

Monetisation and Sustainability in 6G

Worth the hype or worth the cost?

Participants:

- **Marta Brzoza** - Vice President of the Polish Chamber of Information Technology and Telecommunications – PIIT, PL
- **David Kennedy** – Director of Eurescom, DE
- **Mårten Ericson** - Master Researcher at Ericsson Research, SE
- **Piotr Romanowski** - Tietoevry, Director, Manufacturing & Automotive Chapter Principal, PL

Moderator:

- **Marcin Ratkiewicz** - Orange Innovation Poland, Director, PL

6G: Value, Power, Sustainability

Marcin Ratkiewicz
Director of Orange Innovation Poland



What's at Stake in 6G?

- **Monetisation:**
fair share in value chains
- **Sustainability**
environmental, economic, societal
- **Resilient infrastructure**
networks for emergencies and autonomy
- **Sovereignty**
control over infrastructure and data
- **Wartime relevance**
6G as dual-use: civilian & defense



Where is the money?

	Net Profit Margin [%] avg last 5 years	
	Sector Telco	6,04
	Orange Polska	6,74
US	AT&T	4,17
US	Verizon	13,65
US	T-mobile US	7,20
Europe	Deutsche Telekom	7,77
Europe	Orange SA	5,61
Europe	Telefonica	4,87
Europe	Telecom Italia	-8,73
Europe	KPN	14,91
UK	BT Group	6,78
UK	Vodafone	7,73
Japan	NTT	3,92
Japan	Softbank	9,06
Indie	Bharti Airtel	-7,67
Mexico	América Móvil	7,51
China	China Mobile	13,55
China	China Telecom	5,72

Source: www.roic.ai

CAPEX ↑

Value ↓

Network access/services - subscription

Voice services - billed in minutes

SMS/MMS- billed per unit

Data usage - billed per MB/GB

Bandwidth – billed in Mb/s

subscription

	Net Profit Margin [%] avg last 5 years	
	Sector Platform	28,75
US	Microsoft	34,84
US	Alphabet	25,08
US	META	30,81
US	Apple	24,28
	Mixed models	
US	Amazon	5,09
US	Netflix	16,17

Will „6G” restore operators' agency in the digital value chain?

The Telco Dilemma

