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PRESENTATION

**Voice-Over**

What do we mean when we say, "All you need is an idea and Intel inside?"

That in today's fast moving high-tech world, big ideas are powered by a one-of-a-kind partnership with Intel, because our customer-first approach is more than just a byline.

From the moment we put the silicon in Silicon Valley, Intel has been accelerating the industry in big ways.

Setting a course for a new era of bold innovation.

No one else is this obsessed with engineering a brighter future.

That's why we're driving the industry’s biggest inflection points, putting intelligence where it's needed most, in ways that only Intel can, with the multi-architecture approach that empowers our customers to transform their businesses from the inside out.

We're democratizing AI in big ways, combining software and hardware to open up new possibilities.

And we're moving that innovation around the world at lightning speeds with our advances in 5G.

Collaborating with global operators and creating a new vision for networks of the future.

We're taking intelligence and bringing it to the edge.

Accelerating business outcomes with over 30,000 Edge to Cloud solution deployments.

And we're taking that same innovation to the streets, deploying new technology and advanced data layers to make autonomous driving not only possible, but safe and seamless.

Every day, we create world-changing technology that enriches the lives of every person on earth, making bold moves, because Intel has the unique portfolio breadth and depth, plus the global scale to serve as an unparalleled catalyst for our partners’ biggest ambitions.

So, if you've got a big idea, let's go off and do something wonderful together.

**Harish Gopinath**

Welcome everyone to the Enterprise Networks Insights Series brought to you by Intel Network Builders. This is Harish Gopinath from the Partner Alliance Sales Group for Asia Pacific and Japan at Intel, and I will be your host for today’s webinar.

Thank you for taking the time today to join us on this session, titled Unlocking the Enterprise Opportunity with Private 5G. We will start with a presentation by Accenture and then head into a fireside chat with our other presenters as well.

Before we get started, I want to point out some features of the BrightTALK tool that may improve your experience. If you have questions, there is a Questions tab below your viewer. I encourage our live audience to please ask questions at any time. There is also an Attachments tab with additional documentation and reference materials, which pertain to this presentation. Please take the time to provide your feedback using the survey link. As usual, your feedback is always invaluable to us. Do take five minutes of your time to give us your thoughts after the webinar.

The Enterprise Networks Insights is an ongoing series brought to you by Intel Network Builders. This takes place live every month, so check the channel to see what is upcoming and access our growing library of recorded content.

In addition to the resources you see here, we also offer a comprehensive NFV and 5G training program through Intel Network Builders University. You can find the link to this program in the Attachments tab as well.

Today, we are pleased to welcome Albert Tan from Accenture and Eric Levander from Intel. Albert is a Managing Director at Accenture and is the Head of Networks for Australia, New Zealand, Southeast Asia, India, Africa, and the Middle East. He has over 25 years of experience in the telco consulting and C-level telco executive engagements across strategy, network consulting, integration, and outsourcing. Prior to Accenture, he has served as the chief digital officer with Huawei Australia, group chief strategy officer of VEON Amsterdam, chief strategy officer at Telkom Indonesia. An ex-consultant himself, he has also worked with other key consulting firms in the industry.

Eric is a General Manager for the Global Solutions and Scale Organization hosted in the Data Center Sales Group at Intel. He's an experienced sales and marketing leader with deep experience in semiconductors, telecom, and the information technology segment. His current organization works together with some of Intel’s most trusted hardware, software, and system integrator partners to ramp and scale commercial solutions in the networking and communications market. His organization is global and consists of sales development, solution architecture, and marketing functions.

Welcome, Albert and Eric, and thank you for your time to join us today. And with that, we’ll start the proceedings of the day. Albert, over to you.

**Albert Tan**

Thank you, Harish, and it’s a pleasure to meet everybody on this call.

First and foremost, it’s a very exciting time for all the enterprises of the business today to be able to unlock value with the new opportunities with enhanced connectivity with 5G, higher speed, lower latency, secure, and the proliferation of cloud services. I would like to just share with you what is the topic of the agenda today, what will you be listening, what are the three main areas that the audience will be getting out of it.

One is how can enterprise benefit from 5G and software-defined networks to power up connected industries to gather and capture more value in productivity?

Number two, to the ecosystem partners, how could you be part of this very exciting digital enterprise services journey?

And to the CSPs, the telcos today, how would you enable and think about capturing enterprise and Government services to be able to differentiate yourself and to be bringing out very next generation, fast, low latency, secure services to your clients in enterprise and Government for managed services.

Well, I'm sure you’ve heard a lot of all the recent advancements in 5G and edge connectivity, and the compute evolution that’s driving market growth. Specifically, there are four areas of the very interesting market data itself. 79% of enterprises are willing to go and embark on this journey to untap these capabilities and this value. 75% of enterprise-generated data will be created, processed from edge and B2B services. 25.4 billion IoT devices will be connected to the 5G networks. And also, about 149 zettabytes of data will be transmitted.

But specifically, where's the value to the different players in the ecosystem? For telcos, it would be around the platform and the security on how it bundles these services to the end user of its enterprise and Government clients. For the enterprise, it will be around how do you unlock data in terms of leveraging AI from the data captured to be able to run a very automated process to drive productivity from automation robotics, and leverage the whole wave of IR 4.0.

With the whole OEM/ODM and ecosystem partners, it’s about building and connecting to the right platform with your new sensors, devices, and services, and needing to think of it as a platform partnership with ecosystem partners to drive scale, and scope, and economies of scale for the users.

Let’s start with the enterprise customers. 5G wireless edge, where digital meets physical, is no longer a wish, it’s reality today. What are we seeing at the moment? There are intelligent machines real-time driving productivity that’s optimized close to consumption where things are happening closer to your customers, where experience and extended reality are coming into all smart works of life, especially in healthcare. And security is now becoming more paramount. Privacy and security is default, and that’s where 5G will enhance your security capabilities. And there's always-on and untethered situation for all your customer sales, real-time capturing customer needs, and creating more insights. These are the five areas that drive your productivity opportunity levers for every single enterprise to leverage.

Now, the question is with a market context of more data, more connectivity coming, leveraged from 5G, more compute power, more bespoke solutions coming into cloud, and much more evolved, leapfrogging, connected, digital-transformed industries, how does enterprise drive this change?

Every single enterprise consists of different stakeholders internally that it needs to consider the relevant stakeholders that drive this transformational change, which includes the CMO, how do you reach to the customers better? The head of customer support and operations, how do you drive more efficiency in the organization? The product managers, and the CPOs, and head of engineering would need to actually consider new technology to integrate services. Head of manufacturing to how to drive productivity in terms of production and manufacturing faster. And COO and CFO be able to extract value in this real-time in an enterprise environment.

It is complicated. There's three aspects that we need to consider in this. Number one, how to synergize the organization. Number two, how to drive the new operations model. And number three, how to drive the change management internally in your organization.

Now, this is where a lot of thinking, a lot of planning needs to come into place to unlock value in this environment. It is not just copying an existing ready-made use case in the 5G use case solution out in the industry and applying it into your organization. It’s about thinking about the use cases that is relevant and critical for you to build on from today into tomorrow’s solutions that your organization needs to build. This needs to take into account your infrastructure on what hardware, connectivity, platforms, devices, public cloud, edge cloud, and how it all brings together in an intelligent network orchestration where it integrates edge, IoT, 5G, 5G slices, SDN, accelerated network services, and security. And this needs to be run real-time and always-on optimized processing and storing data closer to the physical world.

And how does one think about it? You need to also consider in your environment, how do you build a private network? Specifically, how do you accelerate your private wireless acceleration module, what are the use cases, what are the solution architecture, what are the programs that is available in your current operations technology layer, the spectrum, the engineering and planning, site development, and operations? I know it can be very overwhelming to you, however, the most important alignment needs to come that it brings you faster outcomes, reduced risk, and achieving your ROI faster.

And let’s talk about the operations layer in a deeper sphere. I would like to highlight a case where Accenture has actually helped our enterprise customers to link the operations and the network together to unlock value. Here, we've studied each client in detail to look at the upstream, downstream and the whole value chain of the operations to design horizontal use cases where we leverage the networks and network capability to your operations to drive automations, insights, and processing real-time with a secured environment. We've done it specifically by aligning to your productivity levers and your return on investments and segue it out by different horizon planning, building on the horizontal use cases that is relevant today, but scalable for tomorrow and interoperable to the applications and IoTs as it evolves in an open architecture.

And obviously, this needs a layer of platform underneath that actually links an environment to drive the horizontal use cases. We leverage a very specific matrix and look at how the horizontal use cases are done, specifically looking at mission critical use cases to drive productivity, mission critical IoT and services that leverage your 5G network and private networks, and secure environment to ensure the safety of your working environment.

Now, a lot of these use cases can be the foundation and the pillar of your operations efficiency and productivity, that can be built from Horizon One today, to Two, and then the Three of the future. Taking into account all the cloud, all the AI data that you require, and all the security functions, leveraging the innovation of 5G, 5G slices, especially tapping on the new 5G releases, like 5G Release 17 that’s coming in, that will be able to unlock value from ultra-low latency services.

Now, Accenture and Intel have started working on a lot of network opportunities, levers, and solutions. This includes edge, B2B industrial area, O-RAN deployment, multi-edge computing, and 5G cloud native services area, specifically designed to help enterprise and telcos and ecosystem partners on core, near edge, far edge, and far edge solutions that is applicable to suit all the stakeholders’ needs.

Lastly, why Accenture? You might have heard that we’re able to do a lot of the network end-to-end offerings. However, we always consider our customers and end users in mind, bringing along the cloud, the edge, the industry network capabilities. Accenture is designed with Accenture Network Services, linking the network capabilities, the cloud, IoT, and asset and ecosystem partners, but we do also bring in industry specialization from Industry-X. You might have heard recently that we have been voted by Everest as the Leader in Network Engineering Services, and also by IDC as the Leader in Worldwide Network Consulting Services. This is all accentuated by new capabilities that we've acquired recently with two new companies called Arca and Umlaut.

So, if you'd like to understand more, how to unlock new productivity levers and value in your organization, I urge you to discuss and reach out to me in my email listed in the screen today.

And thank you.

**Harish Gopinath**

Thank you, Albert. That was an insightful presentation. It’s time to transition to our next segment of the webinar, which is a fireside chat and where we get to speak with Eric as well.

But let me start the first question with you, Albert. There is this buzz going around for long now on the 5G enterprise side. Where has the market gone wrong so far with enterprise network in the 5G scenario?

**Albert Tan**

Harish, thanks for your question, I think that’s an excellent question. In the market today, there are many solutions and a lot of solutions are fragmented and complex, and they are also trying to build the solution like a killer app to different buyers, hence confusing the buyers significantly, and the end user and the enterprise customers.

I don’t think there is one-size-fits-all. I think we need to think and take into consideration the operations and the requirements of the enterprise, number two, the networks, and then number three, the internal organization capability. The required skills to build, operate, and enhance the services is absolutely critical. This is where we need to bring into the consideration of network, capabilities, understand the business needs that unlocks value, and also the third element in understanding technology that’s available. So, it’s absolutely critical.

And lastly, it also needs to understand that the capabilities of the internal organization itself, especially on the spectrums that’s available for them to leverage, and this varies country-by-country.

I hope that shares with you, Harish, an overview, roundup where there's no one-size-fits-all.

**Harish Gopinath**

Great, thanks for that, Albert. Eric, now, this one is for you. We've been working with different end customers and partners in the private wireless space. How has Intel addressed the messaging to end customers on TCO for deployments, future upgrades and et cetera?

**Eric Levander**

Well, I think you’ve got to take a step back and look at what's going on here. 5G and edge, the capabilities of 5G and edge is driving significant disruption and will continue to drive significant disruption in, basically, every industry on the planet. The high performance, deterministic networks with real-time analytics, the possibilities of developing your offerings, the way you produce your services is immense.

That means for enterprise customers this is a time when they need to think about disrupting or getting disrupted. So, that’s kind of where it’s not a question about if. It’s about how you participate in this market. And when you do that, you'll get a few different choices. And one fundamental one is, how do I enter this? What are the big decisions I need to take?

Our belief and the way we’re talking to the industry is that the open and broad ecosystems will win in every major transformation, where we have innovation from a broad ecosystem that understands the underlying platforms, and where we have a force of innovation and infrastructure that is being built. And that provides you with the investment protection that you need, because you know that there will be servers, there will be a broad ecosystem of x86 servers, there will be developers available for that, and that is the first step of decisions that enterprises will need to take.

And our job is really to ensure that they can start on an as high level as possible with platforms and solutions that are battle-hardened and proven.

So, just put up an advertisement for 5G private network in a box solutions that we’re doing with a whole set of ecosystem partners that enables, basically, every industry to take advantage of these capabilities.

**Harish Gopinath**

Great, thanks for that, Eric. Albert, in your conversation, I think you focused a lot on how to enable this entire segment. So, why does building a foundational model with a bottom-up approach makes more sense than a top-down approach, like the traditional connectivity deployments in this case?

**Albert Tan**

Harish, I think to build upon what Eric has mentioned, having an open ecosystem, a platform strategy, and understanding the availability of the spectrum and the networks that drives connectivity to drive your productivity is absolutely critical. Because this is where you put all those three fundamental levers together to contextualize and capture the horizontal use cases that would drive operational efficiency in your organization. And that’s why no two customers for us in Accenture is the same. We treat everybody with care and understanding, and we listen to what their needs are, and we really translate from the business value to the operations need, translated into the network requirement, the AI, the automation, and the services required to enhance the productivity.

**Harish Gopinath**

Great, thanks for those. And Eric, you’ve been interacting with various decision-makers and other participants across the industry. So, where, in your view, do you see demand for private wireless from enterprise customers?

**Eric Levander**

I think this comes in three buckets, basically. There are those mission critical industries that often have vast area of network coverage that they need to manage, mining, oil and gas, warehousing, smart cities, these types of applications where you often have customers, end customers that are pretty well educated in managing networks and kind of understand, intuitively, the value of this.

Now, what they are seeing is then the opportunity to go with deterministic, high performance networks and add that to their operations. This is the first wave of the enterprises that are jumping into this, and that is going fast. That’s very obvious.

The next set of industries that we are working with and that we’re seeing is the industrial, the manufacturing, Industrial 4.0 manufacturing companies that definitely-- they have very high deterministic-- they have real-time requirements and the opportunity with 5G and private networks is really to cut the cables inside the factories and provide a completely, not completely, but much more flexible factory floor and environment.

Of course, the uptime, the requirements of having this to work all the time is really, really high. It’s going to-- they are cautious about how to go about this, but the upside is really, really big. So, that is absolutely happening. It’s going to be implemented with dual-mode, both wired and wireless as it gets implemented, and it will take a while, but the need in the industry for that is absolutely clear.

And finally, we have basically the rest, where there are retail, stadiums, any other, schools, education, and these guys, where maybe the real-time requirements aren't as high, but as services, more complete services are getting available, prices are being pushed down. The requirements for network-as-a-service and these applications will absolutely go up. It might take a bit longer and it might not always be 5G that is the connectivity. You might be working Wi-Fi 6, but it’s the same type of service from that perspective. That’s kind of what we’re seeing.

**Harish Gopinath**

So, it looks like the demand is near-term and real-time. That’s my key takeaways from that insight.

**Eric Levander**

There's a great opportunity today and there is a huge opportunity long-term and it’s going to change a lot of what we’re seeing in many industries.

**Harish Gopinath**

Great, thanks for that, Eric. And Albert, back to you, so in your presentation, you spoke about connecting with the C-suite across the new enablements and capabilities. So, would like to hear some more insights and learnings from your initial discussions with the likes of the COO, CIO, CTOs across the region.

And a two-part portion of the question here is, what would be your recommendation on adoption to other key stakeholders in our audience today?

**Albert Tan**

I think it’s very important to understand what the organization or the enterprise requirements are. So, I call it-- there are three functional areas that we really need to listen and understand.

Number one is understanding the vertical needs in terms of operations efficiency that would unlock value, and having the domain expertise to connect with the chief operating officer, the manufacturing, the chief product officer of the enterprise that’s actually driving the sale, the products, and the SKUs to the customers, to their customers.

Number two is really understand, being able to connect the business needs and requirements to the IT requirements in deriving what the applications and the processes, and the digitization that’s required.

The third level actually, importantly, is about having the ability to decipher what is actually the network technologies and the orchestration uses. Now, this third leg is always missing in most of the enterprises, because you usually have a very strong CIO ,or a CFO, or a COO, but there's always missing, there's no CTO in enterprise. Usually, it’s only in telcos. And this is where Accenture comes in and actually builds that framework and that migration, that creates what we call a Value 360 to the organization meter that aligns everybody in this transformation journey and to unlock value and working with the CFOs and the COO to target key levers to reduce their TCOs, reduce their CapEx, and optimize their OpEx utilization in planning for this transformation journey.

**Harish Gopinath**

Great, thanks again, Albert. Eric, now switching gears to some recent developments. You know, there was a recent announcement from Intel Innovation. What do you think, will a software-centered approach and a platform that cuts across network would look like?

**Eric Levander**

Well, first of all, I was delighted to look at Intel Innovation and Pat Gelsinger’s-- really the geek is back, the geek is chic, and all of those messages. I mean, we make Intel architecture CPUs, we make accelerators and IPUs, connectivity silicon and storage. And that offers kind of the baseline for the industry to innovate on. Without developers, what we do is only heat, that’s the only value it generates.

And working with the developers to innovate on top of this is mission critical for us and for the industry. So, that’s just the way things are going to go going forward.

Edge is no different than this. Edge. it’s all about the developers that will provide applications and services for the end users. Mobile edge compute brings these resources close to the end users, so that real-time compute and AI can be performed. Hybrid cloud offers it to be as efficient as possible. Not everything needs to be developed or executed at the edge. But this is for application developers to make sure that we have the right balance of close to the user where it’s mission critical, or in the cloud where it’s actually cost effective to run it.

And all of this gets developed and innovated by our industry, our developer industry. Our job here is to provide the best tools, the best support, and the best platforms to innovate on, and that’s what we’re going to do for the edge, for private wireless and for all cloud environments.

**Harish Gopinath**

Great, thanks for those insights, Eric. On a related note, Albert, you spoke about why Accenture. And you spoke about the capabilities, the reach, the new skill sets and tool sets that you’ve been adding to Accenture’s overall capabilities. Could you speak a little more on Accenture’s differentiation orchestrating the solutions for industries across the value chains?

**Albert Tan**

Well, thank you, Harish. I mean, first of all, I think, I strongly believe that we are one of the leading solution providers that can provide end-to-end services and solutions. And this is comprised of four areas.

Number one is we have the deep understanding of the industry knowledge in the connected industry areas. So, Accenture covers multiple industries in our Industry-X capabilities, in all the verticalization where we translate business value into what are the productivity levers that we need.

The second area is we work with all the different cloud partners today where it’s actually required for a lot of AI, compute power, processing itself.

Thirdly, security is paramount. Accenture has a whole practice on building safety, security.

And lastly, it’s about network where Eric has mentioned, whether it’s 5G, software-defined networks, and also capitalizing of your invested, in what networks that you already have, and making that suite your existing asset, and build that up in a journey while tackling and capturing new values that could be unlocked from your 5G networks itself that’s coming up with the new level of slicing.

This is all translated into CapEx and OpEx planning for enterprise to truly manage a three, five-year horizon journey with an open architecture model in mind to integrate all these services into your platform, and that’s where Accenture is truly differentiating itself.

**Harish Gopinath**

Thanks for those. And Eric, as we work with various industry partners in the space, what excites you about the prospects for the business as we look into the future?

**Eric Levander**

Well, think about it. We’re at the beginning of transforming every industry on the planet. That’s exciting. Collaborating with partners like Accenture that can pull all the pieces together, whether it’s IT or OT or IoT or whatever it is, and help end users take advantage of it. That is exciting. Getting to learn about all the new use cases, be out there exploring and winning together with partners. That’s exciting. And develop those new business models that capture all this transformation. That’s truly exciting. And finally, I mean the business prospects of this for us and for the industry and everyone involved. That is truly, truly exciting in my perspective.

**Harish Gopinath**

Great. Great conversation overall and thanks for the insights, both Albert and Eric. If we didn’t address your questions, please feel free to reach out to us at the email addresses included here.

Thank you, again, for joining us today. Please be sure to complete our quick five-minute survey under the Attachments tab. As usual, your feedback is valuable to us in providing the content you want to see and the solutions you need.

Also, be sure to join us in our next edition, which is on the 15th of December at 1 p.m. Singapore Time. In this session, we will be speaking to our guest from Microsoft on Monetizing Enterprise Services with Private 5G, LTE, and IoT.

Thank you once again for joining us today. This concludes our webcast.