

A close-up photograph of a mechanical assembly, likely a part of a machine. The image shows several circular components, possibly rollers or guides, arranged in a cluster. A thin, dark wire or cable runs across the scene, passing through or near these components. The background is a metallic surface with various screws and mechanical parts visible. The lighting is dramatic, with strong highlights and shadows.

RCS MESSAGING

sinch**ENGAGE**



“Messaging brings brands into the inner circle where you talk to your closest friends.”

“Messaging provides an opportunity for brands to build deeper relationships with their customers....a means of forging deeper connections...”

—WIRED DECEMBER 2018

RCS NEXT GENERATION CUSTOMER ENGAGEMENT



WHAT IS RCS?

“Messaging 2.0” – Next generation network messaging that enables richer, “conversational” interactions across devices on any network.

RICH COMMUNICATION SERVICES

Global standard, sponsored by GSMA, backed by 53 operators, 11 OEMs, Google, Microsoft—and growing.

Universal Profile

A single, industry-agreed set of features and technical enablers developed to simplify the product development and global operator deployment of RCS.

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Release 1 (Nov 2016) – Includes core features such as capability discovery, chat, group chat, file transfer, audio messaging, video share, multi-device, enriched calling, location share and live sketching.

Release 2 (July 2017) – Introduces the key enablers for Messaging as a Platform (MaaP). MaaP includes support for Application-to-Person messaging, Rich Cards, privacy control and spam protection.

Release 2.1 (Dec 2017)

Release 2.2 (May 2018) – A2P enhancements



FORECAST: US ENTERPRISE INVESTMENT IN RCS

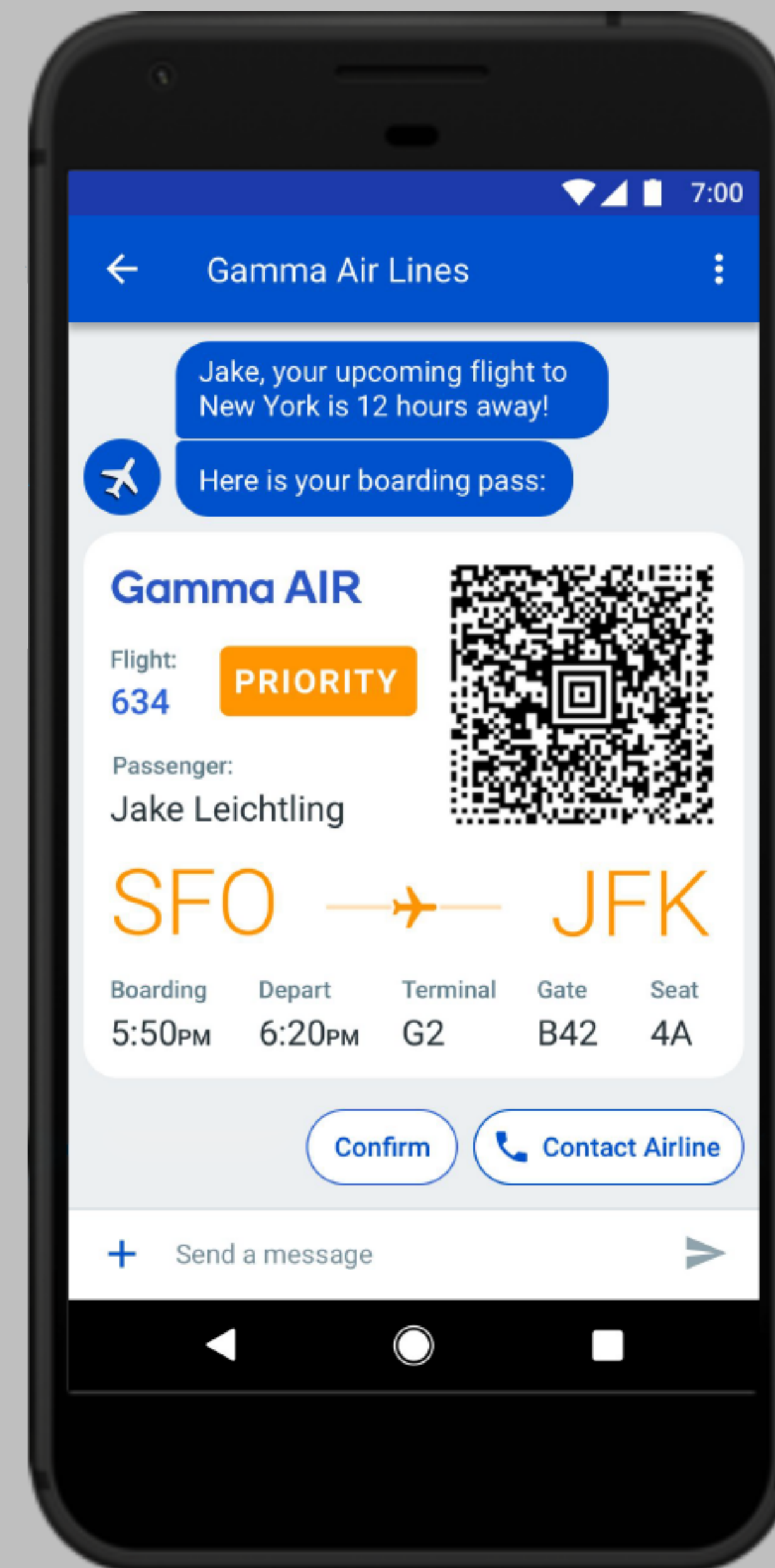
\$18B

2023

— Source: MobileSquared 2019

RCS BUSINESS MESSAGING: CONSUMER INTERACTION AROUND BRANDED, VERIFIED RICH-CONTENT EXPERIENCES.

- Web and app-like interactive messaging experience in the phone's native SMS app
- RCS=rich media messaging conversation
- Broadcast (A2P) RCS push to lists
- Branded native SMS app chatbot (P2A)



RCS BUSINESS MESSAGING: CONSUMER INTERACTION AROUND BRANDED, VERIFIED RICH-CONTENT EXPERIENCES.

- Verified name of business
- Conversation is Brand's color
- Messages include Brand logo
- Large content (10MB -- 50MB)
- Images, video, text, audio, vCard
- Chips: reply & action buttons
- Suggested replies send a text back
- Action buttons invoke other apps
- Maps, Call, Web, Calendar



FEATURES

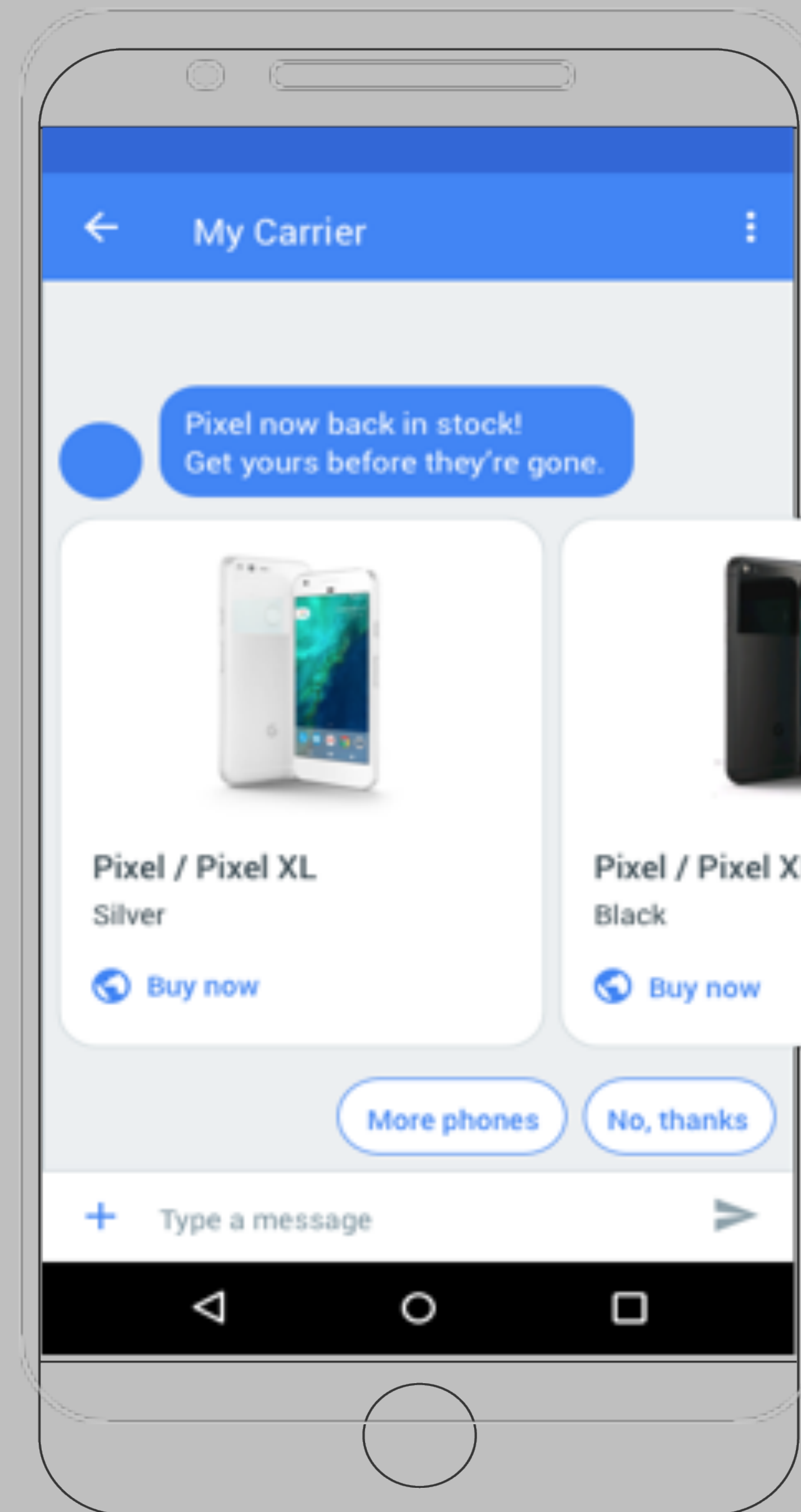
Rich Card Carousels

Verified Sender

Location Sharing

Anonymization of Users

Directory Query

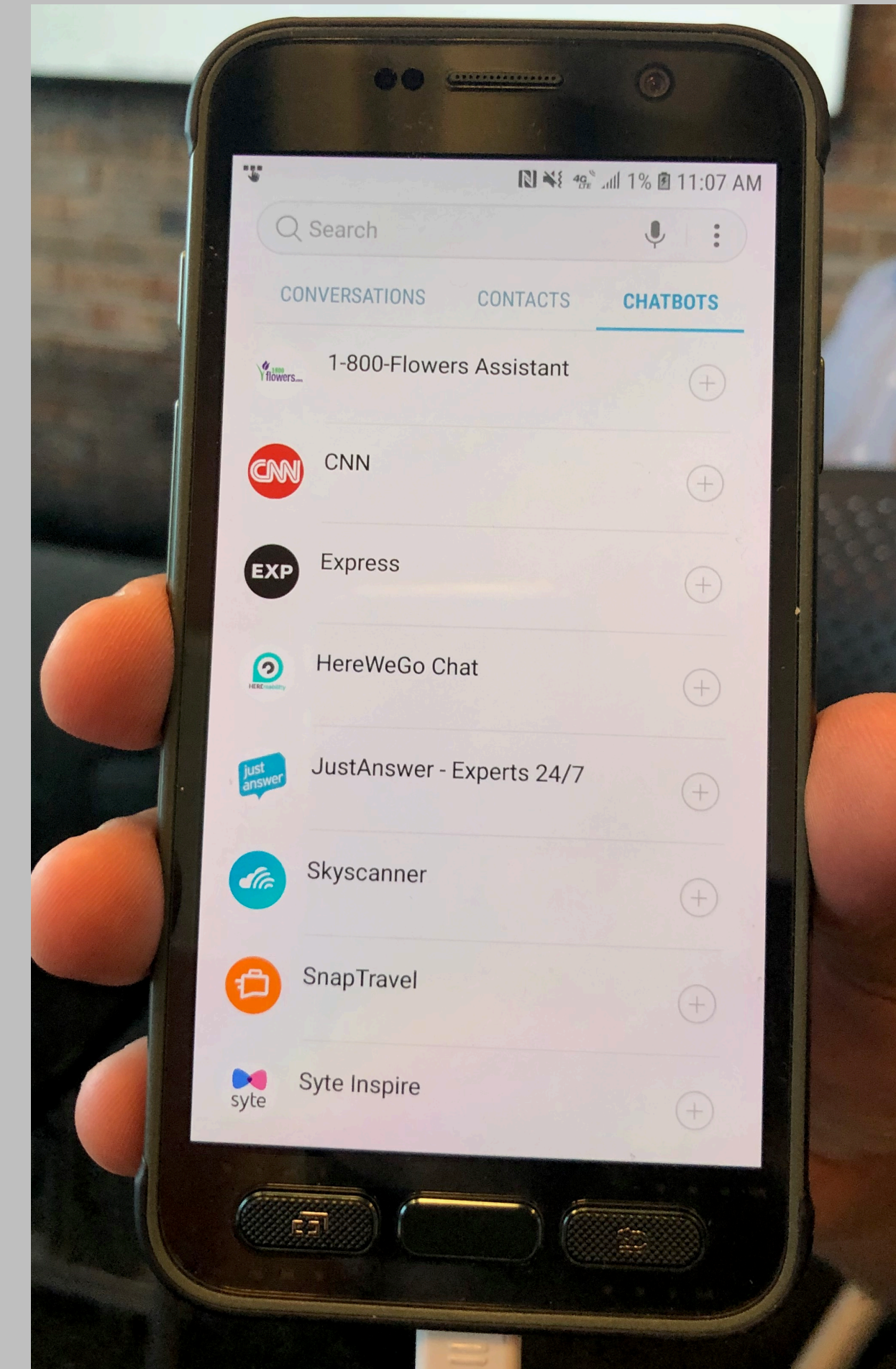


STATUS FOR AT&T

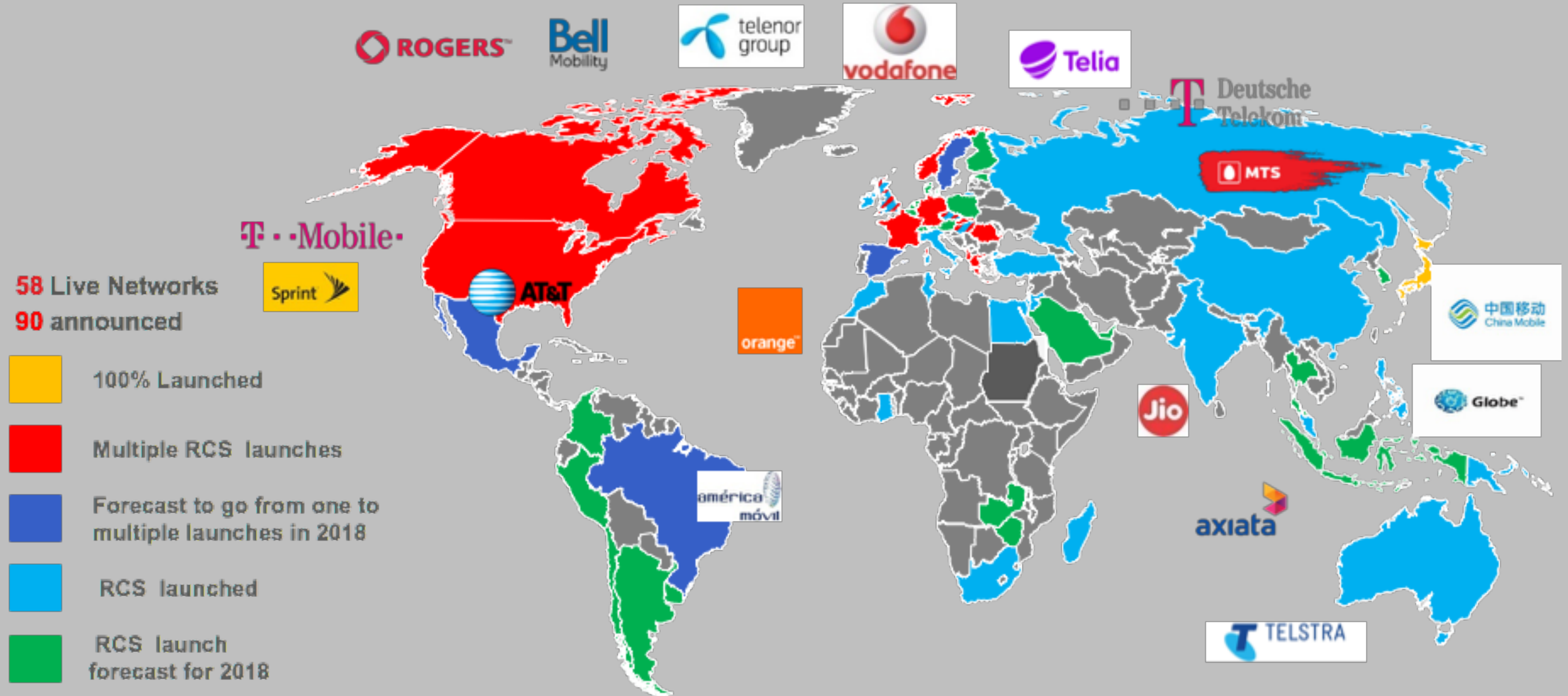
RCS is currently deployed on Samsung* devices on the AT&T network with growing number of brands featured in “chatbot” directory.

* Galaxy S6 (and above) ~ 3M subscribers

* Forecast is for 100%+ growth in 2019



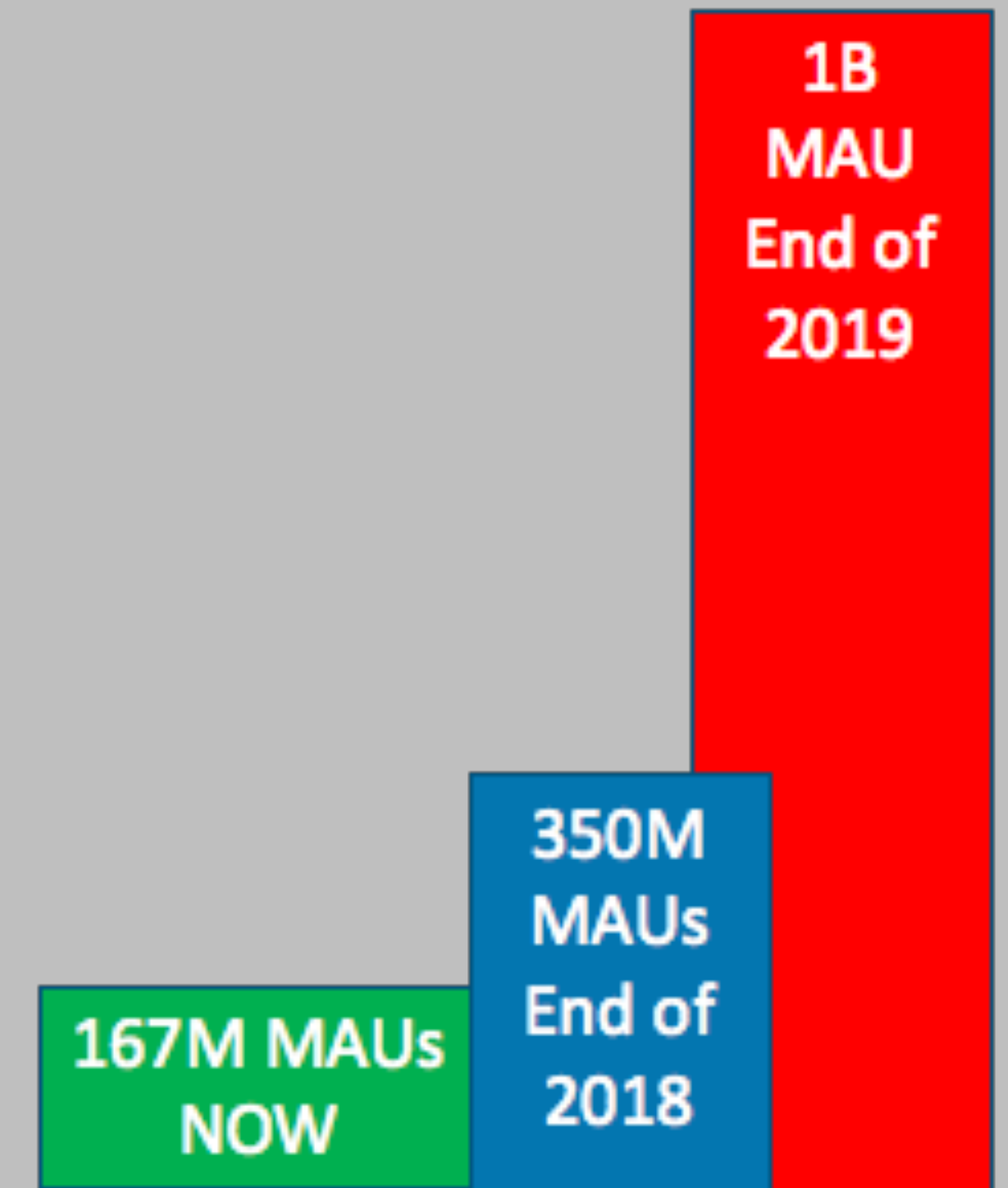
RCS LAUNCH STATUS



RCS MARKET DEPLOYMENT

Statistics from GSMA

- RCS has been launched by 58 operators in 40 countries
- 40 more in 30 countries expected in the next 12 months
- Currently 167M Monthly Active Users (MAUs)
- Projecting 350M MAUs by end of 2018
- Projecting 1B MAUs by end of 2019
- Projected growth for A2P Messaging: \$60B now to \$90B in 2021



RCS Handset Penetration

- Upon launch of P2P RCS, penetration starts at 0%, but many phones can be upgraded
- In networks that have deployed P2P RCS, penetrations rates have achieved 25-30% so far

APPLE

- Apple Inc. represents under 15% of handset sales globally but up to 40% in some markets
- Recently Apple has engaged in discussions with GSMA and Operators about including RCS in iOS to:
 - Provide a better fall-back than SMS, when messaging non-iMessage devices (Apple to Apple would still use iMessage)
 - Improve the Apple-to-non-Apple messaging experience for its customers
 - Meet the needs of Operators in high-Apple-concentration markets deploying RCS
 - Prepare for the post-2G, post-SMS future
- **Operators putting pressure on Apple to launch RCS**

GSMA Universal Profile Commitments

The GSMA ensures interoperability between RCS clients, networks and hubs.

53
Operators



11
OEMs



2
OS Providers



alcatel

htc

SAMSUNG

SONY



NOKIA

GENERAL MOBILE



RCS DEPLOYMENT TODAY

Brand/
Enterprise

RCS Marketing
Provider

RCS MAAP
Infrastructure

Carrier
Networks

Carrier
Subscriber

Walmart
Best Buy
Weather Channel
Express
FC Barcelona
IHG
Accuweather
Groupon
1-800 Flowers
Kroger
Warby Parker
SnapTravel
SeatGeek

sinch

Google

SAMSUNG

MAVENIR

 **AT&T**

verizon✓

T-Mobile

Sprint 

 **ROGERS**

RCS US REACH

	2019	2020	2021	2022	2023
P2P Enabled Devices	69,333,082	84,126,521	101,457,601	110,594,722	112,274,244
A2P Enabled Devices	55,466,466	79,920,195	96,384,721	105,064,986	106,660,532
P2P % of total smartphones	23.50%	27.90%	33.10%	35.80%	36.20%
A2P % of total smartphones	18.80%	26.50%	31.50%	34.00%	34.40%
USA Population	330,625,882	332,958,657	335,282,665	337,598,262	339,905,387
P2P % of total population	21.00%	25.00%	30.00%	33.00%	33.00%
A2P % of total population	16.78%	24.00%	29.00%	31.00%	31.00%

SOURCE: MOBILE SQUARED



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