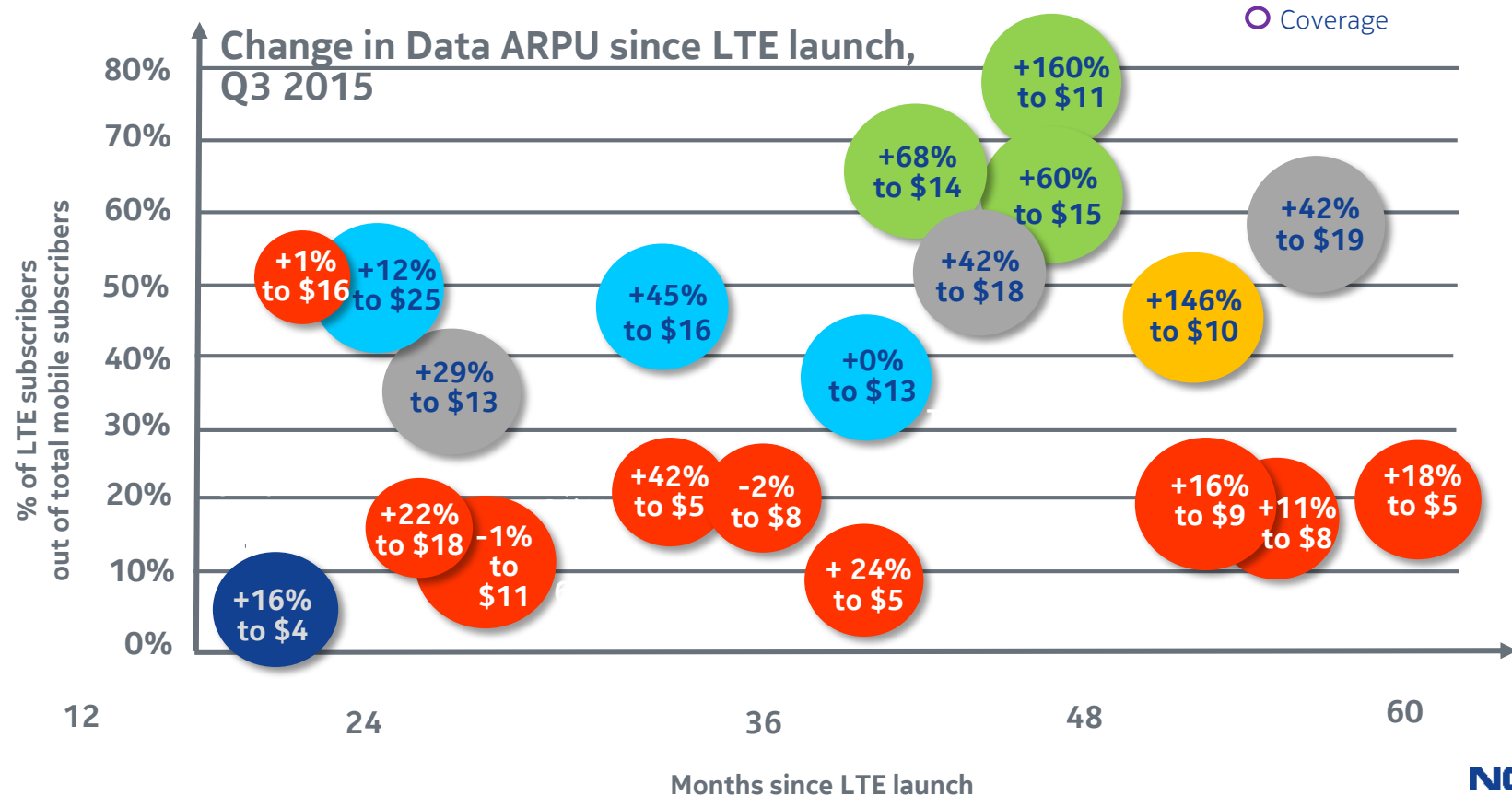


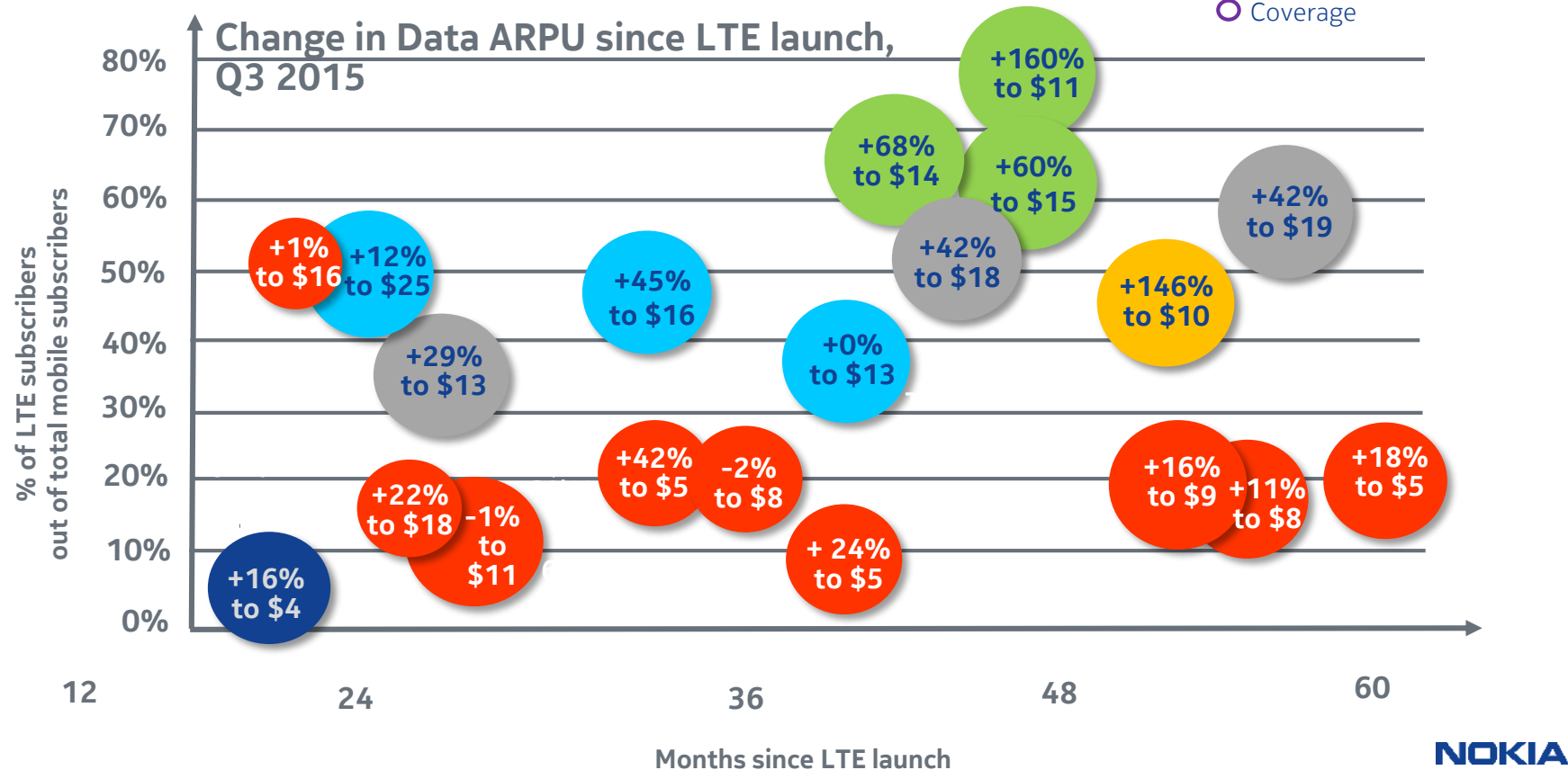
# Re-engineering infrastructure: Need for Speed!



## Time since launch does not determine LTE success: Q3 2015

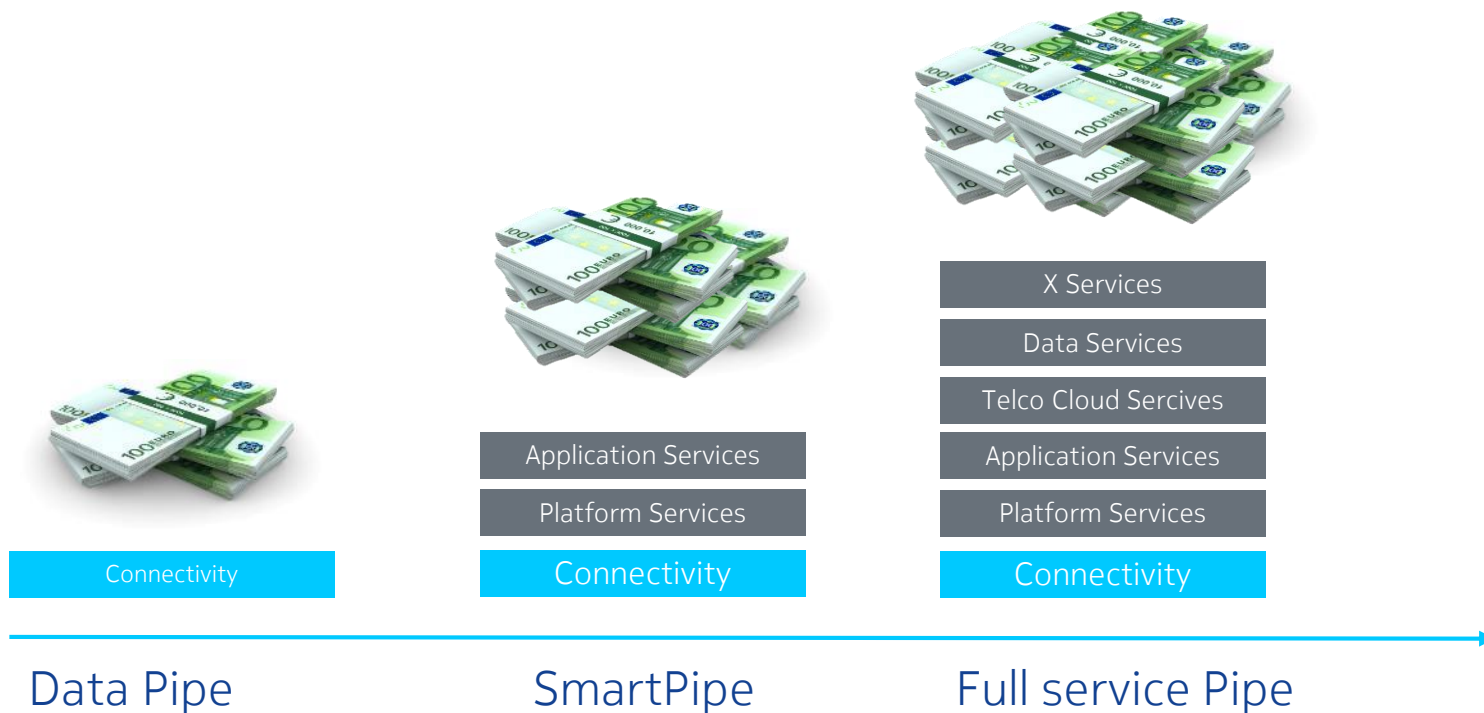


# Time since launch does not determine LTE success: Q3 2015



# But why should you target to have a high number of 4G subscribers?

Because it is the foundation for your future business!



Inspired by 451 Research

# World of disruptions




- Internet players dominate mobile services and address billions of mobile users
- Mobile device ecosystems dominated by Google & Apple. Chinese vendors like Xiaomi getting momentum
- Operators with data and communication bundles
- Fast, agile & innovative application, content & service development
- Partnerships everywhere and high importance of developer ecosystems
- Internet of Things ecosystem game

## Internet innovations

Messaging & communication	Mobile/network services	Internet of things	Video & virtual reality	Convergence
   	   	    		





To fully capture the Industry 4.0 and IoT opportunities, four main challenges have to be overcome in Europe

**Robust  
connectivity**

4G coverage to pave the way for 5G

1

**Strong  
ecosystems**

vertical-specific insights, domain knowledge, new partnerships

2

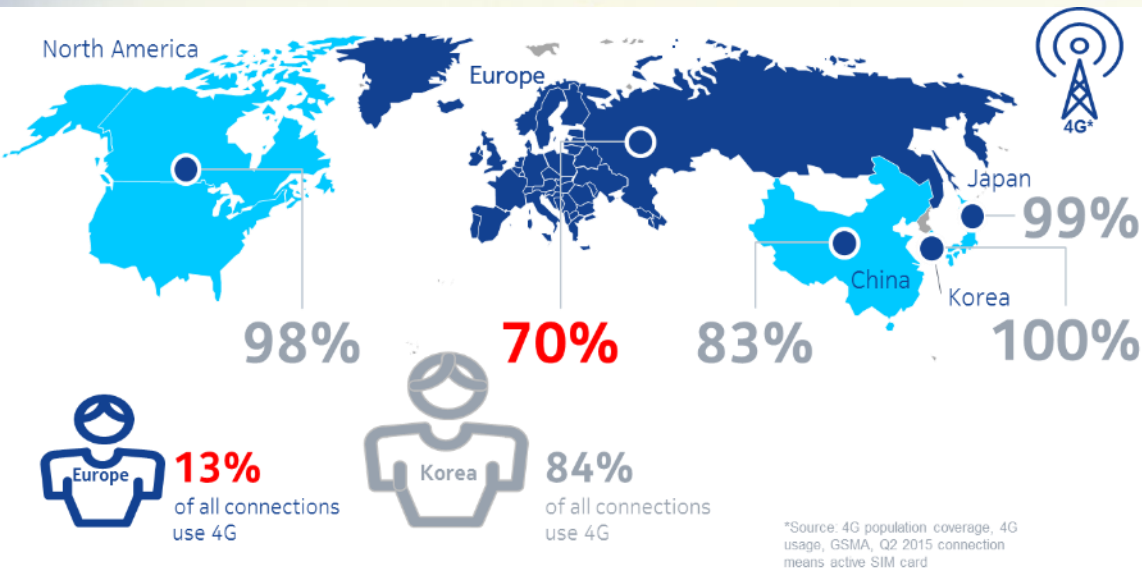
**Regulatory  
framework**

3

**Be ambitious**

4

# 4G is the foundation of 5G - Industry 4.0 and IoT will suffer from white spots



US, China, Korea and Japan did a good job in 4G – Europe lags behind



An ambitious roadmap to 5G & IoT  
Europe's 5G launch in 2020

## Winning Europe - UEFA EURO 2020\*

- Flag-ship event!
- Launch commercial 5G in selected UEFA cities
- Showcase first 5G IoT applications

