

**Quicktake**

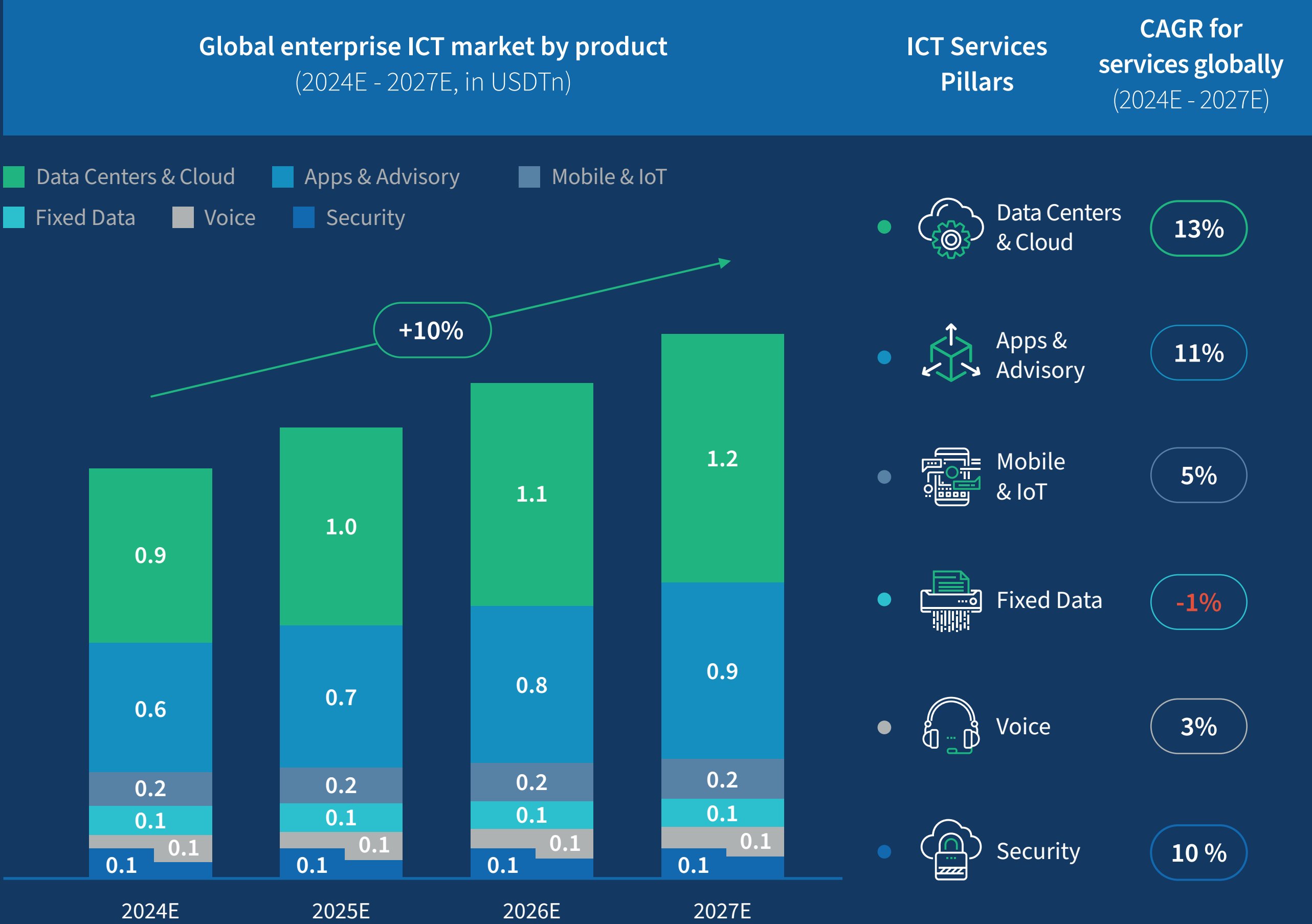
 FTIDELTA™



# Enterprise ICT

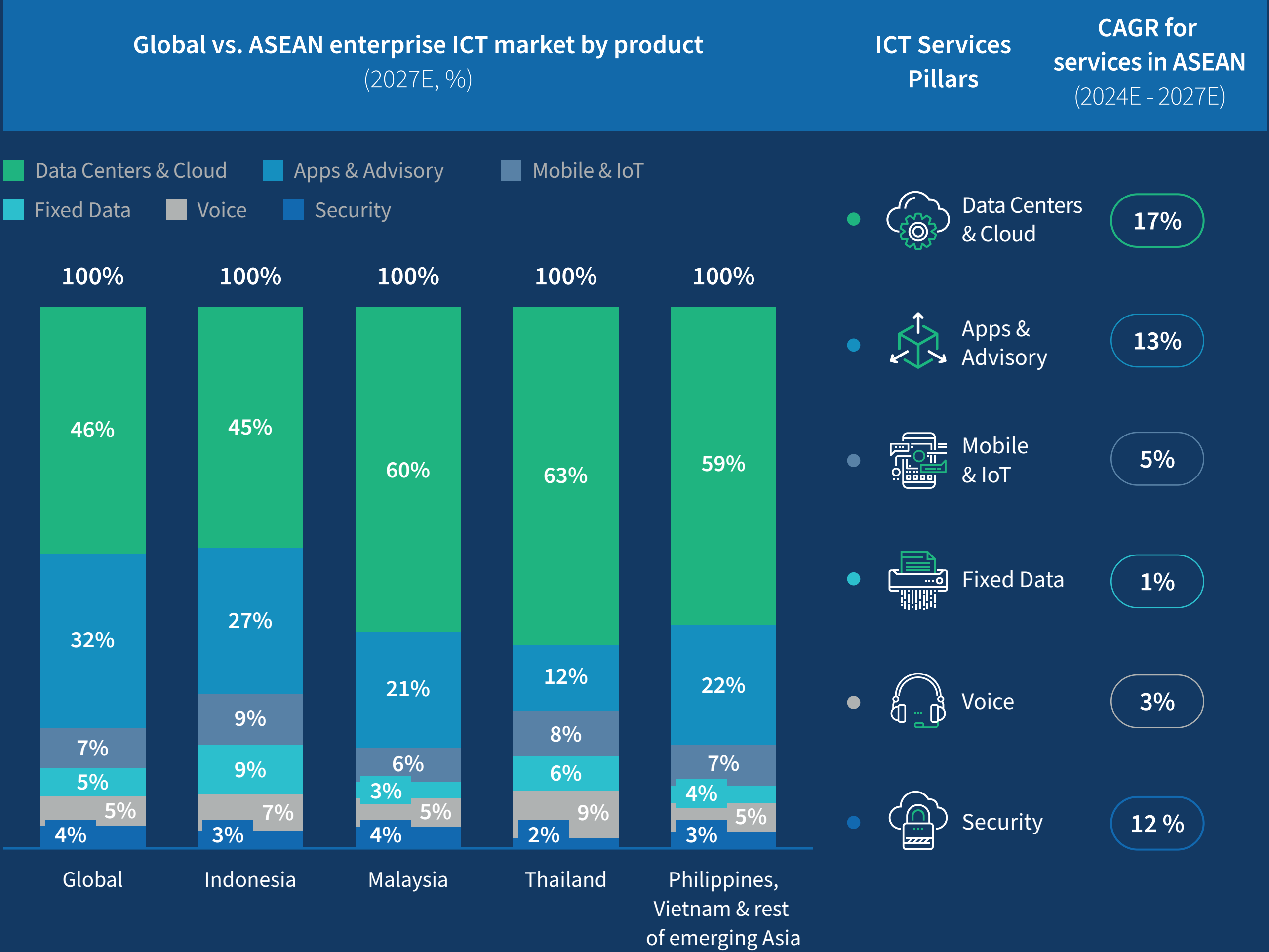
## The opportunity for telcos

# Global enterprise information and communication technologies (“ICT”) market is expected to continue to grow, driven by beyond-connectivity services



Source: Omdia, Gartner, FTI Delta analysis

# The ASEAN enterprise ICT market is expected to grow slightly faster at 13% — driven primarily by their faster-growing and larger DCs and cloud markets









Source: Omdia, Gartner, FTI Delta analysis



# FTI Delta's enterprise ICT offering framework summarizes the wide range of core and adjacent offerings that telcos provide to enterprises

## CORE

## ADJACENCIES

	 Fixed voice	 Fixed data	 Mobile & IOT	 DCs & Cloud	 Security	 Apps & Advisory
<b>Infra &amp; Connectivity</b>	Legacy voice	FTTB	Mobile voice & data	Data center leasing	Network security	Managed IT support
	IP voice	Private fixed networks	Mobile devices	Colocation	Security ops center	Managed IT applications
	Unified comms (UC)	FWA	IoT connectivity	Cloud connect	Identity and access management	Application development
	Contact center (CC) infra	LEO		Public / private / hybrid cloud	Incidence & response management	IT consulting & SI services
<b>Managed Services</b>	Managed voice	Connectivity devices	Private networks	SaaS / PaaS	Endpoint security	AI model & applications
	Managed UC	Managed connectivity	IoT platform / applications	Biz continuity DRS	Security setup & advisory	
	Managed CC		Mobile device management	Multi-cloud manager	Advanced security analytics	
				AI computing		

Telcos have taken various approaches — typical positioning groups are: (P1) connectivity & cloud provider; (P2) digital enabler; (P3) ICT one-stop shop

	 Fixed voice	 Fixed data	 Mobile & IOT	 DCs & Cloud	 Security	 Apps & Advisory
<b>Infra &amp; Connectivity</b>	Legacy voice	FTTB	<b>P1</b> Mobile voice & data	Data center leasing	Network security	<b>P3</b> Managed IT support
	IP voice	Private fixed networks	Mobile devices	Colocation	Security ops center	Managed IT applications
	Unified comms (UC)	FWA	IoT connectivity	Cloud connect	Identity and access management	Application development
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<b>Managed Services</b>	Managed voice	Connectivity devices	Private networks	SaaS / PaaS	Endpoint security	AI model & applications
	Managed UC	Managed connectivity	IoT platform / applications	Biz continuity DRS	Security setup & advisory	
	Managed CC		Mobile device management	Multi-cloud manager	Advanced security analytics	
				AI computing		
			<b>P2</b>			

Note: At least 50% of required services to be classified within a category; 1. Commonly provided by most telcos in P1/2.

Sources: Company websites and annual reports, FTI Delta analysis

# Telcos have had mixed success — the most diverse positionings (sophisticated offerings) have often resulted in slower/declining growth

Positioning of telcos' enterprise ICT business:

**P1**

Connectivity & cloud provider

**P2**

Digital enabler

**P3**

ICT One-Stop Shop



Note: 1. Enterprise revenue in 2023; 2. CAGR 2019-2023.  
Source: Company websites and annual reports, FTI Delta analysis

Our research indicates that telcos are more likely to be able to drive growth by adopting a focused approach — summarized within three key themes

## KEY THEMES FOR SUCCESS

<p>1</p>  <p>Double-down of <b>STRENGTHS</b></p>	<ul style="list-style-type: none"><li>— Focus on digital <b>infrastructure as a key differentiator</b></li><li>— Prioritize <b>adjacencies that add value</b> to the core</li></ul>
<p>2</p>  <p><b>SIMPLIFY</b> products &amp; services</p>	<ul style="list-style-type: none"><li>— Migrate away from <b>declining legacy offerings</b></li><li>— Focus on offerings that drive the <b>majority of value</b></li></ul>
<p>3</p>  <p><b>TAILOR GTM</b> for target verticals</p>	<ul style="list-style-type: none"><li>— Clearly <b>tailored propositions</b> for key verticals</li><li>— <b>Experts</b> in verticals and technical solutions</li></ul>



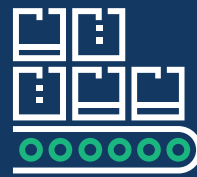
# FTI Delta can support telcos in defining their enterprise growth strategies answering six key questions

1



Where (and how attractive) are the **opportunities**?

2



What telco **offerings** are required?

3



What is the optimal **operating model**?

4



What are the **financial implications**?

5



What is the required **GTM plan** and capabilities?

6



How should this be **operationalized**?

## KEY CONTACTS IN ASEAN

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