

Episode 1



Ecosystem evolution series

The key contexts shaping 5G ecosystems around us

Main message

The 5G ecosystem is more diverse than its 4G predecessor, giving innovators, businesses and service providers more tools in the toolbox for business success.

Target audience

CSP ecosystem owners
Enterprise digital transformation owners

Talking points

Teaser/context setting

The diverse nature of the 5G ecosystem

- Different anchors for describing entry points into the ecosystem
- Enabling ecosystem stakeholders to see relationships to adjacent players
- 400 stakeholders in 25 categories, only 18 months after first network launch

The 4G ecosystem we start from

The 4G ecosystem is homogenous with a center of gravity around 4 pillars

- Smartphones as the anchor device
- Universal connectivity over 4G and WiFi, equal for all services and applications
- Centralized cloud infrastructure, optimized for lowest possible cost
- Two app stores operating with a revenue share model

Connecting 5G, with IT and vertical ecosystems

The 5G ecosystem is richer and has strong connections to the IT and vertical ecosystems

- Reinforced connections between 5G, IT and vertical ecosystems
- 5G is heterogenous – more devices, connectivity differentiation, clouds centralized/at the edge/on-premises
- IT ecosystem – central in all digital transformation initiatives
- Vertical ecosystems – industry-specific and anchored in physical heritage

Complexity creating opportunity

Complexity breeds exponential opportunity – when you know how to navigate the landscape

- More building blocks to leverage
- More choices on each parameter
- Applications taking advantage of new cellular connectivity types

Innovating in the 5G ecosystem

To unlock the full potential of 5G, we envision we are likely to see

- Cross-industry collaborations for nailing new solutions before scaling
- Creation of exponential innovations through combining technologies
- Closer connections between device, connectivity and applications at the edge

Three different roles you can play

As a key stakeholder in the ecosystem, you are likely to play one of three different roles

- Orchestrator
- Contributor
- Beneficiary