

# 2018 Annual Meeting of Members

Welcome – we will begin in a few minutes

- Chairman's Introduction
  - *Motion #1: Minutes of last Annual Meeting of Members (AMOM) meeting*
- Financial Report - 2017-18
  - *Motion #2: To appoint Auditors*
- Annual Report
  - *Governance structure*
  - *Forum Strategy, progress of key strategic programs and priorities for the next 12 months*
- Q&A
- Any Other Business

## **Motion**

Propose that the available minutes shall be taken as a true and fair record of the Annual Meeting of Members held on 30 January 2018.

***Proposed:*** David Pleasance, *TM Forum Chairman*

***Seconded:*** Nik Willetts, President & CEO, TM Forum

**Note:** Only Principal contacts may vote. Please do not vote again if you have already placed your vote via the online survey.

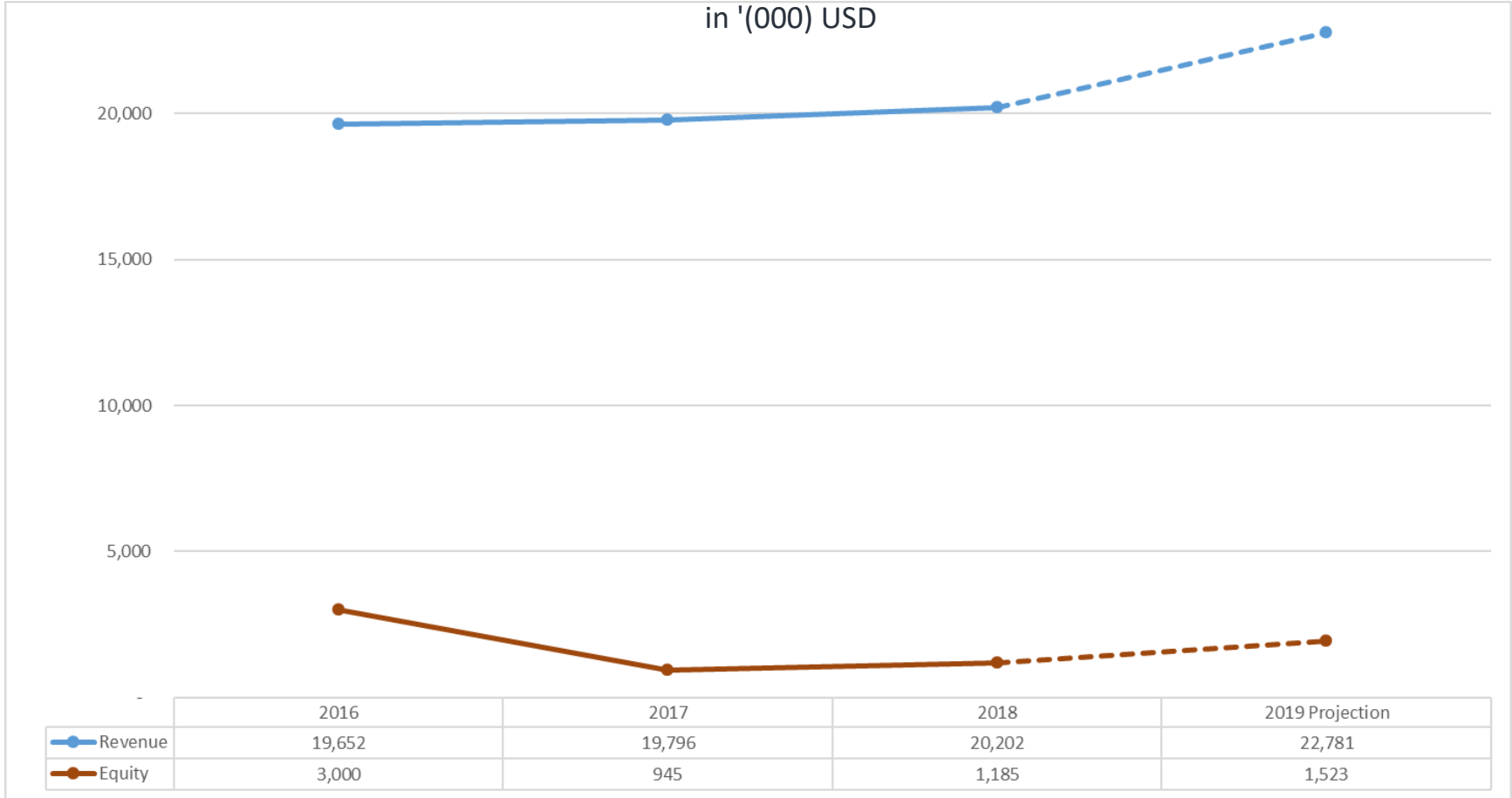
# Financial Report & Appointment of Auditors

Olga Martynov, CFO  
Treasurer and Secretary to the Board

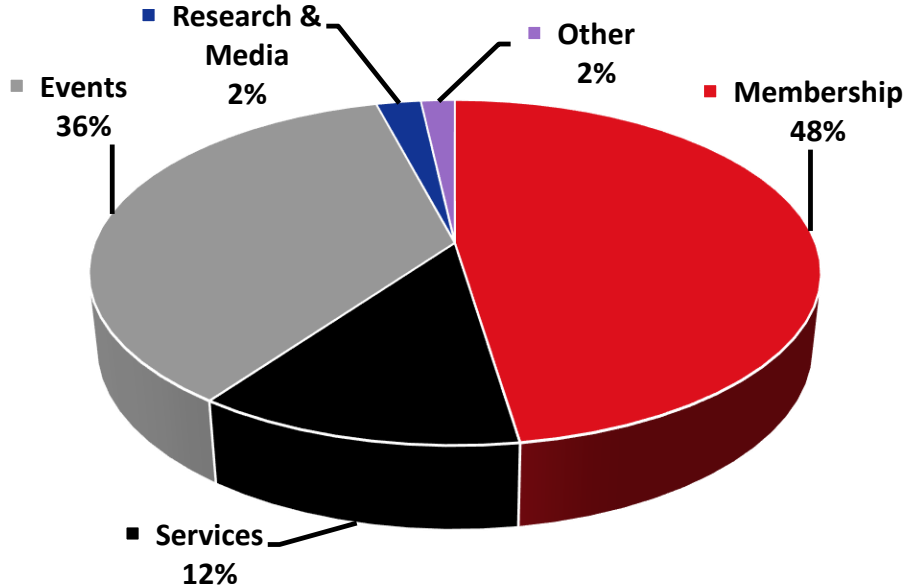
# TM Forum Revenue and Member Equity for FY17-18 (unaudited)

3 Year History with 2019 Projections

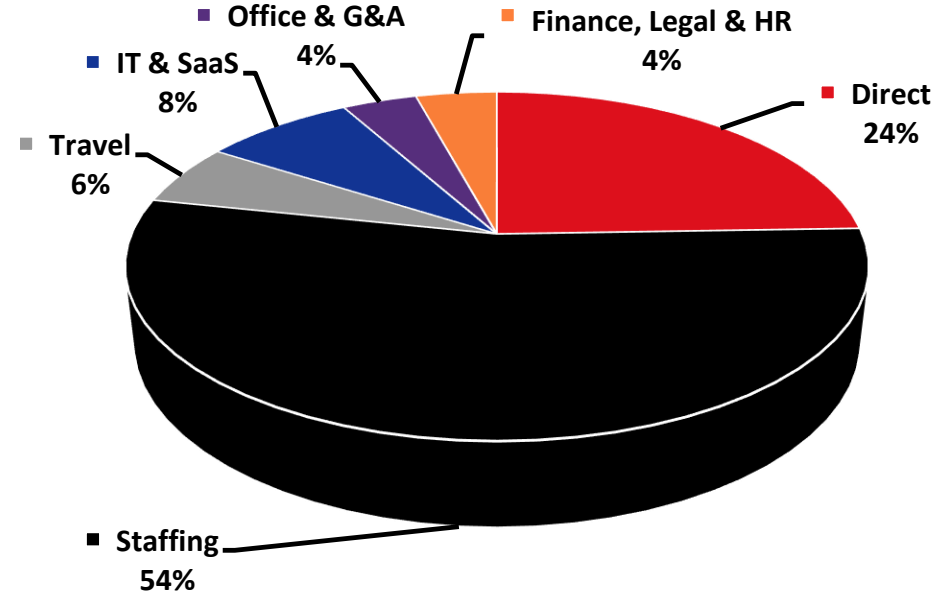
in '(000) USD



## FY 17-18 Revenue of \$20.2M



## FY17-18 Expenses of \$19.7M



# Balance Sheet (unaudited)

	<u>March 31, 2018</u>	<u>March 31, 2017</u>
Cash & Investments	3,013,641	2,984,104
Net Accounts Receivable	5,720,790	5,987,325
Net Fixed Assets	1,448,542	1,559,921
Event Prepaid	1,395,877	1,381,655
Deposits & Prepaid Expenses	352,236	453,060
<b>Total Assets</b>	<b>11,931,086</b>	<b>12,366,065</b>
Accounts & Taxes Payable	778,395	1,165,035
Deferred Revenue	9,235,696	9,684,432
Future Expense Accruals	732,380	571,462
<b>Total Liabilities</b>	<b>10,746,471</b>	<b>11,420,929</b>
<b>Total Member Equity</b>	<b>1,184,615</b>	<b>945,136</b>
<b>Total Liabilities &amp; Equity</b>	<b>11,931,086</b>	<b>12,366,065</b>

### **Motion**

Propose that Smolin, Lupin, & Co., PA shall be appointed as auditors for the corporation for the financial year 2018/19.

***Proposed:** Michael Lawrey, TM Forum Director and Chair of Finance Committee*

***Seconded:** Olga Martynov, CFO, Treasurer & Secretary to the Board*

**Note:** Only Principal contacts may vote. Please do not vote again if you have already placed your vote via the online survey.



# Annual Report 2017-18

Nik Willetts, President & CEO

# Current Board



David Pleasance  
Deloitte  
**Chairman, TM Forum**



Dr. Haiping Che  
CTO & Vice President  
Huawei



Rachel Higham  
Managing Director, IT  
BT



Gary Miles  
Chief Marketing Officer  
Amdocs



Nik Willetts  
President & CEO  
TM Forum



Alpa Doshi  
Group CIO, Business  
Transformation & IT  
Royal Philips



Dr. Li Huidi  
EVP  
China Mobile



Steffen Roehn  
CIO & Advisor  
Reliance Jio  
**Chair, Digital Ecosystem  
Advisory Board**



Olga Martynov  
CFO, Board Treasurer  
& Secretary  
TM Forum



Bhaskar Gorti  
President  
Nokia Software  
Nokia



Michael Lawrey  
Independent  
**Chair, Finance Committee**



Thierry Souche  
CIO  
Orange Group



Bob de Haven  
General Manager,  
Worldwide  
Communications & Media,  
Microsoft



Harmeen Mehta  
Global CIO  
Bharti Airtel  
**Chair, Appointments  
& Governance Committee**



Doug Suriano  
SVP & General Manager  
Oracle

## Ex-Officio Directors

# Board engagement and momentum is high



**Haiping Che**  
*Chief Strategy Officer,  
Digital Transformation*  
**Huawei  
Technologies**



**Thierry Souche**  
*Group CIO*  
**Orange**



**Harmeen Mehta**  
*Global CIO*  
**Bharti Airtel  
Limited**



**David Pleasance**  
*Senior Partner Deloitte*  
**Chairman  
TM Forum**



**Rachel Higham**  
*Managing Director*  
**BT**



**Steffen Roehn**  
*CIO & Senior Advisor*  
**Reliance Jio**



**Alpna J. Doshi**  
*CIO*  
**Phillips Group**



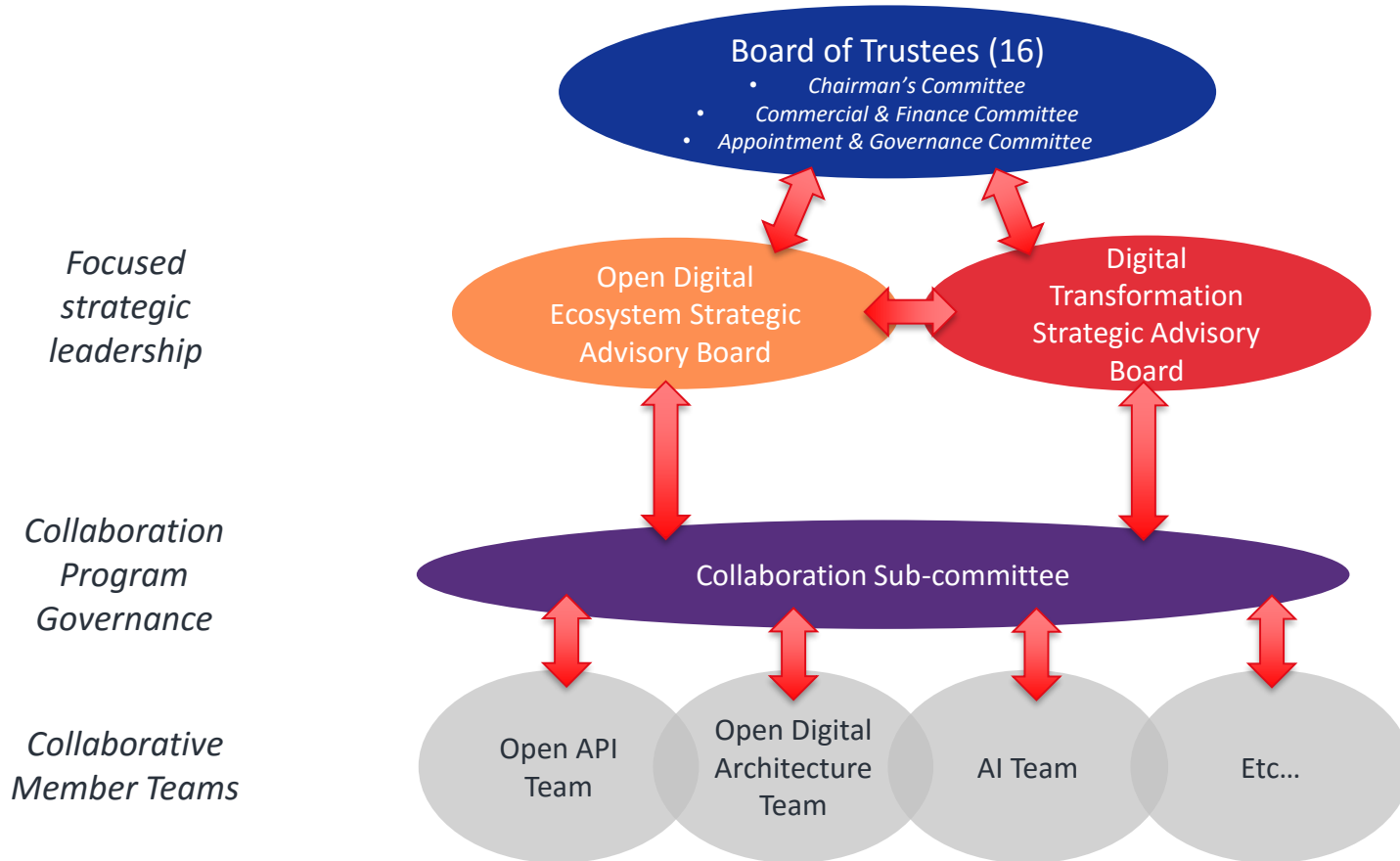
“ A good digital leader combines vision, the ability to operationalize that vision through fair process and delivery, energy to see the vision through and people leadership skills to drive change. ”

**Ibrahim Gedeon**  
CTO, Telus

## THE FACE OF DIGITAL LEADERSHIP

To view more digital leaders visit [www.tmforum.org/meettheboard](http://www.tmforum.org/meettheboard)

# Proposed new Board & governance design



\* Committee and Advisory/Strategic Board Chairs sit on Chairman's Committee

# TM Forum Senior Leadership Team



**Andy Tiller**  
*EVP, Collaboration  
& Innovation*

**Paul Wilson**  
*Chief Marketing  
Officer*

**Nik Willetts**  
*President & CEO*

**Olga Martynov**  
*Chief Financial Officer*

**Tim Banham**  
*Managing Director,  
Membership  
Engagement & Sales*



How we work - the first thing you wish you had is more...

We make **TIME** so you  
can go faster

# TIME

## Think

6 Month cycle

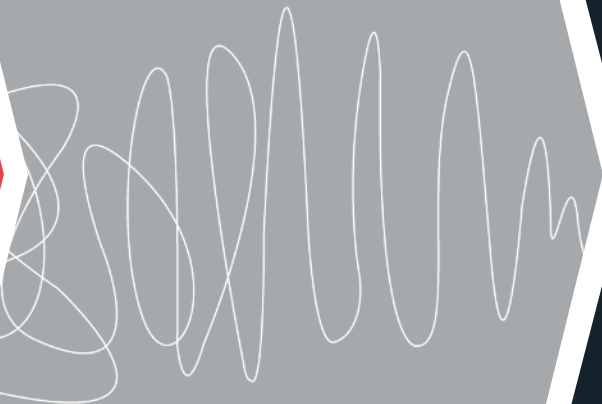


Non-Members

Members

## Innovate & Make

6 -12 Month cycle



Members

## Execute

Ongoing



Members

Non-Members

How we work - the first thing you wish you had is more...

We make **TIME** so you can go faster

# TIME

## Think

6 Month cycle

### Research

In-depth research of the key challenges and opportunities in our industry

### Media / Inform

News-analysis, opinions and thought leadership

### Conferences

Gathering the community to work through all the key issues

### Community

Share and grow ideas and connect with peers

## Innovate & Make

6 -12 Month cycle

### Collaborative R&D Projects

Member-driven research & development collaborations to shape the future of our industry

### Catalyst Projects

Rapid fire, member-driven proof-of-concept projects

### Open Digital Labs

A small number of digital labs, first one with University of Bristol

## Execute

Ongoing

### Digital Maturity Model

Industry standard tool to navigate the maze of digital transformation

### Frameworks

Blueprint for best practice business operations

### Open APIs

Standardized interoperability for IT systems & partner integration

### CurateEx

Modeling tool for ecosystem projects & digital transformations

### Toolkits

Best Practice Guides | Technical Reports | Maturity Models...

### Training & Education

Training | Coaching | Conformance Certification | Maturity Assessments

Non-Members

Members

Members

Members

Non-Members



We're helping our members address the critical business challenges... tmforum



## Navigate Transformation

*Accelerate and execute  
urgent business  
transformation to seize  
the digital opportunity*



## Deliver Business Agility

*Dramatically simplify and  
automate to deliver zero-  
touch operations fit  
for the 5G world*



## Manage Digital Ecosystems

*How to rapidly onboard,  
manage and grow  
partnerships that underpin  
business model  
transformation*

to enhance their customer experience, profitability and opportunities to grow.

# 2018-19: 3 critical challenges, 5 industry collaboration focus areas

THREE CRITICAL CHALLENGES

FIVE FOCUS AREAS



Navigate Transformation

DIGITAL MATURITY



Model & Benchmark



Tracker

DIGITAL LEADERSHIP



Network



Awards



Community



Deliver Business Agility

SIMPLIFICATION, AUTOMATION & INTELLIGENCE



Reimagined OSS/BSS for zero-touch operations



Open Digital Architecture & APIs



Data Analytics & Customer Satisfaction



Agile Governance & Security

GAME-CHANGING TECHNOLOGIES



AI



Blockchain/DLT



Digital Ecosystem Management

DIGITAL ECOSYSTEM CREATION



IoE & Smart City



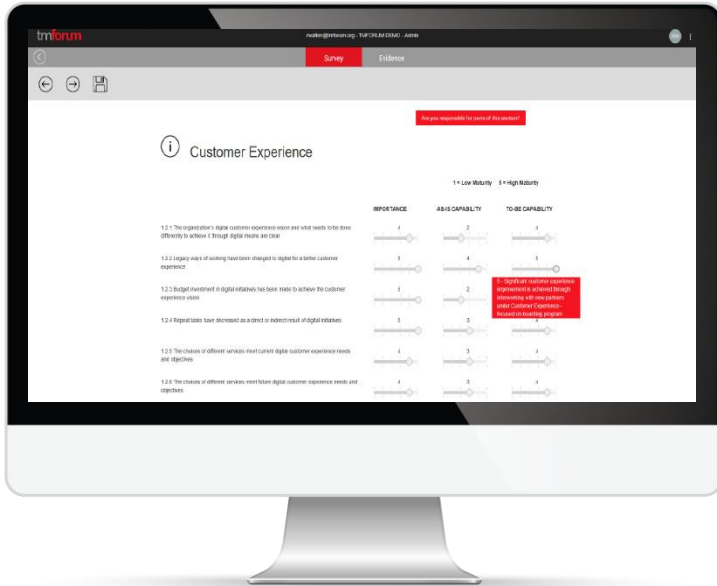
Biz Assurance



Ecosystem Catalysts

# 1/5 Digital Maturity Model – developed by industry, for industry

To help enterprises measure and navigate their complex digital transformation journeys by providing actionable insights, benchmarking and clear understanding of industry best practice, in order to prioritize investment and accelerate transformation.



# 1/5 Digital Maturity Model –

*The most comprehensive model to navigate the journey*



## Customer

Customer Engagement

Customer Experience

Customer Insights & Behaviour

Customer Trust and Perception



## Strategy

Brand Management

Ecosystem Management

Finance & Investment

Market & Customer

Portfolio, Ideation and Innovation

Stakeholder Management

Strategic Management



## Technology

Applications

Connected Things

Data & Analytics

Delivery Governance

Network

Security

Technology Architecture



## Operations

Agile Change Management

Automated Resource Management

Integrated Service Management

Real-time insights and analytics

Smart and Adaptive Process Management

Standards and Governance Automation



## Culture, People Organization

Culture

Leadership & Governance

Organisational design  
Talent Management

Workforce Enablement

179 specific digital criteria to test your organizational maturity

# 1/5 Digital Transformation Tracker: taking the industry's digital pulse **tmforum**

The telecommunications industry is in a catch-22: New digital architectures, processes and work practices such as Agile software development, DevOps, cloud and microservices can help communications service providers (CSPs) address the pressure they're under to cut costs and find new sources of revenue, but organizational silos and cultural issues like hierarchies, red tape and aversion to risk are standing in the way.

This is the key finding in our second Digital Transformation Tracker (DTT). As its name implies, the DTT tracks the status of digital transformation in the telecommunications industry and CSPs' perceptions about progress. We publish the tracker twice a year, and our inaugural edition appeared in October 2017.



## Digital Transformation Tracker 2: How to fix the cultural divide

[inform.tmforum.org](http://inform.tmforum.org)

**Author:** Mark Newman, *Chief Analyst:* [mnewman@tmforum.org](mailto:mnewman@tmforum.org)

**Editor:** Dawn Bushaus, *Managing Editor:* [dbushaus@tmforum.org](mailto:dbushaus@tmforum.org)

May 2018



# 3/5 Simplification, automation, intelligence

To continuously simplify and automate operations across the whole enterprise by reimagining systems and processes with in-built intelligence, unlocking the agility and zero-touch efficiency required to compete in the digital market and play a key role in new open ecosystems and business models.

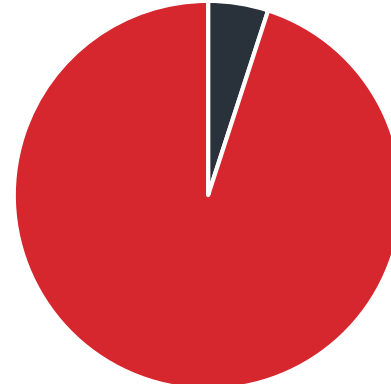
**1990s Mindset**  
Cost-centric: "Reduce the 5%"



■ IT ■ Rest of Business

- 'Internal supplier' of support systems
- Monolithic systems design
- Waterfall management & governance
- Deep technology expertise

**2018+ Mindset**  
Impact-centric: "Transform the 95%"



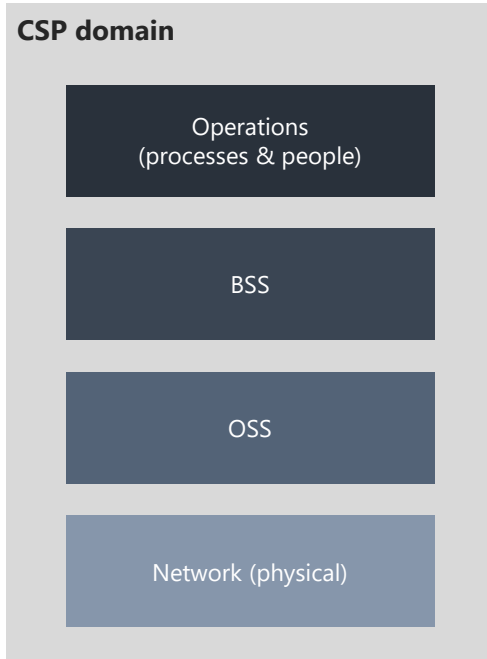
■ IT ■ Rest of Business

- Integral to innovation & improvement
- Modular, API-enabled design
- Highly agile front-end; super-stable backend

# 3/5 Reimagining OSS & BSS with Open Digital Architecture & APIs

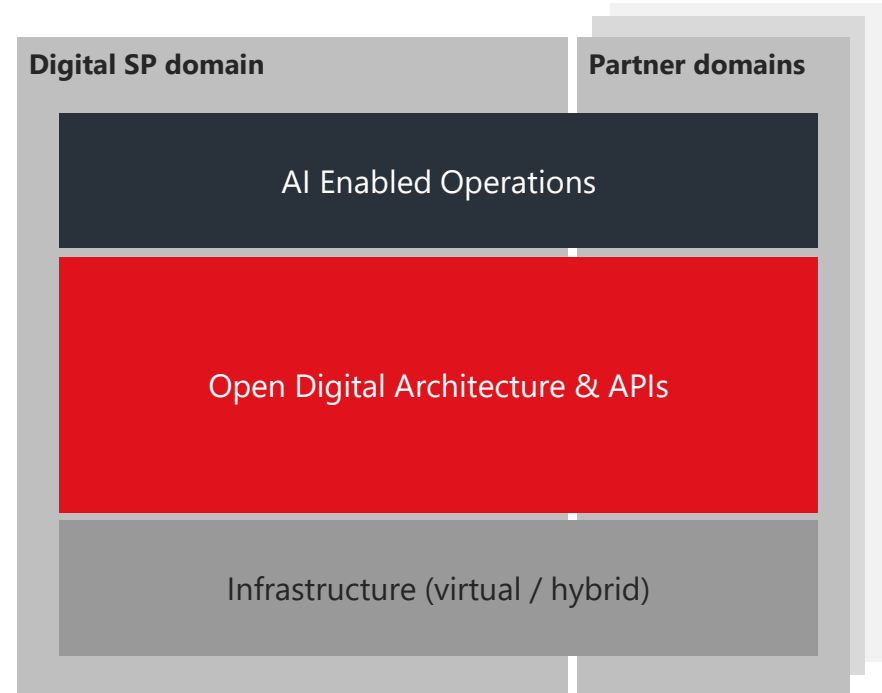
## 1990s IT Mindset

Cost-centric "Reduce the 5%"



## 2018 IT Mindset

Impact-centric: "Transform the 95%"



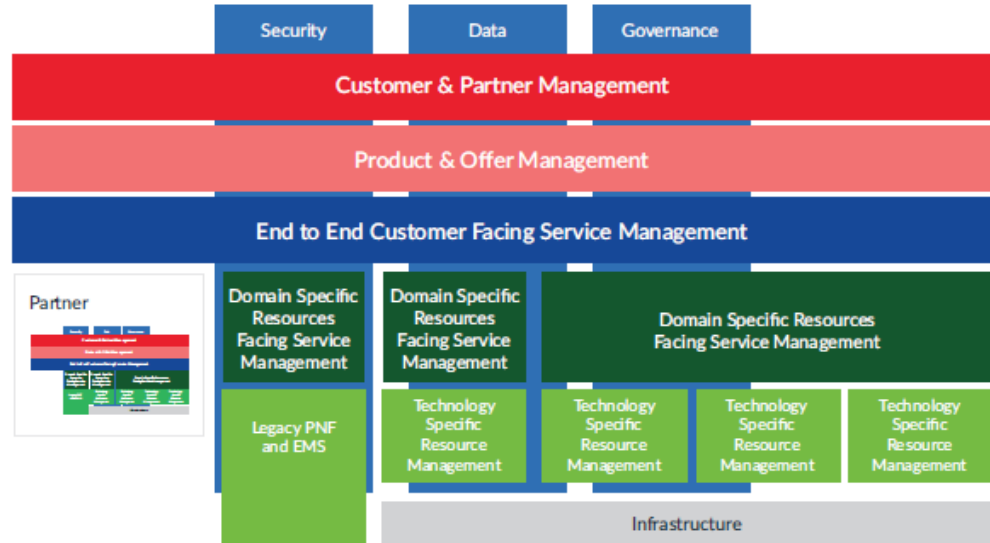


# 3/5 Strong Momentum with Open Digital Architecture

“


*Concepts like open-APIs, artificial intelligence, platform business models, and digital ecosystems will help drive agility and innovation. The TM Forum Open Digital Architecture provides a pragmatic way to bring these concepts together and sets the blueprint for digital transformation.”*


**Lester Thomas,**  
Chief IT Systems Architect, Vodafone



# 3/5 Simplification, Automation & Intelligence

Global Open API adoption and impact continues to grow...

 **54**  
Open API  
specifications  
deployed in  
**66** countries  
globally

 **40**  
member  
companies  
signed up to the  
Open API  
Manifesto



**770+**  
member  
companies  
and **5,400+**  
professionals  
downloading  
and using  
the APIs

 **21,000+**  
community  
professionals

# 3/5 Momentum is building – 42 Open API Manifesto signatories



## Open Source and Standards Organizations Collaborate to Enable Digital Transformation

TM Forum Catalyst Projects prove the value of a single Open API standard and contribute improvements to ONAP's Beijing Release



*“I can tell you that if you use TM Forum Open APIs, they will work because we are using them ourselves in mass markets for our customers.”*

**George Glass,**  
Chief Systems Architect, BT Group

New 'Innovate & Make' Collaborative Work program launched this spring, focusing on Artificial Intelligence, with four member-led Collaborative Workstreams:

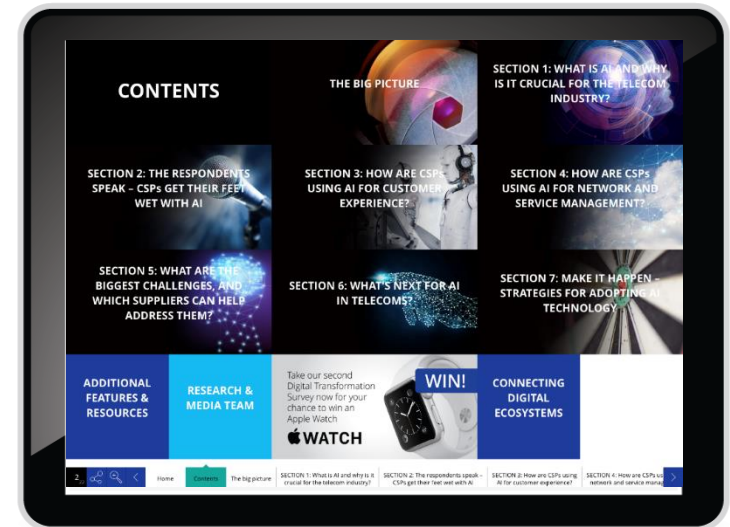
Collaborative Workstream 1: Service Management Standards for AI

Collaborative Workstream 2: AI Data Model for Telco

Collaborative Workstream 3: AI Data training repository

Collaborative Workstream 4: AI Maturity Model

## Artificial Intelligence Research Report



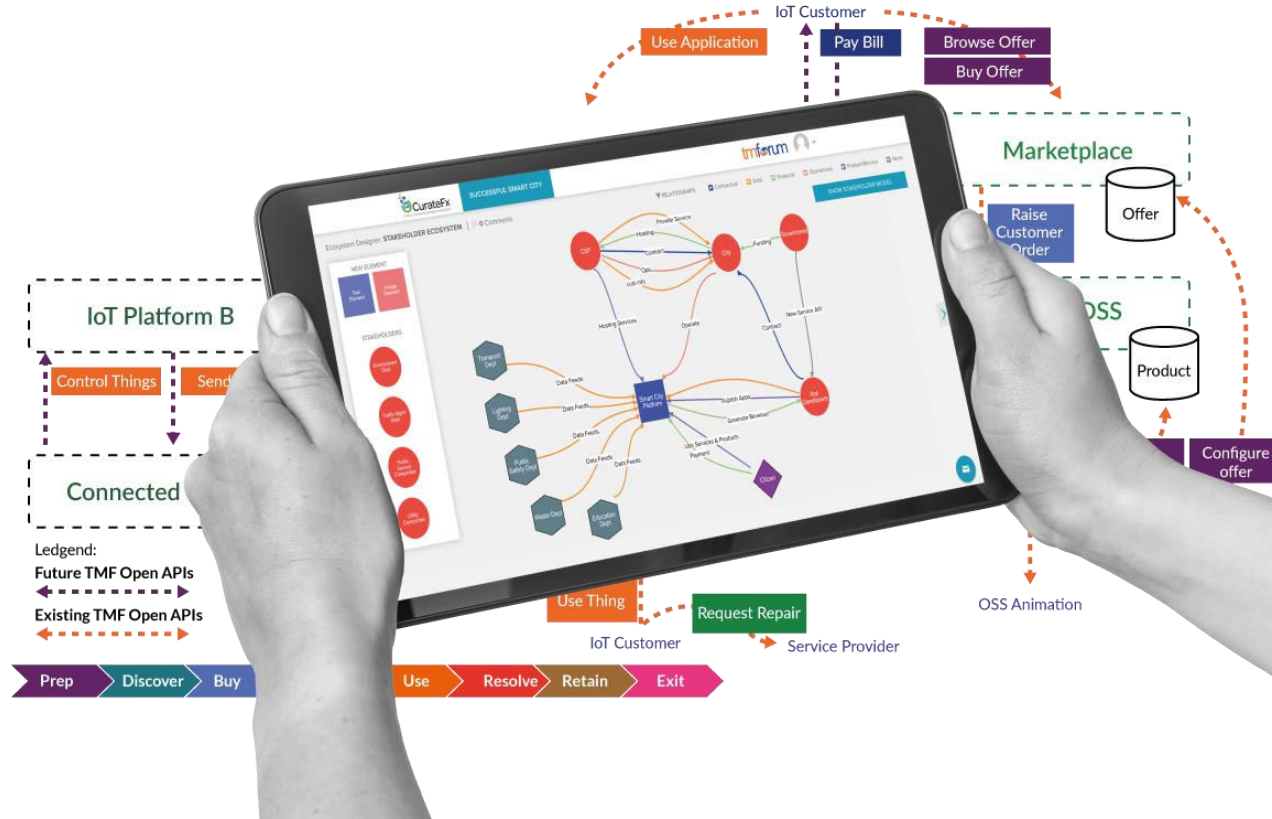




“

*Using CurateFx we were able to capture the problem statements, the value propositions and the roles that each partner will play in the ecosystem – CurateFX is one of its kind”*

**Gnanapriya Chidambaranathan,**  
AVP, Sr. Principal Architect, Infosys



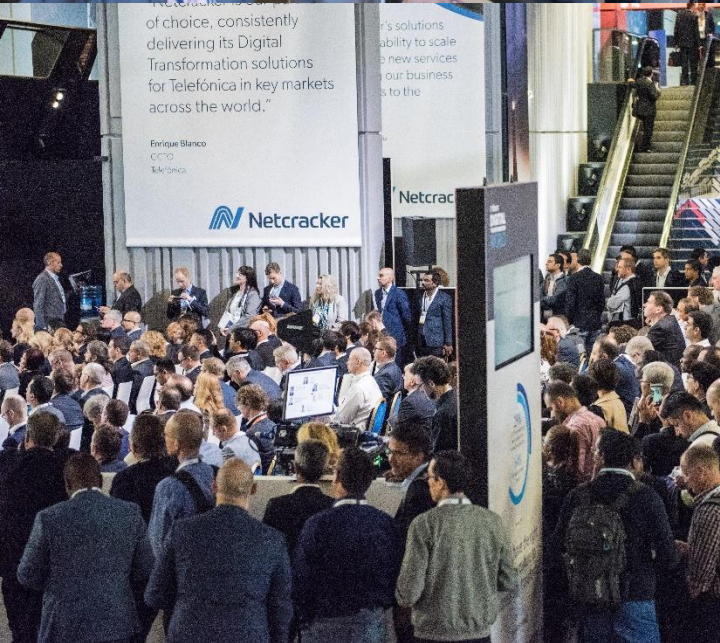


**City platforms must:** *100+ City as a Platform Manifesto signatories*

<b>1</b> Enable services that improve the quality of life in cities	<b>6</b> Inform political decisions
<b>2</b> Bring public and private stakeholders together in digital ecosystems	<b>7</b> Involve local government and be managed by the most competent and merited organizations
<b>3</b> Support sharing economy principles & circular economy agenda	<b>8</b> Be based on open standards, best practices and open APIs with industry agreed architecture models
<b>4</b> Help local start-ups & businesses to innovate & thrive	<b>9</b> Support a common approach to federation of data between cities
<b>5</b> Enforce the privacy and security of confidential data	<b>10</b> Support the principles of UN SDG11: Making cities and human settlements inclusive, safe, resilient and sustainable.



# Digital Transformation World 2018: Caliber, Content & Collaboration **tmforum**



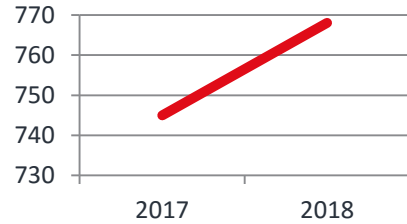


# Attendance from CSPs increased this year

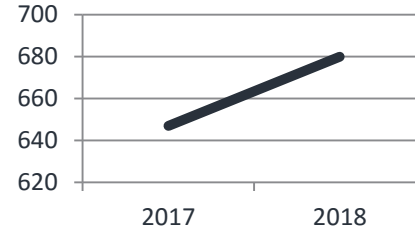


## TOTAL ATTENDANCE: 2,549

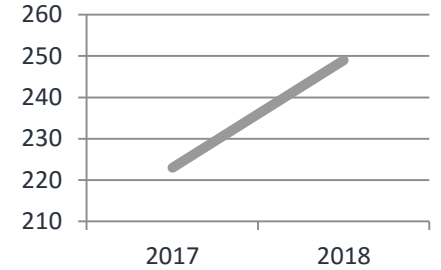
CSP delegates



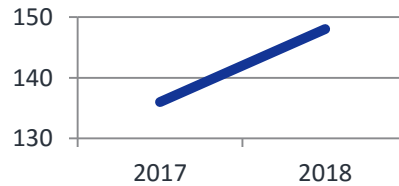
Total CSP delegates excluding speakers



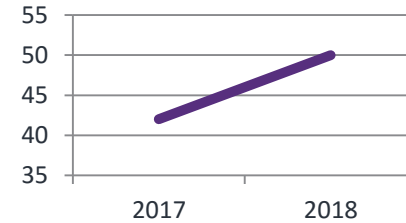
Unique CSP companies



CSP CXOs including CTIOS

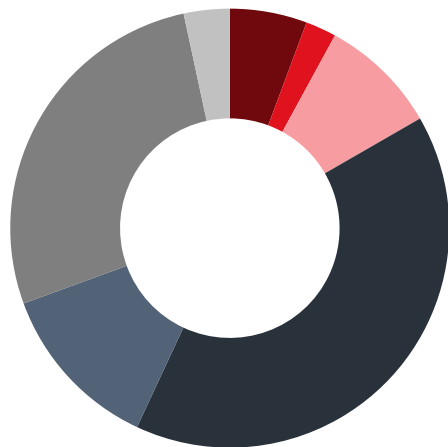


CSP CTIOs



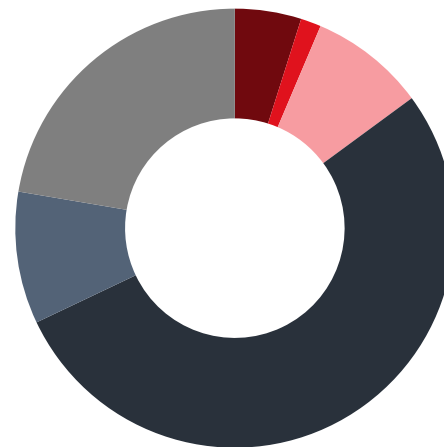
# High Delegate Caliber, Engaging Content, Great Conversations

2017



- Platinum
- Platinum Speaker
- Speaker
- Gold
- Silver
- Exhibitor
- Open Hack

2018



- Platinum
- Platinum Speaker
- Speaker
- Gold
- Silver
- Exhibitor




# 120 companies behind 25 Catalysts for Digital Transformation World

New ecosystem Catalysts for Media Industry challenges  
In collaboration with IBC



CATALYST PROGRAM - AN

Read More




ARTICLES

Read More

MEET THE CATALYSTS	5G View More	OPEN DIGITAL ARCHITECTURE View More	ONAP View More	ZERO-TOUCH View More	OPEN APIs View More
AI View More	BLOCKCHAIN View More	CUSTOMER EXPERIENCE MANAGEMENT View More	ANALYTICS View More	IoT View More	ECOSYSTEM MANAGEMENT View More
Scroll down	TRUST View More	MONETIZATION View More	SMART CITY View More	CULTURE / DMM View More	Back

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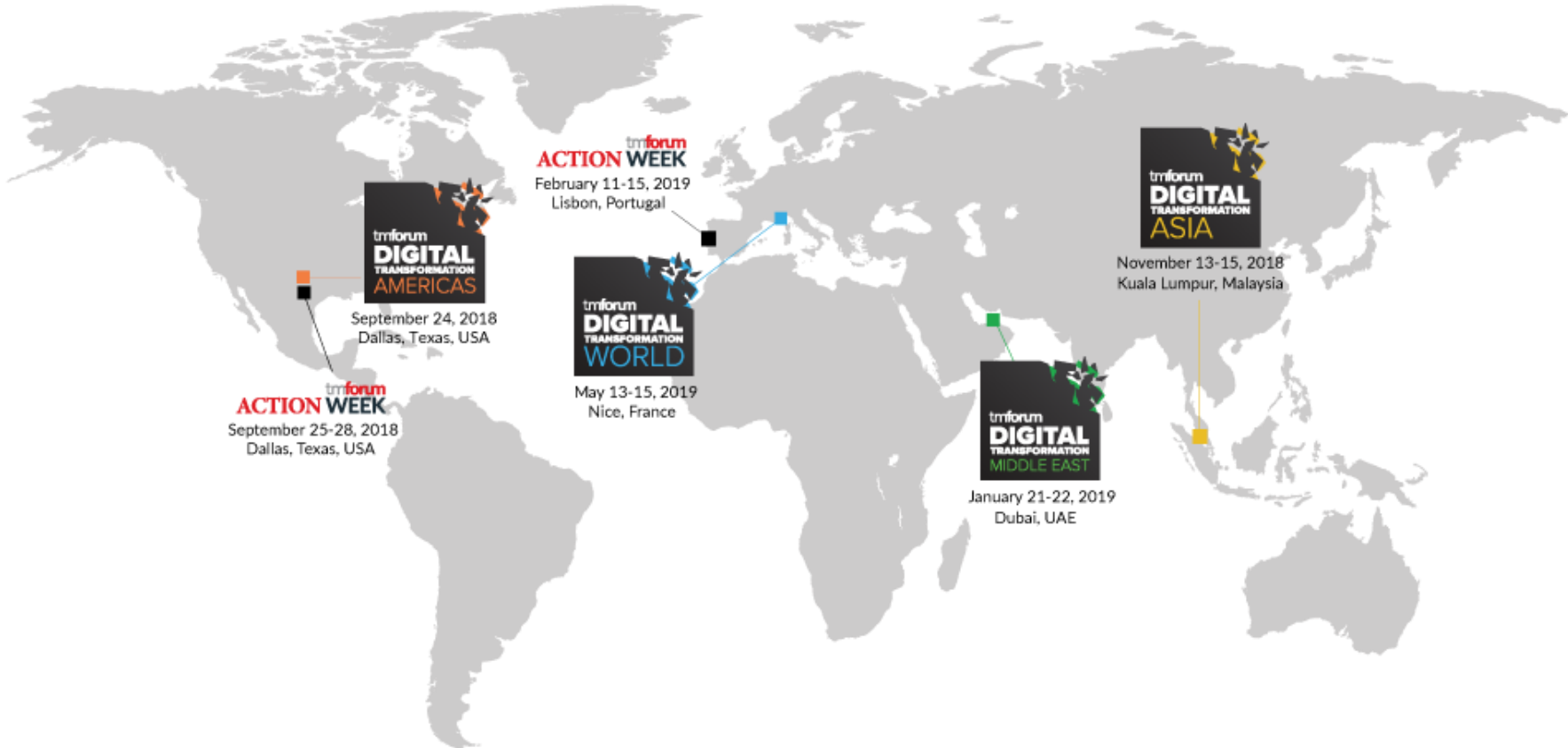


AWARDS

PARTICIPANTS INDEX

Winner

# TM Forum global events: Next stops – Dallas, Kuala Lumpur, Dubai **tmforum**



# Let TM Forum give you more TIME...

Influence the market by use of our **'Think'** program:

- Commission our industry analysts, sponsor a thought-leadership research report or webinar
- Speak-at or sponsor a TM Forum conference
- Engage with your peers in our online community

Shape the future of the industry with our **'Innovate & Make'** collaboration program:

- Engage in one of the workstreams in our five focus areas
- Join an Asia Catalyst *in the next ten days* or a Media Catalyst *in September*
- Attend Action Week in Dallas 25 September, or Digital Transformation World, Asia in Kuala Lumpur 13 November

Accelerate your time-to-market by using of our **'Execute'** solutions:

- Use our Open APIs to save cost and time, sign the Open API Manifesto
- Use the Digital Maturity Model
- Roll out online or inhouse training
- Invite us to tailor a senior leadership team workshop for your organisation
- Use CurateFX to map new digital ecosystems

# Any Questions & Any Other Business?

Please type your question in the question window now

# Thanks for your time today

Contact us at any time:

- Nik Willetts, [nwilletts@tmforum.org](mailto:nwilletts@tmforum.org)
- Olga Martynov, [omartynov@tmforum.org](mailto:omartynov@tmforum.org)
- David Pleasance, [dpleasance@tmforum.org](mailto:dpleasance@tmforum.org)