

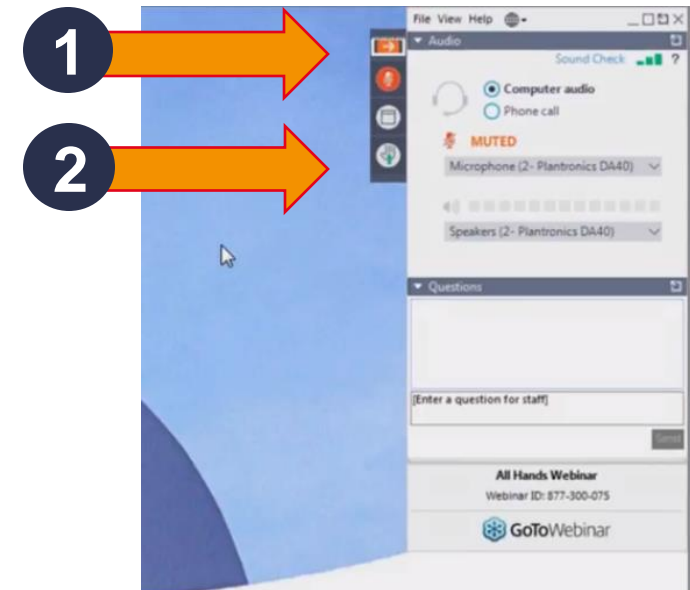
The State of the Industry

The best new growth opportunities for telcos

10th March 2021

Some housekeeping...

- 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
- On Twitter? Tweet us @STLPartners & use hashtag #TelecomCovid



Agenda

- 1** Introduction
- 2** Opportunities for telcos in WFH and digital health
- 3** Panel discussion

The State of the Industry 2021 webinar series

Tuesday 9th March 10.30 GMT
**Situation, strategies,
priorities**



Rainer Deutschmann
Group COO
Telia



Dean Buble
Founder, Disruptive Analysis
Associate Director, STL
Partners



Andrew Collinson
Research Director
STL Partners

Weds 10th March 10.30 GMT
**The best new growth
opportunities**



Liisa Puurunen
VP, Brand, CX &
startups
Elisa, Intl Digital
Services



Anette Bohman
Strategy Director
Telia, DivisionX



Amy Cameron
Principal Analyst
STL Partners

Thursday 11th March 10.00 GMT
**5G, edge & cloud
ecosystems**



Jennifer Didoni
Head of Cloud Portfolio
Management, Vodafone



Tri Pham
Chief Strategy Officer
Tata Communications



Gordon Hewitt
Intl Innovation & 5G Executive
Verizon



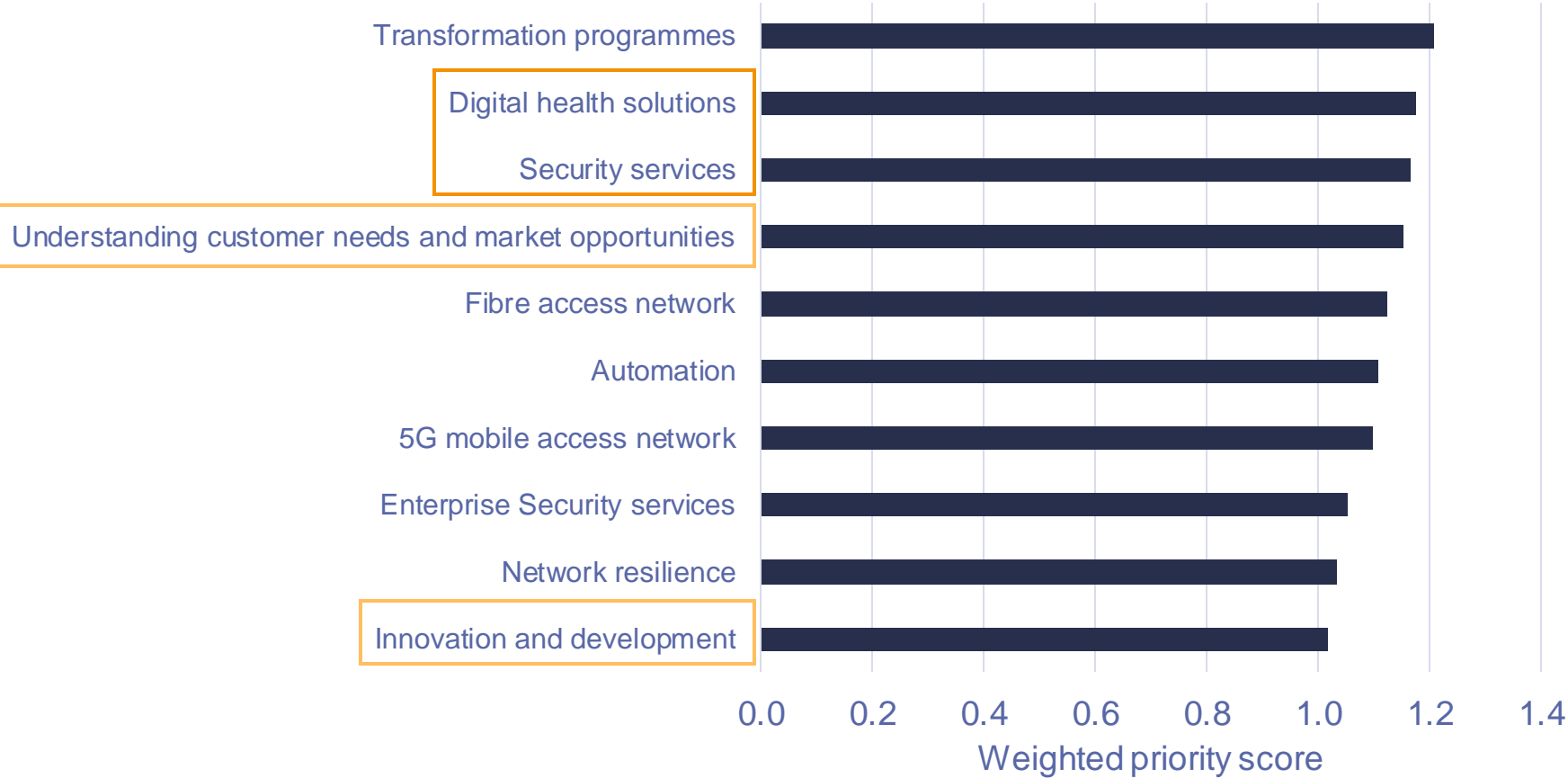
Dalia Adib
Principal Consultant & Edge
Practice Lead, STL Partners

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Our 2021 telco investment priorities survey shows that Healthcare & Understanding customer needs are among top ranked priorities

Top 10 priorities in Jan 2021



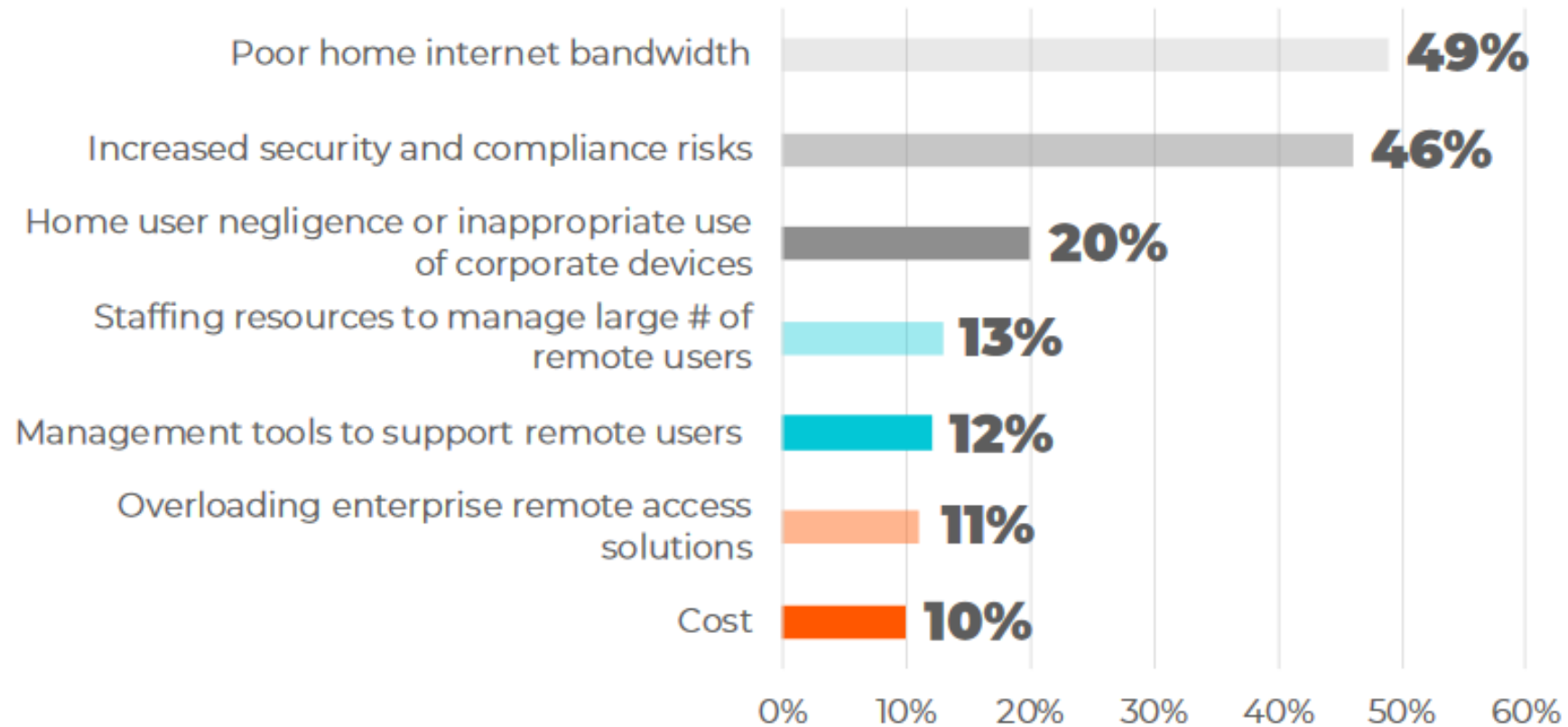
Rating scale	Weighted score assigned
Major acceleration, budget lift or launch	+2
Minor acceleration, budget lift or test / pilot	+1
No change likely	0
Minor delay or budget drop	-1
Major delay or budget cut	-2



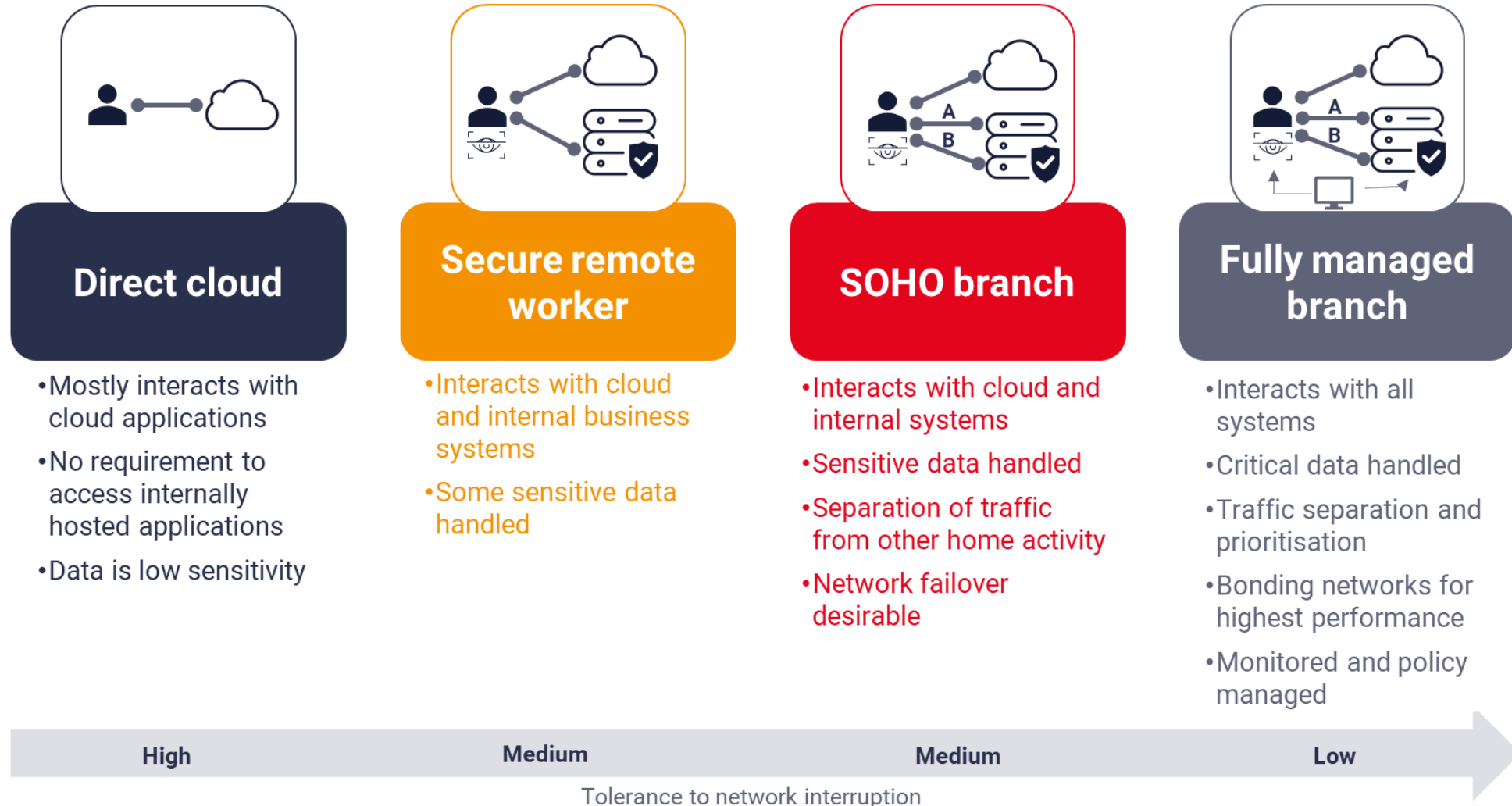
**Enhanced remote working
solutions is an opportunity
for most telcos...**

Connectivity quality and security are still big issues in supporting remote working

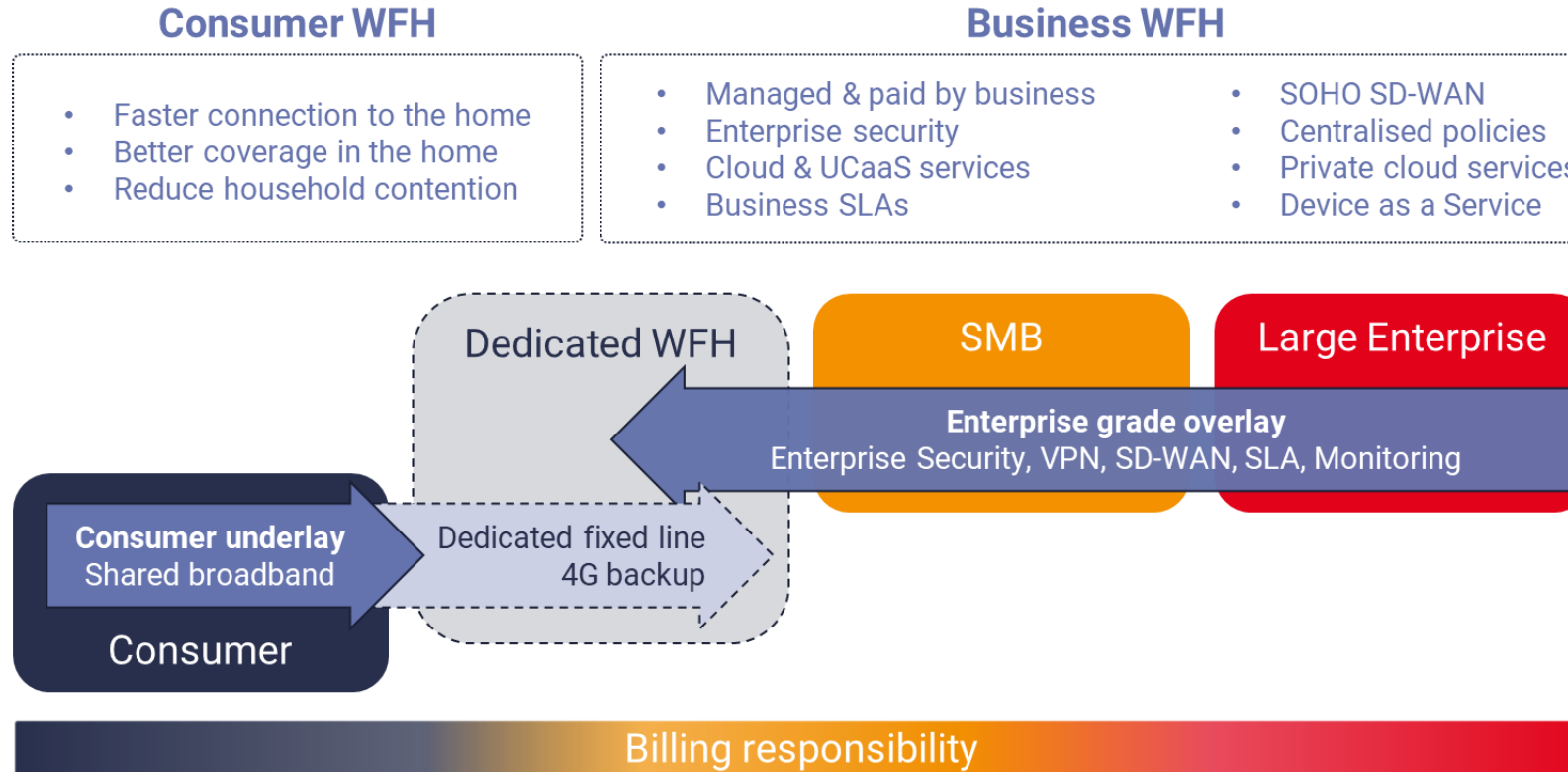
What worries you most about supporting work-from-home employees in the months ahead?



The reality is that different users have different needs, but employers need to address them all




SD-WAN and remote VPN services are converging into advanced WFH SD-WAN + intelligent networking



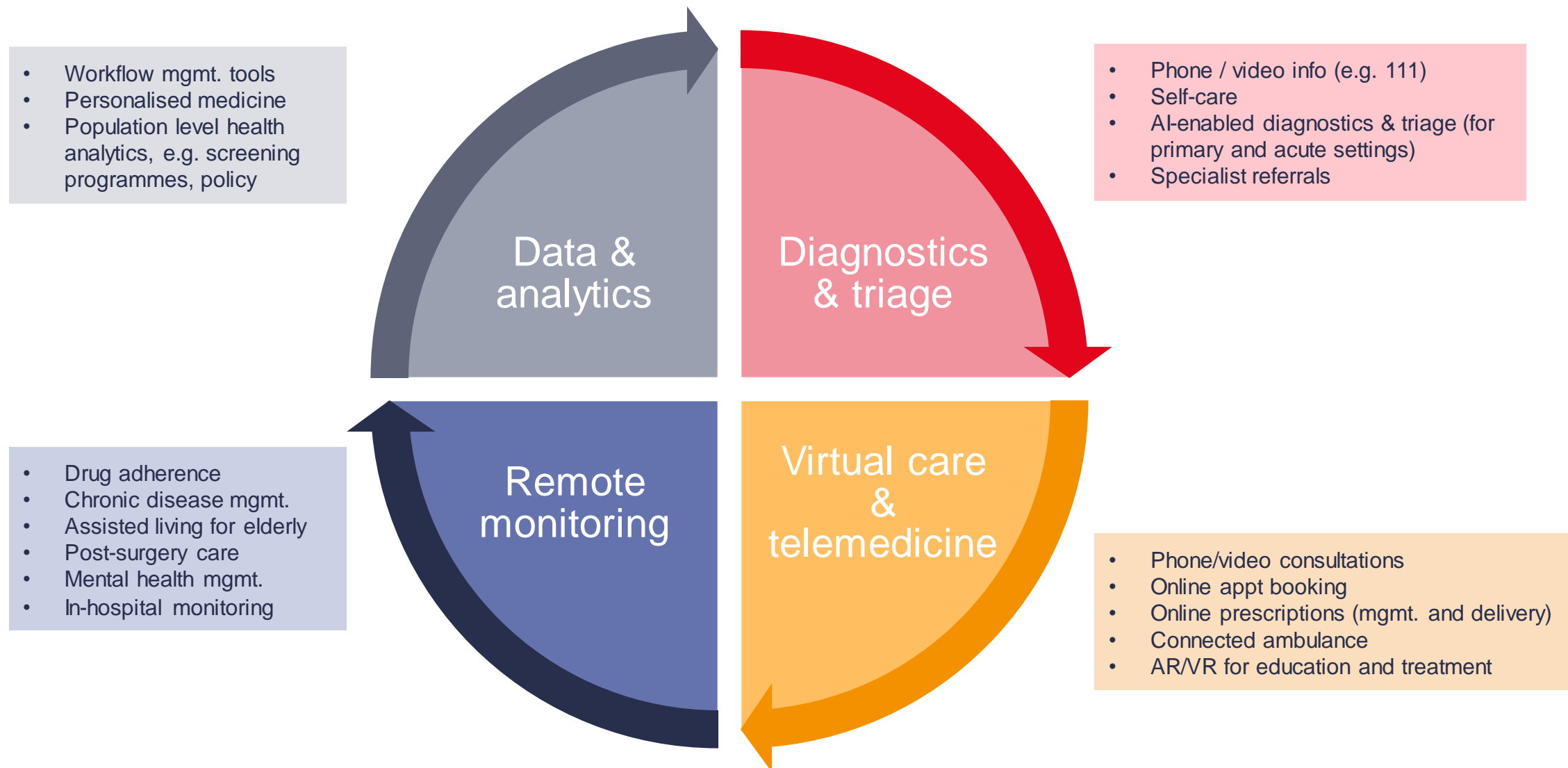
The key elements telcos should seek to resolve for hybrid consumer/enterprise customers in WFH:

- Friction
- Performance
- Security
- Implementation

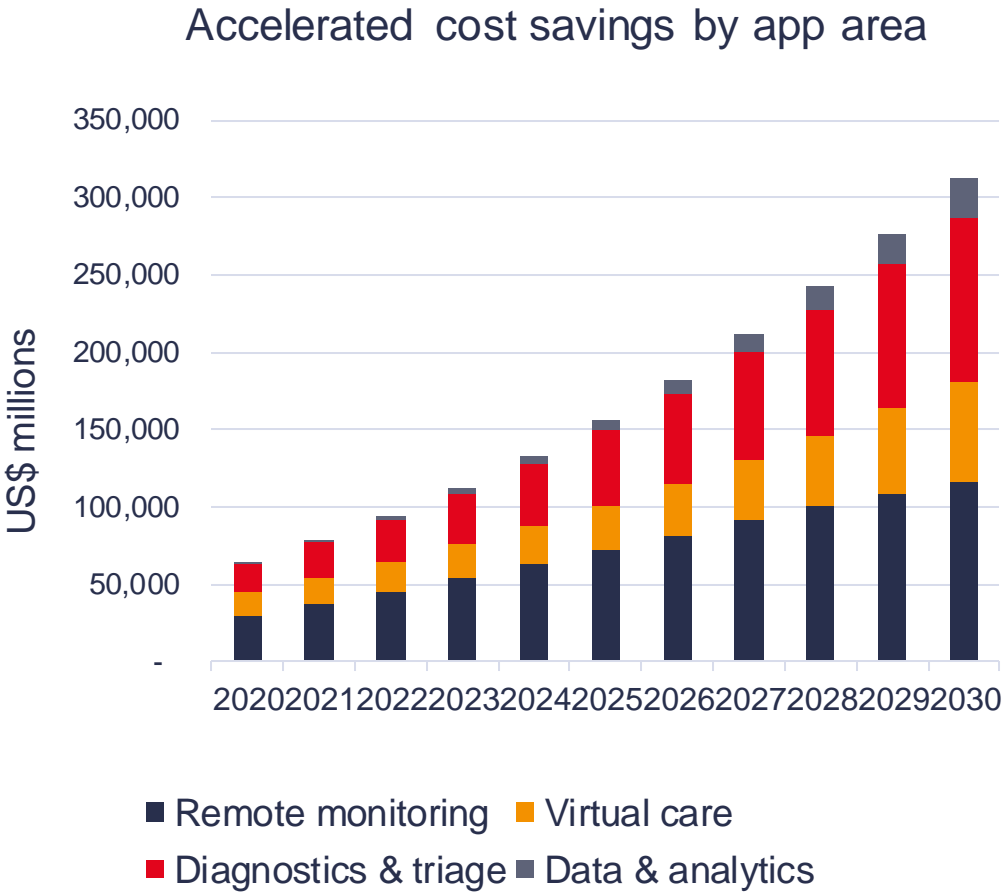
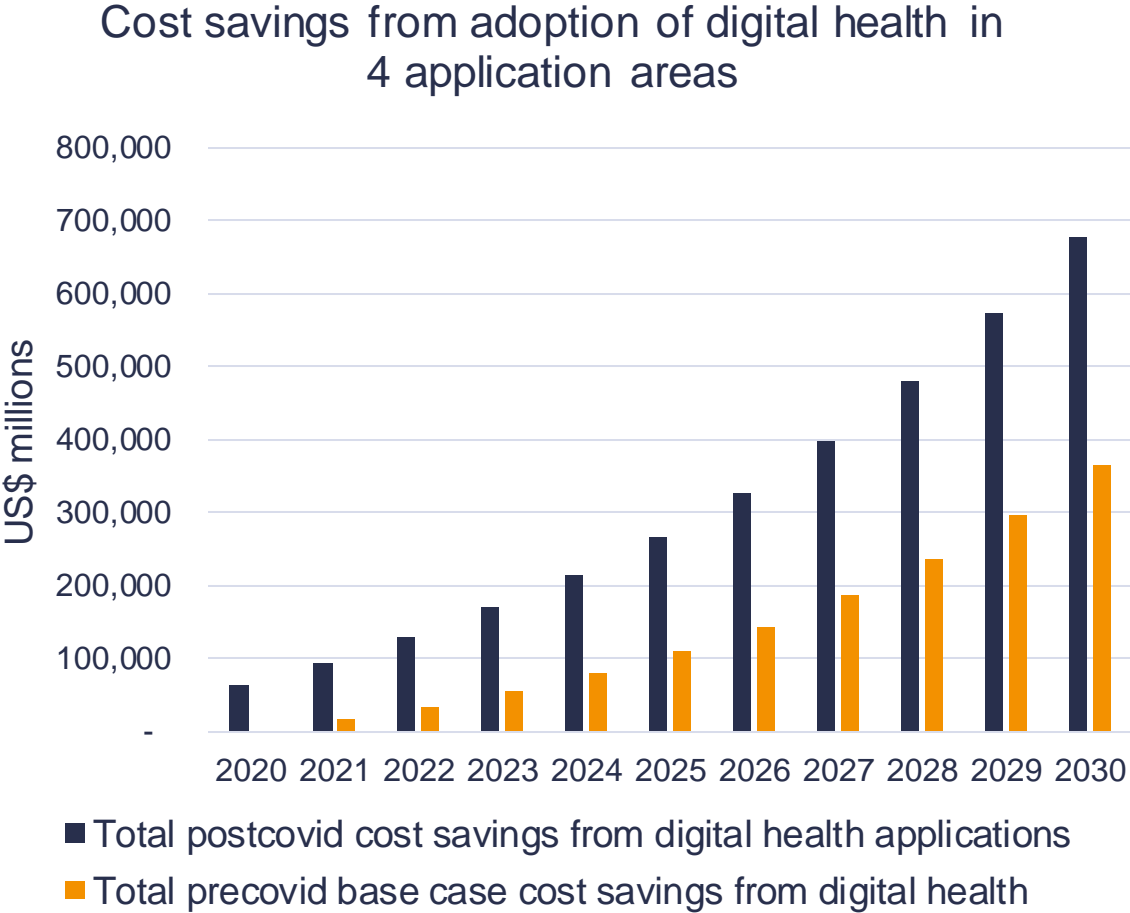


Digital health could be a bigger opportunity over the long term, but it is further away from telcos' core capabilities...

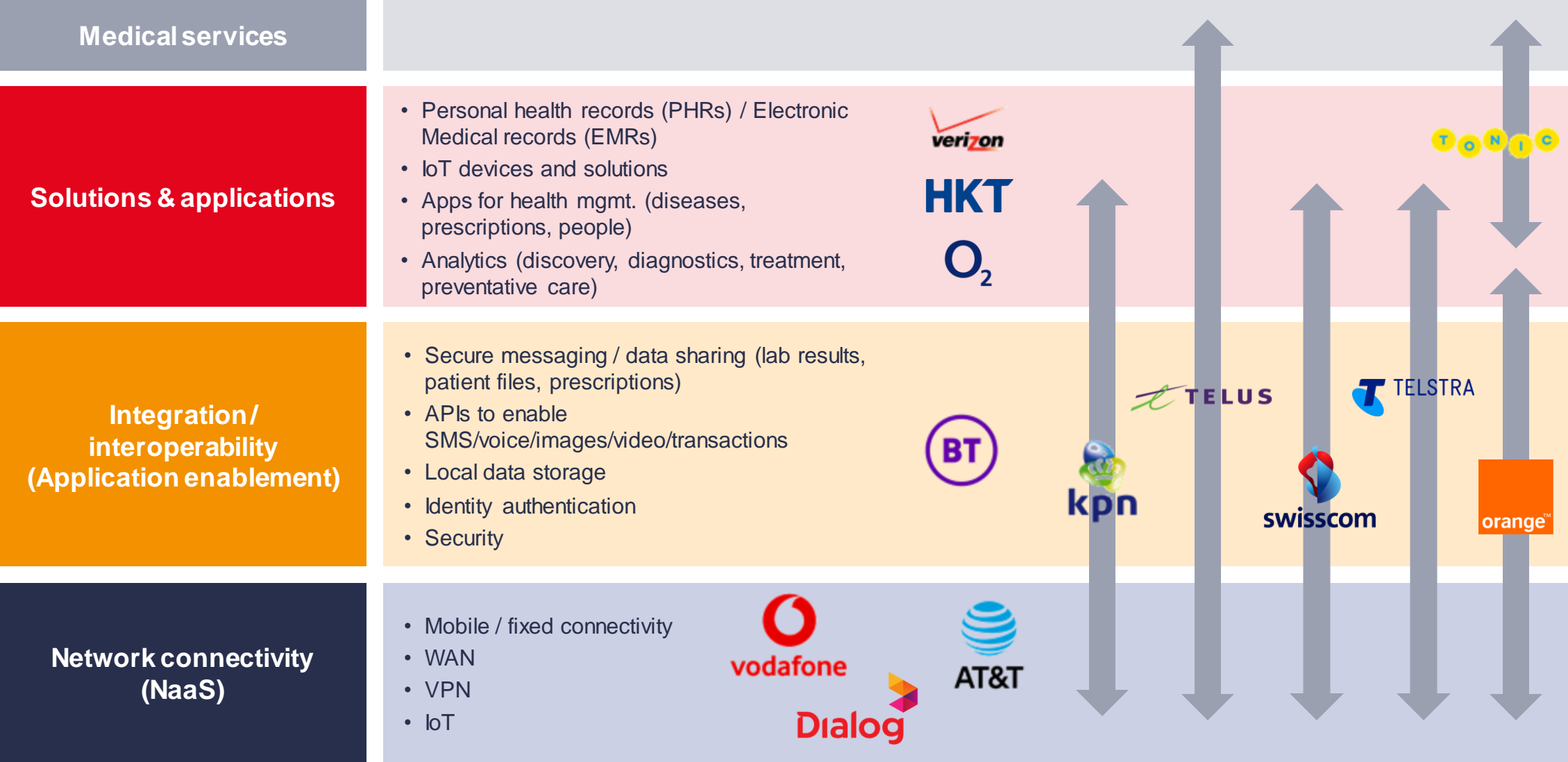
There are many application areas in which telcos could position themselves as secure, reliable, local partners in digital health

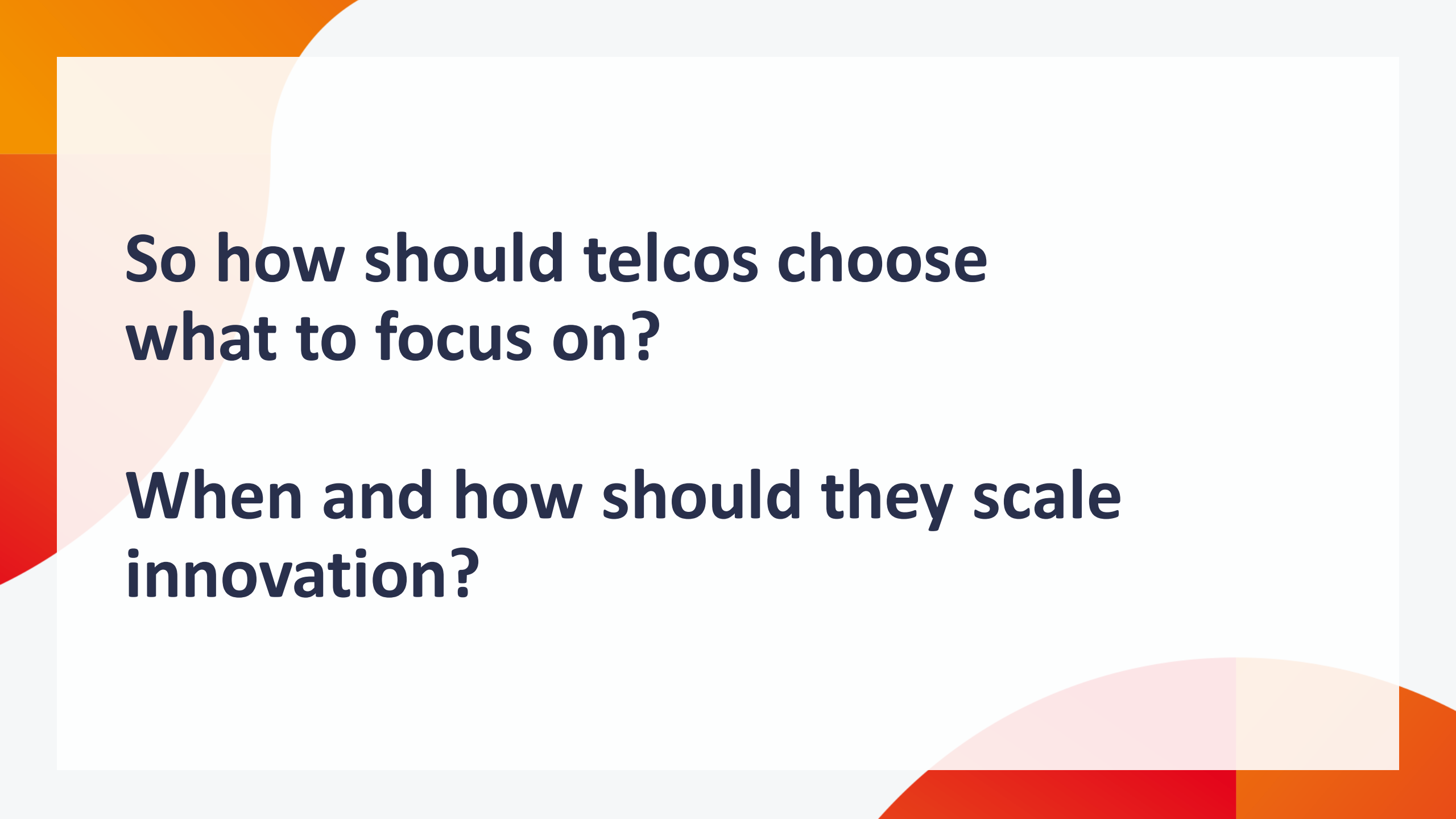


Accelerated adoption of digital health since COVID has increased potential cost savings by \$300bn globally by 2030



But it takes significant time and effort for a telco to build expertise and scale across the value chain





**So how should telcos choose
what to focus on?**

**When and how should they scale
innovation?**

The best new growth opportunities for telcos

Part of the *State of the Industry* webinar series



Amy Cameron

Principal Analyst

STL Partners



Liisa Puurunen

VP International Digital
Services

Elisa



Anette Bohman

Strategy Director,
DivisionX

Telia

10th March

10:30am GMT | 11:30am CET

STL PARTNERS

Thank you!

