

Reset. Reinvent. Rebound.



Dr. Kyriacos Sabatakakis
Country Managing Director

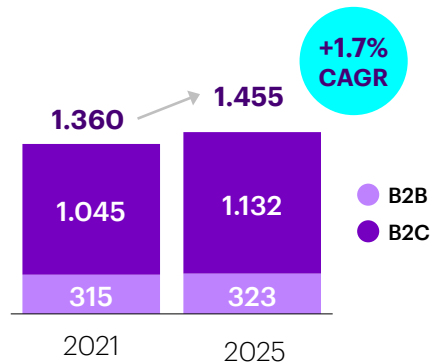
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The pressure on connectivity service providers has never been greater

Traditional connectivity services show moderate growth

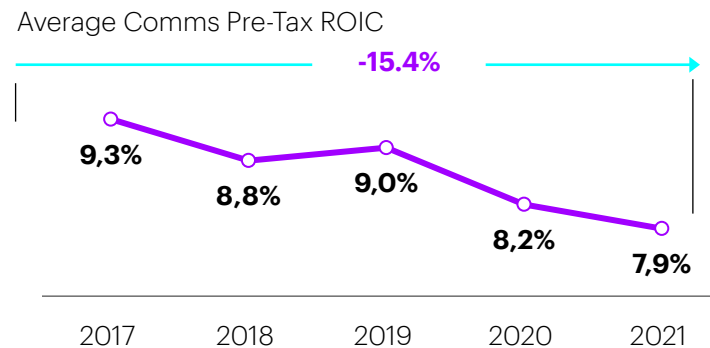
B2B and B2C connectivity show slow annual growth



Source: Analysys Mason DataHub (Business); Gartner, Forecast: Communications Services, Worldwide 1Q22 (Consumer)

Returns on investment for Comms companies are declining

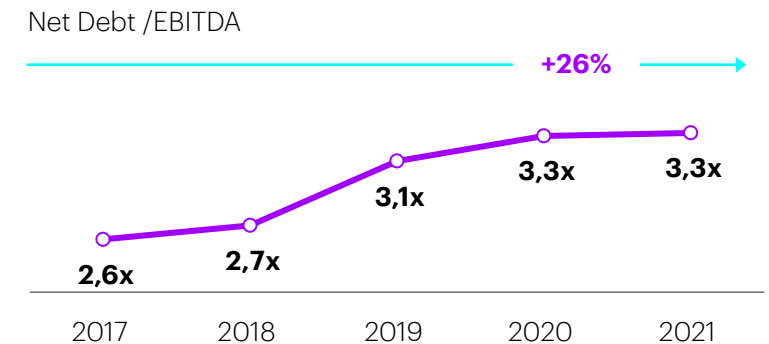
Returns on capital globally are in a multi-year decline



Source: CAPIQ, based on 36 largest Comms companies worldwide, Accenture analysis, [Link](#)

Debt reach new heights

Increasing debt loads to mask lackluster growth is quickly approaching its limits



Source: CAPIQ, based on 36 largest Comms companies worldwide, Accenture analysis, [Link](#)

But a window of opportunity exists

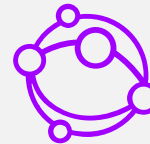
Businesses are seeking transformational partners, customers are requiring a new set of experiences and services, and technology is enabling every aspect of the industry transformation. This presents challenges, but also a window of opportunity for CSPs.



New business models, products, & services



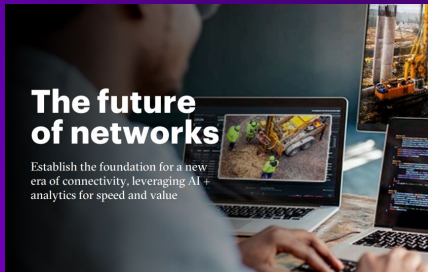
Evolving customer expectations



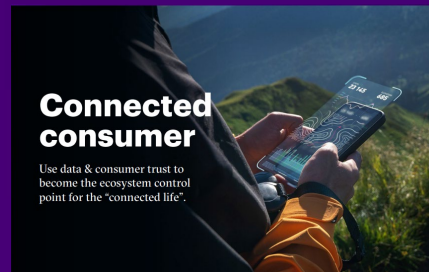
Rapidly revolutionizing technologies

Moving Forward

Five scenarios to guide CSPs on their journey to grow revenue, deliver products & services that delight customers, improve profitability & margin.



Establish the foundation for a new era of connectivity, leveraging AI + analytics for speed and value.



Use data & consumer trust to become the ecosystem control point for the "connected life".



Become a true advisor and business partner invested in SMB success through new services & targeted offerings.



Build horizontal & vertical E2E solutions that demonstrate the power of 5G, connectivity, edge, security.



Create innovative business structures to focus on core & differentiating capabilities & streamline investments.



Every operator will have a unique path informed by strategic leadership decisions based on investment priorities, competitive landscape, current and potential customer base, and partnerships.

The future of networks

Establish the foundation for a new era of connectivity, leveraging AI + analytics for speed and value





Connected consumer

Use data & consumer trust to become the ecosystem control point for the “connected life”.

SMB growth

Become a true advisor and business partner invested in SMB success through new services & targeted offerings.

Large enterprise orchestration

Build horizontal & vertical end-to-end solutions that demonstrate the power of 5G, connectivity, edge, security.



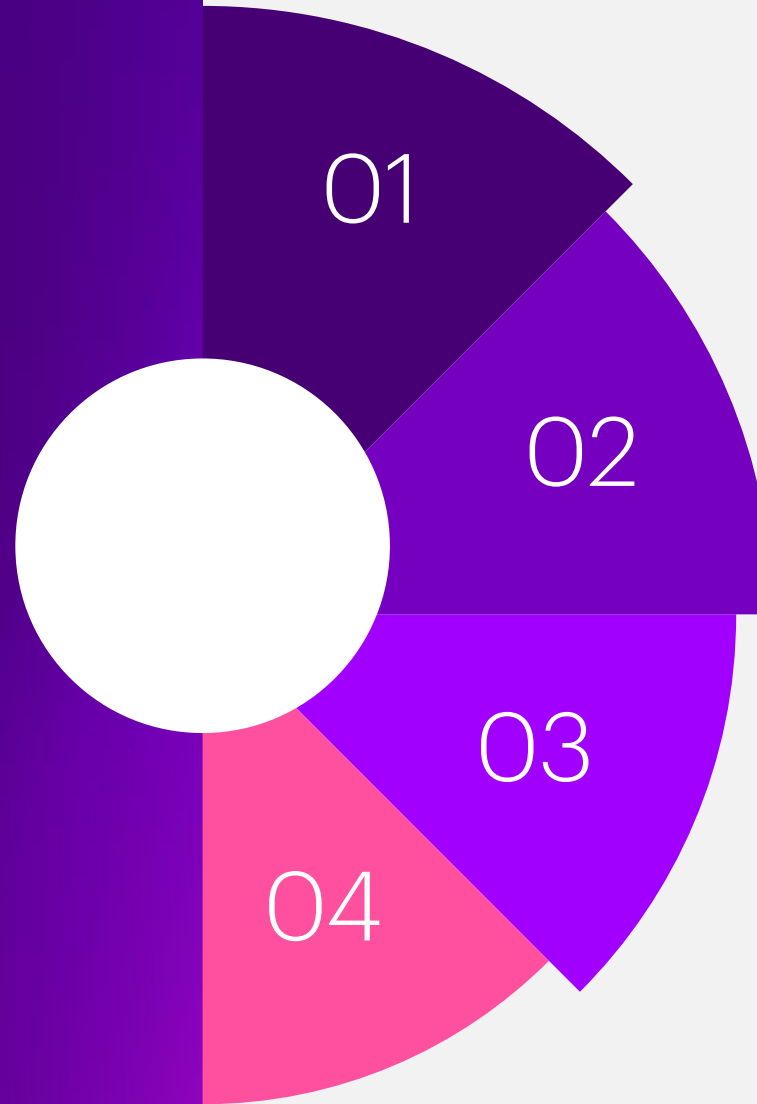
Industry restructuring

Create innovative business structures to focus on core & differentiating capabilities, and to streamline investments.

How to begin and where to focus...

CSPs are unlocking growth with a deliberate focus on four key fundamentals. The journey will be different for each telco, but the foundations of these actions are the same.

Leading examples are emerging around the world, with significant results...



Build advanced networks and deploy with speed.

Reduce costs to improve margins and fund innovation.

Create new offers and transform go-to-market to find growth.

Execute on necessary structural changes to unlock value and capital.

Thank you