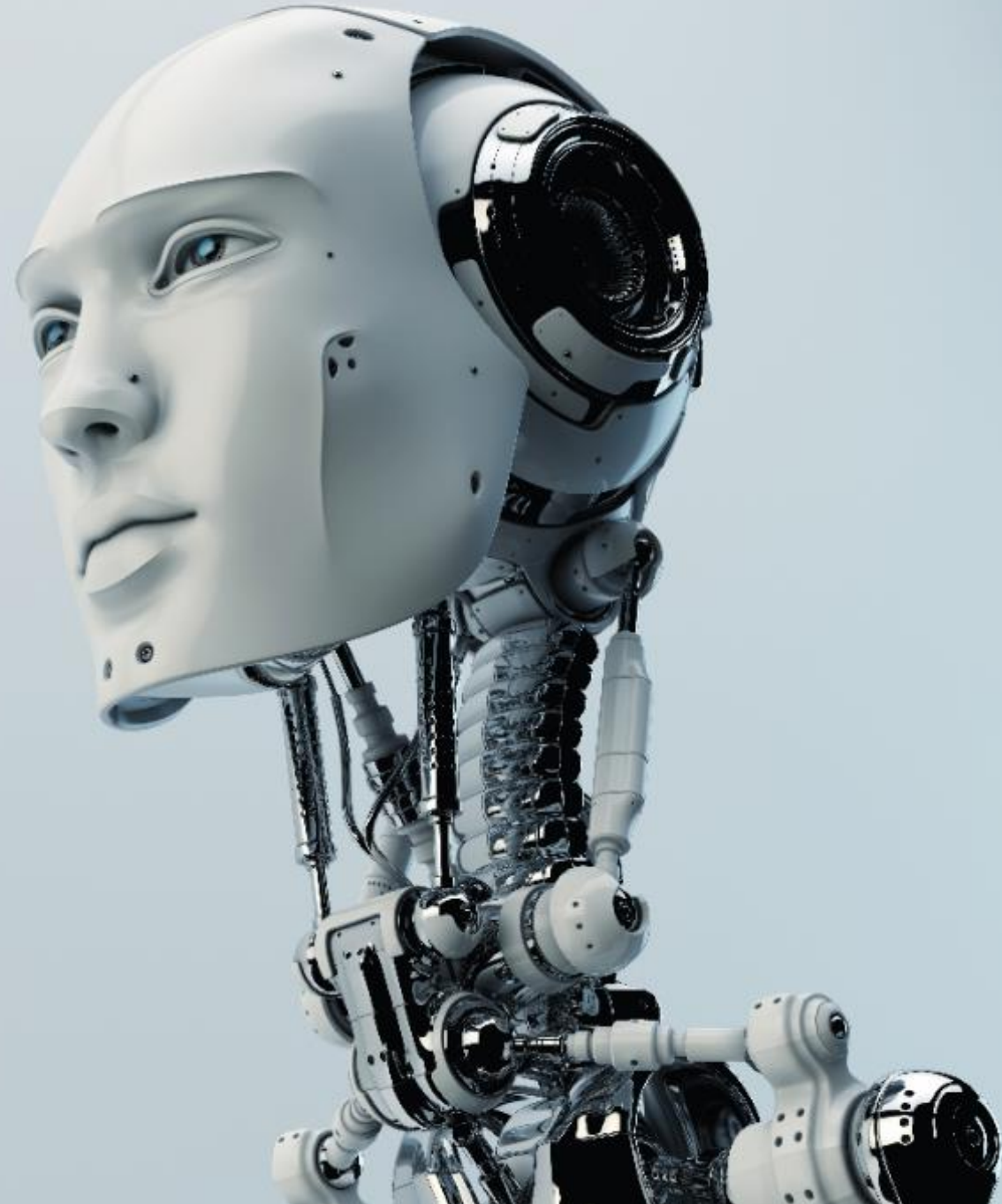


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To be or not to be
Telecommunications 2030:
A perspective

September, 2017



The iPhone

Exponential technology development: How the world changes in 10 years

2007: LAUNCH OF THE IPHONE



10 YEARS AFTER

3.2 bn Smartphones active

1.5 bn Smartphones sold every year

With a profound impact on:

- 📞 Communication
- 🏦 Banking
- 🛒 Shopping
- ✈️ Traveling
- 🎮 Entertainment
- ...

The Challenge

Breaking out of the incremental 3-year strategic planning cycle

WHAT WE DO ...

- Annual strategy and business planning
- Mid-term incremental forecasting
- One “truth”
- React on unplanned developments



... AND WHAT WE SHOULD DO

- Pursue a longer term vision
- Adjust strategy only if, when and where required, act tactically
- Scenario thinking
- Anticipate uncertainties

The Phenomenon

Digital Era: For the first time in history, technology is inseparable from personal, consumer, business, employee, government and education activities



TECHNOLOGY

The enabler for the Digital Era

Technology has become **ubiquitous** and **embedded** into lives of everyone. The explosion of connectivity, data, ease of use, computing power, accessibility, and the rapid pace of innovation have made technology as important as food, water and shelter in society.

PERSONAL/CONSUMER

The digital lifeline

Digital technologies are woven into the **fabric of everyday living**. Family and friends stay connected, scheduled, and entertained. Technology is now necessary for entertainment, health, driving, socializing, shopping, banking, traveling, learning and dozens of other personal activities.

BUSINESS/EMPLOYEES

Digital disruption in every sector

Digital is **transforming every business** and **touches every employee** in a unique way. Some industries are being turned inside out, while others are benefiting from the expanded capabilities. Marketing, customer engagement, employee productivity, sales, and many other business functions are being redefined.

The Drivers

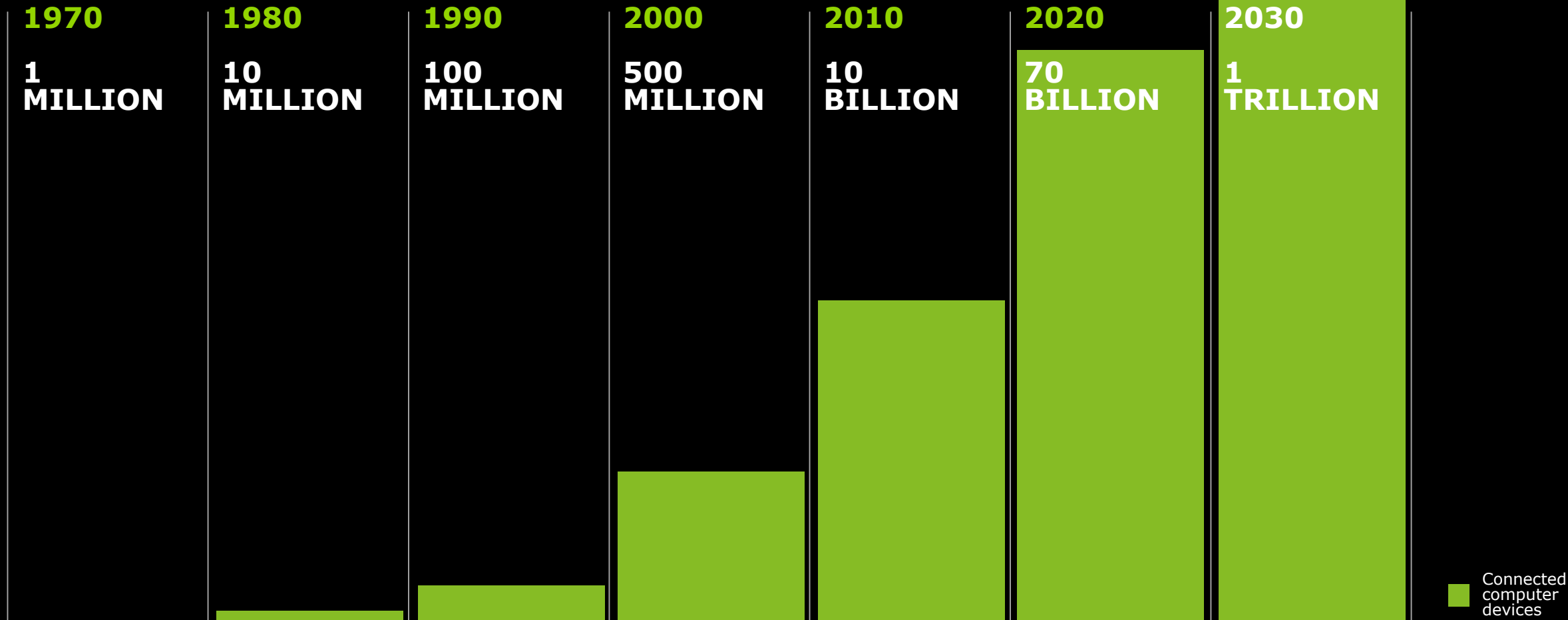
Today's disruptive innovation cycles are predominantly driven by combinations of different key trends

SELECTION



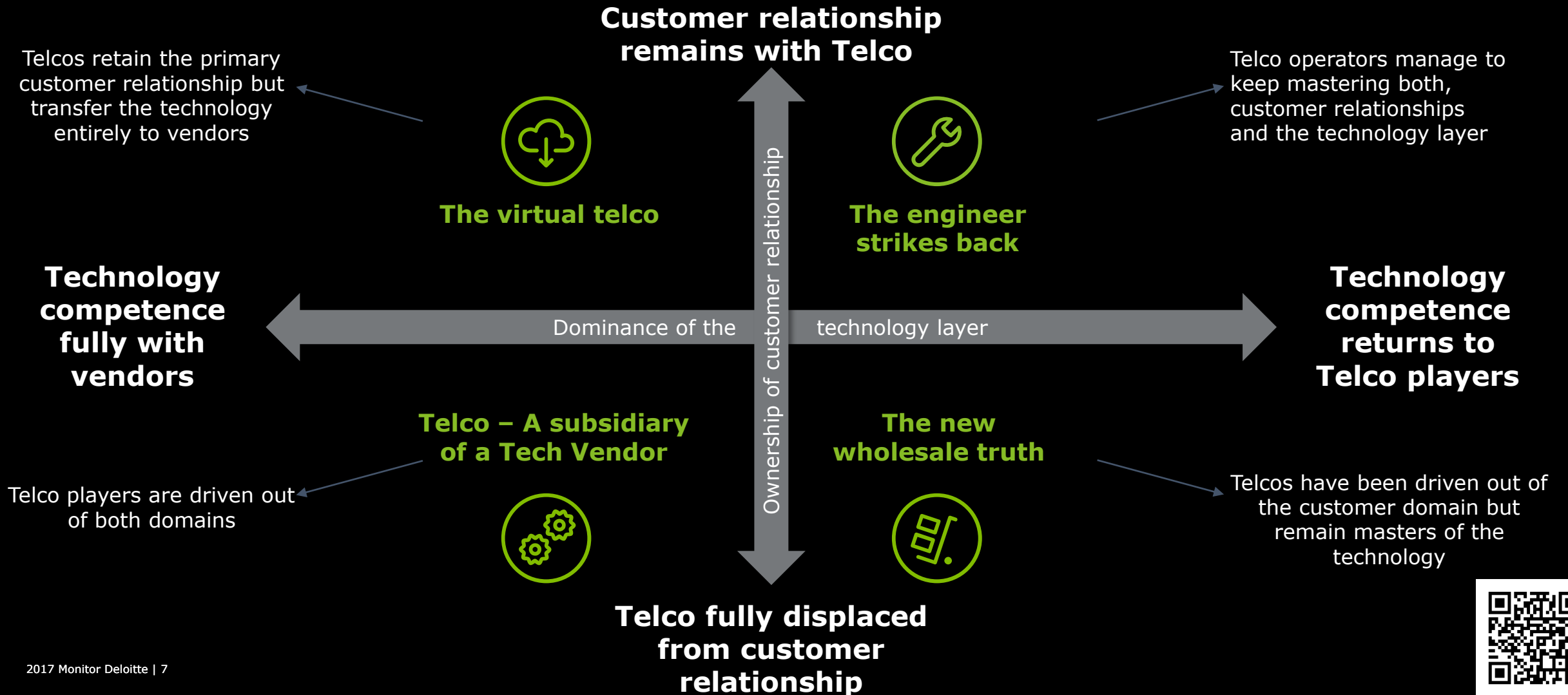
The Relevance

Connected computing devices – every 10 years there are 10 times more connected devices



The Scenarios

Clustering the main trends & drivers we prioritized two main forces influencing the future...



The Questions

For each scenario you should answer ...

... THE FOLLOWING ...

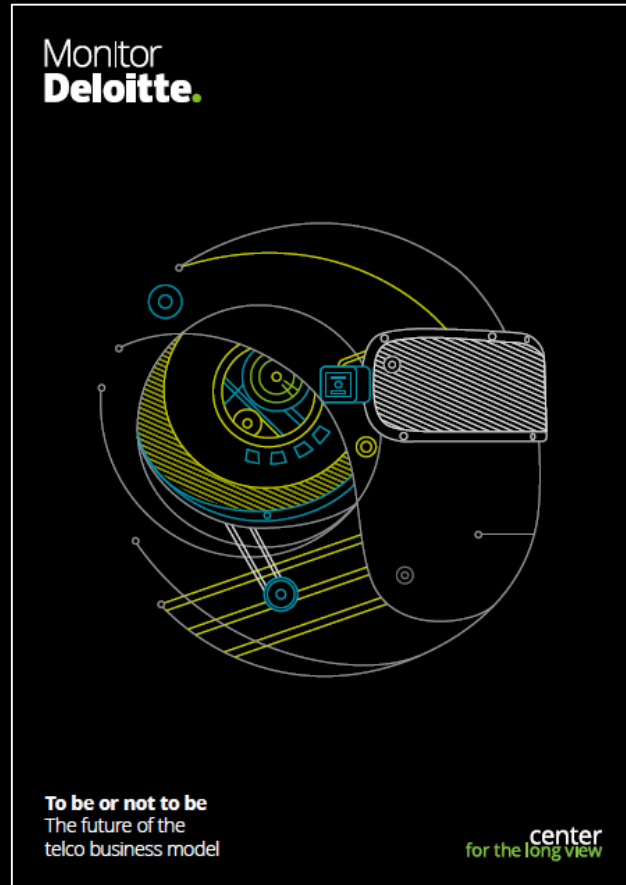
- How would the market look like?
- What would be my role, the role of others?
- What would be my strategy?
- How would I define winning/success?
- What would I need in this market for my success?

... ALSO LEADING TO

- What do all scenarios have in common?
- How could I influence the market towards the preferred scenario(s)?
- How can I play against the market?

Our Thought Leadership

The future of the telecommunication landscape in 2030 – A scenario approach



To be or not to be

The future of the telco business model



www2.deloitte.com/de/de/pages/technology-media-and-telecommunications/articles/future-of-telco-business-model.html



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Embrace uncertainty.
We are happy to help



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