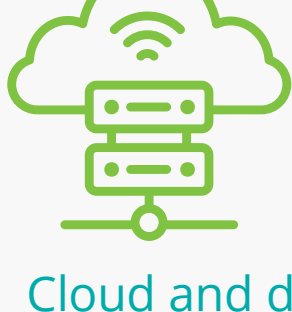


Gathering velocity

Technology will continue to transform how we work and live—in 2021 and beyond



Cloud and data center

The cloud cover intensifies in 2021, and it is a bright future

2020 saw many unprecedented catalysts arriving together to accelerate the demand for cloud including the COVID19 pandemic, organization transforming for the 'new normal', policy push by the government and a maturing cloud ecosystem

\$10.3B By 2023 Predicted size of the cloud and colocation market in India

\$11.3B to

30% CAGR 2020 to 2023 Projected growth of the cloud and colocation market in India

>\$1.5B 2019 to 2020 Over a dozen transactions in the data centre space valued in excess of \$1.5B

IaaS, SaaS, and colocation are expected to constitute the largest opportunities in the cloud space with IoT & edge computing, serverless and exponential computation emerging as important use cases



Online Gaming

At a screen near you

Video games have 'levelled up' - making the leap to nearly every screen, and capturing hearts young and old.

\$2.8B By 2022 Online gaming, driven by key segments will reach \$2.8B (growing at 40% CAGR)

10% Will command a larger portion of the Indian Media & Entertainment industry from current 4-5%

40M User additions to online gaming by 2022

Powered by multiple ingredients, online gaming is plugged in and rising up the progression curve rapidly.



Intelligent edge

Racing to the edge

As technologies mature and combine, tomorrow's internet will dwarf today's.

\$12B By 2021 5G, hyperscale cloud, and other edge techs will drive a \$12B market (growing at 35% CAGR).

70% By 2023 70% of enterprises will be using the intelligent edge.

\$16B By 2025 The edge data center market will reach \$16B.

Vehicles, VR, and the Internet of Things—faster, cheaper, more secure, and paving the way for the Fourth Industrial Revolution.



Cloud migration

For cloud computing, a sunny forecast

Amid lockdowns, COVID-19 made cloud a rare focus of growth. Soon it will be standard.

In 2020 Total IT spend down 10%, hyperscale cloud revenue up 25%, cloud chip sales up 45%

2x Cloud internet traffic doubled 2019 volume during the pandemic.

30% In 2021 Cloud revenue will grow >30% annually through 2025.

\$150B In 2022 Hyperscale capital spending will top \$150B.

The more the cloud grows, the more space there is to mine it for value creation.



5G and health

Facts versus fears

New 5G cellular networks use far less energy than radio or TV and present no proven health risks. But some people still fear it causes cancer and spreads COVID-19.

13% to 36% Public perception 13% to 36% of people in 14 countries believe 5G presents health risks.

Power output 5G base station: 100–200 Watts
TV and FM radio: 100,000 Watts
AM radio: 500,000 Watts

FM radio and TV expose people to 5 times the radio energy they absorb from cellular.

5G actually uses less transmitting power than 4G. Clear, consistent messaging will be necessary to overcome myths about its danger.



Open RAN

Proprietary no more

Advanced mobile services will rely on the flexibility of open, virtualized Radio Access Networks (RAN).

70+ By 2021 More than 70 open RAN trials active, doubling current activity.

80% By 2023 80% of core wireless network deployments will be virtualized.

10x By 2025 Open RAN share of the RAN market may grow 10 times or more.

History repeats itself as closed gives way to open and hard gives way to virtual.



The digital athlete

A new peak for performance

Athletes everywhere are finding a new edge in data and analytics. How can sports benefit effectively—and ethically?

\$500M In 2019 \$500M lost to injuries in the NFL alone.

3k Since 2014 3,000 sports tech deals.

\$150B By 2024 Global sports betting will reach \$150B.

Leagues will need new policies built on a foundation of openness and trust.



8K TV

Bigger, sharper TVs

The standard for image quality—and bragging rights—is rising yet again.

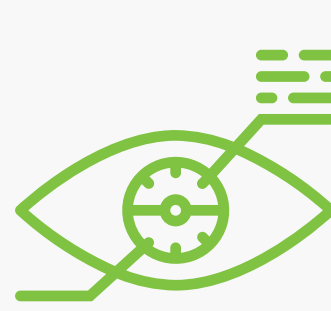
Specs 4K TV: 8M pixels
8K TV: 33M pixels

\$2.5B In 2020 8K TV sales total \$2.5B.

1M In 2021 8K TV sales will reach 1M units (out of a total 220M-unit market)/ \$3.3B and rising.

\$1.5k 8K sets will average \$3,300 but entry level will fall to \$1,500.

As 8K TVs grow in the market, the cameras and equipment to generate 8K content will grow in parallel.



Digital reality

Virtual gets real

Headsets improve learning, conquer distance, and keep danger away. They're a small market on a fast track.

2x In 2021 Enterprise and educational revenue for XR headsets will be twice 2019 levels.

32% Enterprise VR increases productivity 32%.

75% AR training boasts a 75% retention rate.

As pilot projects mature into full deployments, headset hardware will claim a greater percentage of project value



Virtual medical visits

Medicine at a distance

Video doctor consults were "coming soon" for years—until COVID-19. Now it seems they're here to stay.

43% In spring 2020 April Medicare primary visits were 43% telehealth (April 2019: 1%).

100% Video consults in France rose 40% to 100%.

5x In 2021 5% of doctor visits will be virtual— 5 times the 2019 level.

\$25B 400M virtual visits will represent \$25B.

Advancements in app-based diagnostics along with main streaming of virtual consulting will evangelize healthcare pan India.

The insights represented here are only part of the picture. Explore our full report on 2021 predictions to get more details on the emerging landscape.

<https://www2.deloitte.com/in/en/pages/technology-media-and-telecommunications/articles/tmt-predictions-2021.html>

#TMTIndiaPredictions

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. Please see www.deloitte.com/about for a more detailed description of DTTL and its member firms.

This material is prepared by Deloitte Touche Tohmatsu India LLP (DTIILLP). This material (including any information contained in it) is intended to provide general information on a particular subject(s) and is not an exhaustive treatment of such subject(s) or a substitute to obtaining professional services or advice. This material may contain information sourced from publicly available information or other third party sources. DTIILLP does not independently verify any such sources and is not responsible for any loss whatsoever caused due to reliance placed on information sourced from such sources. None of DTIILLP, Deloitte Touche Tohmatsu Limited, its member firms, or their related entities (collectively, the "Deloitte Network") is, by means of this material, rendering any kind of investment, legal or other professional advice or services. You should seek specific advice of the relevant professional(s) for these kind of services. This material or information is not intended to be relied upon as the sole basis for any decision which may affect you or your business. Before making any decision or taking any action that might affect your personal finances or business, you should consult a qualified professional adviser.

No entity in the Deloitte Network shall be responsible for any loss whatsoever sustained by any person or entity by reason of access to, use of or reliance on, this material. By using this material or any information contained in it, the user accepts this entire notice and terms of use.

©2021 Deloitte Touche Tohmatsu India LLP, Member of Deloitte Touche Tohmatsu Limited