

# 5G Opportunities and Use Cases

Saudi Market highlights and use cases

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## Executive Summary

# 5G

In today's world, **90%** of the **30M broadband** users' demand is shifting towards **Richer Content**. With more than **27M** family members get **Engaged Online**, We have seen in **2018** more than **10M** users spent more than **SAR900M** on **Online Gaming** and growing at a rate of **+15% y/y**. The users are becoming more engaged day by day spending more than **5hours daily** on average in online entertainment.

These customers behaviors are creating more pressure on the current infrastructure which is **72% consumer ready** at **60% Network Readiness** struggling to match customer satisfaction. Despite the continuous demand and high growth in both mobile subscribers and mobile data traffic, overall mobile service revenue growth has flattened out. Operators are struggling to turn the growing usage of mobile data services into greater revenues.

It is the time to start looking into the future opportunities expected to generate more than **SAR30B by 2030** from telco emerging technologies and start preparing the country infrastructure to be ready with emerging experiences.



# Content

01

Current Market &  
Challenges

Overview on the current market, important applications, challenges and gaps

02

Opportunities & Use  
Cases

Highlight about market potential, opportunities and used cases of 5G

03

Roadmap

A simple roadmap to overcome challenges, and capitalize on market opportunities.

# Current Market



# Internet and Online Content Activities

## Subscribers and Network



Percentage of mobile broadband users to mobile subscribers



29.31Mbps

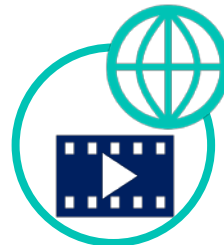
Average speed of mobile internet connections



+81%

Year-on-year change in avg speed of mobile internet connections

## Internet Users Streaming Activities



95%  
Watch Video Online



52%  
Watch TV Content Online



12%  
Watch Sports Online



26%  
Play Video Games Online



20%  
Stream or watch Video Games Online



Source: GlobalWebIndex: <https://www.globalwebindex.com/reports/social>

# Mobile Users Activities

## Mobile Users Online Activities



**89%**

Use mobile messaging



**90%**

Watch Video on Mobile



**74%**

Play Games on Mobile



**80%**

Use Mobile Map Service



Source: GlobalWebIndex: <https://www.globalwebindex.com/reports/social>

# Mobile Users Challenges

## Mobile Connection Challenges



89%

Use mobile messaging



90%

Watch Video on Mobile



74%

Play Games on Mobile



80%

Use Mobile Map Service



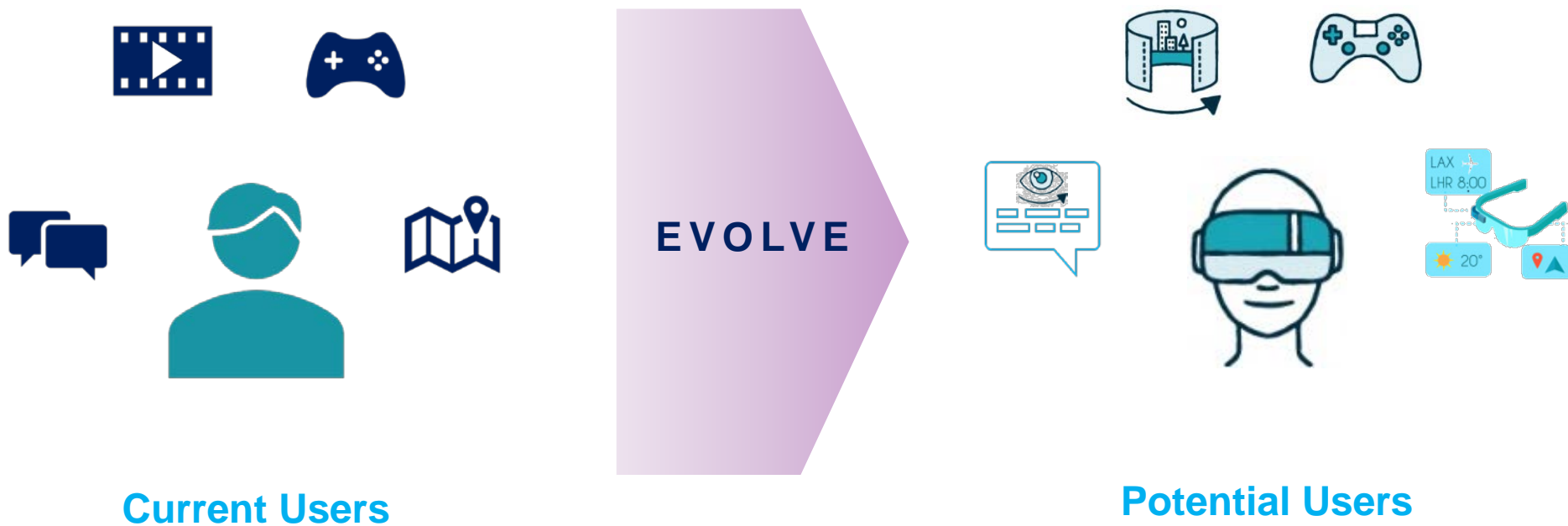
# Opportunities & Use Cases





# Capitalizing on the ultimate customers

Business always has been about customers. By focusing on the ultimate user and consider a customer centric approach of redefining market development, we understand we need to harness the potential of the current users to evolve using emerging technologies. Afterwards, businesses will start adopting these technologies based on the penetration and readiness level.



Philosophy

# Transforming Traditional to Emerging Users



89%

Use mobile messaging



90%

Watch Video on Mobile



74%

Play Games on Mobile



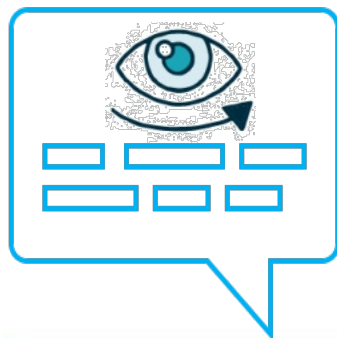
80%

Use Mobile Map Service

Emerging Experience

Opportunity

Rich Content msg



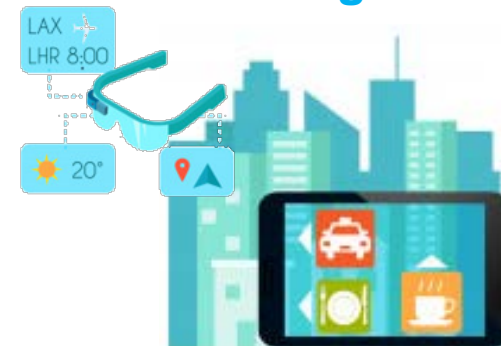
VR & 360 Videos



VR/AR Gaming



AR Navigation



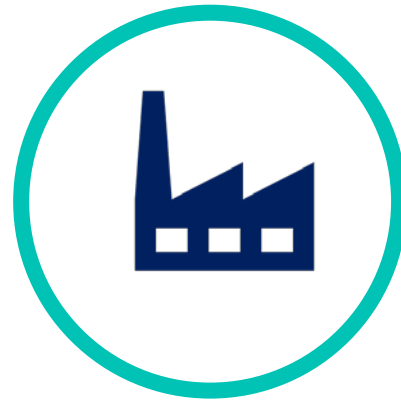
# Transforming Traditional to Emerging Business



Smart Cities



Remote Health



Training & Maintenance



Transportation



## Emerging Businesses

Instant Response    HD stream    AR Experience



HD Stream    Low Latency



VR Content    AR Experience

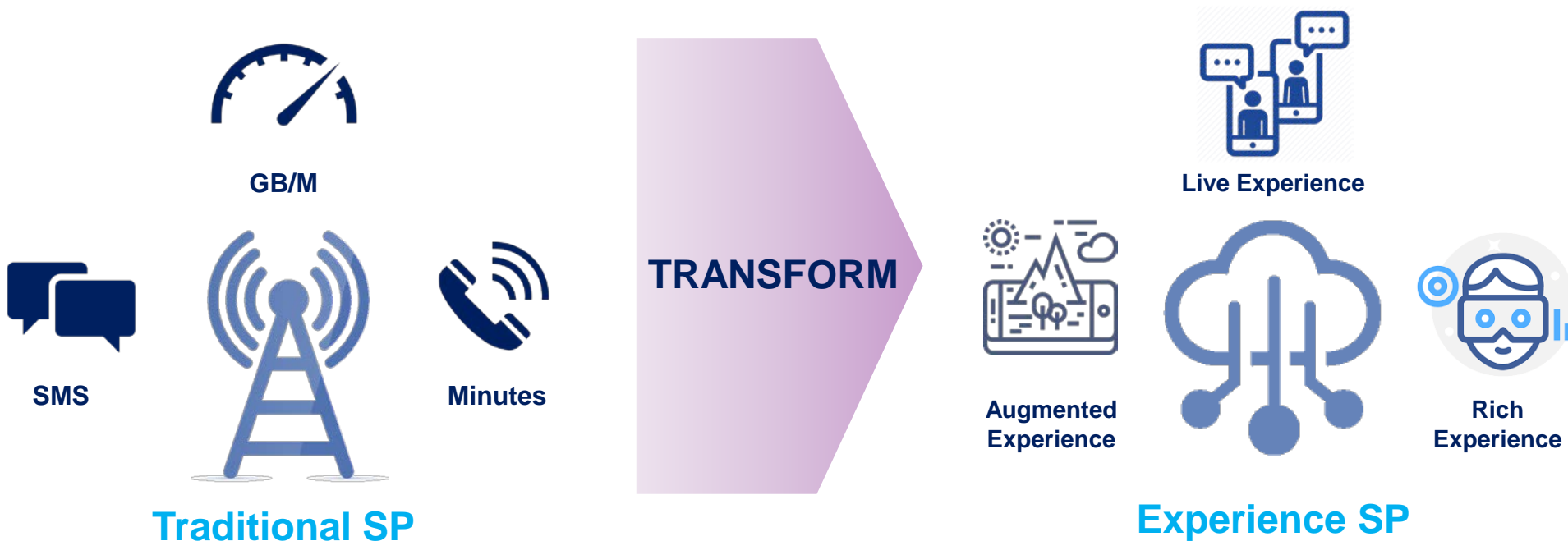


Instant Response    High Accuracy    HD Content



# We need to Transform SP business models

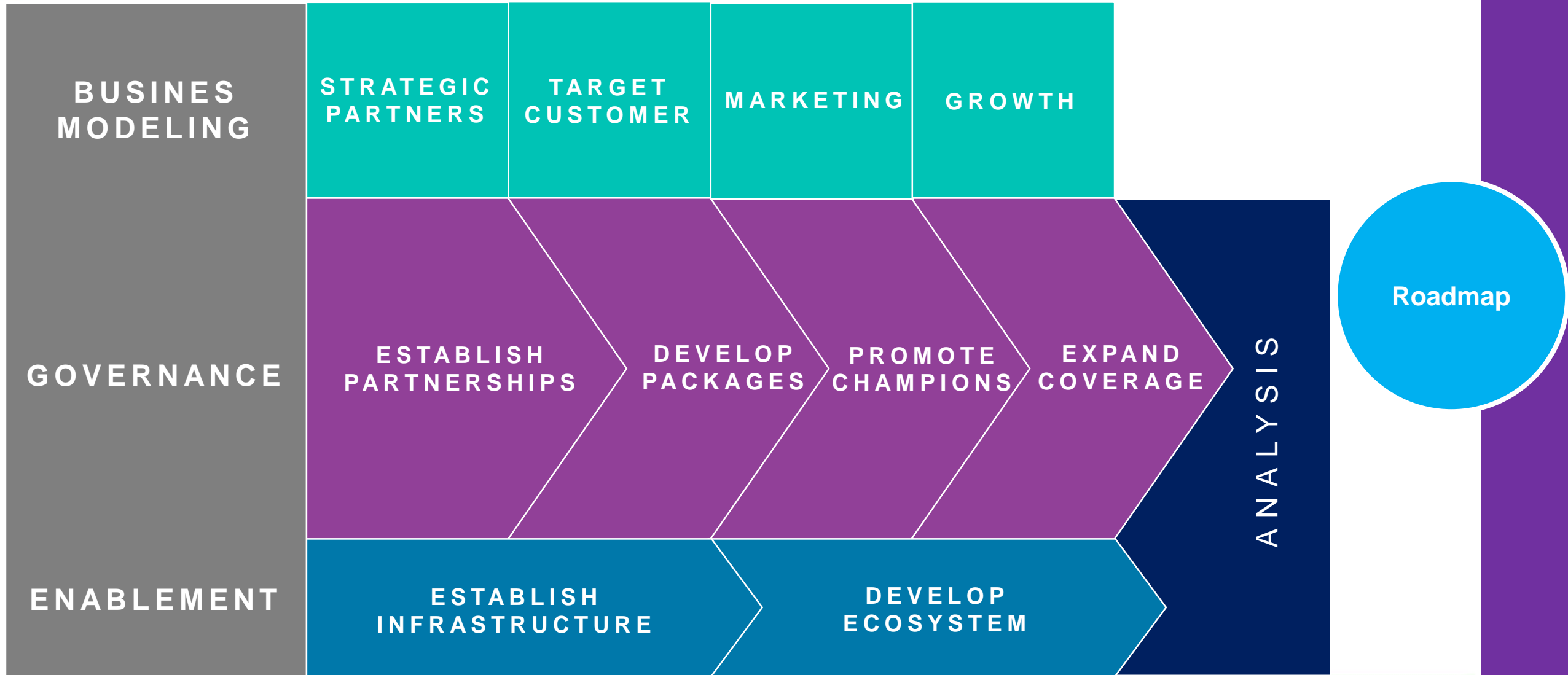
Service Providers have been always following a traditional approach in providing their services. It narrows down to basic data bundles, voice calls minutes or SMS counts. We understand the challenge of billing software and traditional business model inherited from an old era. Yet, end users technologies is evolving and demanding more consumption. Therefore, to encourage users to evolve, we need to focus on the customer experience rather than customer consumption. There fore, we highly advise to introduce new innovative experience packages regardless of the underlying consumption.

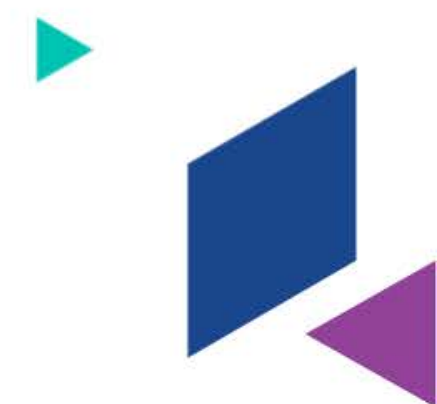


# Roadmap



# TRANSFORMATION ROADMAP





Thank you...