

5G Economic Impact Whitepaper

Executive Highlights

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 accenture

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5G Economic Impact Between 2021 – 2025

Qualcomm and Accenture partnered to create a 5G economic impact whitepaper for U.S. and Europe, here is a quick summary



Drive up to \$2.7 TRILLION in additional U.S. gross output *



Add up to \$1.5 TRILLION to the U.S. GDP



Create or transform up to 16 MILLION (full-time + part-time + temp) U.S. jobs**

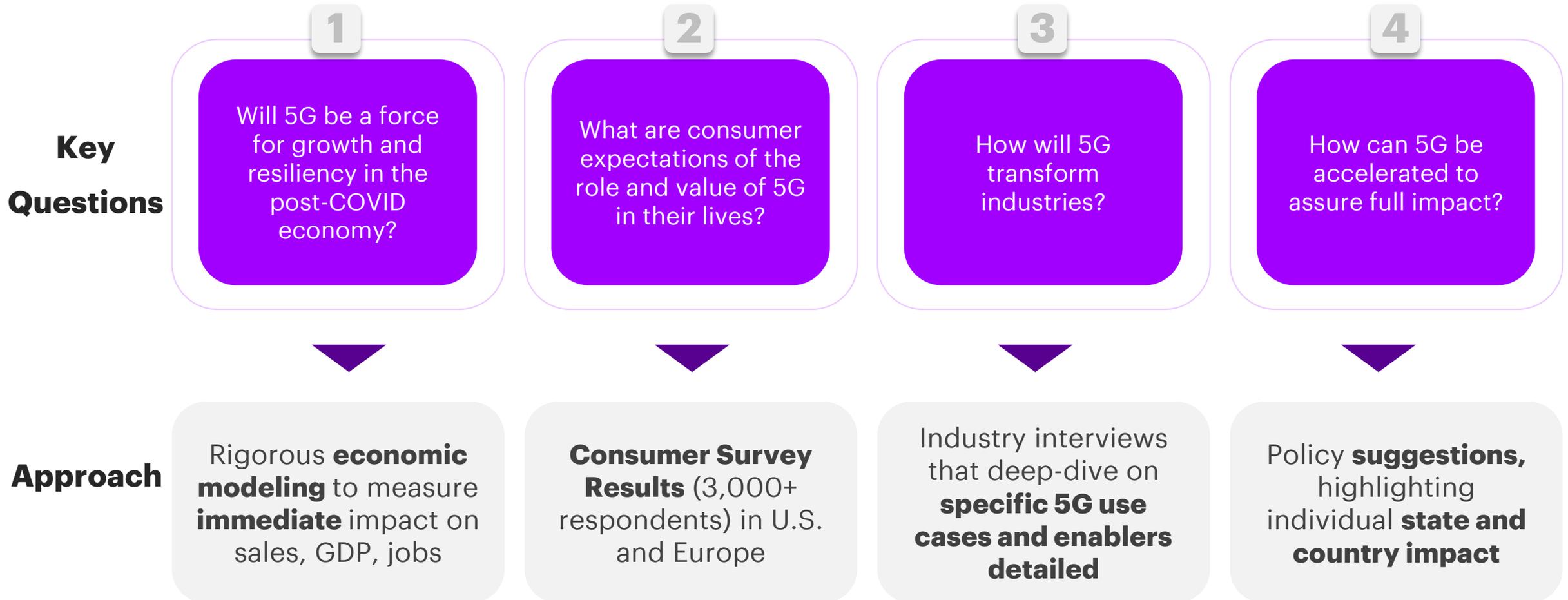
** 5G sales value indicates additional sales increase based on new 5G connections*

***Assumes no labor supply constraints, some of these jobs will be replaced by upward pressure on prevailing wages instead.*

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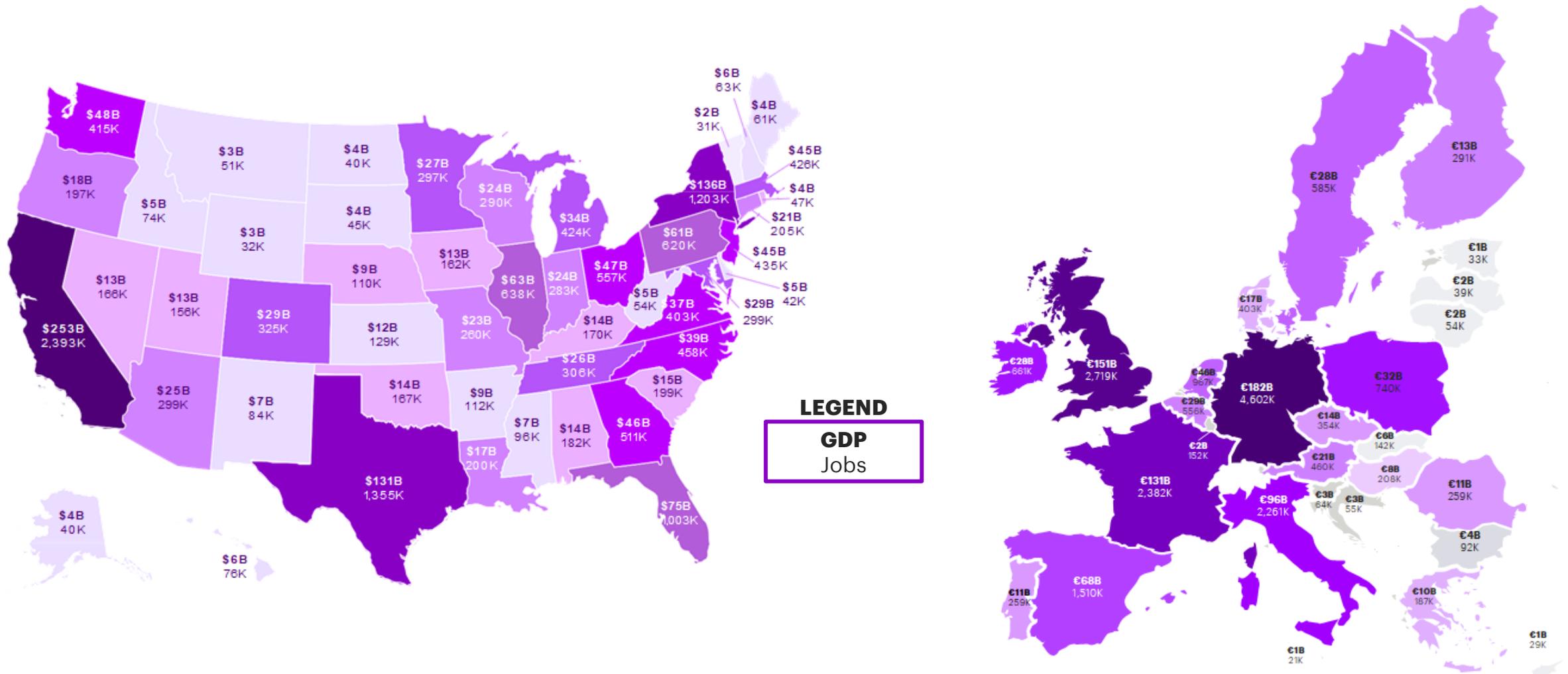
5G Economic Report Key Questions

Within this economic analysis, Qualcomm and Accenture economists worked together to address four key questions



U.S. and Europe GDP and Jobs Breakdown

5G's economic impact will be felt across the United States and Europe



Includes full-time, part-time and temporary jobs; Assumes no labor supply constraints, some of these jobs will be replaced by upward pressure on prevailing wages instead.

Sample U.S. and Europe Highlights by Industry

Below we've highlighted some of our key findings over the course of this engagement, through research, interviews and surveys.

MANUFACTURING



- 20%- 30% potential overall productivity gains
- 50% improvement in assembly efficiency
- 20% increase asset life
- 90% defect detection

HEALTHCARE



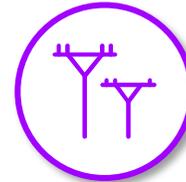
- 30% cost savings in transition to remote-home based models
- Improved patient outcomes and access to care

AUTOMOTIVE



- Up to 80% reduction of vehicle collisions*
- \$3.6 billion savings in repair costs
- 25% reduction in traffic

UTILITIES



- ~Billions in savings resulting from 5G transmission and distribution line monitoring
- Drive down 12% of energy use
- Reduce risk of wildfires

RETAIL



- Up to 50% sales growth when combined streaming and XR

AGRICULTURE

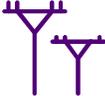


- 25% potential increased productivity
- 30% potential decrease inputs
- 20% potential decreased costs
- 15% increased crop yields

Note(*): With 5G supporting technology.

Sample 5G Use Cases Estimated (non-exhaustive)

Through our industry experience, 5G project work and primary industry client interviews, we highlighted a set of use cases by industry

 MANUFACTURING	 HEALTHCARE	 AUTO/TRANSPORT	 UTILITIES	 RETAIL	 AGRICULTURE	 FINANCE
FACTORY FLOOR AUTOMATION	VIRTUAL HEALTH	AUTONOMOUS VEHICLES / AGV	INTELLIGENT GRID MOD	EXTENDED REALITY SHOPPING	PEST AND WEED ERADICATION USING DRONES (UAVS)	ADVANCED BIOMETRIC / WEARABLE LOCAL AUTH
INTELLIGENT ASSET MANAGEMENT	REMOTE PATIENT MONITORING	INTELLIGENT TRANSPORT	SMART POWER PLANT	FRICTIONLESS CHECKOUT	SMART TRACTOR	VIRTUAL BANK TELLER
QUALITY ASSURANCE (PRODUCT AND PROCESS)	FUTURE HOSPITAL	CRASH DETECTION AND INSURANCE	FUTURE WORKER	IN-STORE MONITORING	LIVESTOCK MONITORING	CONVERGED PAYMENTS (V2X)
WORKFORCE EFFECTIVENESS		AUTOMATED TRAIN OPERATIONS (ATO)				FUTURE INSURANCE CLAIMS



U.S. Consumer Survey Findings Snapshot

5G's benefits include enabling work from home, bridging the digital divide, and better services

1

Connectivity is a fundamental expectation and is seen as essential.

2

Consumers are not quite getting what they need in terms of quality.

3

US consumers recognize the digital divide.

4

People really like working from home—and want to if they don't already.

5

Consumers are surprisingly willing to pay for potential added benefits or new services.

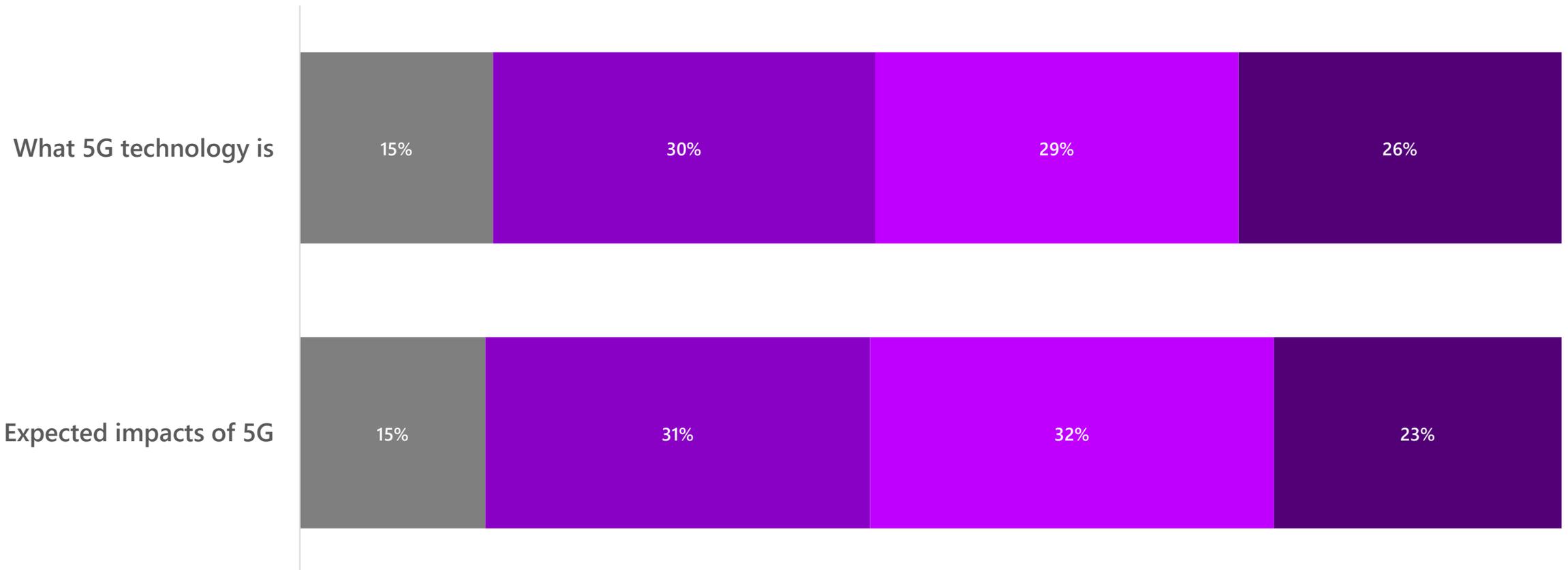
6

5G has an image problem.

Potential of 5G Still Requires Consumer Education

How well do you understand what 5G technology is? How well do you understand the potential impacts of 5G on your life?

■ No understanding at all ■ Minimal understanding ■ Moderate understanding ■ Strong understanding



Download the 5G Economic Whitepapers

U.S. 5G Economic Impact Whitepaper Website and pdf

<https://www.accenture.com/us-en/insights/high-tech/5g-economic-impact>

Europe 5G Economic Impact Whitepaper pdf

https://www.accenture.com/_acnmedia/PDF-144/Accenture-5G-WP-EU-Feb26.pdf

