q&A



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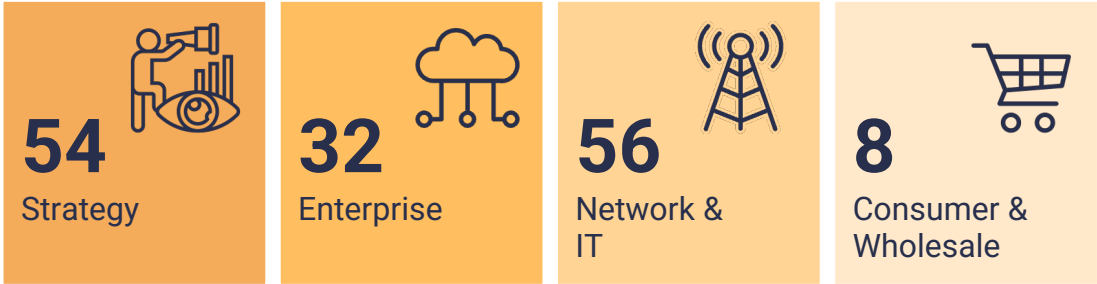
This session will showcase insights from STL and Red Hat's ongoing research on edge computing...

STL Partners surveyed **150 telecoms operators** globally between Dec 2020 - March 2021

Respondents by region



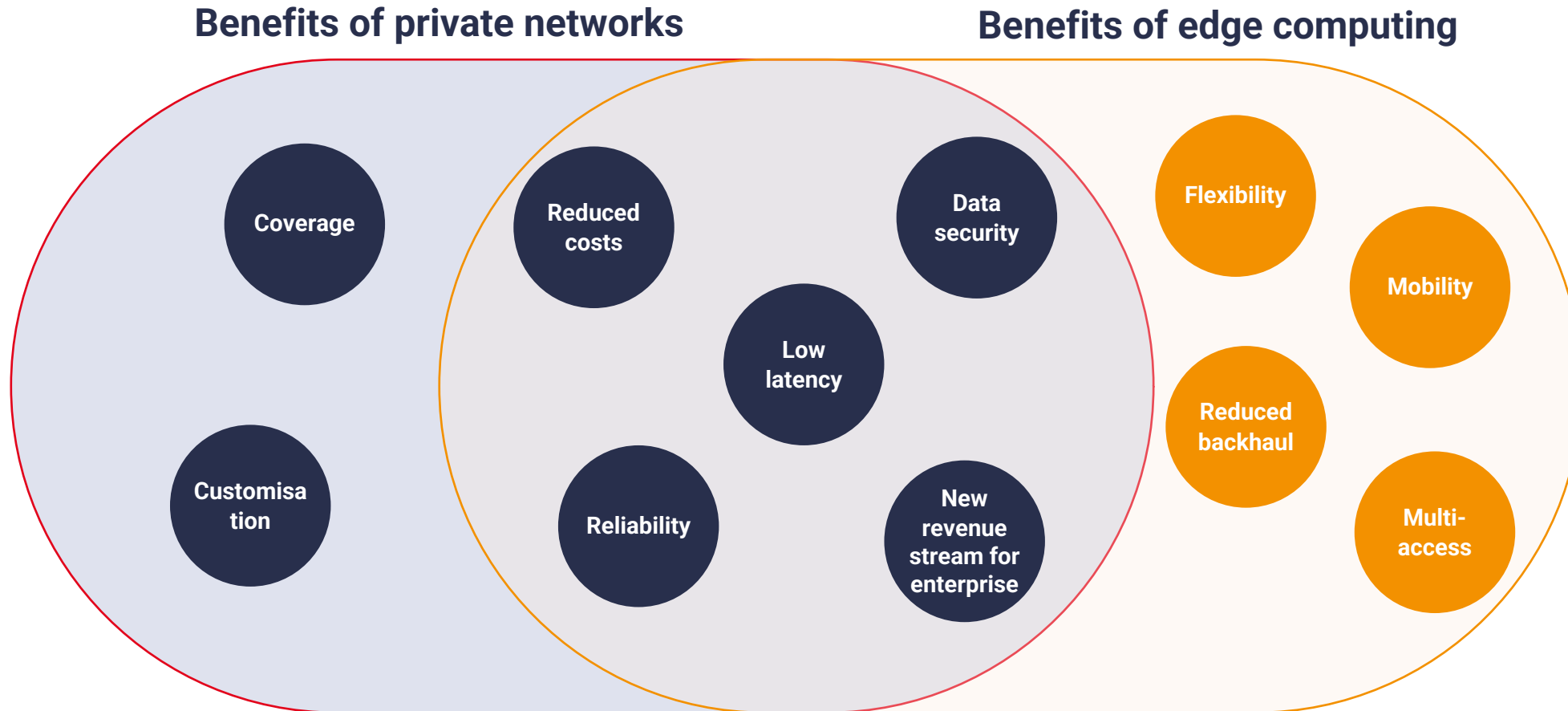
Respondents by business unit



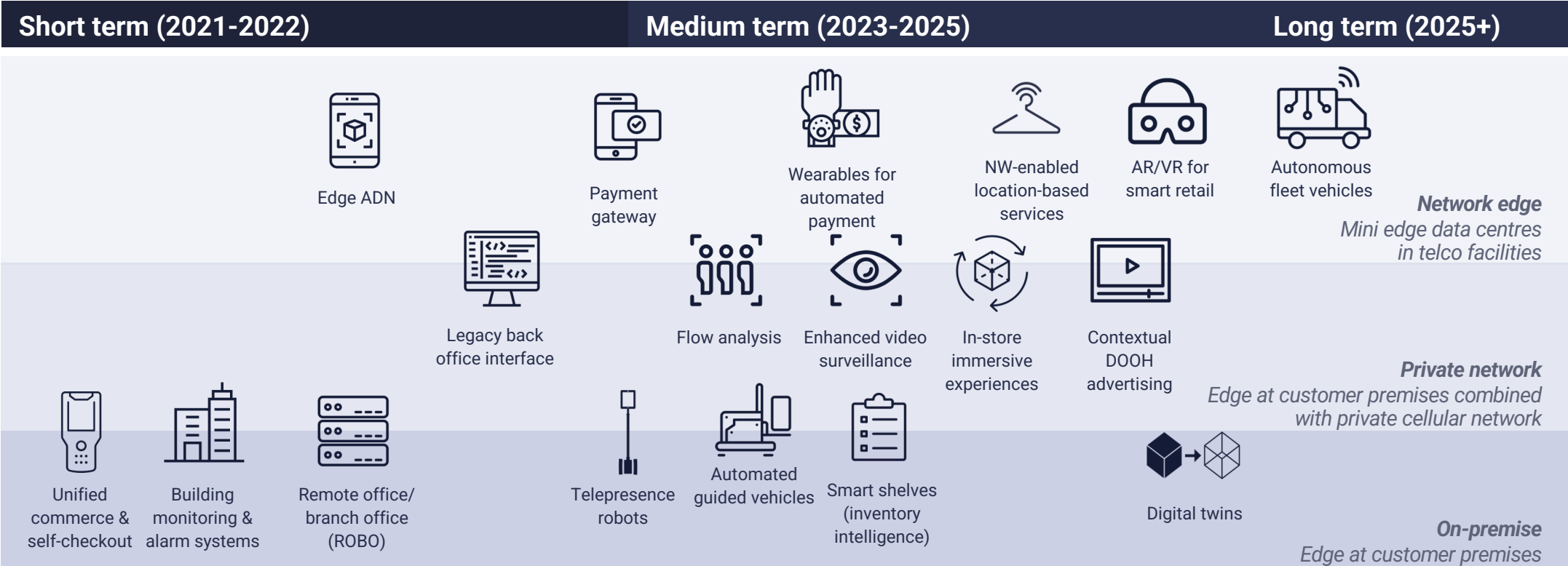
Example CSPs



Combining private networks and on-premise edge can offer a range of benefits to end customers



Different applications will use different edges – and some benefit from private networks, for example in retail



Source: STL Partners Edge Use Case Directory

Telecoms operators face two key questions



1. How should telecoms operators **build private network + edge solutions/services?**

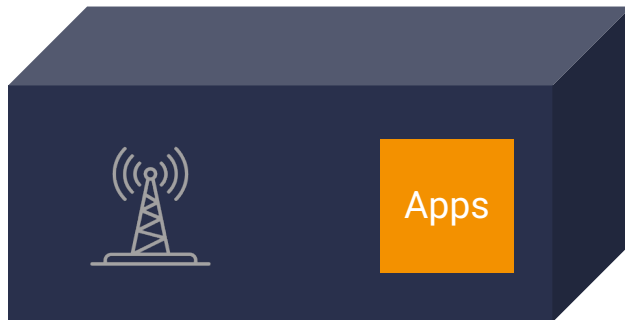


2. How should telecoms operators **take private network + edge solutions/services to market?**

There are different options for building private cellular + edge solutions

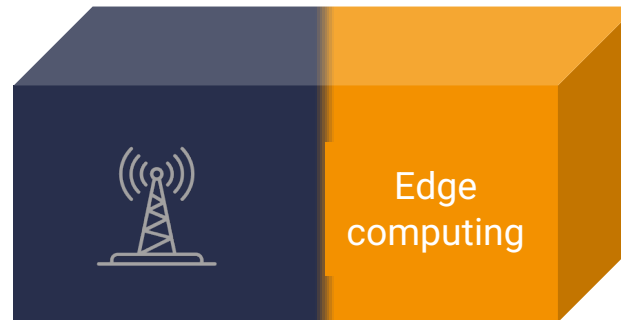
Standalone private cellular

(infrastructure mainly for private cellular with limited capacity for edge computing for applications)



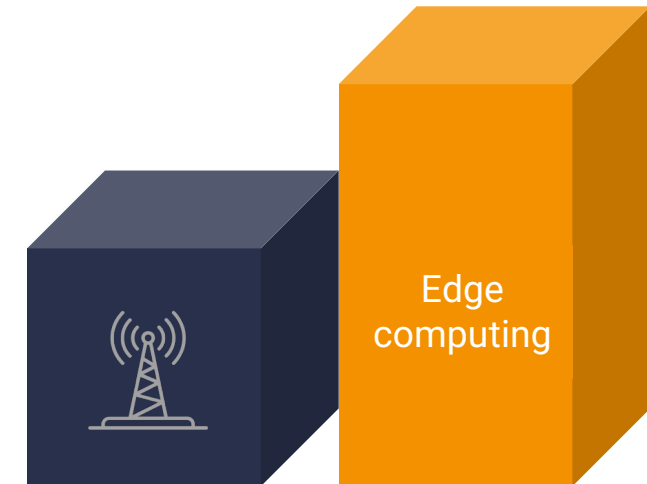
Combined solution

(single infrastructure for both private cellular network functions and applications)



Separated infrastructure

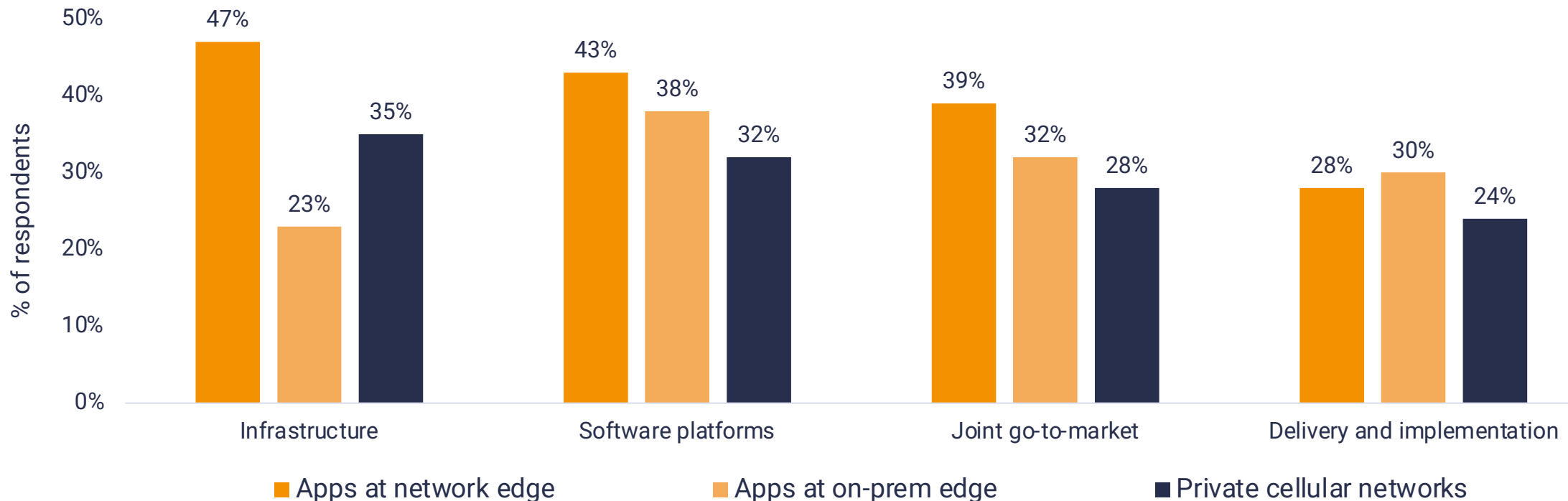
(private cellular solution links to edge application running in on-prem data centre)



CSPs are considering hyperscaler partnerships to support them with edge computing and private networks solutions

CSPs are most keen to work with hyperscalers to enable infrastructure for edge applications at network edge...

...And see a role for hyperscalers across the value chain, although less so in delivery and implementation



Q: Are you considering or already engaging with hyperscalers as partners for edge computing today?

Source: STL Partners survey, N=150

The emergence of new telcos and specialist players leads to a highly competitive and dynamic ecosystem

Mobile network operators

- Public, regional and national MNOs



Major telecoms stakeholders and other network service providers

- Fixed & cable providers
- MVNOs
- FWA and WISPs
- Tower & infrastructure companies



Enterprise connectivity and solution providers

- Neutral host players
- Specialist IoT connectivity providers
- IT & networking providers
- Hyperscalers and cloud service providers
- System integrators

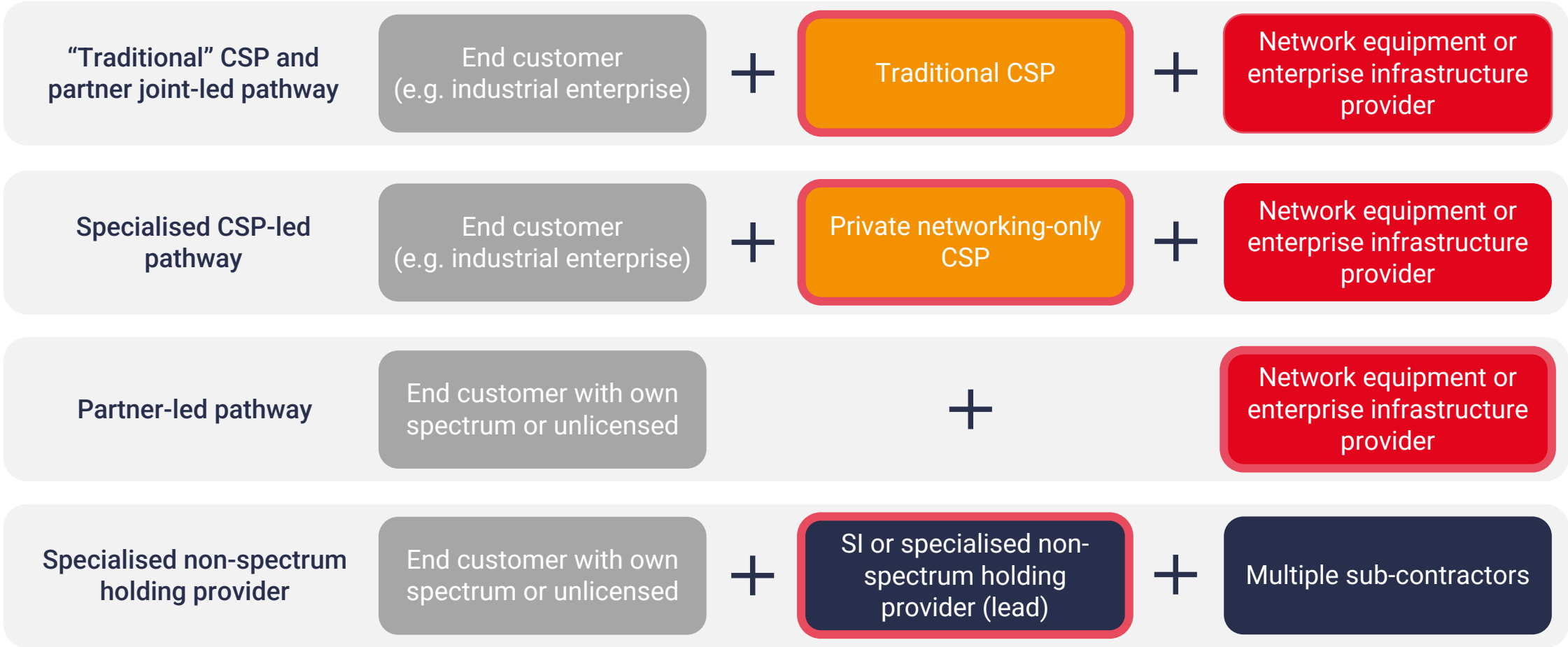


Vertical specific players

- Manufacturing and industrial automation
- Energy and utility
- City municipalities and government authorities
- Railway operators
- Airlines, airports and ports
- Universities and schools
- Architecture, construction
- Hospitals and healthcare
- Hospitality, entertainment



On taking solutions to market, we broadly see four key pathways for delivering private cellular networking services



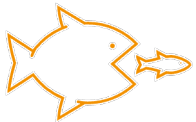
Likely go-to-market lead

CSPs should think through their technology and go-to-market strategy for developing private cellular and edge solutions



CSPs can build strong propositions when combining edge with private cellular networks:

- Complementary benefits, e.g. low latency, reliability, data security, etc.
- Can leverage same infrastructure stack
- Ability to build an ecosystem around both technologies (partner overlap)



The market is open and there are many different players (outside of traditional MNOs):

- Opportunity for non-MNOs to provide private cellular/edge services
- Spectrum will be a determinant for how open the market is
- This puts pressure on CSPs to have a compelling proposition vs. competitors
- Likely to result in co-opetition – partners may be competitors too



CSPs are exploring partnerships with different types of companies, including hyperscalers:

- Significant interest in partnering with hyperscalers for both edge and private networks, particularly for infrastructure and software platforms
- However, other partnerships are developing e.g. hardware vendors, network function vendors, general application providers, network equipment vendors, edge platform companies, etc.

Poll: In which industry sector(s) are you seeing the most interest in private cellular and edge use cases?

1. Energy & extractives, such as oil and gas, mining
2. Healthcare, for example in hospitals for patient care
3. Manufacturing, incl. process, discrete or automotive manufacturing
4. Transport & logistics incl. warehouses, sea ports and airports
5. Other

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Panel discussion and Q&A



Panellists



TIMO JOKIAHO

Chief Technologist, Global
Telco Ecosystem

Red Hat



PHILLIP COLEMAN

Director of Product
Marketing Management

AT&T



ANDRÉS ESCRIBANO

New Business & Industry 4.0
Director

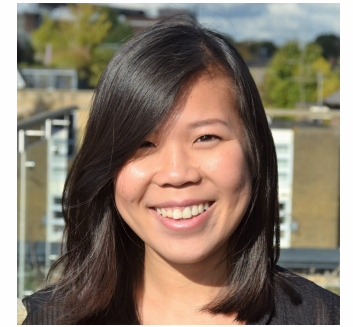
Telefónica Tech



NAREN MUTHIAH

Strategy and Business
Design – New Growth &
Development

Cox



YESMEAN LUK

Senior Consultant & Telco
Cloud Practice Lead

STL Partners

Upcoming workshop in October

Monday 18 October | Dubai, UAE
8AM – 11AM

Senior CSP Executive Edge Strategy Workshop

Monday 18 October 8:00-11:00 AM
NOVOTEL, Dubai World Trade Centre
RSVP-only event - free of charge with complimentary breakfast

 PARTNERS

 Red Hat

 intel.

[Link to register here](#)

Thank you to everyone for joining

We hope you enjoyed the session!

If you have any further questions, please email:

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