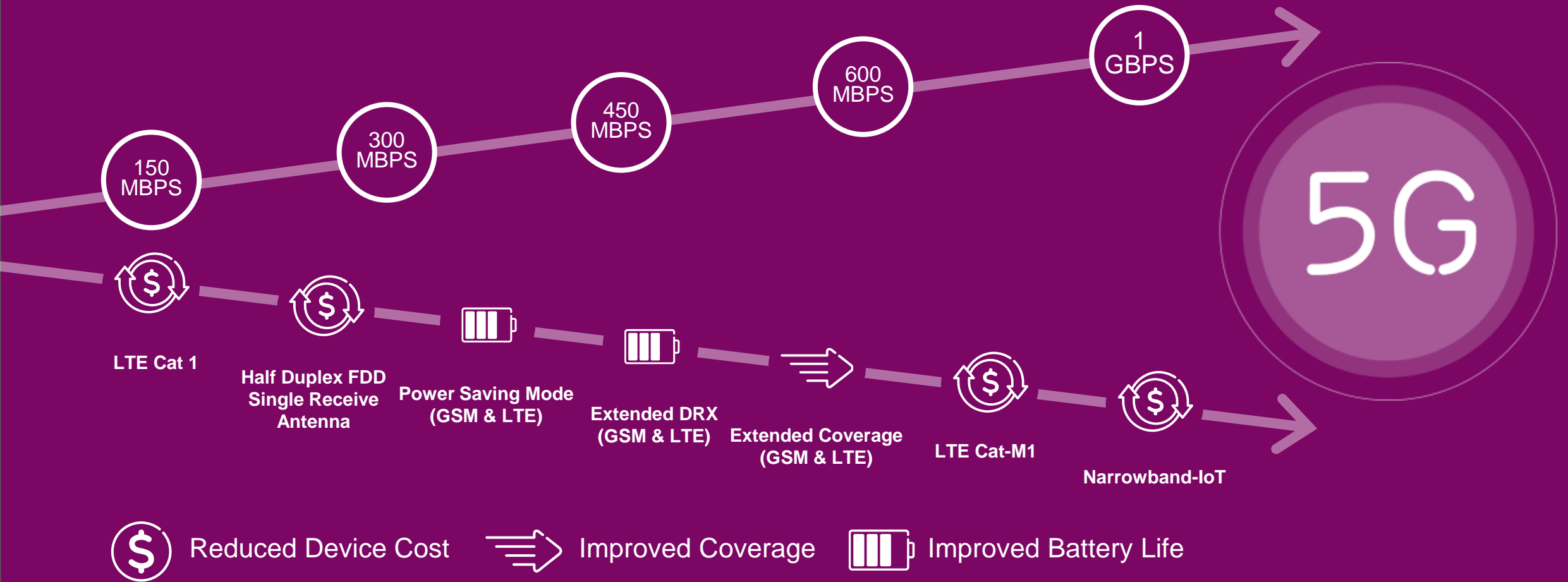


5G OPPORTUNITIES SUPPORTING CUSTOMER- CENTRED SERVICES



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CELLULAR PERFORMANCE DIVERSIFICATION



A NEW BUSINESS



1st wave

2nd wave

3rd wave – next 3 years

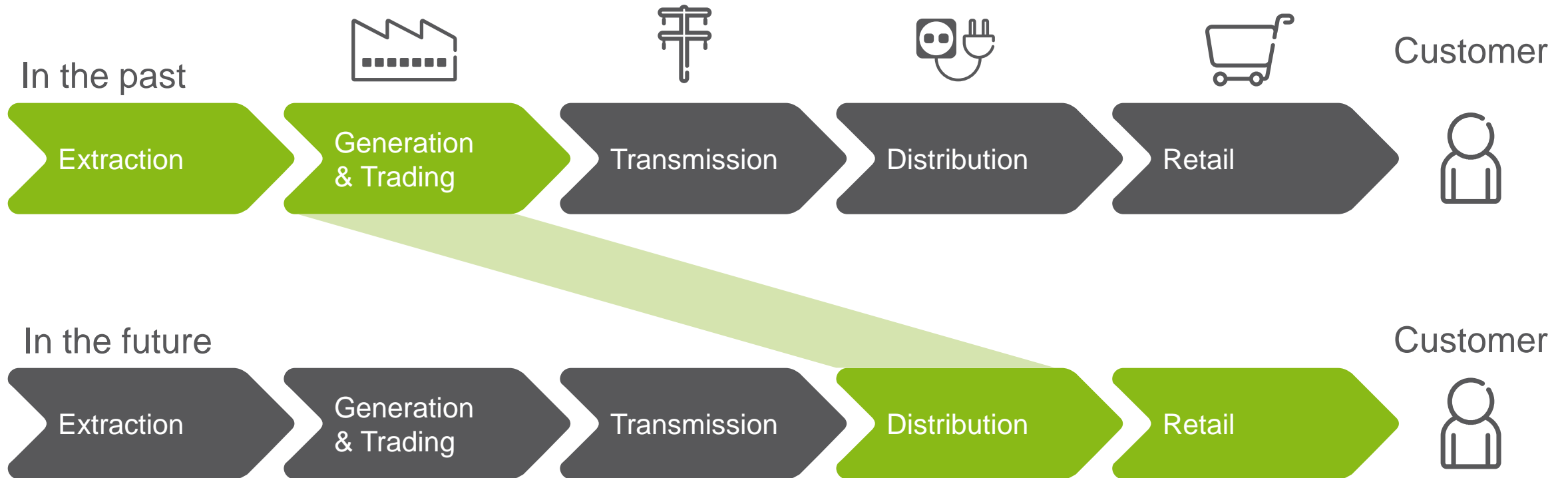
› Liberalisation brings choice of provider		› Proliferation of tariff choices		› Energy efficiency	
› Fixed priced deals emerge		› Rise of comparison sites		› Social and community energy	
› Some bundling & loyalty		› More extensive bundling		› Distributed generation	
		› 2nd wave of independents		› Smart grids & Energy storage	
		› Initial moves to digital		› Cloud and In-Memory Computing	
				› Home automation	
				› New business models	

More change in the **next 3 years** than in the **last 30**

A NEW BATTLEFIELD



Value migrating towards the customer



IMPLICATIONS FOR CONSUMERS



- › **5G massive communications** will build on LTE capabilities and **low cost devices** enabling enhanced **networking of all the objects of daily life** making it easier for everyone to optimise their energy usage and reduce their CO2 impact
- › **5G critical communications** will enable **new consumer markets** for supply and demand by enabling new architectures for power networks using near real time communications for measurement and control
- › **5G SDN** supported **edge processing** of data will enable new use cases for **low latency local processing and improved data security** by reducing the dependence on the core network for all services
- › **5G critical communications** will enable near real time **proactive management of power networks**, reducing the risk of power outages while enabling the increase in the penetration of renewable energy sources to up to 100%



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