

5 themes from MWC17

SE Asia Readout



1 *Enterprise Mobility*

2 *Connected Cars*

3 *Cross-Industry Partnerships*

4 *Robots*

5 *5G, LPWAN and SDN*



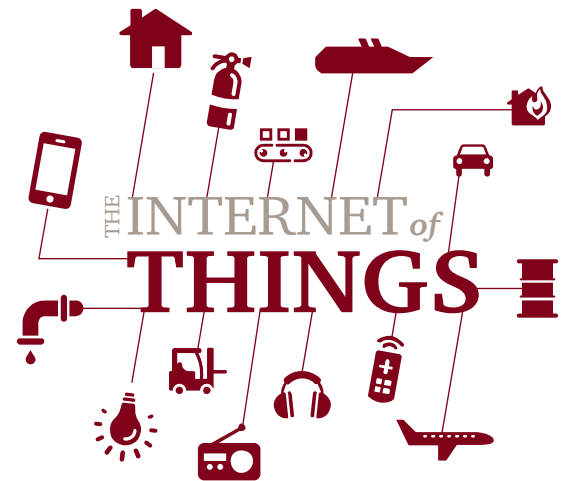
www.pwc.com/id

High expectations for MWC17 were met as the event had in excess of 100,000 visitors for the first time. Whilst there was plenty of buzz, at PwC we were hard at work trying to separate hype from signs of long-term value for our clients. We hosted many of you from SE Asia this year – more than even before. Here are our 5 key take-aways from MWC17.

Enterprise Mobility

Attention has shifted towards enablement of enterprise usage of IoT, as the ICT industry sees that the business case around productivity increase and control of the production process is more compelling in enterprise than for many consumer uses. Many of this year's demonstrations embodied this shift, such as for factory workflows, asset control and logistics solutions. The challenge that remains is how much value will the mobile operator contribute to the end solution: beyond the basic connectivity.

1



2

The salons of the Fira could well have been hosting a Motor Show for all you know, since one could barely wander 50 meters without finding a connected vehicle being used to demonstrate autonomous driving, remote monitoring, or some sort of in-car connectivity solution. Monetisation appears to be the key “driver” here, in that automotive solutions are seen as one of the early generators of revenue from IoT and digitalization. The car industry is also becoming a test-bed for true cross-industry partnership and collaboration.

Connected Cars



Cross-Industry Partnerships

Auto manufacturers, home appliance makers, healthcare providers, financial services companies, energy utilities, telcos and network providers shared stands at MWC17 as the trend towards cross-industry partnerships continues to build momentum. According to our analysis, 10 industries are expected to account for 80% of IoT revenue globally by 2020. Themes such as Smart Cities are a force for collaboration. It is time for telcos to build up the deep skills they will need to collaborate with others to co-create and co-deliver services.

3

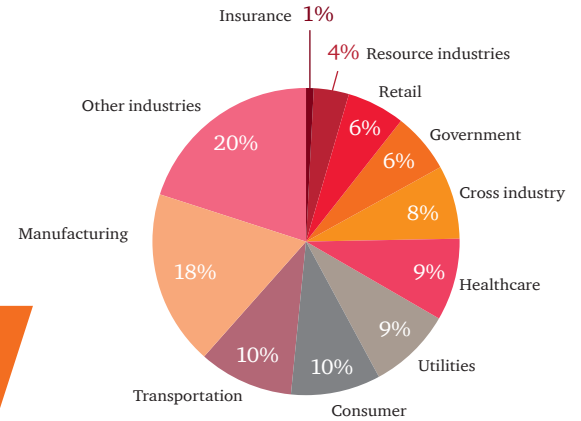


Robots

Walking, rolling and flying: the newest trend at MWC were humanoid robots, a step up from the drones we saw last year. The halls were busy with Star Wars-like droids undertaking all manner of basic tasks. The message was clear: digitalized automation is coming and the mobile industry wants to be central to it. One stand showed how 5G technology can control a robot's movement with significantly more precision than a 4G connected one, removing most of the latency when conducting precision tasks. In general, the industry was keen to show how robotics can increase productivity, and how alternative wireless technologies have to be harnessed cleverly to help this scale.

4

IoT Revenue Share by Vertical Markets Global, 2020



Source: IDC, Global Institute, Strategy& analysis

5

Last year at MWC we saw talk of Low Power Wide Area Networks and this year the demos were complemented by 5G and software-defined networks (SDN). Network equipment providers have been keen to showcase how the network is going to become more intelligent as the demands upon it become more varied with a need to service voice, text, data for messaging, data for video, and data for IoT all at once. As network demands evolve, operators will have to become even more savvy in how they manage cost.

5G, LPWAN and SDN



At PwC we had our biggest year ever at MWC17, hosting clients at our stand in Hall 1, networking at our VIP lounge in Hall 4 and hosting our 2nd Digital Revolution Summit in Hall 8, where he hosted the CIOs of several smart cities and a former Chairman of the US Federal Communications Commission. One of our Partners chaired the Ministerial Programme, and we spent valuable time with numerous clients assessing some of the demos and also introducing clients to one another for exploring business possibilities. Thank you for those of you who visited us this year. **See you at MWC18!**

Let's continue the conversation



Mohammad Chowdhury

TMT Consulting Leader, Australia, SE Asia and NZ
mohammad.chowdhury@id.pwc.com

Acknowledgement to Dan Hayes, Florian Groene, Greg Chiasson for contributing to this leaflet.

Photos source: <https://medium.com/pwc/>

PwC Indonesia is comprised of KAP Tanudiredja, Wibisana, Rintis & Rekan, PT Prima Wahana Caraka, PT PricewaterhouseCoopers Indonesia Advisory and PT PricewaterhouseCoopers Consulting Indonesia, each of which is a separate legal entity and all of which together constitute the Indonesian member firm of the PwC global network, which is collectively referred to as PwC Indonesia.

© 2017 PwC. All rights reserved. PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see <http://www.pwc.com/structure> for further details.