

# Service and business model innovation: why agility will be key in enabling new revenue streams from 5G

STL Partners

10<sup>th</sup> May 2023

In partnership with:

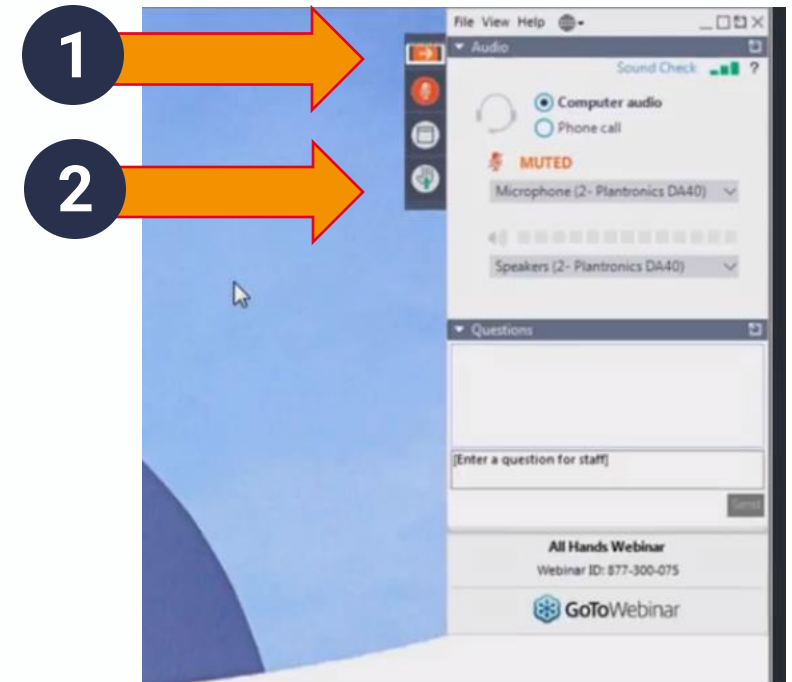


# Agenda

- |          |   |         |
|----------|---|---------|
| <b>1</b> | <b>Introduction and housekeeping</b>                                    | 5 min.  |
| <b>2</b> | <b>Enabling new revenue streams for CSPs through live video capture</b> | 15 min. |
| <b>3</b> | <b>Poll question</b>  | 2 min.  |
| <b>4</b> | <b>5G innovation</b>  | 15 min. |
| <b>5</b> | <b>Q&amp;A</b>  | 20 min. |
| <b>6</b> | <b>Wrap up</b>  | 5 min.  |

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OUR SPEAKERS

# Service and business model innovation: why agility will be key in enabling new revenue streams from 5G



**MALCOLM CROUCH**

Regional CTO

CSG



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Director, Consulting

STL Partners



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Consultant

STL Partners



Wednesday 10 May – 9:30 AM IST | 12:00 PM AWST | 14:00 PM AEST



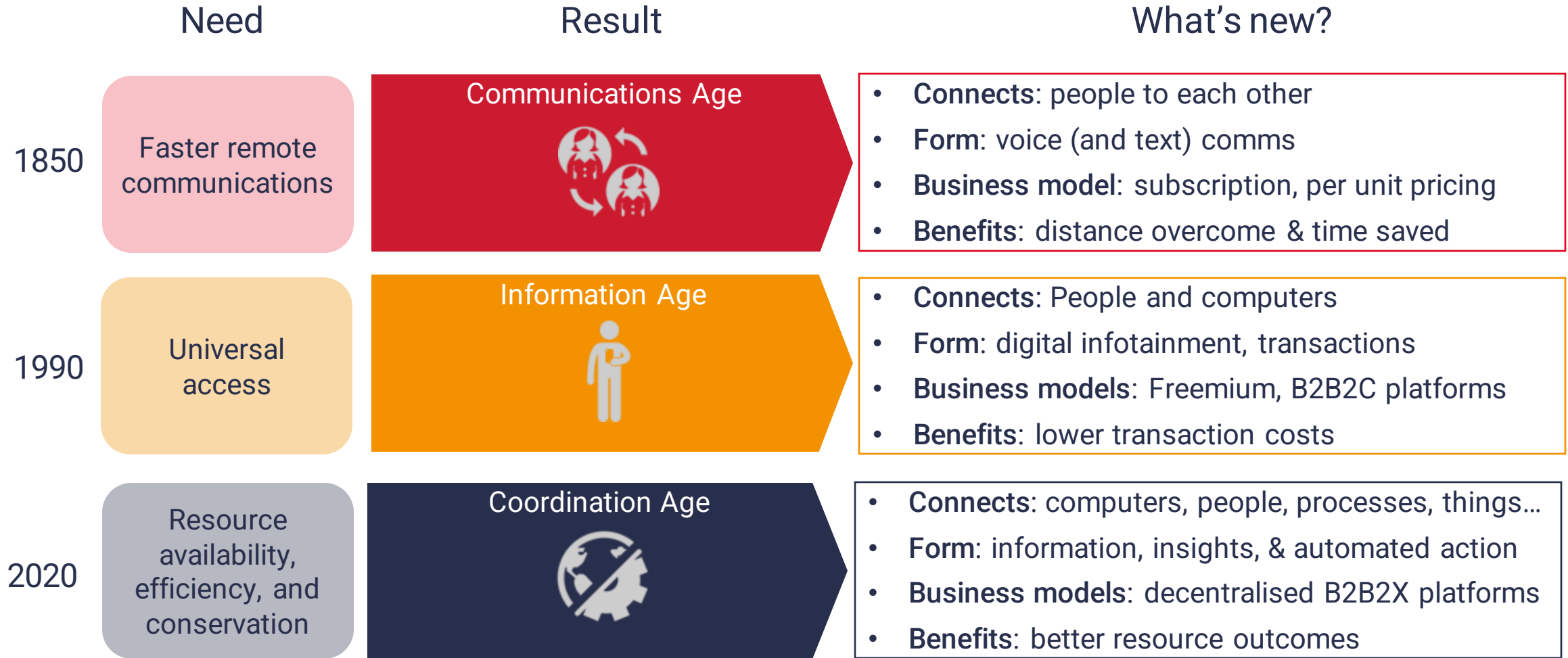
PARTNERS



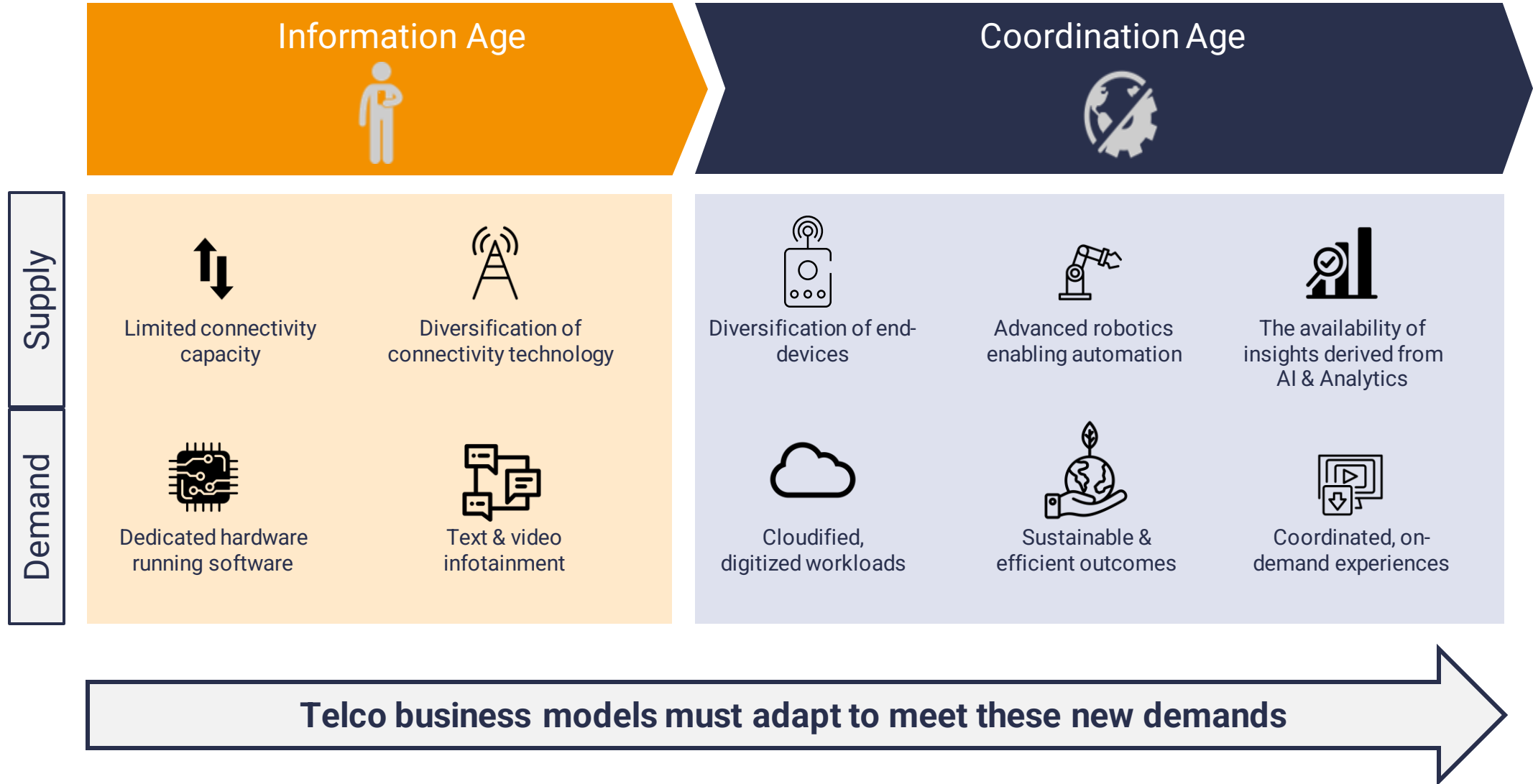
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# The Coordination Age: A new era for connecting technologies



# Coordination age: A transition towards new business opportunities



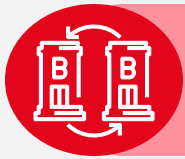
# 5G offers telcos the opportunity to enable new revenue streams



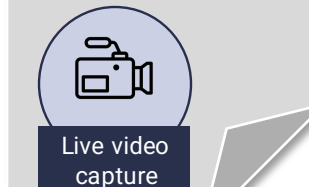
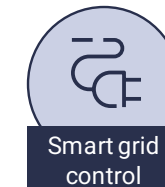
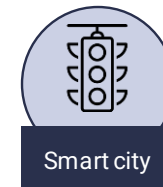
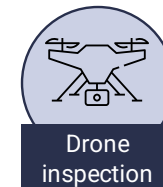
CSPs have heavily invested in 5G architecture



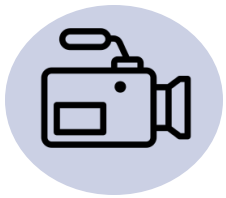
5G consumer revenue streams have mostly already been commoditised



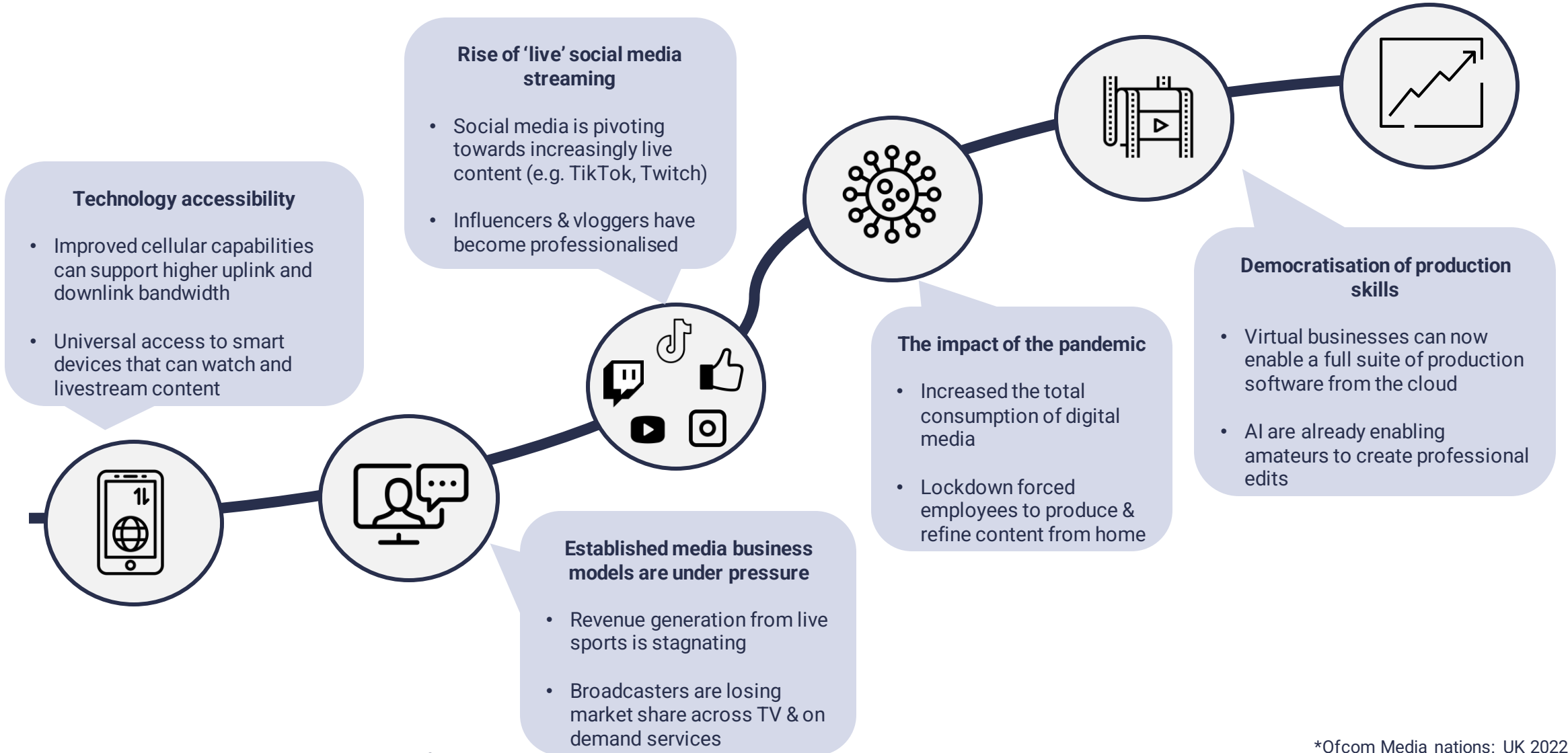
CSPs need to look towards new monetisation opportunities, typically around B2B





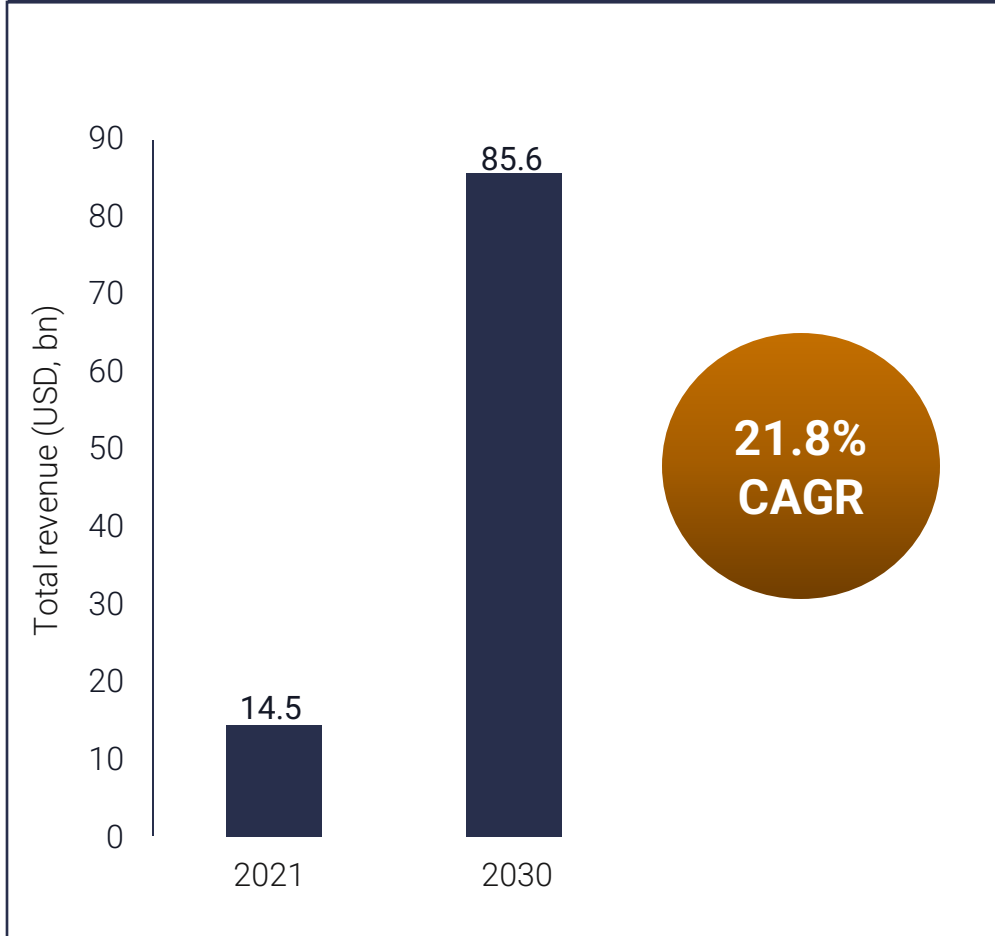


# The live media industry is undergoing transformational changes...

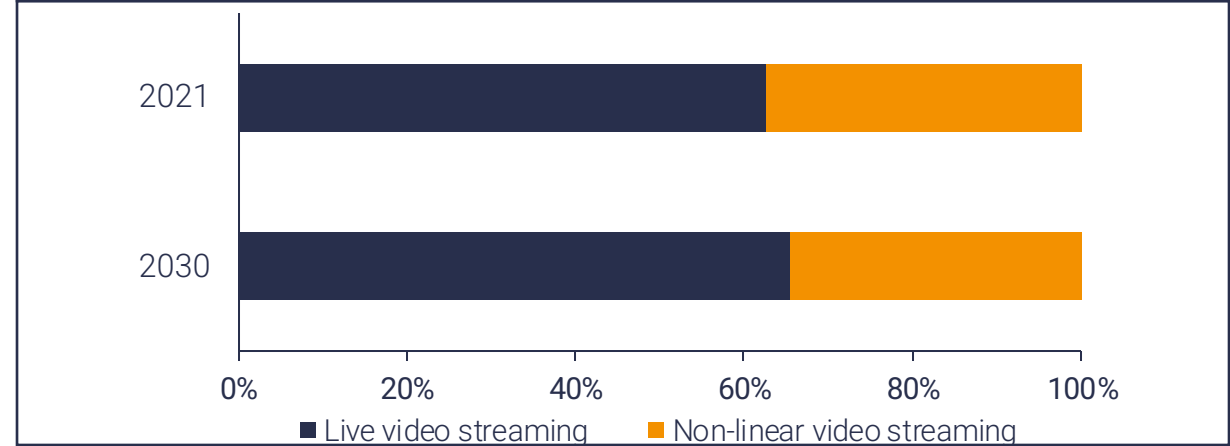


# The APAC live video capture market is growing rapidly...

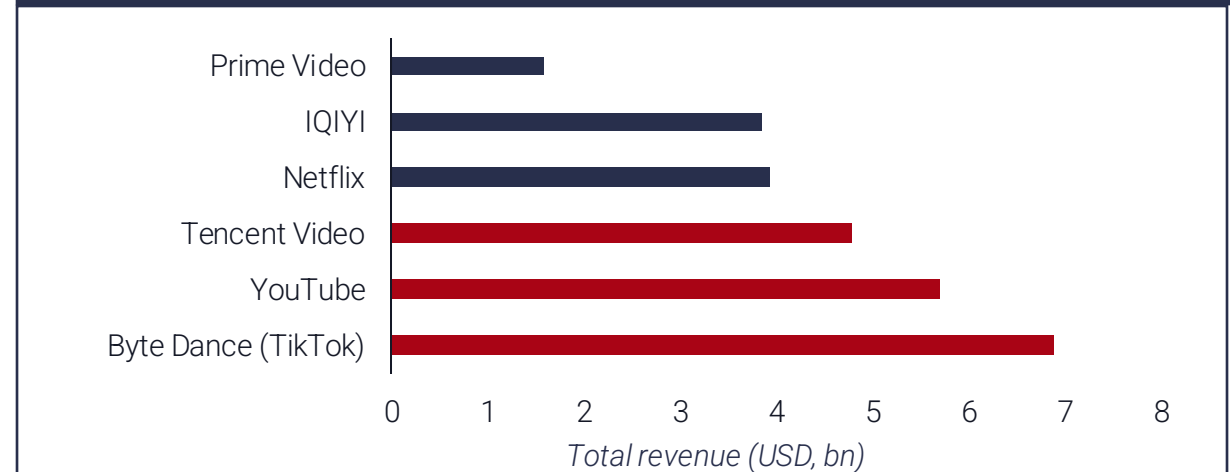
The APAC video streaming market is forecast to continue its strong growth following the pandemic...



Live video streaming will take up a larger market share by 2030...



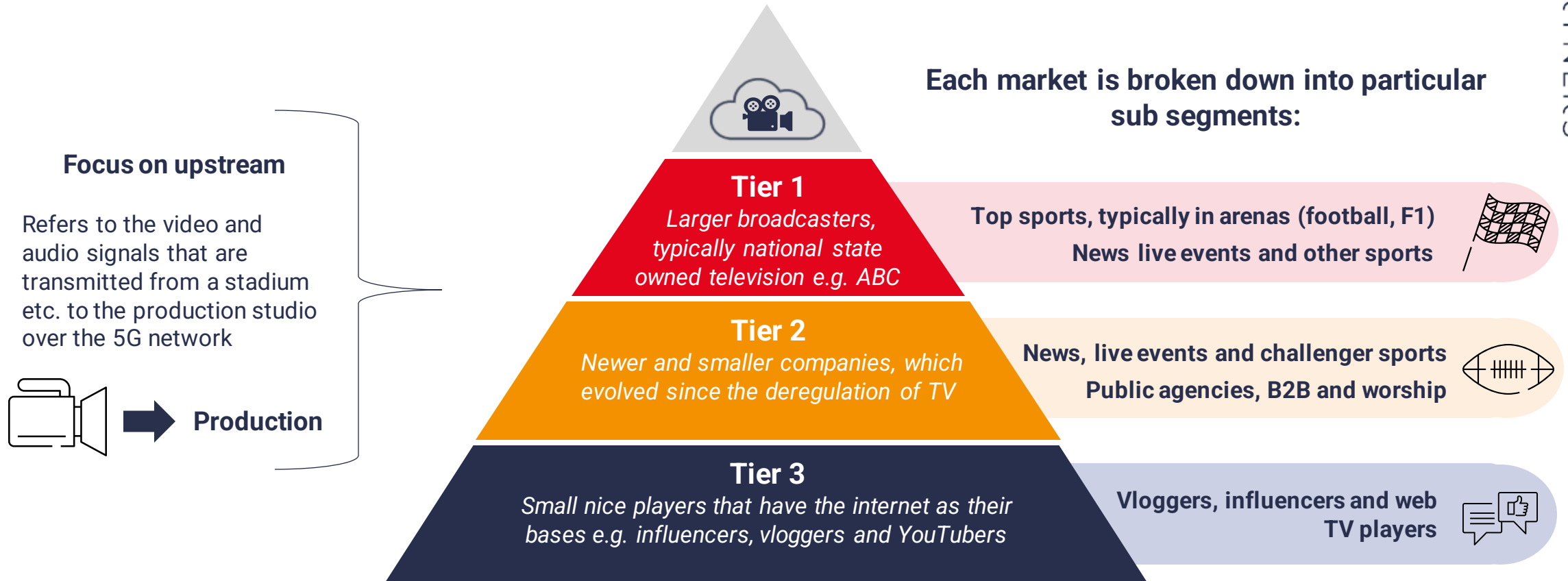
...and is an increasingly prominent part of social media content



\*Source: Video Streaming Market, Grand View Research, 2023

# Telecom customers for the live video capture opportunity fall into three distinct categories

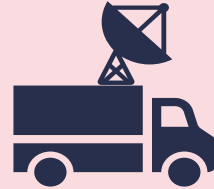
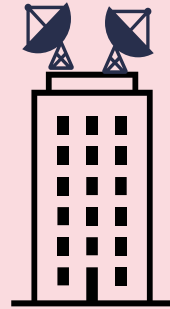
Each market is broken down into particular sub segments:



# 5G network slicing offers several customer benefits for live video capture

**Tier 1**  
Larger broadcasters,  
typically national state  
owned television e.g. ABC

## Traditional broadcast operations



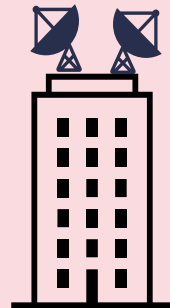
**Crew**



**Presenters**



## 5G slice enabled operations

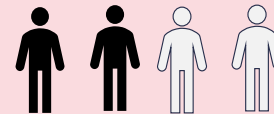


Cloudifying the  
processing and  
production suite



Fewer crew  
required

**Crew**







More dynamic  
camera work

**Presenters**



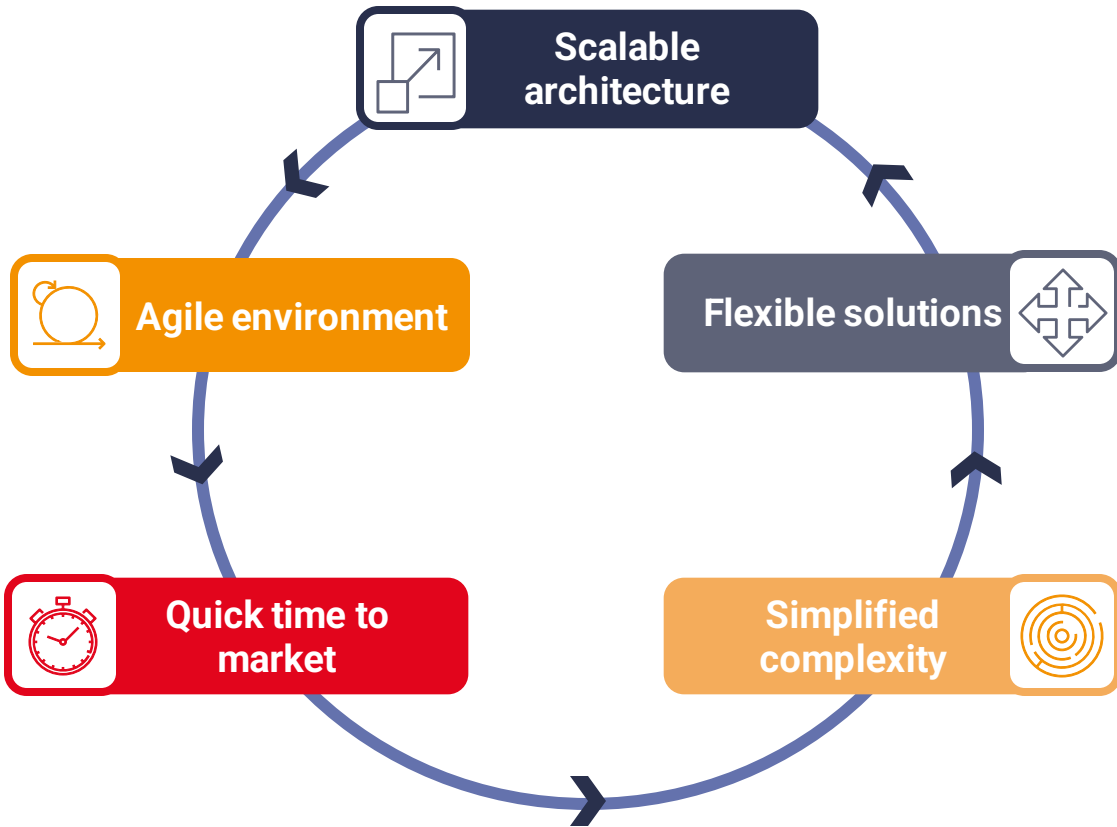
# The slicing opportunity spans multiple sub-sectors of the live-capture market

	Tier 1	Tier 2		Tier 3
Broadcasters	<p>National sports broadcaster</p> 	<p>Specialist news organization</p> 	<p>eSports event livestream</p> 	<p>Influencer/vlogger</p> 
Aims	<p>Enable the capture of tier 1 &amp; 2 sports events with fewer camera and production crew</p>	<p>Flexibility to capture &amp; broadcast breaking news with limited equipment</p>	<p>'Pop-up' media capabilities that can engage its large livestream audience</p>	<p>Fast video production turnaround and reliable social media live functions</p>
Why slicing?	<ul style="list-style-type: none"> <li>✓ Operational cost savings</li> <li>✓ Remote production capabilities</li> <li>✓ Greater coverage flexibility</li> </ul>	<ul style="list-style-type: none"> <li>✓ Dynamic camera work</li> <li>✓ Separated traffic</li> <li>✓ Large uplink demand</li> </ul>	<ul style="list-style-type: none"> <li>✓ Lightweight camera</li> <li>✓ Separated traffic</li> <li>✓ Cloudified production</li> </ul>	<ul style="list-style-type: none"> <li>✓ UHD livestreaming</li> <li>✓ Prioritized traffic</li> <li>✓ Guaranteed services</li> </ul>

**Operators can best meet customers' needs by offering more than connectivity: bespoke → packaged**



# Operators must be more agile, flexible and robust to monetise these new 5G-enabled use cases


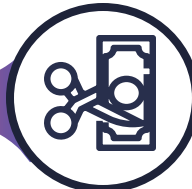
Operators need to offer digital services with:


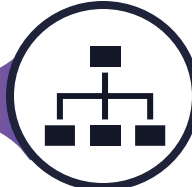


*Common platform with common capabilities*

Partnering for these capabilities enables operators to:

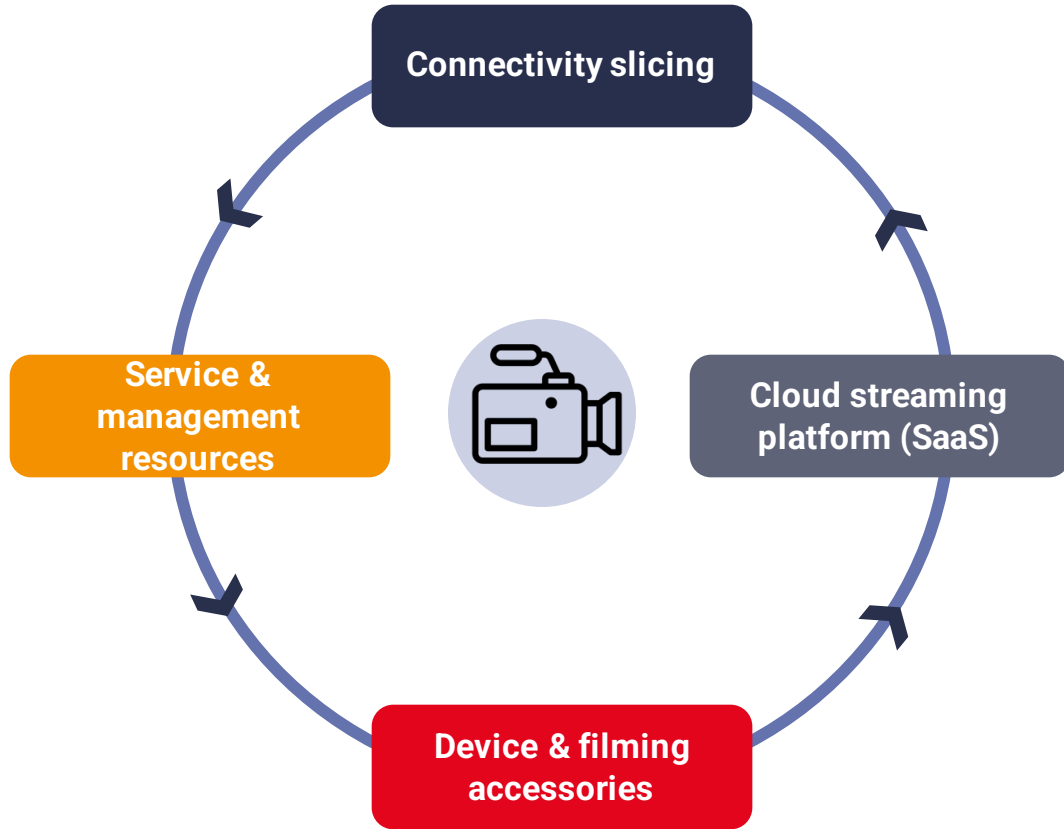
- 


Focus on core business and secure the ability and agility to improve time to market for new services
- 


Avoid, unnecessary risk, cost and time in complex transformation of operational processes
- 


Availability of broader perspectives and capabilities from potential provider

# Live video capture represents just one potential revenue stream for CSPs



*There are numerous monetisation routes for CSPs to seize the live video capture opportunity*





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**Poll: Where do you see the bigger challenges in addressing this growth opportunity?**

## Where do you see the biggest barrier in addressing this growth opportunity?

1. Lack of customer understanding and knowledge of their needs
2. Lack of technical capabilities for delivery
3. Lack of clear demand for underlying services
4. No clear route to market/channel
5. Other (please state)

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# Everything changes but everything stays the same

“A solution looking for a problem”

October 16, 1960



JUST LIKE SCIENCE FICTION

## Death Ray Possibilities Probed by Scientists

written by Ralph Dighton for the Associated Press,



Before long **the distinctive qualities** were being harnessed very broadly.

January 2020



## 5G CORONAVIRUS THEORY

millimeter wave spectrum used by 5G technology and Covid-19, the disease caused by the novel coronavirus,

Les moutons enrégés, website post

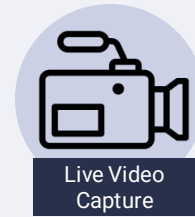


Like the laser it will be **embedded and enable innovative** solutions, services & products.

# disruptive in·no·va·tion

*noun* /ɪnə'veɪʃ(ə)n/

Innovation happens when someone "improves on or makes a significant contribution" to something that has already been invented.





# in·no·va·tion

noun /ɪnə'veɪʃ(ə)n/

Innovation happens when someone "improves on or makes a significant contribution" to something that has already been invented.

If **necessity** is the mother of invention, then **innovation is its monetization.**



# Deconstructing Innovation



## Reinventing requires finding the crux that if done different changes the game



### Challenge norms

Revisit the fundamentals.  
Resolving these with new capabilities and approach.



### Changing the experience

How we interact and consume a service (ease of use).  
Speed and convenience. In control for users and providers.



### Making complex easier

Bring threads together for an E2E timely service  
enabling elevated experiences.



### Enabling scale

Automation and orchestration of the service across all user journeys  
across users and suppliers.



# Marrying innovation with distinctive qualities of 5G



## Challenge norms

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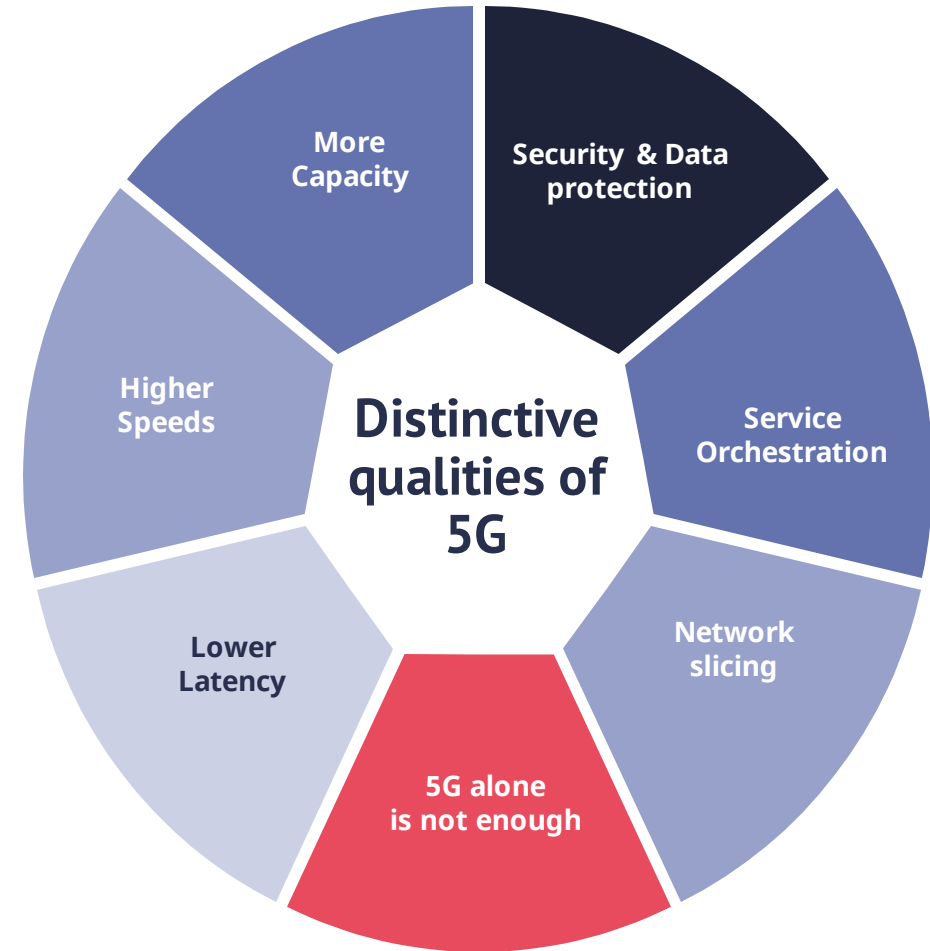
Bring threads together for an E2E timely service  
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## Enabling scale

Automation and orchestration of the service across all user  
journeys across users and suppliers.

## Revisit constraints and existing solutions



Free yourself to work with industry segments and customers

# Understanding B2B2x relationships

An end-to-end view across partners, service provider and customers.

## Understanding roles in the Concept to Cash Journey

Key to expanding the portfolio and entering new markets using a streamlined ecosystem across a diverse range of partners (big, small, simplex, complex and niche) with zero-touch processes.

### Journey Focused



#### Concept to Offer

Onboarding a partner, innovate, co-create, commercialize, launch & settle new products that meet customer needs & expectations



#### Order to Activate

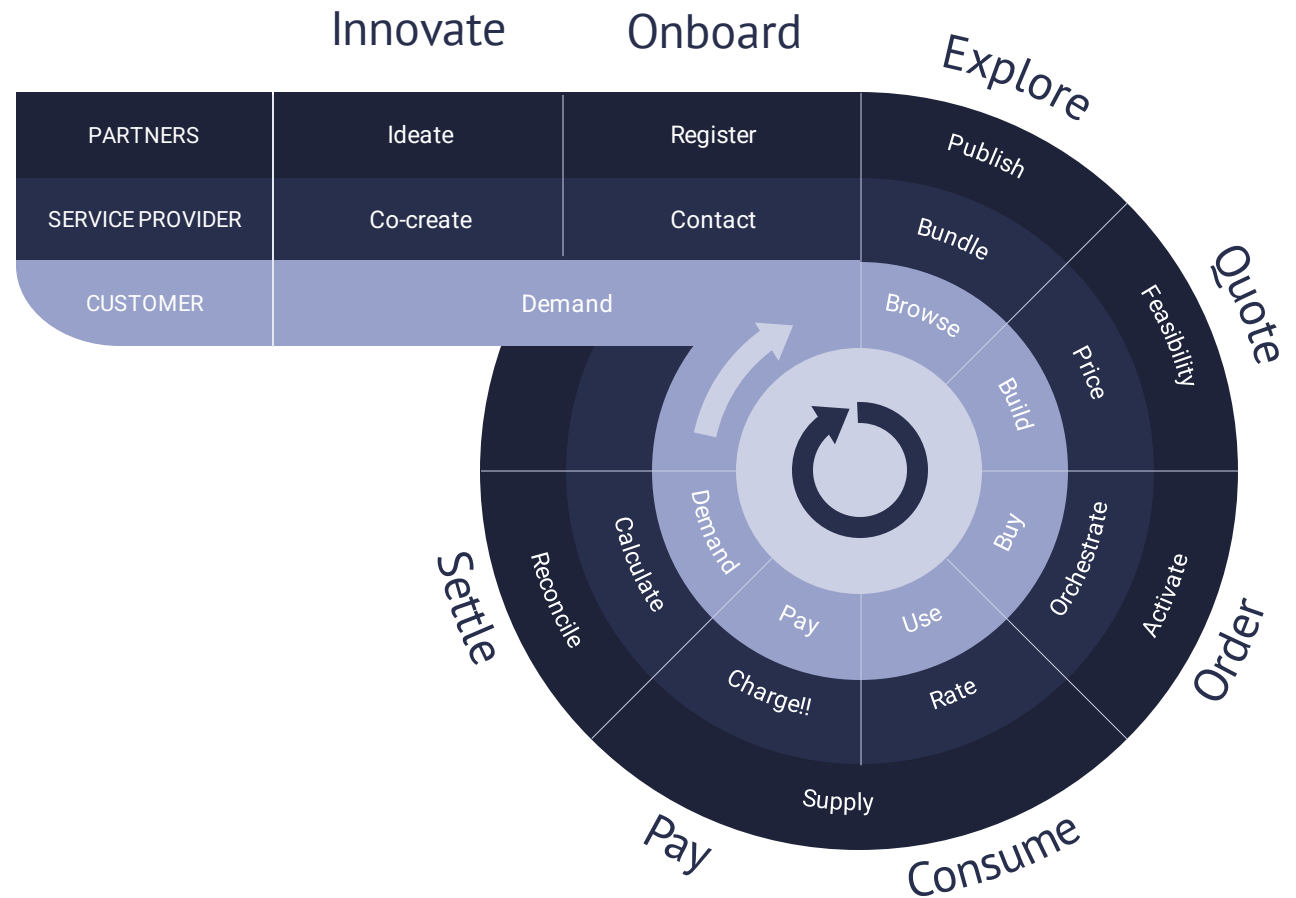
Understand how to market, price, quote, contract, fulfil & deliver multi-party solutions



#### Usage to Cash

Providing connectivity, and core competencies as a Service to partners, collect revenue and settle with partners

You need to understand the various players, their roles and how they relate to each other.



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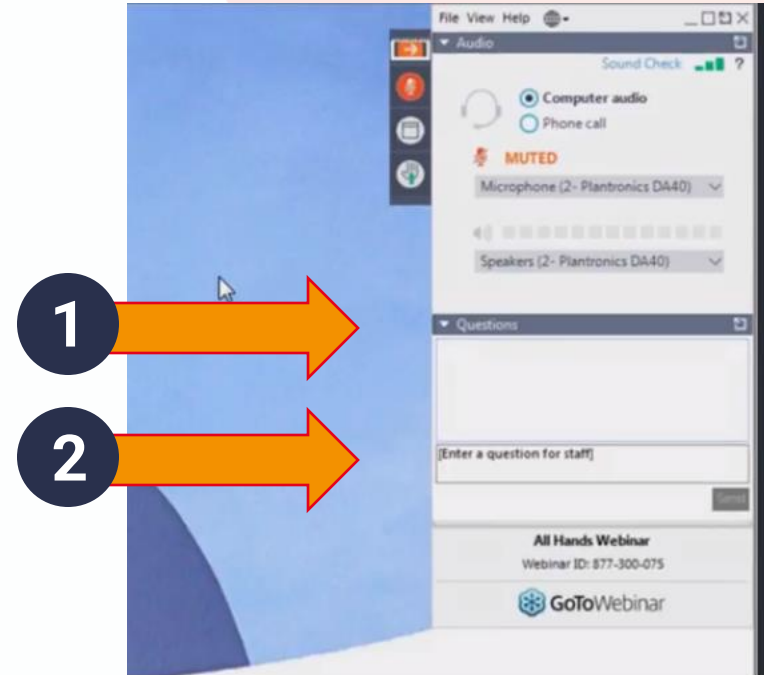
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Q&A



# Q&A session

Please submit any questions using the GoToWebinar control panel



# Our Q&A panellists

## *Moderator*

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**THOMAS QUINN**  
Consultant

**STL Partners**

## *Panellists*

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**MALCOLM CROUCH**  
Regional CTO

**CSG**



**PHILIP LAIDLER**  
Managing Director,  
Consulting

**STL Partners**



**HENRY OSBORNE**  
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# Thank you to everyone for joining

We hope you enjoyed the session!

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If you have any further questions, please email:

- **Henry Osborne**, [henry.osborne@stlpartners.com](mailto:henry.osborne@stlpartners.com)
- **Philip Laidler**, [philip.laidler@stlpartners.com](mailto:philip.laidler@stlpartners.com)
- **Malcolm Crouch**, [malcolm.crouch@csgi.com](mailto:malcolm.crouch@csgi.com)