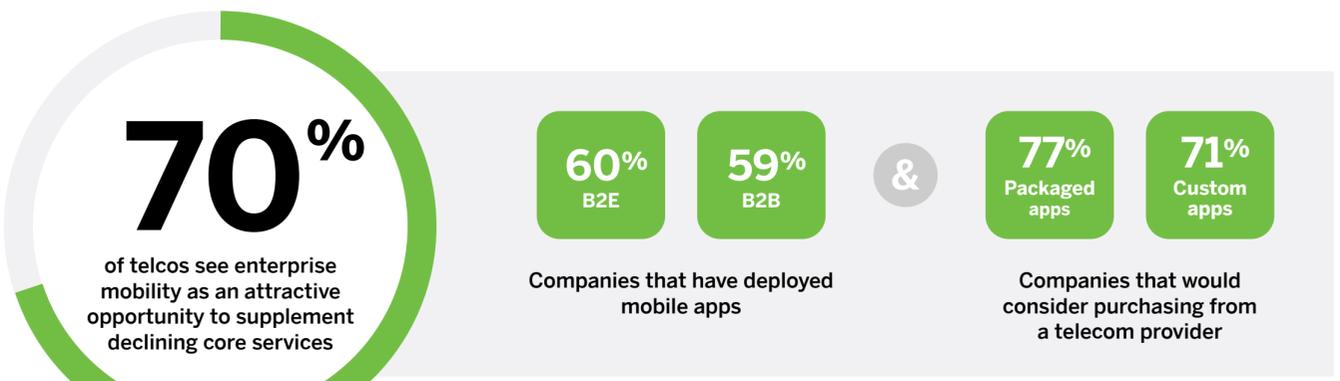


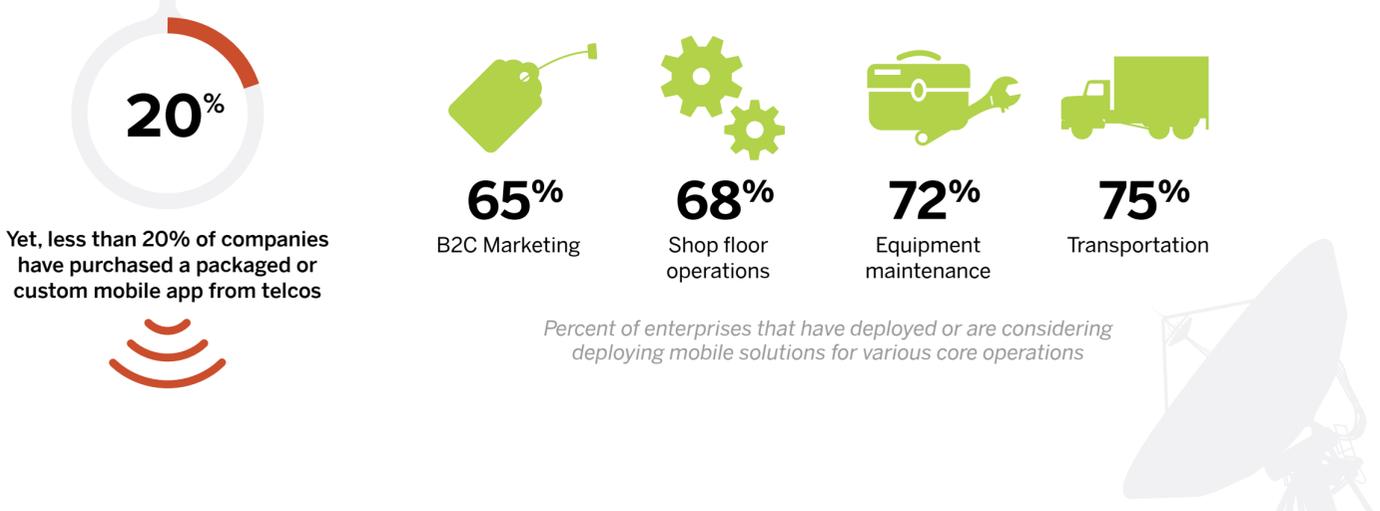
Mobile Opportunity Knocks

For Telecom Providers

SAP partnered with STL Partners recently to conduct global research among enterprises and telcos. Our findings show that many telcos are ideally positioned, but underprepared, to exploit the fast emerging \$50bn Enterprise Mobility opportunity. What can telcos do about it?



Big opportunities in unexpected places



So what's the disconnect?



Lack of expertise
44% of enterprises state lack of industry, business, and app development expertise as the biggest barrier to deploying apps for their business.



Slow internal adoption
Telcos have been slow to mobilize their own workforces and only 27% consider themselves well-informed about enterprise mobility.



Wrong focus
Only 11% of telcos offer high-end custom mobile apps, choosing to emphasize low-end packaged productivity apps and managed mobility services.



Wrong message, wrong audience
Telcos continue to sell into IT instead of selling value-add solutions to line of business owners, perpetuating the perception that mobile apps are low-margin.

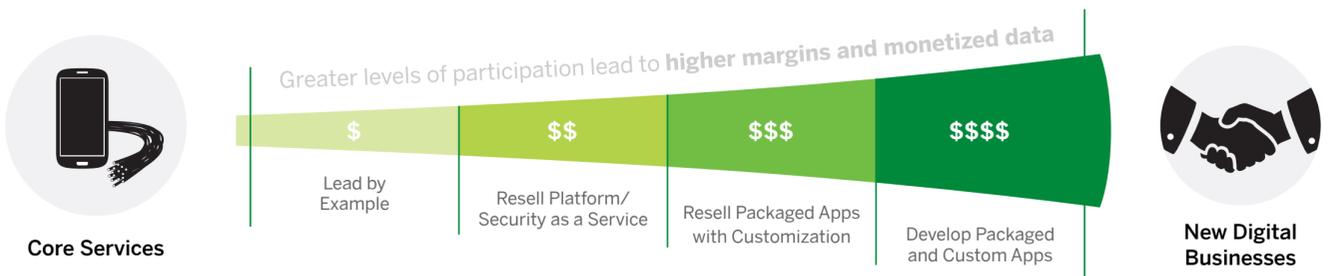
Why is there a disconnect?



Telcos have not overcome these challenges because they lack a defined market strategy or offer.

From operator to strategic partner

STL Partners has identified 4 levels of participation through which telcos can target a worthwhile share of the \$50 billion Enterprise Mobility market. For details on the competencies needed to achieve these levels, [download the complete Telco 2.0™ Executive Briefing at sap.com/stl](http://sap.com/stl) →



What will be your path to mobile success?

While each level is needed to achieve true mobile monetization, each telco will have a different journey. Schedule a workshop with SAP today to establish your mobile market strategy.

[Learn more at sap.com/telco-mobile](http://sap.com/telco-mobile)