

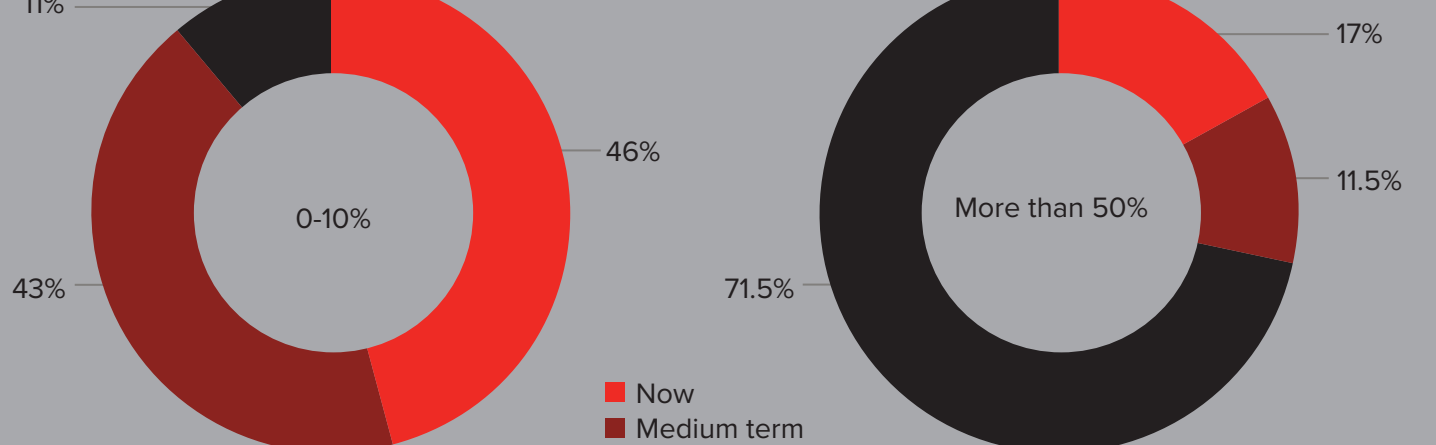
DIGITAL TRANSFORMATION TRACKER 5



If CSPs want to realize the enterprise opportunity they must transform

Telecoms operators have great hopes for growing their B2B revenues

CSP revenue from B2B services



And many are creating new B2B divisions and new product concepts



African telecoms group MTN aims to build Africa's largest and most valuable platform business with a clear focus on Africa as part of its Ambition 2025 Vision. Key pillars to this strategy include mobile payments subsidiary Momo, digital services provider Ayoba and API marketplace Chenosia.



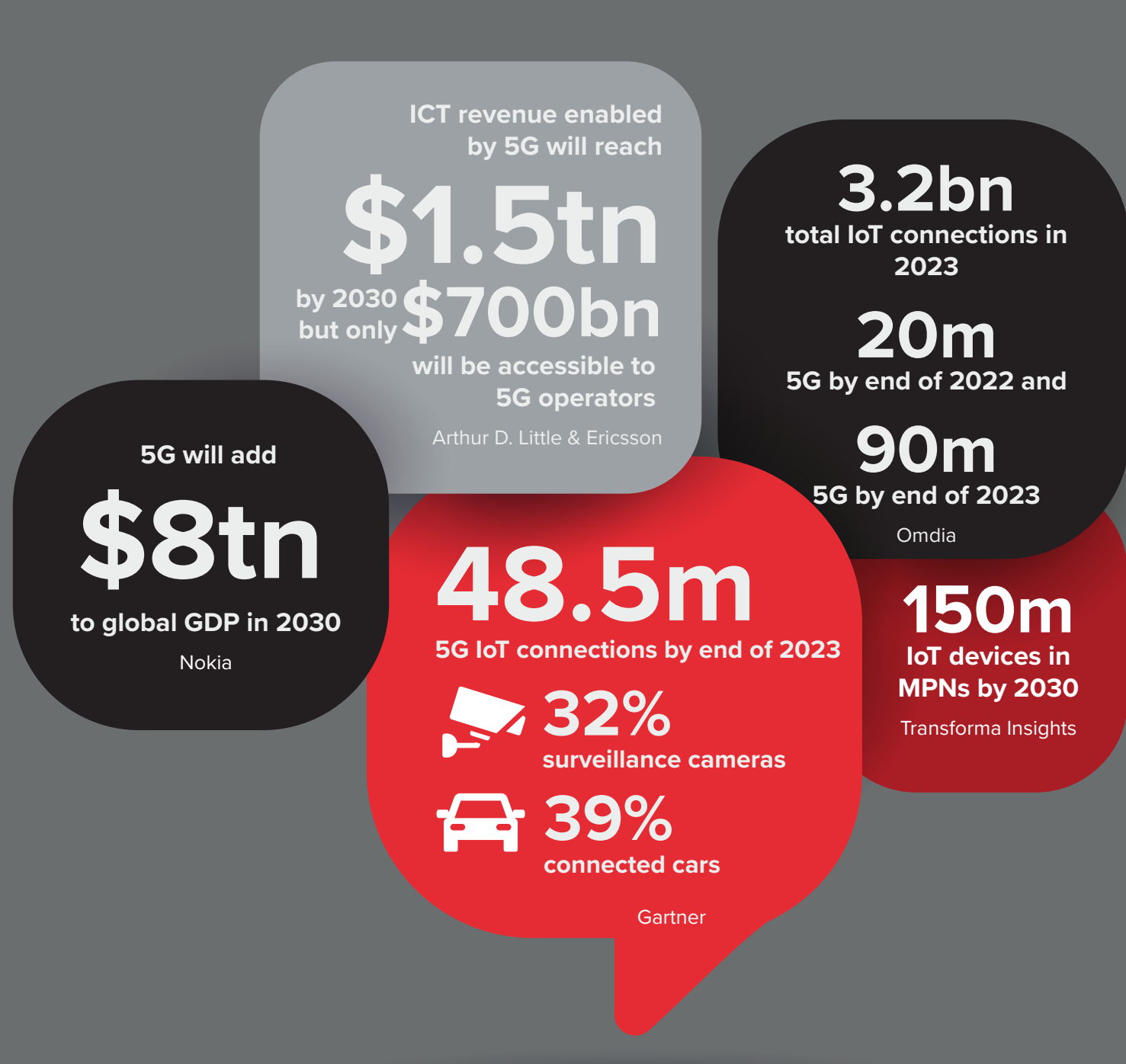
Saudi telco STC has set up a dedicated unit to provide digital services to the government sector and to private businesses. Initiatives include a partnership with Alibaba Cloud focussed on healthcare and an agreement with state-owned oil company Saudi Aramco to develop a super computer to improve mining & exploration practices.



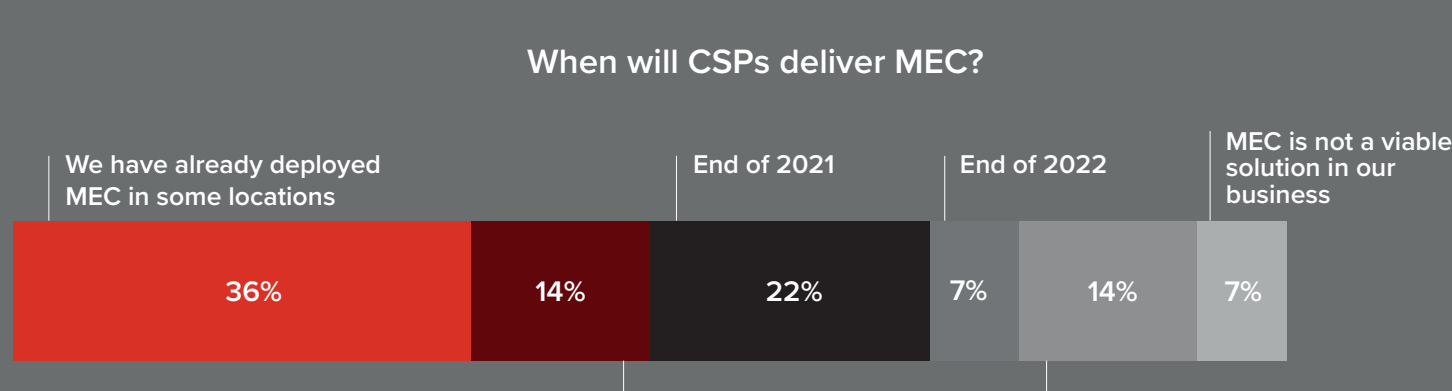
Telefonica has set up a new division called Telefonica Tech which is exploiting the capabilities of 5G, edge computing and public cloud to deliver new IoT and security solutions. In May it signed a deal with Microsoft Azure to deliver 5G

5G and edge will be the drivers

Bullish (and widely varying) projections for 5G & IoT

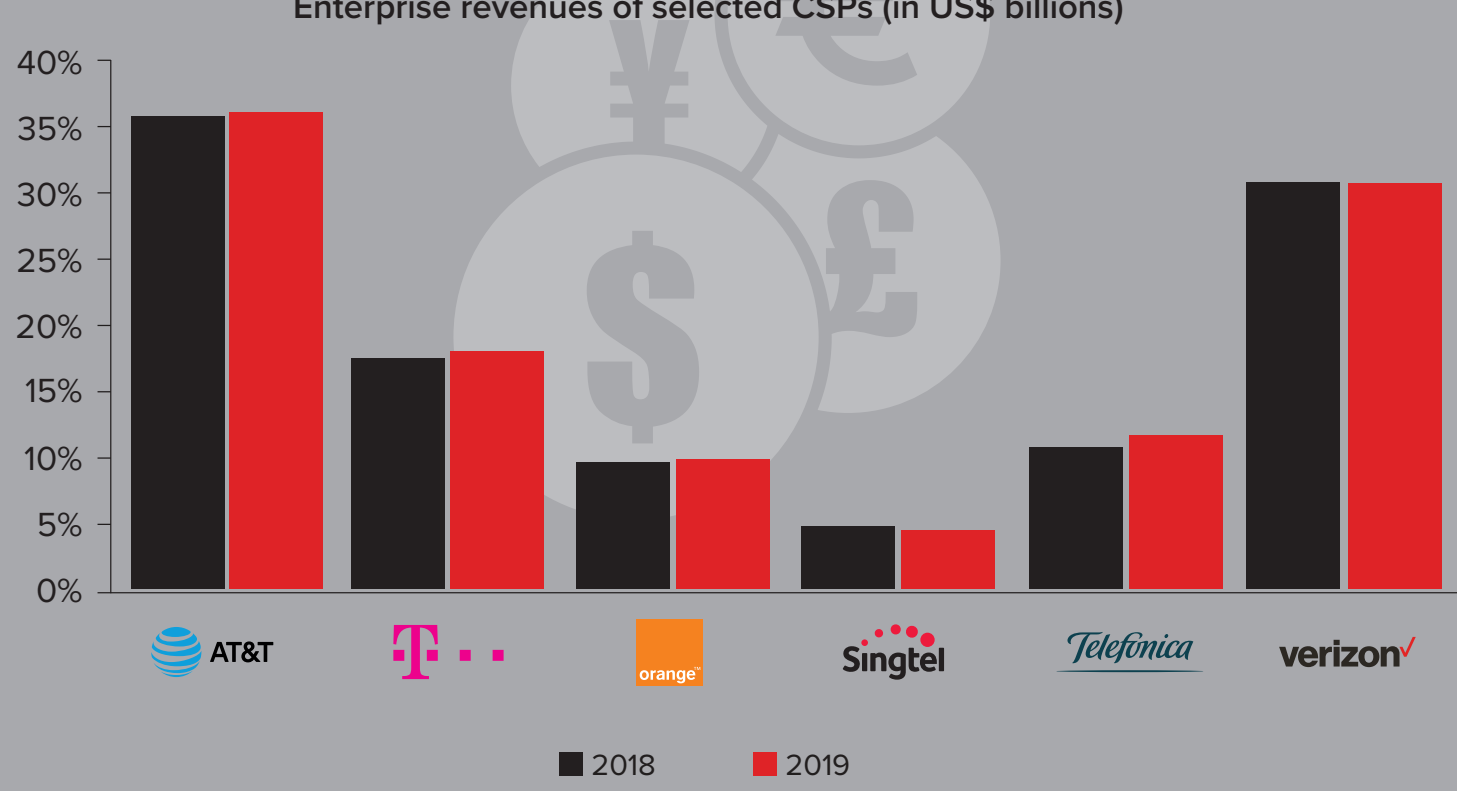


When will CSPs deliver MEC?



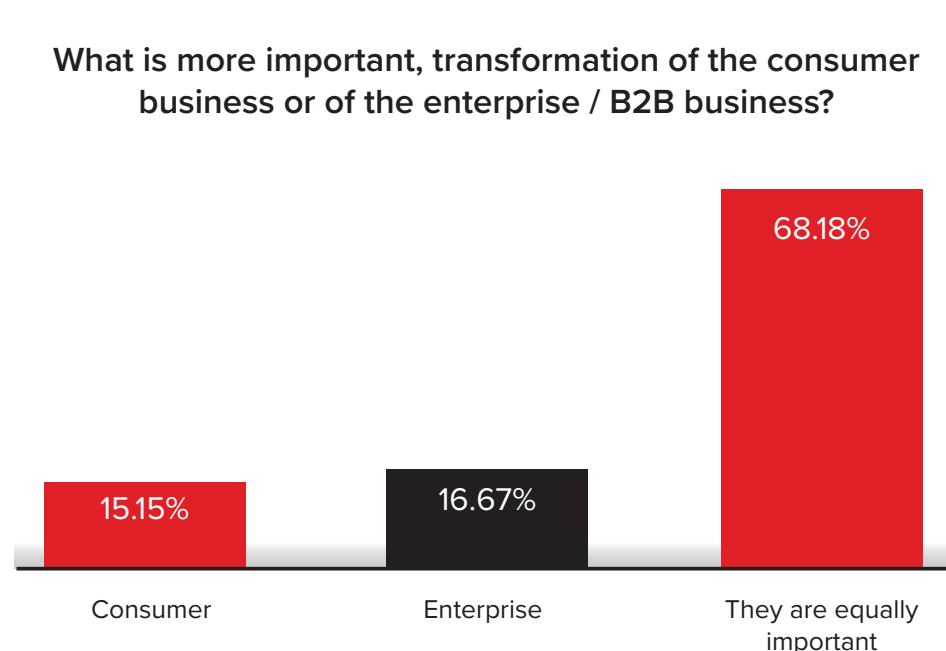
But success is not guaranteed and operators will need to make the right strategic and technology choices to accelerate B2B revenue growth

Enterprise revenues of selected CSPs (in US\$ billions)



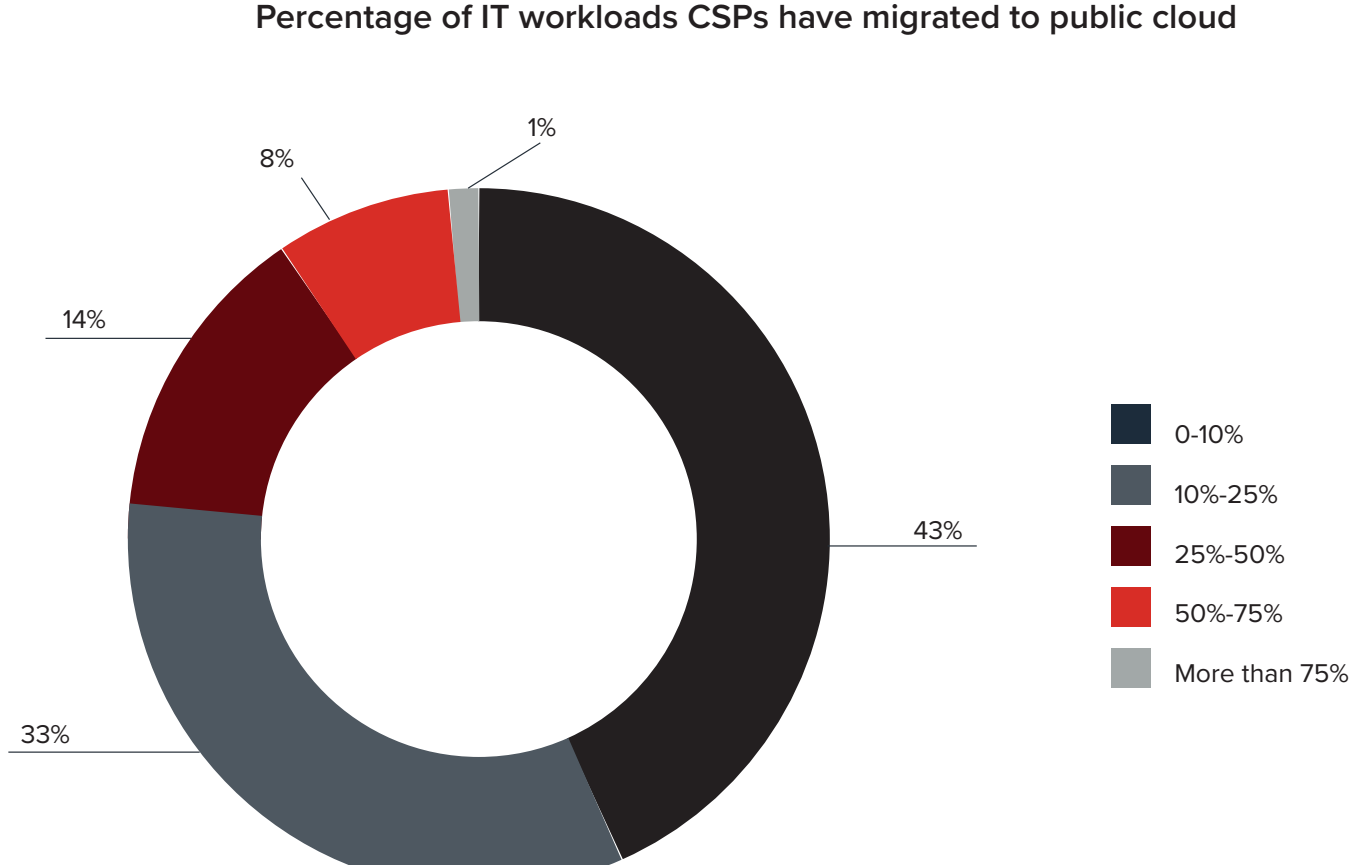
They will need to transform their enterprise BSS/OSS

What is more important, transformation of the consumer business or of the enterprise / B2B business?



and accelerate their cloud migration

Percentage of IT workloads CSPs have migrated to public cloud



Operators believe that they need to adopt cloud native approaches

We are absolutely committed to taking a cloud native approach for all of our IT workloads

22.12%

We want to take a cloud native approach but accept that this may not be possible for all our applications and workloads

60.18%

We don't have a clear preference for a cloud-native approach

17.7%