

STL Partners Consulting services overview

Consulting services

2020

STL Partners helps our clients innovate, grow, and stay ahead of existing and new competition in a digital world



Research



Consulting

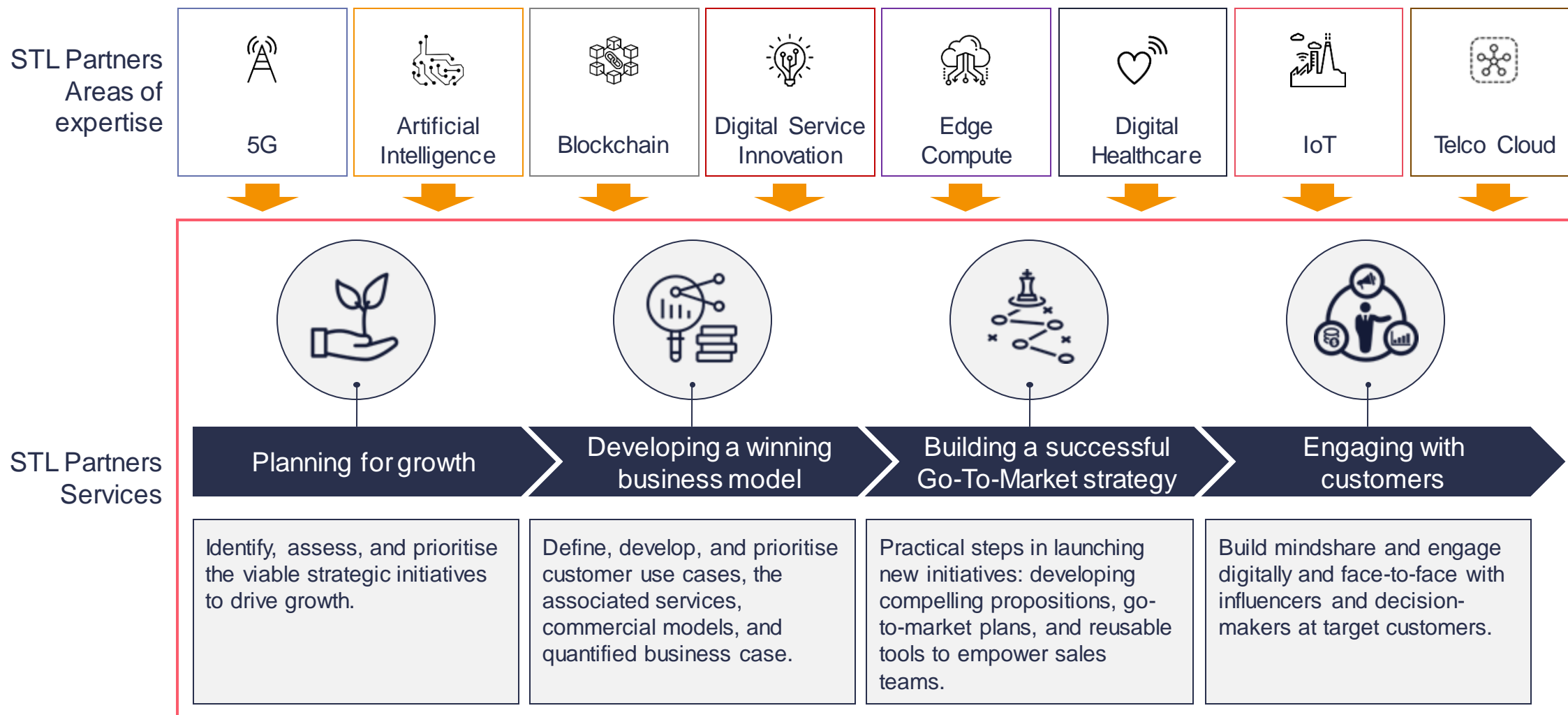


Events

Agenda

- 1 Overview of our consulting services**
- 2 Detailed breakdown of our consulting services**
- 3 Relevant case studies**
- 4 The STL Partners Consulting team**

STL Partners Consulting: Develop and execute a winning strategy in the Coordination Age



STL Partners Consulting: Develop and execute a winning strategy in the Coordination Age



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1. Planning for Growth



Identify, assess, and prioritise the viable strategic initiatives to drive growth.



Market analysis and landscaping

- Conduct research programmes, including customer interviews, to understand market trends and dynamics
- Map the competitor and partner landscape, value chain segments, and wider ecosystem structure
- Leverage desk research and existing expertise to build and extract learnings from a long list of case studies, within a technology or specific industry vertical, from within and beyond telecoms



Market sizing and forecasting

- Produce market sizing research estimating, for example, addressable market, indicative revenues, expected data volumes etc. to forecast market trends and inflexion points
- Provide underlying assumptions, model logic, and usage guidelines to handover model as a value-add tool to clients
- Test and validate output and assumptions through customer/partner interviews
- Refine iteratively with the client to co-create a deliverable



Identifying & prioritising strategic opportunities

- Develop key criteria in collaboration with the client and wider stakeholder groups to assess the potential value of identified opportunities
- Evaluate and prioritise initiatives based on the client's core objectives and capabilities
- Drive alignment and share knowledge in strategic workshops
- Provide clear recommendations on initiative roadmap, including next steps, client roles and responsibilities, timelines and milestones

2. Developing a winning business model



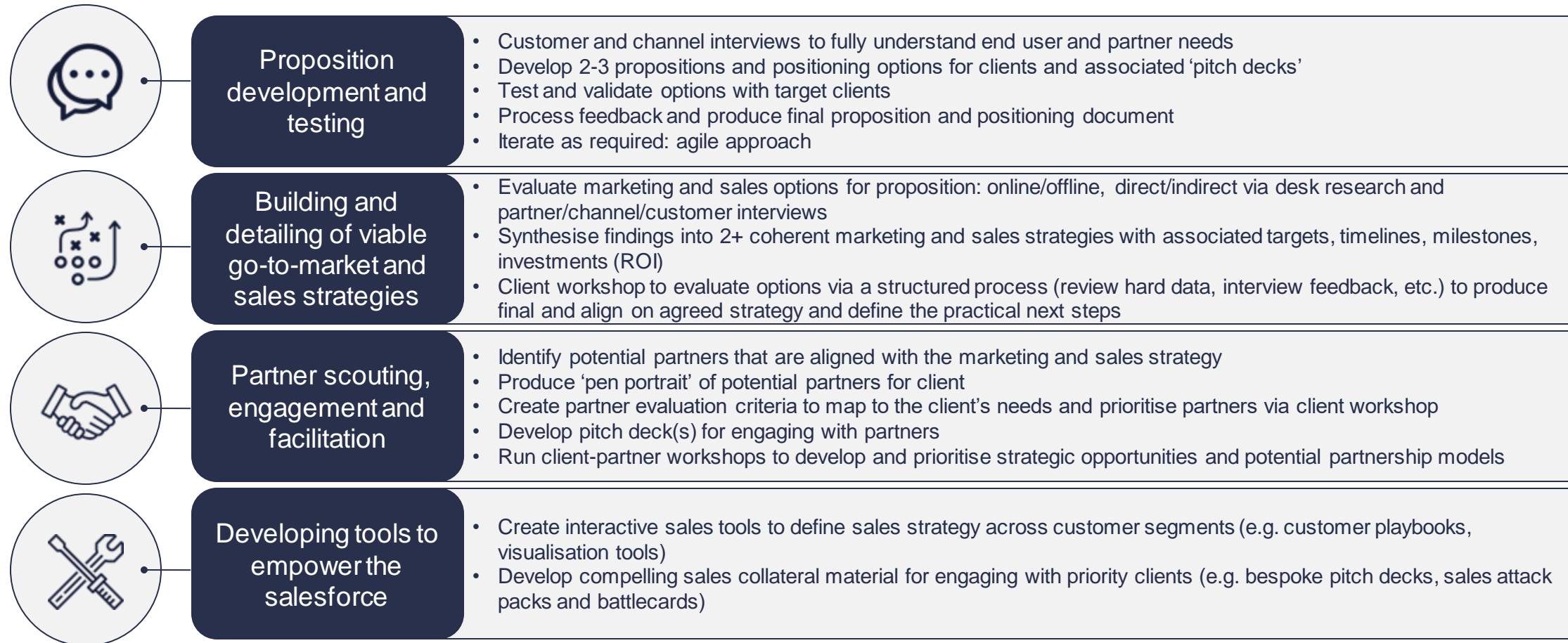
Define, develop, and prioritise customer use cases, the associated services, commercial models, and quantified business case.



3. Building a successful Go-To-Market strategy



Practical steps in launching new initiatives: developing compelling propositions, go-to-market plans, and reusable tools to empower sales teams.



4. Engaging with customers



Build mindshare and engage digitally and face-to-face with influencers and decision-makers at target customers.

	Bespoke reports	<ul style="list-style-type: none">• Co-branded research report on a new technology or business opportunity, investigating emerging trends, implementation challenges, best practice, case studies etc.• Internal report to inform the client's own strategy and identify areas of opportunity or development recommendations
	Case studies	<ul style="list-style-type: none">• "Mini report" case study focusing on client reference customer(s) and highlighting quantified, expected and achieved benefits of a particular solution or partnership• Key findings and data converted into a compelling and visually attractive infographic• Designed to promote the clients thought leadership and for distribution to client's and STL's own channels
	Videos	<ul style="list-style-type: none">• A video of the relevant consultant or analyst from STL Partners talking through findings of a piece of bespoke research – format: being interviewed, presenting (either live or via PowerPoint recorded slideshow), etc.• Video available for the client to upload to its website, use in online and offline customer interactions.
	Webinars	<ul style="list-style-type: none">• Co-hosted or STL Partners-facilitated webinars, marketed to our 40,000-strong telco community (or a targeted segment of this)• Leverage insights from research, create reusable content for marketing & educational purposes, generate tangible warm leads
	Private events	<ul style="list-style-type: none">• STL Partners-facilitated invitation-only events for senior telco executives• Draw upon STL's 10-year history of running invitation-only events for industry leaders globally• Leverage insights from research and STL's relationships to drive deeper engagement with multiple operators
	Customer workshops	<ul style="list-style-type: none">• STL Partners-facilitated workshop with key stakeholders across client and end customer organisations• Draw on STL's experience engaging operators worldwide, with specific insights regarding markets and industry practices• Leverage STL's expertise in designing, preparing and facilitating interactive workshop sessions

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STL Partners worked with a global mobile operator to forecast the connected car market



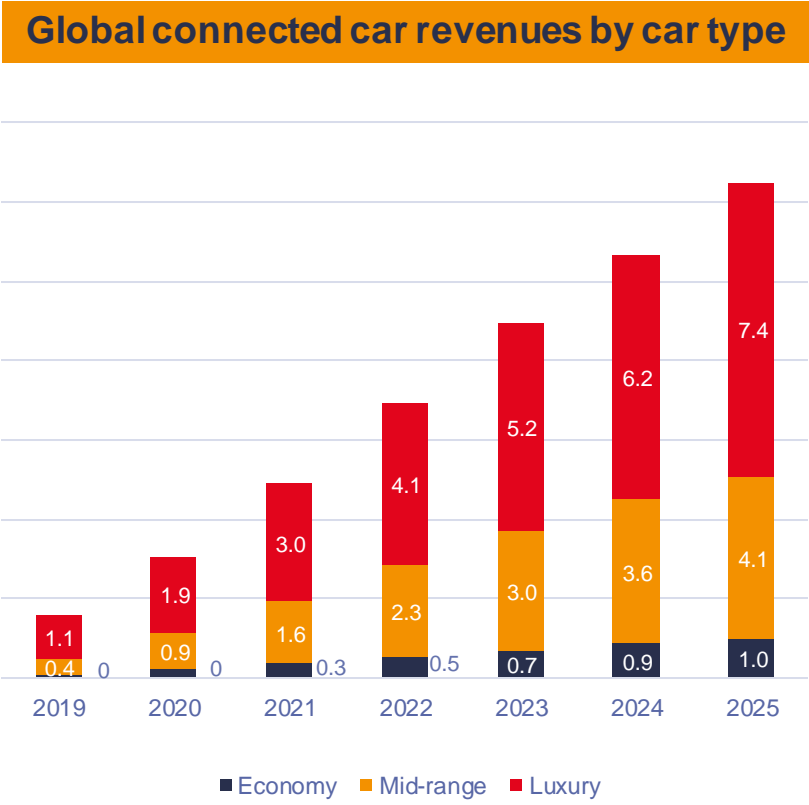
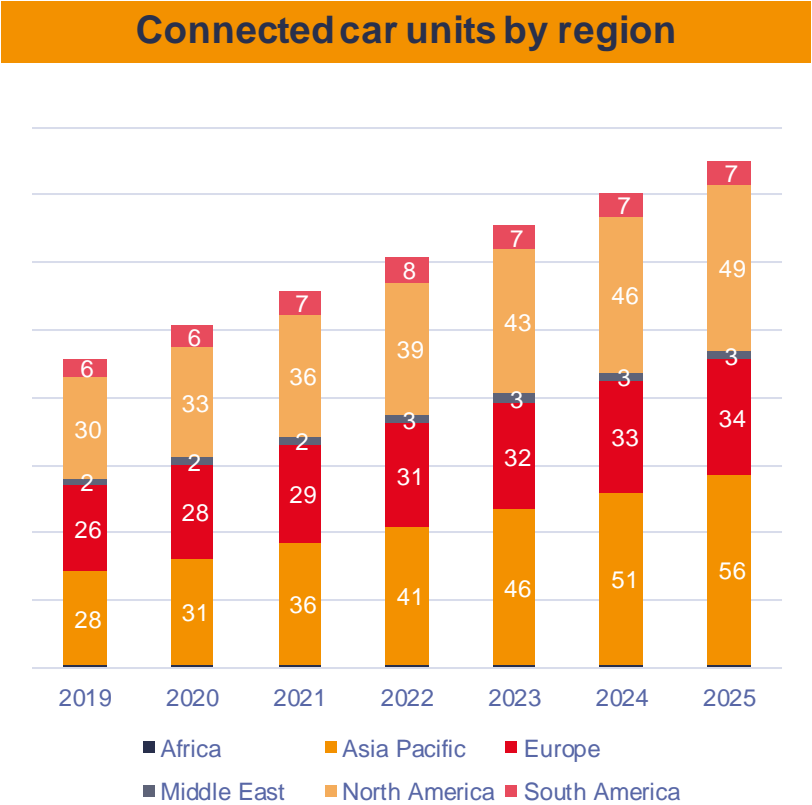
Our client wanted to find out: **How much data will a car in 2019-2025 consume from telematics services broken down by key geographical regions and car segments?**

STL Partners created a tool for finding:

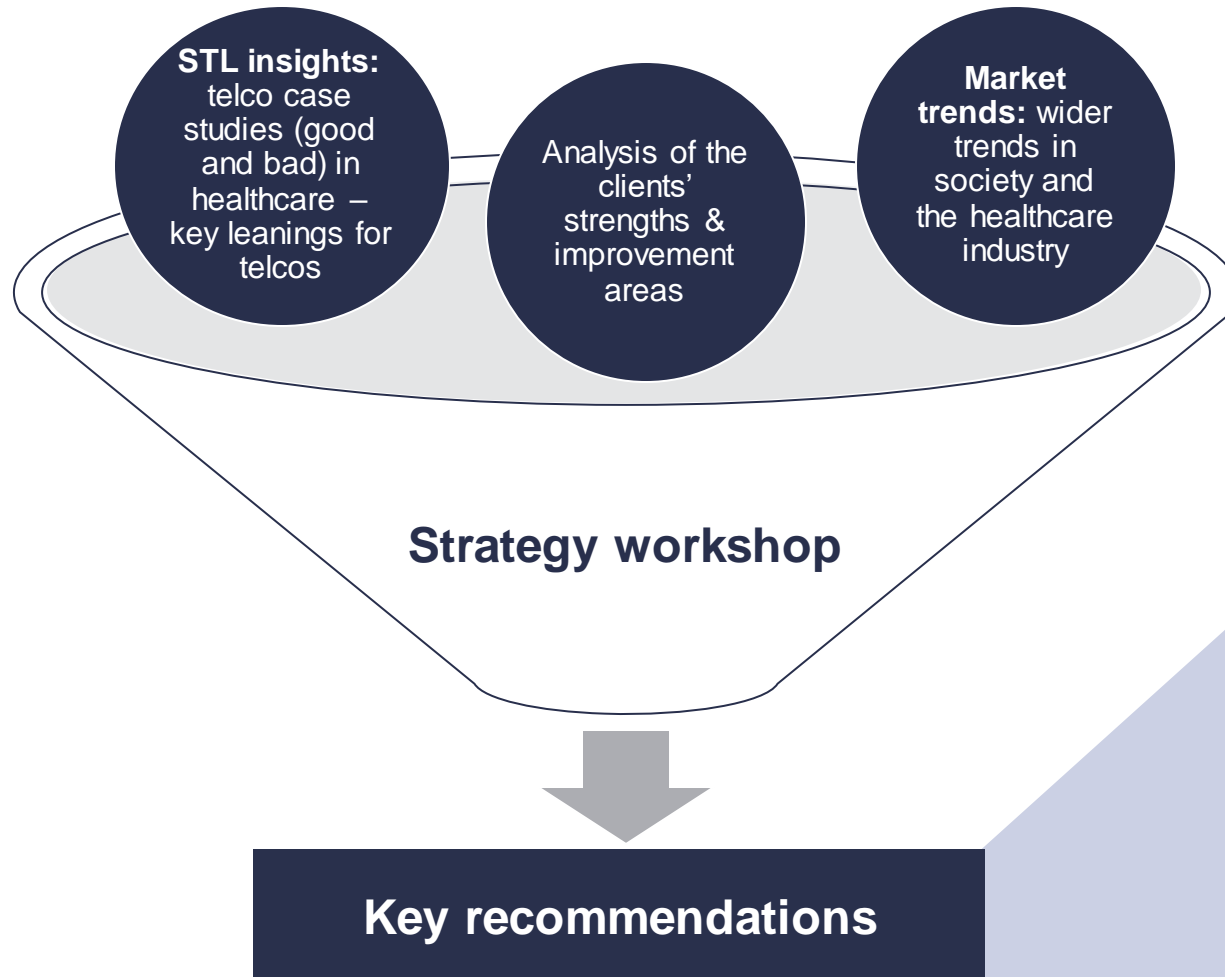
- ARPU
- Data usage
- Revenues
- Car volumes

from telematics by:

- Country / region
- Type of service
- Type of car (economy, middle class, luxury)
- End-market (OEM or aftermarket)



STL Partners conducted a hands-on session with an incumbent operator to identify and prioritise strategic opportunities within healthcare



“STL Partners’ deep insights and knowledge of the market supported us in shaping our healthcare strategy, and their approach drove collaboration across our team. Overall STL under-promised and over-delivered.”

– Healthcare Strategy Manager, European Tier 1 Operator

Recommendations to include:

- Prioritised list of initiatives (strategic and tactical)
- High-level plans and roadmap
- Goals and objectives clearly defined
- Deeper understanding and insight of what others have done and market trends
- Alignment across the team about future direction

STL Partners supported a global software provider to understand the edge computing landscape and opportunity



Interview programme with industrials

- Conducted global interview programme with senior executives across target industries



Manufacturing
(incl. OEMs and automotive)



Extractives
(incl. oil, gas and mining)



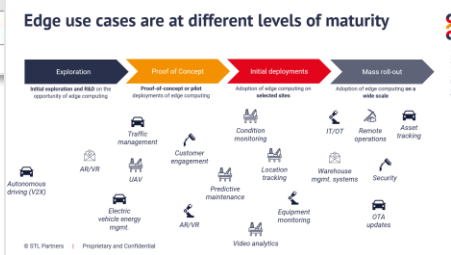
Other industries
(e.g. smart cities, logistics)

- Example companies:



Clarify edge opportunity and landscape

- Analysed the current and developing edge computing opportunity
- Built picture of the edge landscape including needs of target verticals, key use cases, and the edge ecosystem



Identify strategic implications

- Identified strategic implications for the company's edge proposition and partnerships
- Read-out to communicate strategy to internal stakeholders

Key findings from our research programme

Key findings	Implications for Company X
Many industries are in the nascent phase in exploring edge, with a few players within each industry leading the way in terms of initial commercial deployments	Company X is not too late to the market but needs to move fast as the supply-side is investing
Enterprises are increasingly understanding the value of edge but there are still barriers hindering adoption	Potential to position Company X as an enabler to overcome key barriers (e.g. security issues)
There is growing interest in public cloud but many still adopt a hybrid-cloud model for different applications and/or multi-cloud to avoid lock-in	Plays to Company X's strengths in supporting the hybrid- and/or multi-cloud model
The role of telcos is primarily confined within providing connectivity. There is an opportunity to move further up with 5G but requires significant investment	Potential role for Company X to support telco partners who have ambitions in edge
Systems integration remains a huge challenge particularly in industries with fragmented legacy systems and equipment, but there is no single ideal partner	Company X should build relationships with industry-specific partners for GTM etc.
Open source plays a prevalent role with interviewees but not strongly associated with edge and outstanding questions/concerns still need to be addressed	Opportunity for Company X to play active role in 'certifying' open source at the edge

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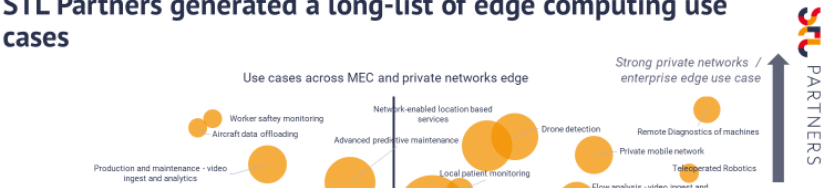
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STL Partners identified, developed, prioritised, and sized key edge computing use cases for a tier one operator



Use case identification and prioritization

STL Partners generated a long-list of edge computing use cases

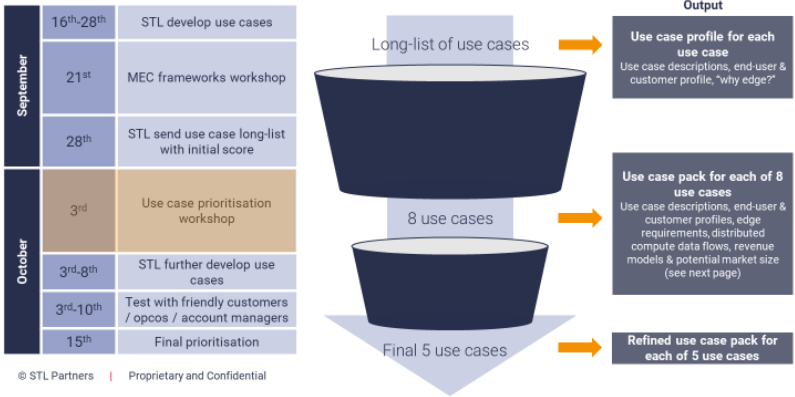


In close collaboration with the client, STL Partners developed scoring criteria for prioritisation

Criteria	Score of -1	Score of 0	Score of 1	Score of 3
1 How "edge"?	Edge compute does not solve the customer problem	There are known alternatives (e.g. cloud) which may work adequately	Edge compute is the "best" option, alternatives are problematic	Edge compute is the only solution to the customer problem
2 Size of opportunity	Niche - small subset of users within a particular industry (e.g. "radiography dept.")	Some appeal to some (large) customers within 1-2 industries (e.g. "hospital")	Strong appeal to many customers within 1-2 industries (e.g. "healthcare")	Strong appeal to different customers across many industries (i.e. horizontal)
3 Pull-through				
4 Network relevance				

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STL Partners developed a process to prioritise the use cases to take forward into future phases of work

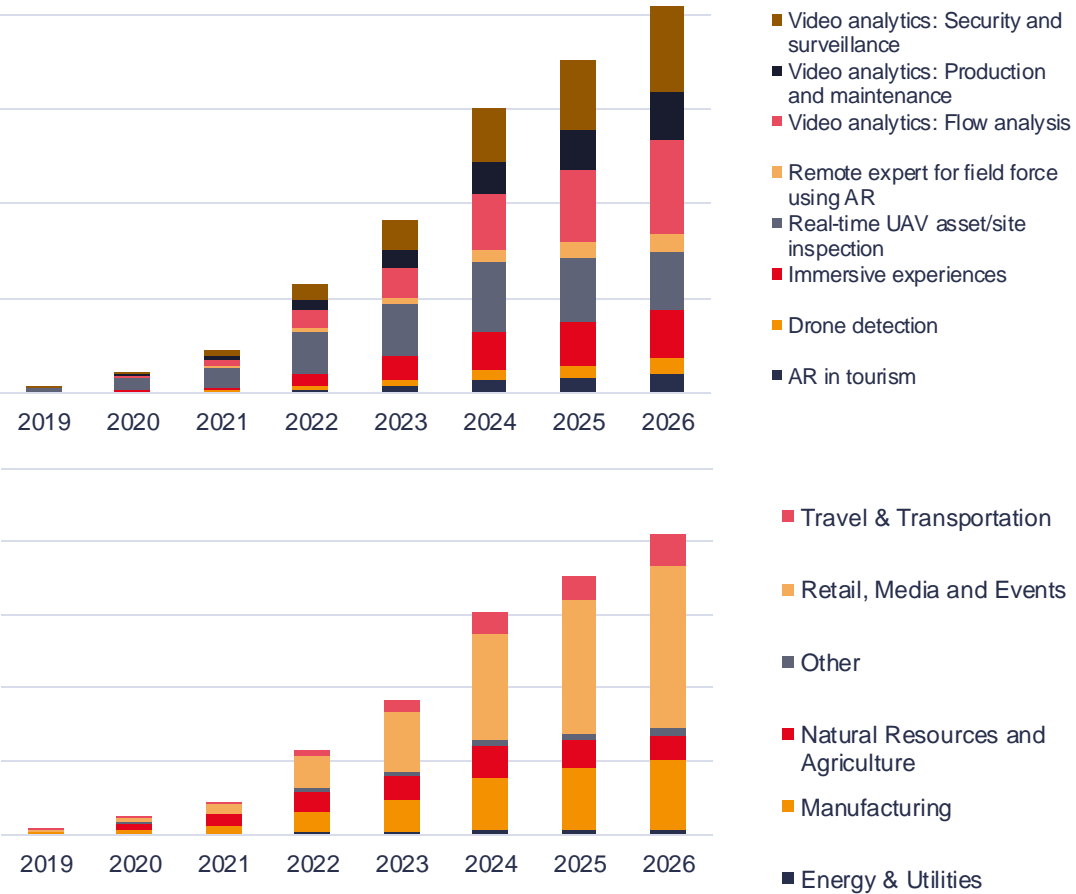


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Market sizing of prioritised use cases



STL Partners supported an alliance of mobile operators to define its strategy around 5G-enabled initiatives



Phase 1. Identification, development and prioritisation of initiatives

Phase 2. Detailed business and commercial model development

STL Partners identified key 5G use cases within each opportunity area

Gaming

- 1. FWA high-performance multiplayer gaming
- 2. Cloud gaming
- 3. High-performance multiplayer mobile gaming
- 4. AR/VR cloud gaming
- 5. Dynamic in-game advertising
- 6. eSports media streaming

AR/VR empowered workforce

- 1. AR/VR Training
- 2. AR remote expert
- 3. Collaborative surgery
- 4. AR for creative collaboration
- 5. AR/VR for process support

Immersive consumer & events

- 1. Smart Wearable Devices
- 2. Immersive Online Shopping
- 3. AR/VR Travel and Tourism
- 4. Massive Multiview
- 5. Smart dressing room
- 6. AR/VR for media consumption
- 7. Connected haptic suits
- 8. 3D holographics

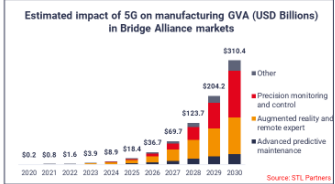
Private/Temporary networks

- 1. Connected events
- 2. Pop up Network
- 3. Private networks

STL Partners and the client selected opportunity areas to move forward based on key criteria

Opportunity areas	Size of opportunity	Member telco applicability	The Client's Value	Tactical opportunity	Risks/Dependencies	Operator retail conflict
Smart industry	●	●	●	●	●	●
Immersive consumer & events	●	●	●	●	●	●
Gaming	●	●	●	●	●	●
Private/temporary networks	●	●	●	●	●	●
Video analytics	●	●	●	●	●	●
AR/VR empowered workforce	●	●	●	●	●	●

STL Partners conducted market analysis to understand the scale and trajectory of the opportunity areas



- APAC is the fastest growing market and accounts for 39% of the overall market. Significant contribution is observed from China, Japan, South Korea and Australia.
- Growth in this region is due to high industrial presence and rising adoption of automation technologies across multiple industry verticals

5G is set to play a key role in growth of the smart industry market - *McKinsey*

Industrial companies consider 5G one of the most important enablers of digital transformation (second only to cloud computing)

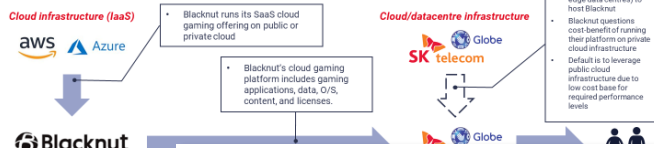
Two thirds of industrial companies want to implement 5G within two years of its roll-out

STL Partners built an activity map to highlight key areas of opportunity for the client

Stage

5. Ecosystem growth	Partner management	Ecosystem recruitment	New partner negotiation	New partner onboarding
4. Operate	Commercial operations	Sales support	Operations	Settlement & reporting
3. Build & deploy	BMO requirements	Customer & partner requirements	Prototype	Develop, integrate & test
2. Define & commit	Propositor design			
1. Discover	Market & tri analysis			

STL Partners detailed the business models across Gaming and Smart industry for the telco and the client



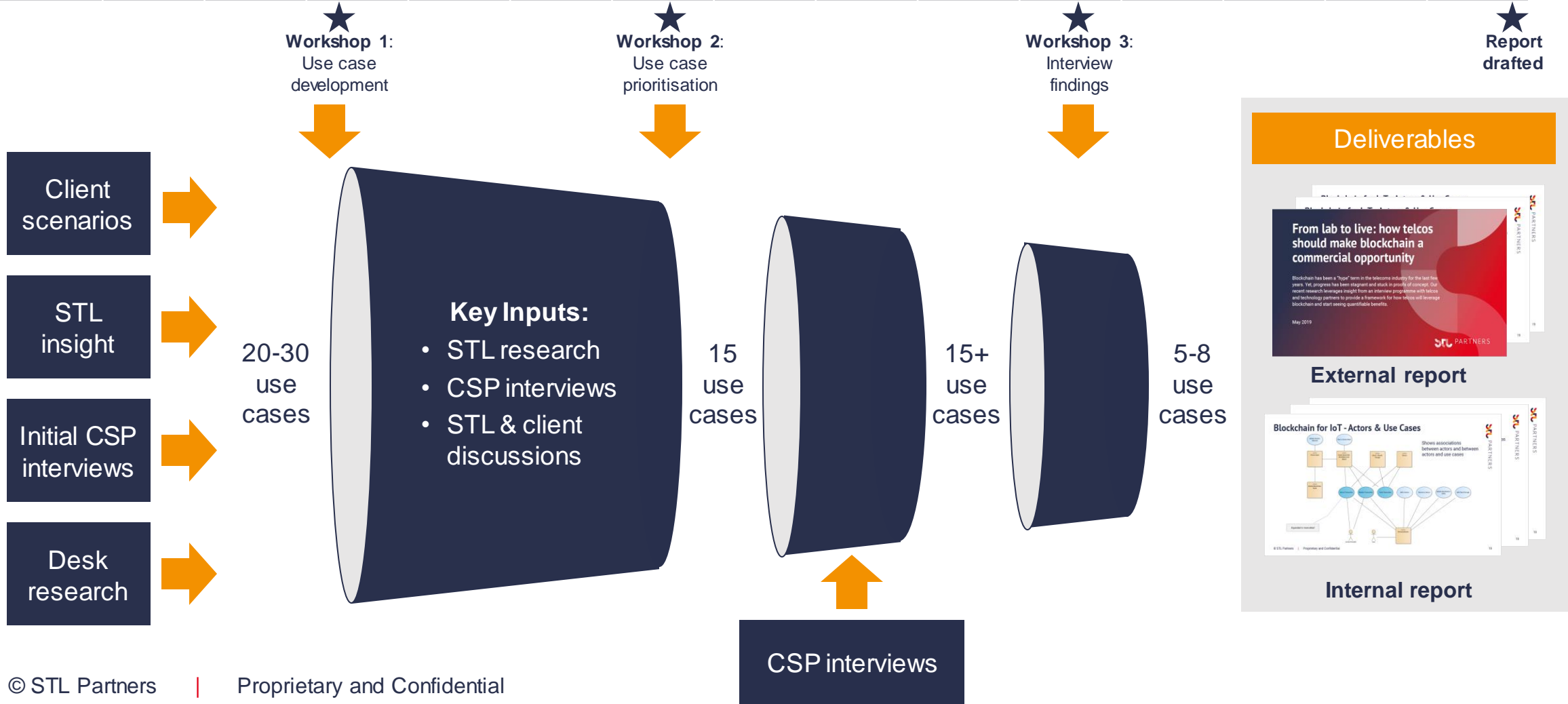
STL Partners made clear recommendations on the value chain and potential partnership models

Value chain segment	Rationale for partnership	Potential partners
System integration & Professional services	• Systems integrators and professional services companies bring industry expertise, credibility, and a potential customer base to the BMO and the client • Client can leverage SI capabilities and training to offer higher-value services to the BMO to gain new revenues beyond membership fees	elisa, EMERSON
Applications & Application Platforms	• Developers can bring the telco the end application, allowing the operator to front the solution and own the end customer relationship in exchange for market entry • Partnerships here allow the operator to bring solutions to market faster and enhance connectivity offerings	elisa, 1000ies, Hologram, senseye
Data Management & Analytics	• Capabilities here offer the opportunity to build horizontal IP (for both the BMO and the client) • Scalable and productised solutions allow easy SaaS/PaaS deployment on top of connectivity/Smart factory solution	elisa, xcrosser, swim
Hyperscale/Cloud	• Players here are often agnostic to the end customer – they are leveraged on an application/use case specific basis • Other solutions will work with whatever existing capabilities, across these value chain segments, the customer has (e.g. existing IoT sensors/compute infrastructure) • Partnerships here will therefore not enable the BMO to lead the solution sale as they do not provide a direct customer relationship or industry specific capabilities	
Connectivity		
Hardware		
End devices		

STL Partners underwent several workshops to prioritise blockchain use cases, complemented by an interview programme to test their viability



January					February				March				April	
1 st	7 th	14 th	21 st	28 th	4 th	11 th	18 th	25 th	4 th	11 th	18 th	25 th	1 st	8 th

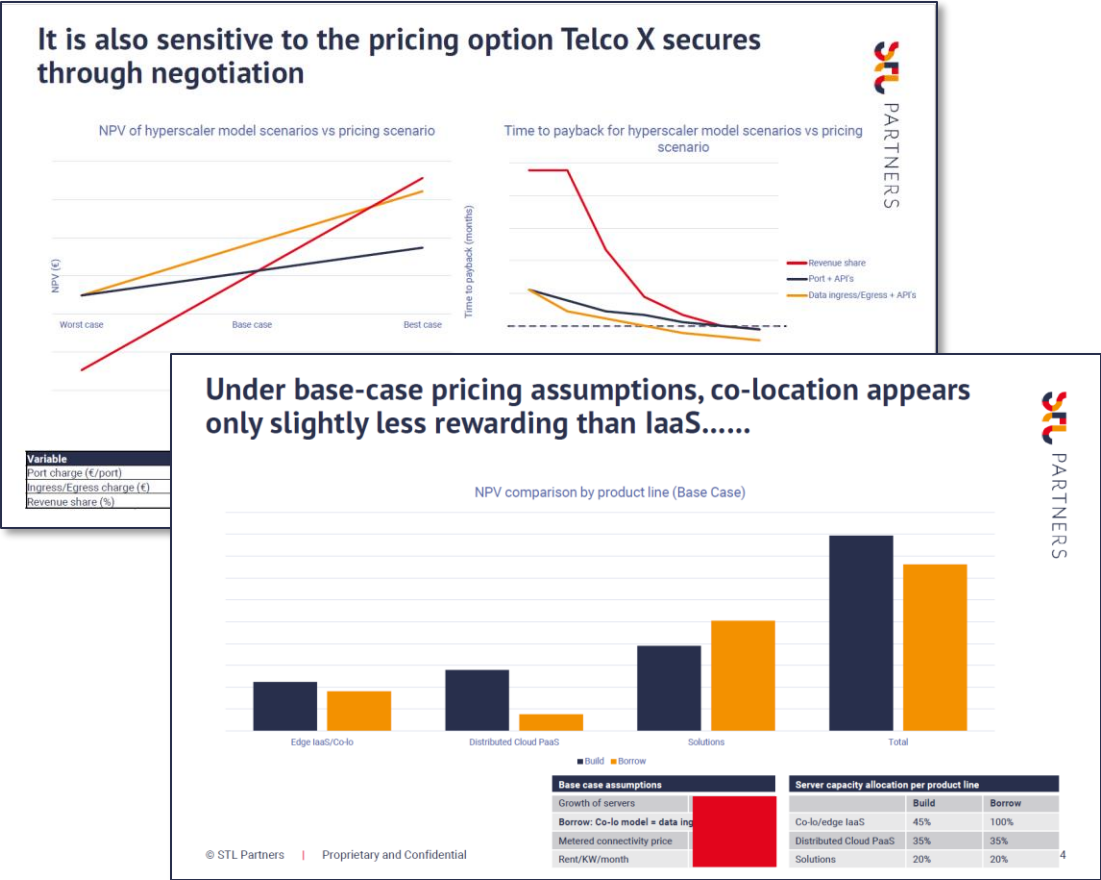


STL calculated ROI across different business, pricing, and investment models for an MNO's edge computing product

Assessment of “build vs borrow” scenarios



Assessment of different pricing models



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STL Partners built a tool for a major technology vendor to accelerate the deployment of NFV/SDN technologies



Stage 1

Global operator interview programme

- Interviews with executives at 16 operators worldwide
- Focused on understanding their experiences in deploying virtualisation technology



Stage 2

In-depth analysis of different NFV/SDN deployment pathways

- 50-page in-depth analysis report
- Summary of the different pathways followed by operators implementing virtualised technology, identifying common strategies, challenges and progress made



Stage 3

Interactive 'playbook' for NFV/SDN implementation

- Guided interactive user document with catalogue of c.150 'plays' to overcome practical hurdles of implementing NFV/SDN
- Based on evidence, insights and best-in-class learnings from interviews

STL supported a leading software and engineering group in identifying and addressing private networking opportunities



Opportunity identification

- Identification of 20 private networking opportunities in selected industries, including potential customers and partners

Evaluation workshop

- Discussion to narrow down and agree selected opportunities to take forward

Deliverable production

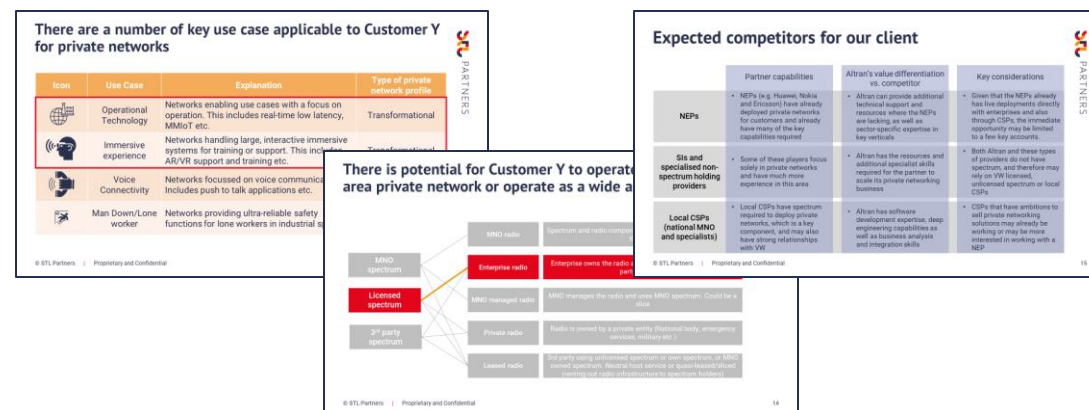
- Production of proposition pitch packs and briefing packs for 6 selected opportunities

Proposition pitch packs

- What the target client (CSP, NEP or Enterprise) is trying to achieve
- How private networks can support any objectives
- How [client's] proposition and capabilities can support them with this

Opportunity briefing packs

- Hypothesis implementation model and our client's services
- Deep dive prospect profiles (Evidence of maturity, basis of interest in private networks etc.)
- Expected competitors (and relative strengths/weaknesses)



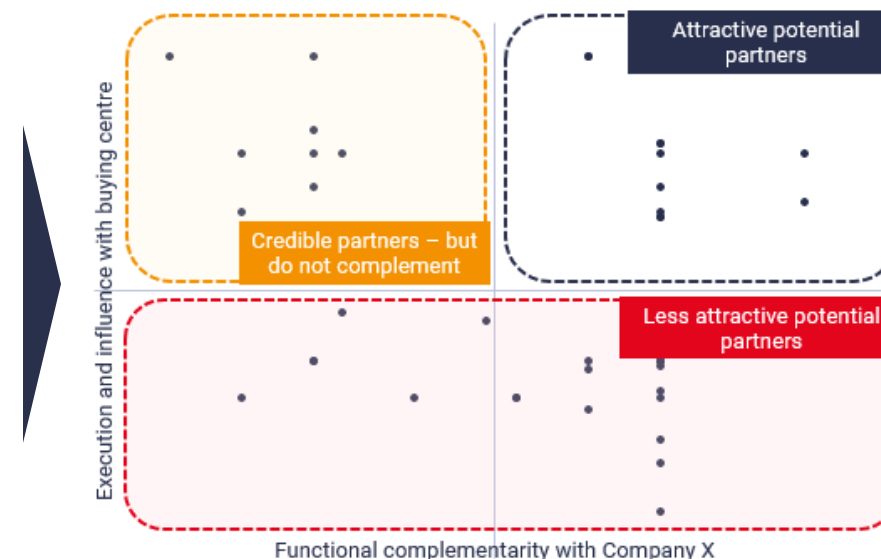
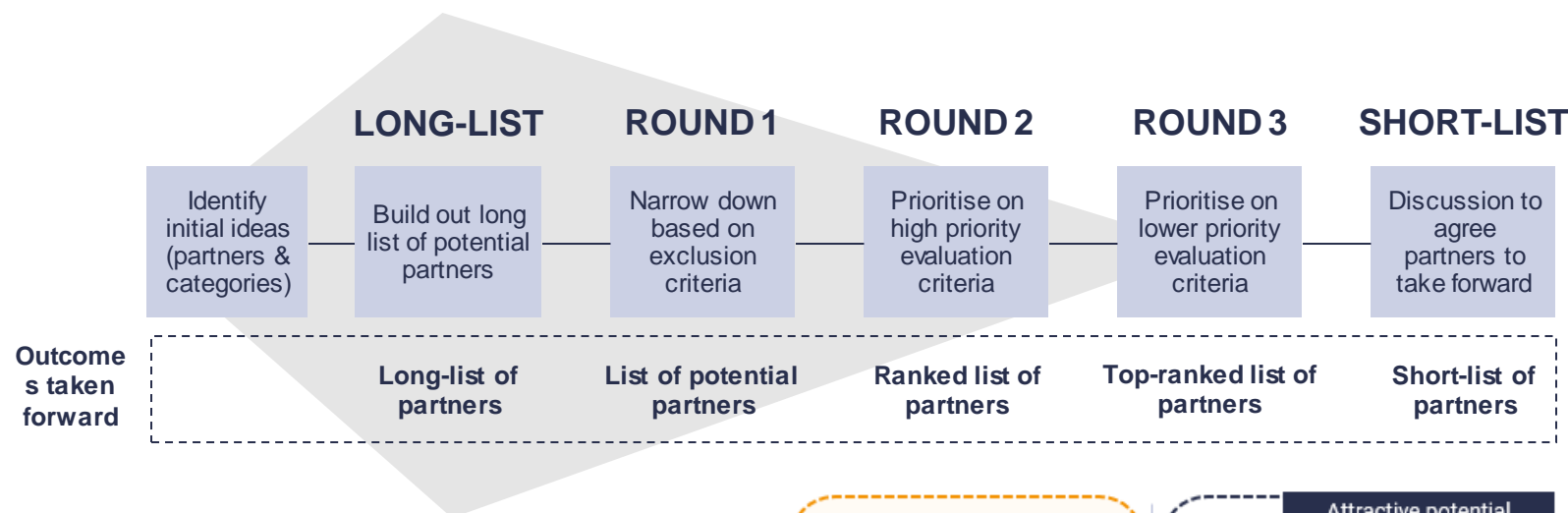
STL Partners helped a technology vendor identify and evaluate suitable partners to gain NFV traction with telcos



STL Partners developed a partnering strategy service and methodology.

This methodology can be adapted in different ways for different clients looking into partnerships across various specific domains.

- In this particular project, a long list of partners was produced through an internal session.
- STL Partners and the client went through an iterative process to identify and assess different evaluation criteria (e.g. deal-breakers to exclude, high, medium, low) with which potential partners are assessed on.
- With the shortlist of potential partners, STL Partners produced partner profiles and an outline of the partnership models



STL Partners supported a Tier 1 European operator in developing its proposition for an edge computing product



Understanding customer needs, challenges, and the proposition

STL Partners built a picture of the healthcare industry and its key drivers for the solution

Healthcare providers want to make better use of patient insights collected from sensors, diagnostic tests, clinicians notes etc. to:

- Create granular, 360 degree, and up-to-date patient EMR and dashboards
- Track patient vitals remotely on the move e.g. ECG/blood pressure
- Analyse and notify when issues are detected (e.g. Detection of acute kidney injury - DeepMind Streams)

Problems with running application using traditional servers

- Expensive dedicated hardware and support
- Difficult to manage for hospital staff
- Traditional servers not scalable and siloed
- There is a cost issue: hardware is expensive. The third party is an expensive siloed hardware also (Problema)

Problems with running application using cloud

- Cost of bandwidth
- Time to process large and "noisy" data sets
- Data security and privacy

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We developed a clear proposition for the product and how it helps solve the healthcare industry's challenges

Scenario: Improve healthcare productivity by freeing up clinician time and providing more accurate data

We believe that customers within...

- The healthcare industry, including organisations, practices and providers across the spectrum of the NHS:
- Primary care facilities e.g. GP
- Allied health professionals/care homes
- Hospitals/institutes

Should be able to...

- Monitor all patient data in one place, through the entire care journey and beyond in an end-to-end manner
- Provide better, more proactive and more tailored care to patients, improving patient outcomes across both acute and chronic diseases
- Do this within budget constraints while maintaining the highest data privacy standards

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We looked at the proposition across key stakeholder groups within the healthcare ecosystem

	Clinicians	Nurses	Healthcare researchers	IT, Procurement, legal team
Before the solution	<ul style="list-style-type: none"> Operate on bits of paper / notes Not real time (what they're at the patient) Steps in data time series Shareable information with (remote) colleagues Time consuming to collate, review and process data 	<ul style="list-style-type: none"> Inefficiency - huge amount of time spent on routine data collection and admin Occasional transcription errors 	<ul style="list-style-type: none"> Focus on current situation and problem 	<ul style="list-style-type: none"> Increasing patient data collected requires increasing server numbers which can get expensive Time trying to find kits Moving all the existing systems to cloud causes a lot of compliance issues
After the solution	<ul style="list-style-type: none"> All the patient data in one place End-to-end 360 view of patient health Monitor patient through entire care journey Less time spent on reviewing patient statistics Maintain data privacy by remaining on site Management of edge may still be difficult for providers 	<ul style="list-style-type: none"> Helps them do their job better and faster by freeing up time for patient care Reduce errors Easier way to collate data 	<ul style="list-style-type: none"> Increased research initiatives: operational, clinical (epidemiological) and public health policy etc. Potential basis for advanced analytics bringing insights for diagnosis Research on the extension of edge cloud offering beyond hospital to ambulance, home and private clinics 	<ul style="list-style-type: none"> Asset monitoring/audit trails - identify where kits are and their status in real time manner Potential basis for advanced analytics bringing insights for diagnosis Research on the extension of edge cloud offering beyond hospital to ambulance, home and private clinics Compliance - IT department doesn't have full control over data

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Assessing the ecosystem and your role within it

STL Partners mapped the local patient monitoring ecosystem and value chain

Services	Remote/On-site monitoring on integrated systems Training and maintenance support for third IT team	VOCERA, IBM, ascom, etc.
System Integration	Integration into existing, often legacy IT systems and processes in hospitals/clinics homes, to improve interoperability	IBM, VOCERA, ascom, etc.
Applications	Integration of analytics to systems and visualisation of real-time patient data (e.g. assessing medical grade via heart rhythm)	IBM, VOCERA, ascom, etc.
Analytics Platforms	Integration and management of patient data from multiple sources Analysis of clinical data to enhance clinical decision making by healthcare providers	IBM, VOCERA, ascom, etc.
Hyperscale/Cloud	Provide electronic health data storage and memory/compute capabilities Limited cloud play currently in the healthcare industry	IBM, VOCERA, ascom, etc.
Connectivity	Providing LAN connectivity between sensors, other diagnostic tools and the edge, and also between edge and core networks	IBM, VOCERA, ascom, etc.
(on-prem) Hardware	Existing servers on hospital premises for storage of patient data	IBM, VOCERA, ascom, etc.
End devices	Healthcare devices and sensors to monitor patients Patient Monitors to manage clinical information	IBM, VOCERA, ascom, etc.

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STL Partners mapped the strength of capabilities across the ecosystem to the client's potential competitors

	Hyperscalers	Industry Specialists	Device Manufacturers	NEP/Telco
Capabilities	aws, Azure, VOCERA, etc.	IBM, etc.	Medtronic, etc.	Cisco, Vodafone, etc.
Hardware/Devices/Facilities	Red	Green	Green	Green
IaaS/PaaS	Green	Green	Green	Green
Application	Red	Green	Green	Green
Professional Services (S/SS)	Green	Green	Green	Green

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STL Partners mapped how and where the client could move further up the value chain within healthcare

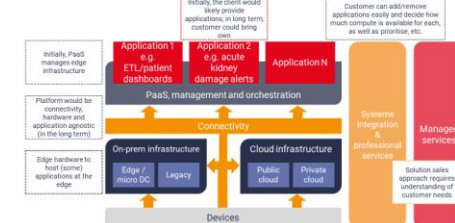
	Managed services	SI & sys. services	Application	Cloud infra.	On-prem infra.	Devices
Managed services	Monitoring & reporting, Maintenance, etc.	Education services, etc.	Data management, etc.	Public cloud, etc.	On-prem data centre, etc.	Hardware, etc.
SI & sys. services	Education services, etc.	Data management, etc.	Application development, etc.	Public cloud, etc.	On-prem data centre, etc.	Hardware, etc.
Application	Data management, etc.	Application development, etc.	Cloud management, etc.	Public cloud, etc.	On-prem data centre, etc.	Hardware, etc.
Cloud infra.	Public cloud, etc.	On-prem data centre, etc.	Hardware, etc.	Public cloud, etc.	On-prem data centre, etc.	Hardware, etc.
On-prem infra.	On-prem data centre, etc.	Hardware, etc.	Public cloud, etc.	On-prem data centre, etc.	On-prem data centre, etc.	Hardware, etc.
Devices	Hardware, etc.	Public cloud, etc.	On-prem data centre, etc.	On-prem data centre, etc.	On-prem data centre, etc.	On-prem data centre, etc.

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Developing the Go-To-Market strategy

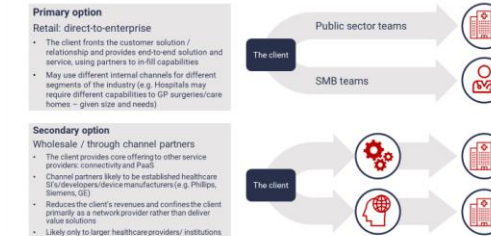
STL Partners helped identify the product structure and develop key requirements from the industry



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STL Partners helped define the clients Go-To-Market strategy for addressing the healthcare market



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STL Partners defined clear and practical next steps to developing and piloting the solution



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STL Partners conducted a research programme with Juniper Networks on the industry's progress so far in telco cloud



Building a meaningful thought leadership-driven campaign for Juniper focusing on telco cloud

Thought leadership report



Extensive interview programme with telcos globally

Insights and assets to drive customer discussions

Thought leadership-driven engagement for webinar recruitment

Infographic



Webinar hosted by STL Partners



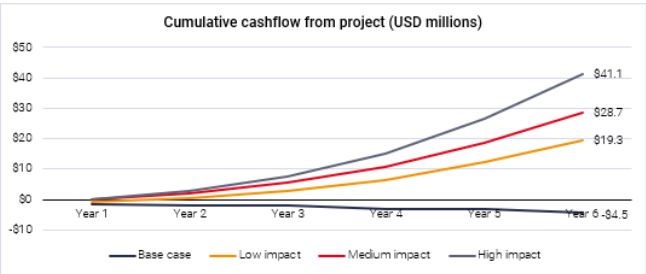
STL Partners highlighted the benefits of implementing an advanced analytics solution through an operator case study



Exploring the qualitative and quantitative impact of advanced analytics on telco operations

ROI modelling

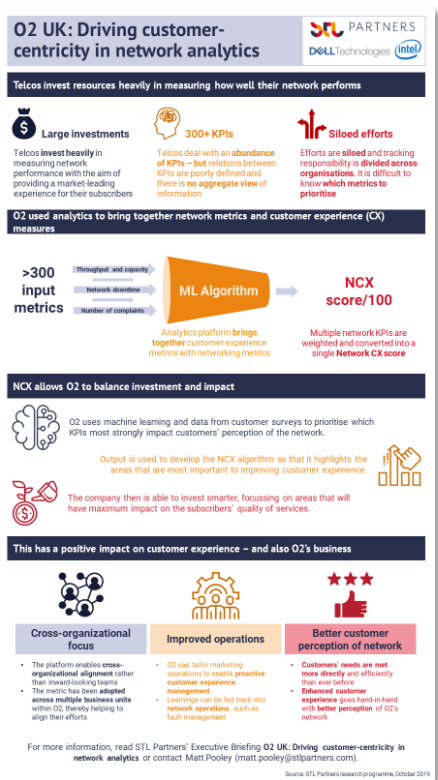
ROI							
Operator X <small>Use toggle to select operator profile</small>							
Perception platform cost (USD millions)							
Metric	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	
Annual cost of the platform	\$1.36	\$0.36	\$0.39	\$0.82	\$0.35	\$1.20	
Cumulative cost of the platform	\$1.36	\$1.71	\$2.10	\$2.92	\$3.27	\$4.46	
NPV							
		Annual cashflow					NPV
Scenario	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	
Base case	-\$1.4	-\$0.4	-\$0.4	-\$0.8	-\$0.4	-\$1.2	-\$0.83
Low impact	-\$0.6	\$1.2	\$2.4	\$3.4	\$5.8	\$7.1	\$0.63
Medium impact	-\$0.1	\$2.1	\$3.6	\$5.2	\$8.0	\$9.9	\$1.38
High impact	\$0.0	\$2.7	\$5.0	\$7.5	\$11.5	\$14.5	\$1.98
Payback							
		Cumulative cashflow					Payback (years)
Scenario	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	
Base case	-\$1.4	-\$1.7	-\$2.1	-\$2.9	-\$3.3	-\$4.5	
Low impact	-\$0.6	\$0.6	\$3.0	\$6.4	\$12.2	\$19.3	2
Medium impact	-\$0.1	\$2.0	\$5.6	\$10.8	\$18.8	\$28.7	2
High impact	\$0.0	\$2.7	\$7.6	\$15.1	\$26.6	\$41.1	2



Co-branded case study report



Infographic



We promoted a Nokia co-sponsored thought leadership report and survey findings in telco's AI maturity



The state of AI in the telecoms industry



The role of AI in simplifying telecom operations

How can telecom operations be more agile, dynamic and efficient? Nokia's Brendan Ziolo and STL Partners' Matt Pooley discuss.



Opportunities for AI-enabled customer experience

Are telcos taking advantage of how AI can significantly reshape customer experience? Nokia's Brendan Ziolo and STL Partners' Matt Pooley discuss.

STL Partners supported Altran in promoting its 5G proposition at Mobile World Congress Barcelona 2019



STL Partners recruited panel speakers from Airbus, Sanofi and Telenor

Organised event within 3 weeks

Secured attendance of 30 senior telecoms industry professionals

Developed compelling content for the discussion
“How will 5G deliver unique value to other industries?”



Sample set of our attendees	
Company	Title
Head of Corporate Strategy and PMO	Alfa Mobile
CEO	Bridge Alliance
Chief Strategy Officer (CSO)	CableLabs
Global Strategic Solutions	Colt
Vice President Group Strategy & Transformation	Deutsche Telekom
Innovation Management	Deutsche Telekom
Business Development, Innovation, Evolving Edge	Equinix
VP of Worldwide Sales	Ethernity Networks
IoT Program Architect and Product Leader	Georgia-Pacific LLC
Domain Sales Representative	Hewlett Packard Enterprise
AVP Product & Business Development	Hutchison Global Communications
Global Strategic Marketing	Juniper Networks
Senior Networks	Kazakh Telecom
CEO	Onycom
Director Product Marketing	Oracle Corporation
5G Squad Member	Orange Spain
Team Manager Mobile Solutions	Proximus
EVP	Qualcomm
Principal Business Development – Data and AI	Swisscom
OnLife Networks DevOps Senior Expert	Telefonica
SVP Internet of Things	Telenor Group
Dir. of NFV Solution Engineering and Validation	VMWare
ITDNE Sr Networking Architect	Vodafone
5G IoT Project Director	Wind Tre
Chief Operating Officer (COO)	ZTE Italy

STL Partners ran a customer workshop at MWC to promote TELUS Health's success and viability as a telco partner



STL Partners' presentation teed up the vertical opportunity in digital health for operators

TELUS Health presented on their platform and their journey to success

All telcos need to leverage new technologies

- Defence**
 - Lower operational costs
 - More efficient capex deployment
 - Keep up with customer demands for flexibility and control over their services

The vertical opportunity can leverage telco strengths

Wide network coverage	Regulatory experience
Access to capital	Brand power
Local presence	B2B and B2C

Why TELUS succeeded

Long term commitment	Don't expect immediate ROI
Flexible	Pragmatic investment in M&A
	Keep trying if you fail

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TELUS in Health – a 3-Step Strategy

- 1. TELCO Partnership**
 - Reduce Risk
 - Reduce Required Capital Spend

TELUS Health Exchange – TELCO FMO

Core Interaction: Collaboration enabled by secure messaging

Applications and Analytics

Infrastructure

Connectivity

Marketplace, Open Standard APIs, Data Commons, Security & Privacy Services, Identity Services, Management Services

Network, Mobility, & Infrastructure Services

Digital Health Wallet Share: 60-70%, 20-30%, 7-10%

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Agenda

- 1 Overview of our consulting services
- 2 Detailed breakdown of our consulting services
- 3 Relevant case studies
- 4 The STL Partners Consulting team

Our partners have all worked extensively in industry



Philip Laidler, Consulting Partner

Phil's experience is in strategic planning, corporate development and strategic marketing consulting. He brings over 23 years' experience in TMT both as a consultant and business leader, having held senior roles with Verizon Enterprise for eight years. A fluent French and Italian speaker, Phil holds an MSc in Information Systems from the London School of Economics and a BA in Engineering and Management Studies from Cambridge.



Chris Barraclough, Partner

Chris is a key contributor to both consulting and research activities at STL Partners. He has over 25 years' experience in strategy and business—18 in the TMT sector working for operators such as Verizon Business and Orange. Particular interest in strategic analysis, proposition development and the use of financial and operational metrics to manage and govern change. MA in English Language and Literature from Oxford University.






Andrew Collinson, Research Partner

Andrew leads STL Partners' research business and has over 25 years' experience working in telecoms, holding senior business and strategic roles within mobile, fixed line, VOIP and internet services sectors. Andrew has particular interests in how organisations and people change, AI, and neuroscience. Andrew holds a BSc in Medical Physics from Exeter and an MBA from Warwick.

STL Partners specialist consulting capabilities

Examples of STL Partners' expertise

	Edge computing	Telco cloud	Digital health
Practice lead	Dalia Adib 	Yesmean Luk 	Darius Singh 
Assets & capabilities	<ul style="list-style-type: none"> • Database of 150+ use cases • Interactive model for forecasting use case revenues • Ecosystem tool mapping 80+ edge vendors • MEC site ROI model & hyperscaler negotiation tool 	<ul style="list-style-type: none"> • 25+ reports covering NFV, SDN, etc. • NFV deployment tracker covering every announced live NFV deployment • Dedicated Telco Cloud research stream 	<ul style="list-style-type: none"> • 5+ reports on telcos role in digital health • 10+ case studies of telcos' digital health solutions
Example projects	<ul style="list-style-type: none"> • Supported 3 major operators to develop a commercial strategy for edge computing • Advised global telco on hyperscaler partnership negotiation worth €0.5M 	<ul style="list-style-type: none"> • Helping a software company to identify and evaluate suitable partners for telco NFVi • Building an operator playbook tool for a major technology vendor to accelerate the deployment of NFV/SDN technologies 	<ul style="list-style-type: none"> • Developing the healthcare strategy and core propositions for an incumbent European operator • Quantifying 5G's impact on the healthcare industry, including three detailed use cases, for a technology vendor
Website hub	https://stlpartners.com/edge-computing/	https://stlpartners.com/telcocloud/	https://stlpartners.com/digital-health-telecoms/

Meet the STL Partners Consulting team



Dalia Adib

Principal Consultant
& Edge Lead



Matt Bamforth

Consultant



Tilly Gilbert

Senior Consultant



Miran Gilmore

Consultant



Reah Jamnadass

Consultant



Yesmean Luk

Senior Consultant



Darius Singh

Senior Consultant &
Digital Health Lead