5G, AI, VR and robotics dominated GITEX 2018 but credible use cases from operators were lacking

October 2018

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The Gulf Information Technology Exhibition (GITEX) was held in Dubai in October 2018. It is the principal technology event in the Gulf region for telecoms operators and technology vendors to share their visions for the future.

At this event, several operators announced partnerships and gave demonstrations of 5G, AI, VR and robotics. However, these operators still appear to be, at least from what was shown at GITEX this year, unclear on how to materialise their visions and take full advantage of the opportunities enabled by new technologies. This comment provides a summary of the main highlights from this year's event.

GITEX acts as a window into a future where technology and automation transform businesses and lifestyles

GITEX gives telecoms operators and technology vendors an opportunity to exhibit their current solutions, as well as showcase products and applications that are in development. Indeed, there were many prototypes of autonomous vehicles, robots and AI applications on display at GITEX 2018. However, much of the technology has been seen before and it provides little information about operators' roadmaps and the timelines to commercialise these prototypes.

du, Etisalat, STC and Zain each had a stand at the event and made a few announcements, as is customary (Figure 1). Some typical applications of 5G, such as autonomous cars and VR, were demonstrated. AI was also an area of focus; Etisalat's CEO said that the company aims to use AI to reduce the number of calls to customer care centres by 50%.

Interestingly, STC showcased its 'STC Pay' mobile financial services platform which was launched on 4 October 2018. The mobile wallet can be used to send money locally to other STC Pay users or to purchase goods and services. STC plans to expand the number of merchants that support the service and make the wallet accessible to non-STC customers.

Figure 1: Key announcements and demonstrations by du, Etisalat, STC and Zain during GITEX 2018

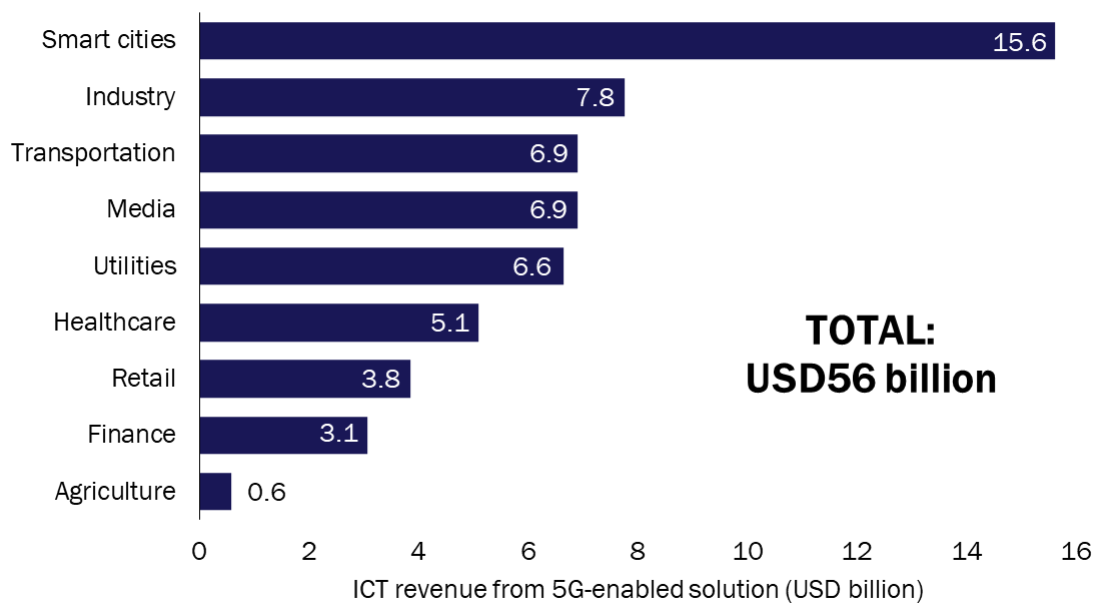| Operator	Demonstrations	Contracts and partnerships
du	Nokia and du demonstrated VR cloud-based gaming over simulated 4G and 5G networks as well as autonomous customer care software.	du formalised its partnership with Microsoft on an AI programme to improve customer service.
Etisalat	Etisalat had a few demonstrations of 5G speed along with a prototype of a flying car and a self-driving car. It also showcased immersive audio-visual solutions for education, and AI-powered solutions for retail.	

Operator	Demonstrations	Contracts and partnerships
STC	STC demonstrated its latest payment platform 'STC Pay' and the first in-flight video calling service in the MENA region.	STC signed a contract with Consensys to launch a blockchain cloud platform, and with National Water Company (NWC) to co-operate on smart meters and video conference solutions. It also signed a MoU with Microsoft to extend its partnership to include cloud, digital and cybersecurity solutions.
Zain	Zain demonstrated AI and IoT applications in the areas of security, education, transport, health, utilities and waste management.	Zain signed a partnership with Samsung and Al Babtain Turnkey Solutions to deploy IoT solutions in Kuwait. It also signed an agreement with Microsoft to offer cloud-based services to large enterprises and SMEs.

Source: Analysys Mason, 2018

The revenue from 5G-enabled digitalisation in the Gulf region could exceed USD56 billion in 2030

During GITEX, Analysys Mason released a white paper, sponsored by Huawei, that provides an assessment of the revenue potential from the deployment of 5G in the Gulf region. The regulators and operators in the region have begun preparations to take advantage of 5G, but there is some way to go to catch up with global leaders in the USA and South Korea in terms of government support and infrastructure policy, as well as planning for the facilitation of 5G in vertical sectors.

In the paper, Analysys Mason estimates that 5G will provide a revenue opportunity exceeding USD56 billion in the Gulf Co-operation Council (GCC) region by 2030; nearly 28% of this will come from smart city applications (Figure 2). This figure represents the combined revenue from new types of 5G-based solutions and consumer services, as well as from services across different vertical sectors (for example, AI-enabled video surveillance and V2X-enabled autonomous cars).

Figure 2: Potential ICT industry revenue from 5G-enabled solutions by sector, GCC region, 2030

Sector	ICT revenue from 5G-enabled solution (USD billion)
Smart cities	15.6
Industry	7.8
Transportation	6.9
Media	6.9
Utilities	6.6
Healthcare	5.1
Retail	3.8
Finance	3.1
Agriculture	0.6

TOTAL: USD56 billion

Source: Analysys Mason, 2018

Analysys Mason estimates that telecoms operators can potentially obtain half (out of a total of USD273 billion) of the cumulative revenue opportunity from 5G within 10 years (2020–2030). This will require operators to be flexible and capable of supporting a variety of use cases to ensure incremental revenue streams.

At GITEX, we saw examples of applications that could potentially benefit from 5G. However, there was less clarity on what role telecoms operators want to play beyond providing connectivity, nor was there strong evidence of horizontal collaboration and discussions with local partners to develop vertical-specific use cases.

Operators will need to start thinking beyond 'quick wins' with 5G such as providing high-speed broadband, and start planning for medium-term upselling opportunities through the development of new services that make use of 5G's other capabilities (such as low-latency and network slicing). They must also work towards expanding their role from connectivity to other areas of the value chain.

Some regulators, especially in Qatar and the UAE, have developed long-term visions and detailed roadmaps involving the use of new technologies in key verticals (such as transportation and smart cities), but these have not taken the impact of 5G into consideration. Therefore, operators should lobby regulators to set policies which facilitate regional cross-industry collaboration to develop, validate and promote 5G use cases.

Operators should also actively collaborate with suppliers, industries and government bodies through regional and international associations, such as 5G Automotive Association (5GAA), to understand how 5G can best support new use cases and experiences, and how the commercial availability of such use cases can be accelerated.