

2017 Annual Meeting of Members

Welcome – we will begin in a few minutes

2017 Annual Meeting of Members

Welcome

- Chairman's Introduction
 - *Motion #1: Minutes of last Annual Meeting of Members (AMOM) meeting*
- Introduction of Directors
 - *Motion #2: To appoint Directors*
- Financial Report
 - *Motion #3: To appoint Auditors*
- Annual Report
 - *Forum strategy, progress of key strategic programs and outlook 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 November 9, 2016.

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.

- Provide leadership
- Set strategy and vision
- Balanced to represent membership
- Providers and enterprises hold a majority seat
- Act as Trustees of the corporation
- Directors hold a seat on the TM Forum Board for two years

Proposed Board Slate

Returning Officers



Jane Chen
Chief Information Officer
ZTE Corporation
*Renewed in 2016
for 2 year term*



Harmeem Mehta
Global CIO
Bharti Airtel
*Renewed in 2016
for 2 year term*



Alpana Doshi
Group CIO, Business
Transformation & IT
Royal Philips
*Renewed in 2016
for 2 year term*



Doug Suriano
Senior VP & General Manager
Oracle
*Renewed in 2016
for 2 year term*



Bhaskar Gorti
President of
Applications & Analytics
Nokia
*Renewed in 2016
for 2 year term*



Michael Lawrey
Independent
Former Chairman TM Forum
*Renewed in 2016
for 2 year term*



Bob de Haven
General Manager,
Worldwide
Communications & Media,
Microsoft
*Renewed in 2016
for 2 year term*



Haiping Che
CTO & Vice President
Huawei
Renewal of Appointment



David Pleasance
Deloitte/Independent
Chairman, TM Forum
Renewal of Appointment

New Officers



Gary Miles
Chief Marketing Officer
Amdocs
New Appointment



Rachel Higham
Managing Director, IT
BT
New Appointment



Steffen Roehn
CIO & Advisor
Reliance Jio
New Appointment



Thierry Souche
Group CIO
Orange Group
New Appointment

Ex-Officio Officers



Nik Willetts
President & CEO
TM Forum



Olga Martynov
CFO
TM Forum

Motion

Propose that the eligible Members present hereby ratify the appointment of the persons listed on the TM Forum website to serve on the Board for a period of two years, and shall be Trustees under the laws of New Jersey.

Proposed: David Pleasance, *TM Forum Chairman*

Seconded: Michael Lawrey, Chair of Finance & Audit Committee

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

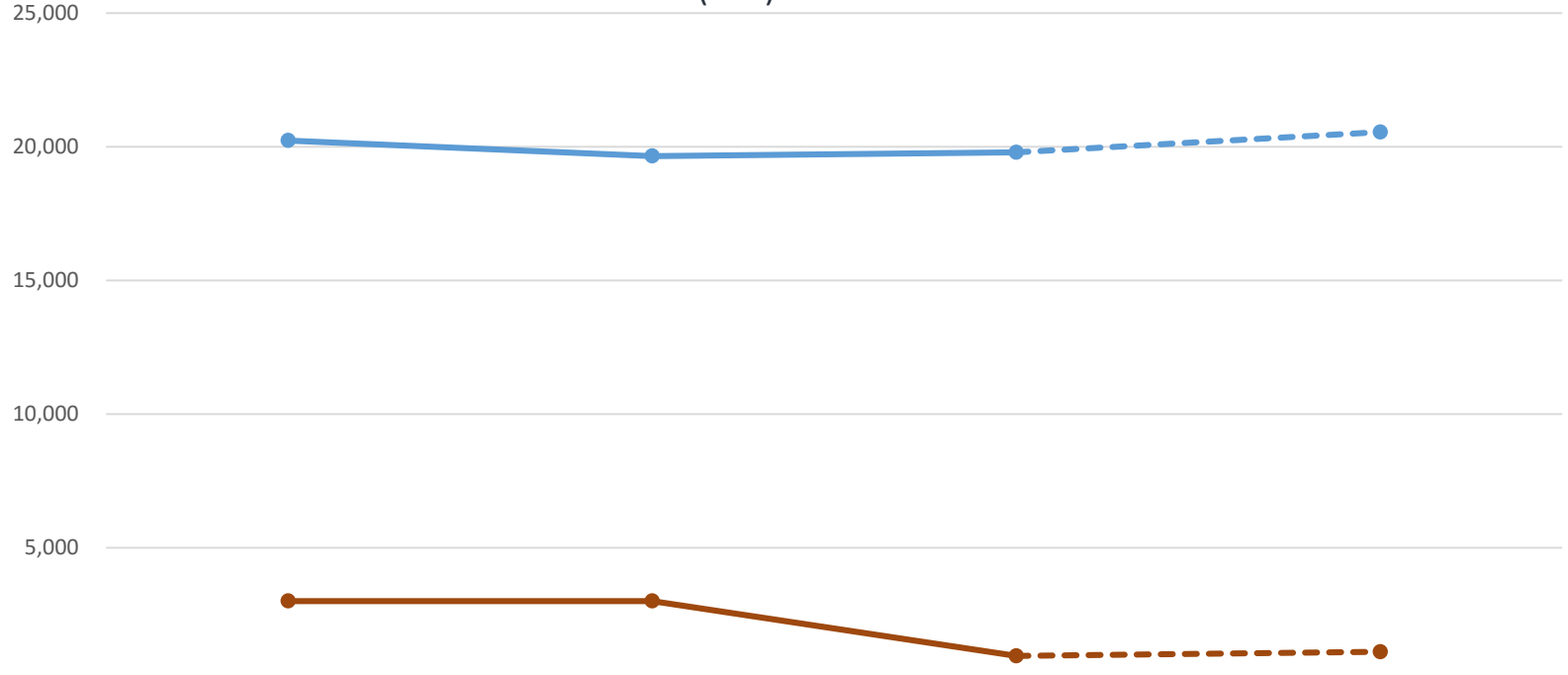
Financial Report and Appointment of Auditors

Olga Martynov, CFO
Treasurer and Secretary to the Board

TM Forum Revenue and Member Equity



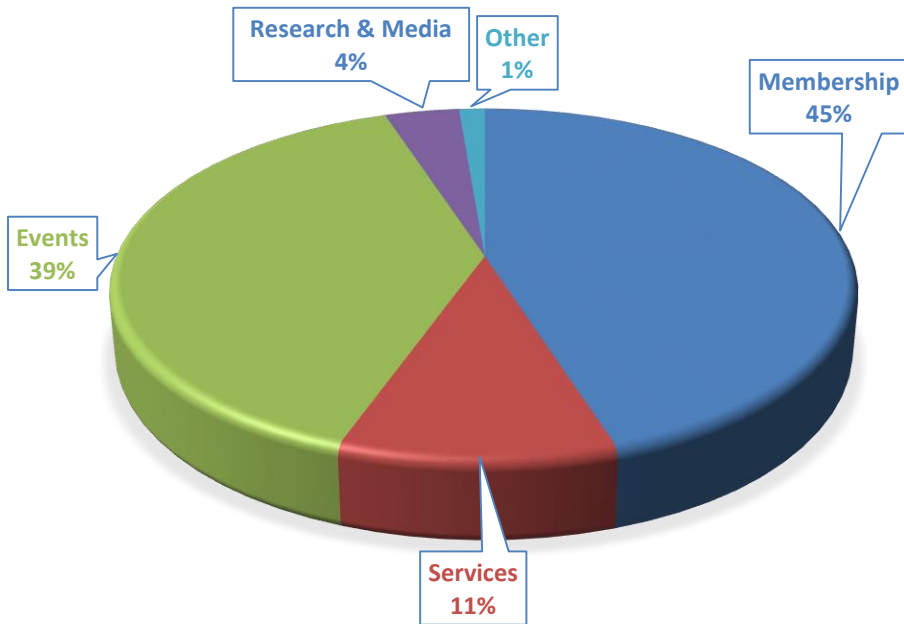
3 Year History with 2018 Projections
in '(000) USD



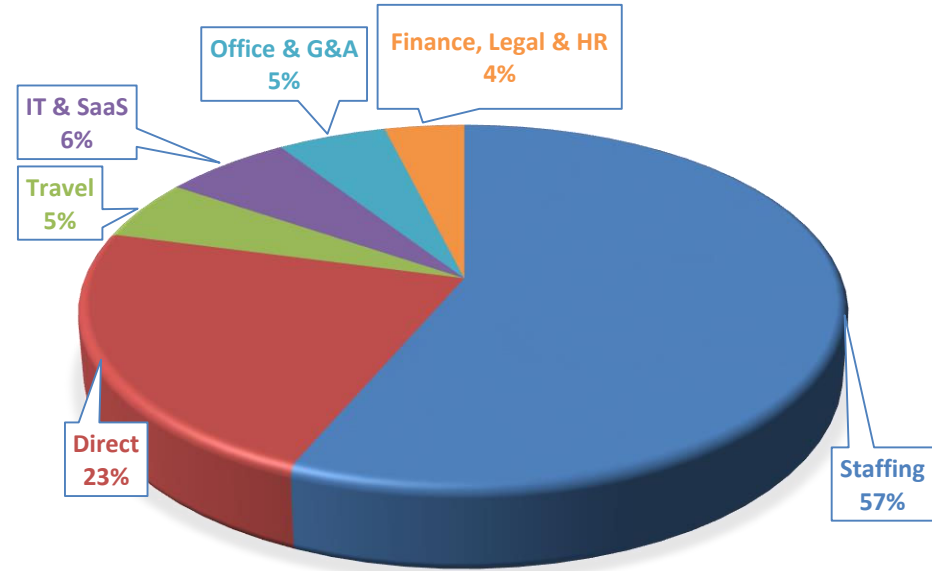
	2015	2016	2017	2018 Projection
Revenue	20,237	19,652	19,796	20,553
Equity	3,000	3,000	945	1,098

FY 16-17 Sources and Uses of Funds

FY16-17 REVENUE OF \$19.8M



FY16-17 EXPENSES OF \$21.9M



Balance Sheet

	September 30, 2017	September 30, 2016
Cash & Investments	3,840,066	5,017,656
Net Accounts Receivables	4,420,582	4,042,677
Net Fixed Assets	1,608,808	1,406,358
Deposits & Prepaid Expenses	1,367,722	778,260
Total Assets	11,237,178	11,244,951
Accounts & Taxes Payable	937,905	579,767
Deferred Revenue	6,960,156	6,855,978
Future Expense Accruals	990,739	515,660
Total Liabilities	8,888,801	7,951,405
Total Member Equity	2,348,377	3,293,546
Total Liabilities & Equity	11,237,178	11,244,951

- The 2016/17 Audit was completed by our external auditors at Smolin, Lupin, & Co., PA
- Auditors expressed “unqualified opinion” which confirms that Forum's financial records and statements are fairly and appropriately presented, in accordance with Generally Accepted Accounting Principles (GAAP).
- The audit opinion was clean meaning no material misstatements and no material adjustments to the financials
- Management has signed the representation letter, stating that all material provided to the auditors is complete and accurate
- The audit report is available to members by request to the CFO – omartynov@tmforum.org

Motion

Propose that Smolin, Lupin, & Co., PA shall be appointed as auditors for the corporation for the financial year 2017/18.

Proposed: David Pleasance, *TM Forum Chairman*

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

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

Annual Report 2016-17

Nik Willetts, President & CEO

Senior Leadership



David Pleasance,
Chairman of the Board

Partner at Deloitte with multi-
industry transformation experience
and perspective



Nik Willetts,
President & CEO

Experienced industry leader in
digital transformation



Tim Banham
MD, Member
Engagement



Olga Martynov
CFO



Dr Andy Tiller
EVP, Collaboration
& Innovation



Paul Wilson
CMO

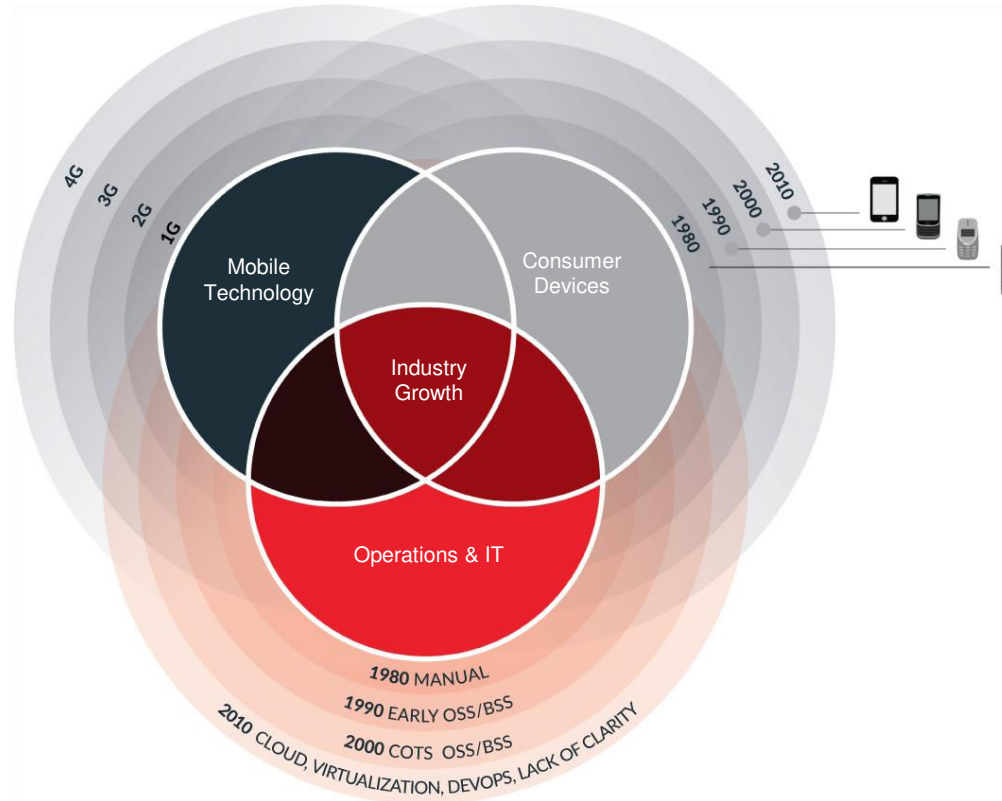


Mike Treacher
MD, Events,
Research & Media

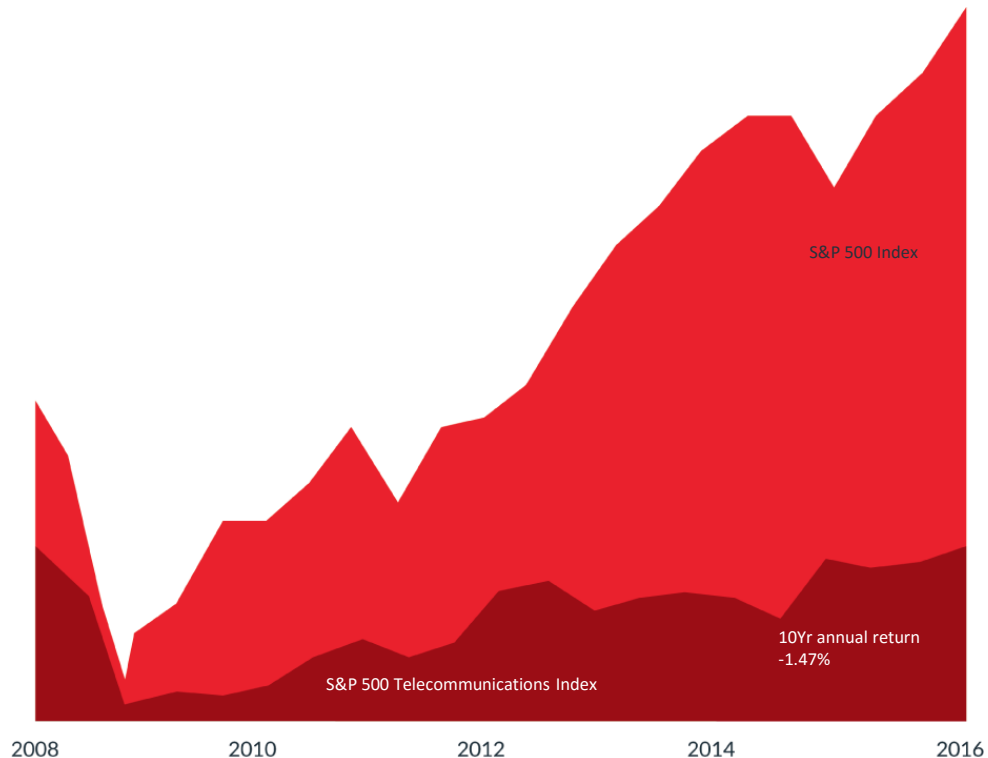
Industry Context

Nik Willetts, President & CEO

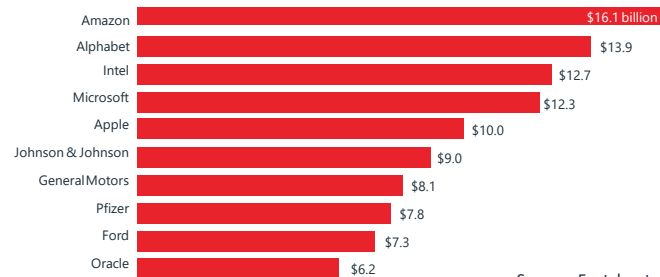
The first 4 generations of mobile followed a repeatable recipe



In the last decade, connectivity has become a commodity

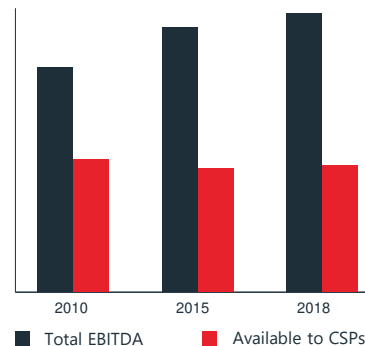


TECH COMPANIES LEAD IN R&D SPENDING

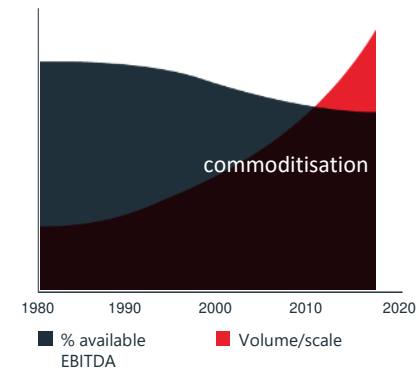


Source: Factsheet

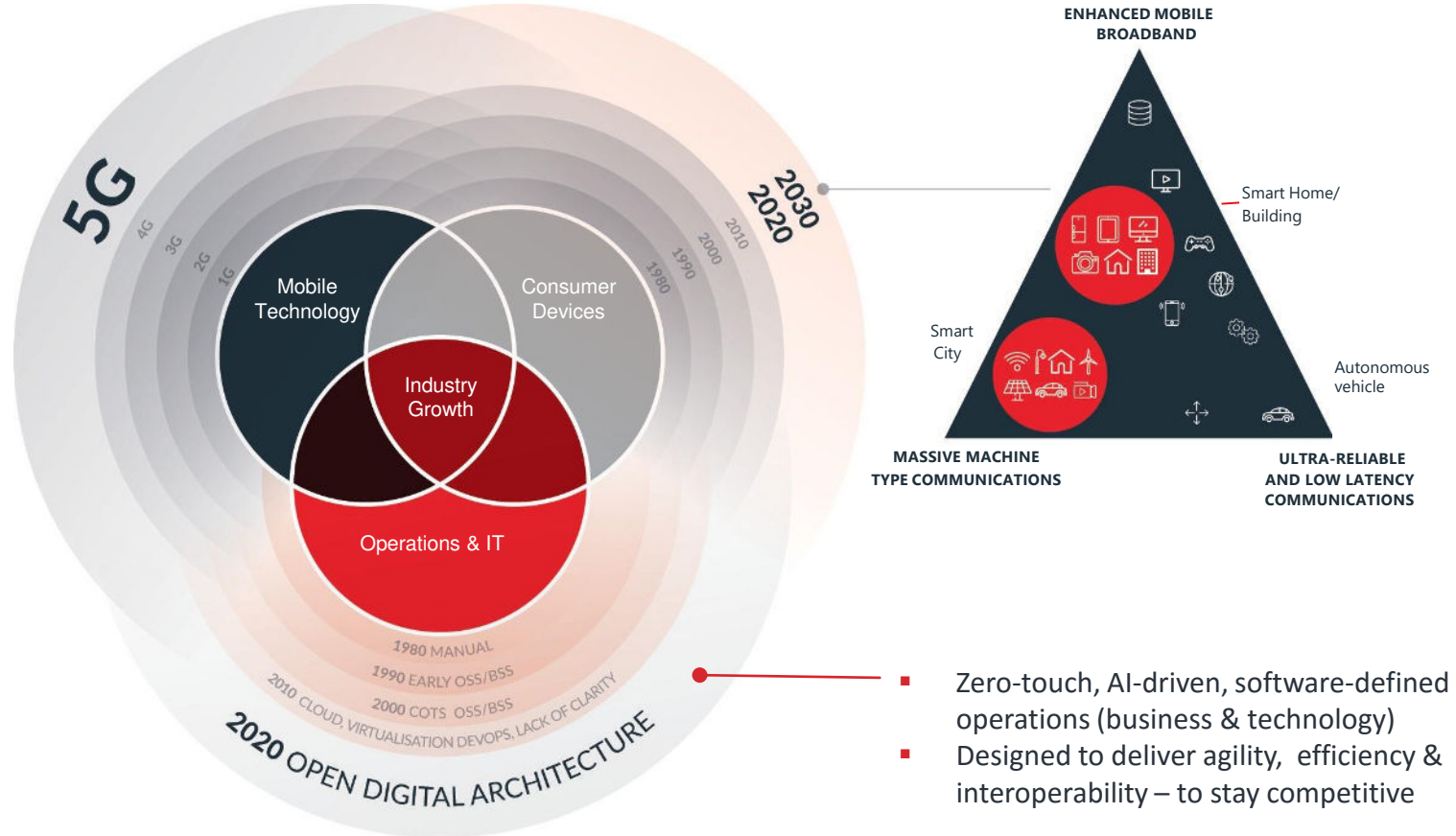
CSP SHARE OF AVAILABLE EBITDA



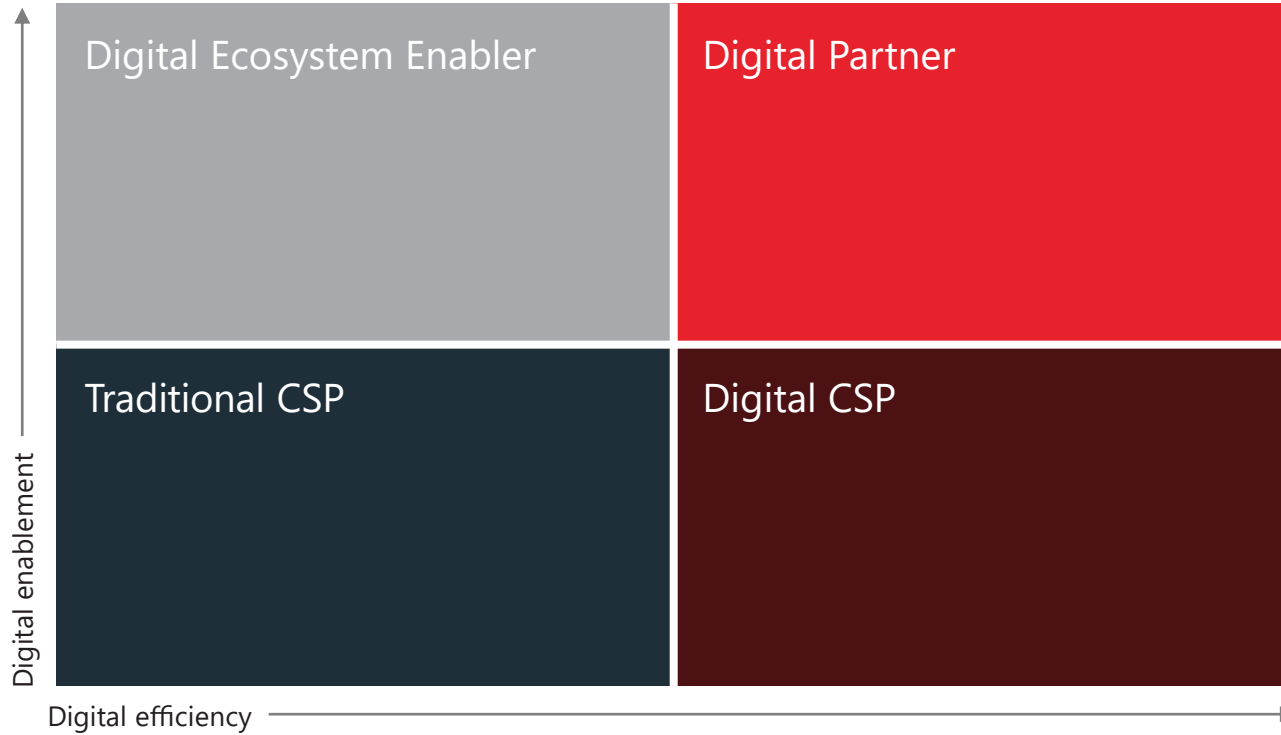
SCALE & SHARE OF PROFIT



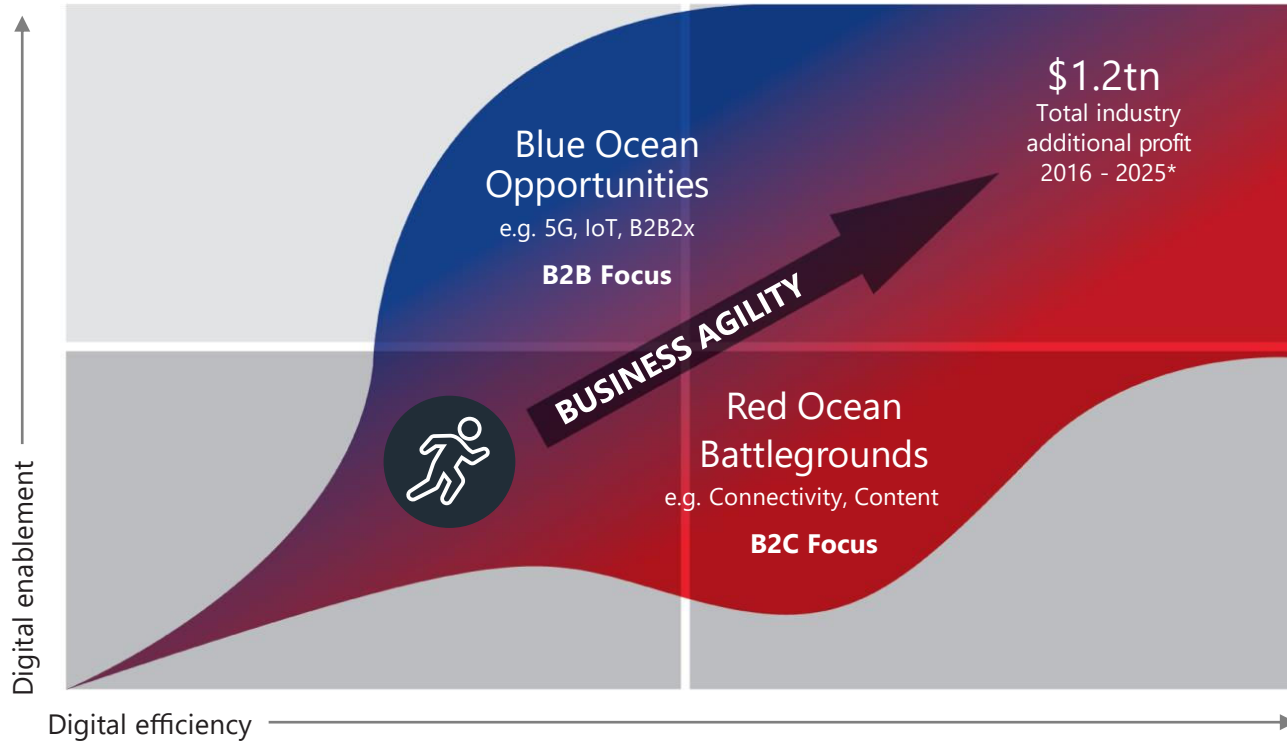
Future success demands transformation of core operations & IT



Transformation demands a clear ambition, executed fast



Speed and agility are the most important factors in unlocking growth **tmforum**



Annual Report: Key Achievements from 2017

2017 Achievements: Open APIs deliver interoperability & agility

50+ Open APIs, supported and used by 680+ members & 4,600 professionals

35 Open API Manifesto Signatories



Open API growth	2016	2017
APIs published	28	52
API manifesto signees	14	35
Companies using	200	680+
Individuals using	1,400	4,600+
API community	0	24,000
Open Hacks	3	5
Service Provider Markets	0	27
MEF's APIs for LSO accelerated and underpinned by extending TM Forum Open APIs		

- 120+ unique participating companies in rapid-fire collaborative proof-of-concept program, addressing the industry's most pressing problems
- 32 Catalyst Projects delivered at TM Forum Live in Nice, May 2017
- 9 Catalysts Projects delivered at TM Forum Live in Singapore, Dec 2017



100+ organisations signed City as a Platform Manifesto & 1,000+ people attended Smart City In Focus, Yinchuan

City as a Platform Manifesto Signatories



- Zero-touch Operations, Orchestration & Management
 - Design guidelines for Customer, Service, and Resource Management Platforms (including Hybrid Infrastructure Platform)
 - Best practice guides: On-boarding automation packaging using TM Forum Open APIs to implement Platforms
 - Support for ONAP R2 Beijing and R3 Casablanca Release
- Customer Satisfaction & Data Analytics
 - 500 new metrics developed & Big Data Analytics Solution Suite updated for personalized services in CX
 - Guidance on analytics in customer lifecycle model, customer sentiment, and non-animate “Things” as users
- Internet of Everything Management
 - Open IoE Community now has 41,500 members
 - Business Assurance working group has re-imagined Revenue Assurance and related practices in the context of Internet of Everything and the Digital Economy



2017 Achievements: TM Forum Live! 2017

tmforum



2,874

delegates



692

unique
companies



291

speakers



32

Catalyst
projects



over
430

CxOs



31%

of attendees
were from
CSPs

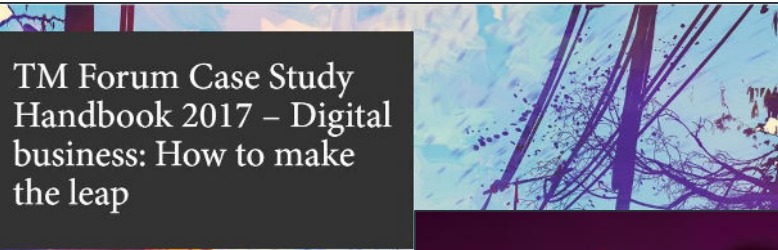


tmforumlive!

May 15-18, 2017 • Nice, France

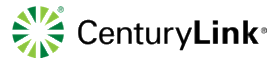


2017 Achievements: 75,000 readers of monthly research reports and daily market analysis **tmforum**



- Member retention is up at **89%** in 2017 vs 80% in 2016
- Net promoter score is up at **23** in 2017 vs 10 in 2016
- Service Provider engagement increased and vendor engagement remained solid

Notable new joiners this year:



2018: It's Time to Transform our Industry

CRITICAL CHALLENGES

2018 TM FORUM FOCUS AREAS



Navigate Transformation

DIGITAL MATURITY



Model & Benchmark



Tracker

DIGITAL LEADERSHIP



Network



Awards



Community



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



Digital Ecosystem Management

DIGITAL ECOSYSTEM CREATION



IoT & Smart City

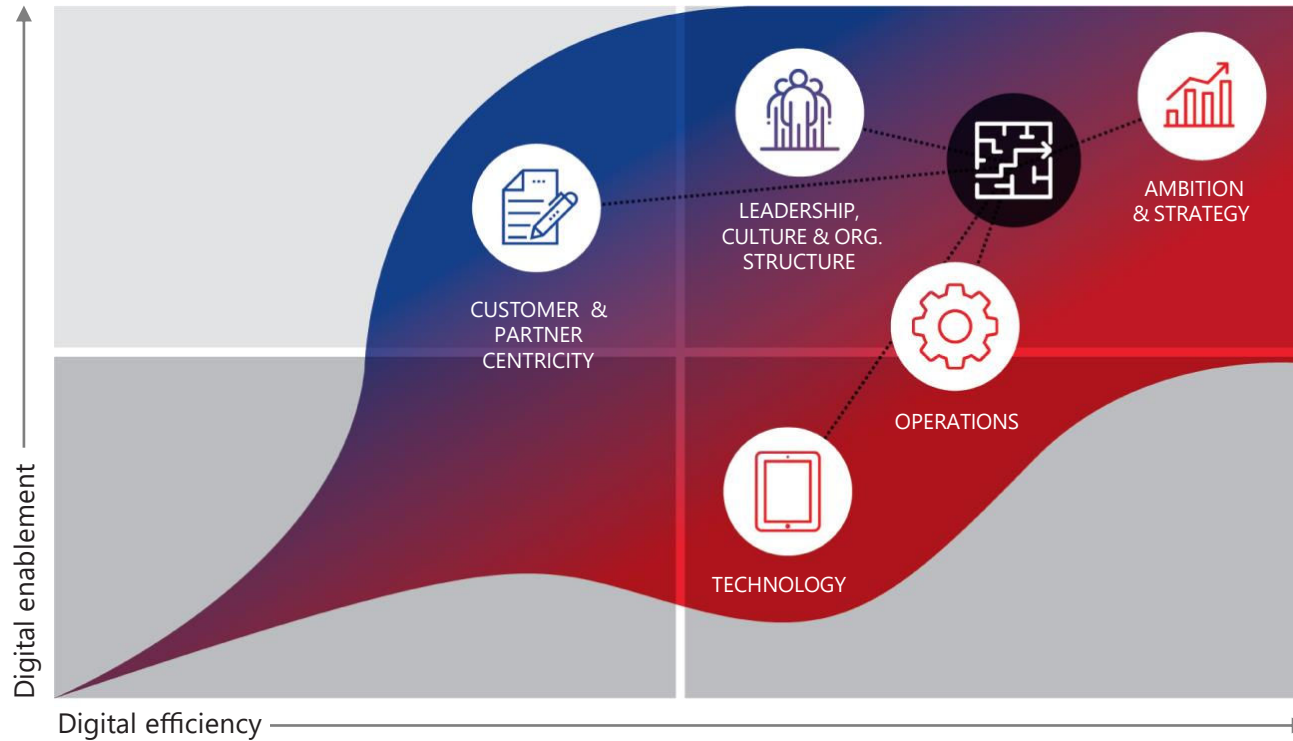


Biz Assurance



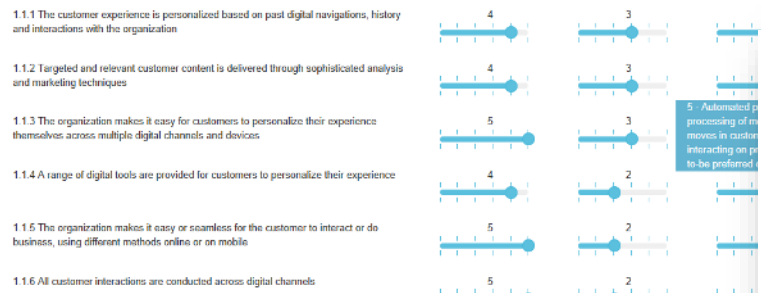
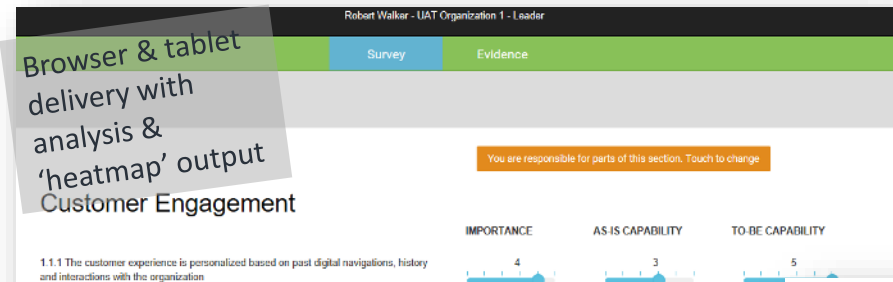
Ecosystem Catalysts

1/5 Digital Transformation – it happens in concert, not silos



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

Endorsed by



- First industry-agreed digital maturity model, launched May 2017
- 5 dimensions, 28 Sub-dimensions, 179 criteria
- Training, tools and partnership options now available

DIMENSIONS	Customer	Strategy	Technology	Operations	Culture, People, Organization
	Customer Engagement	Communicate and interact with digital customers through personalized content, including relevant offers and products, to drive revenue.	Brand Management	Applications	Agile Change Management
Customer Experience	Provide customers with a seamless, personalized, and engaging experience across all touchpoints and devices.	Ecosystem Management	Connected Things	Automated Resource Management	Leadership & Governance
Customer Insights & Behaviour	Deliver business value-added insights through customer behavior, digital engagement, and digital marketing.	Finance & Investment	Data & Analytics	Integrated Service Management	Organisational Design & Talent Management
Customer Trust & Perception	Build customer confidence and loyalty through consistent, reliable, and secure digital experiences.	Market & Customer	Delivery Governance	Real-Time Insights and Analytics	Workforce Enablement
		Portfolio, Ideation & Innovation	Network	Smart and Adaptive Process Management	
		Stakeholder Management	Security	Standards and Governance Automation	
		Strategic Management	Technology Architecture		



We are helping the UK Government with its £300m+ 5G program

'Digital Leadership Workshops' for CTIOs & Members' Senior Leadership Teams

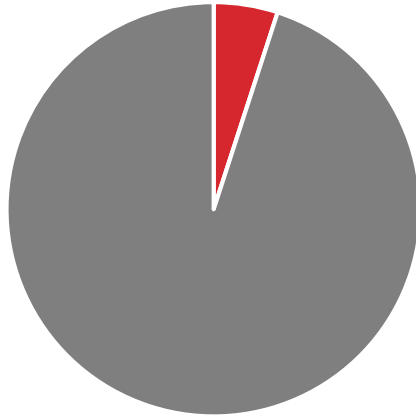
Identify & recognise industry leaders

3/5 Simplification, automation, intelligence

Driving towards zero-touch business and technology operations

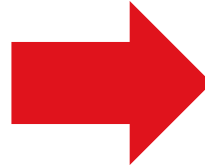
1990s Mindset

Cost-centric: "Reduce the 5%"



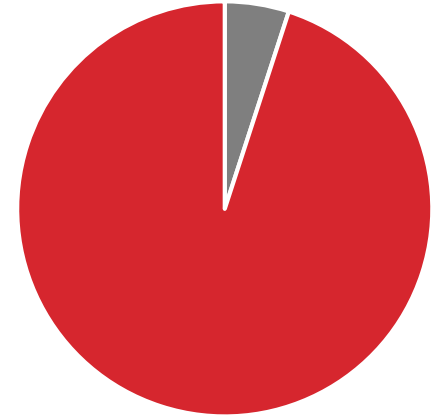
■ IT ■ Rest of Business

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



2018 Mindset

Impact-centric: "Transform the 95%"

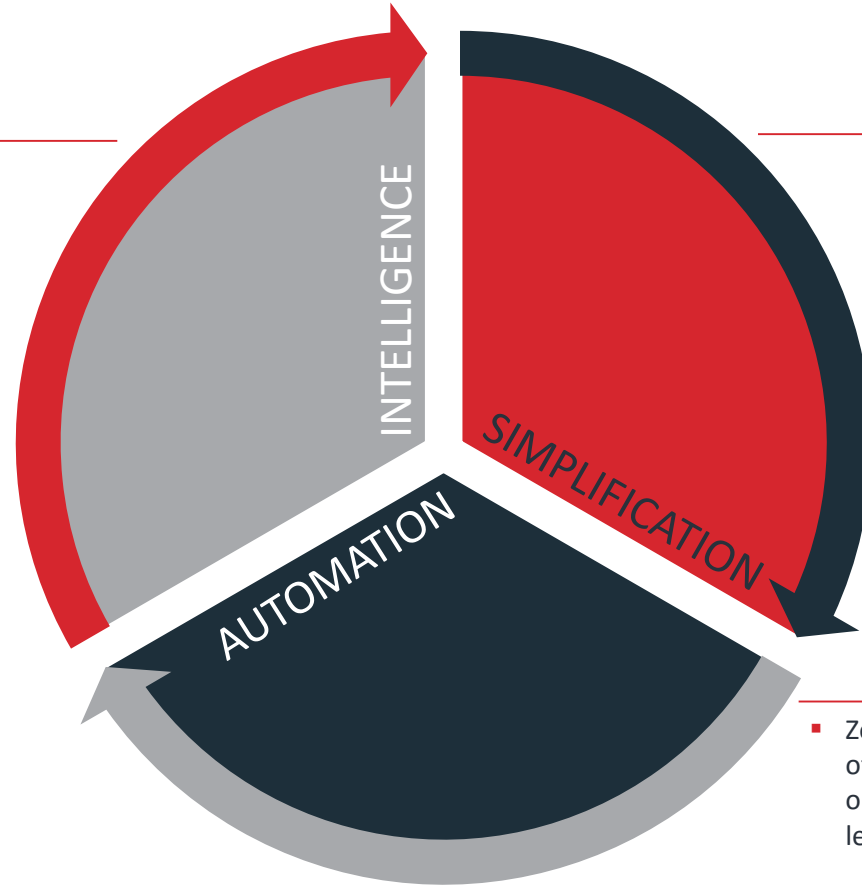


■ IT ■ Rest of Business

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

3/5 The digital telco demands a new operating model...

- Business decisions driven by real-time data, analytics and artificial intelligence
- Continuous view of end-to-end customer experience, constantly driving product and service evolution and innovation



- Radically simplified, flexible and modular business processes
- Componentization of technology into discreet business capabilities through abstraction, APIs and rationalization of legacy systems

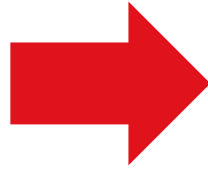
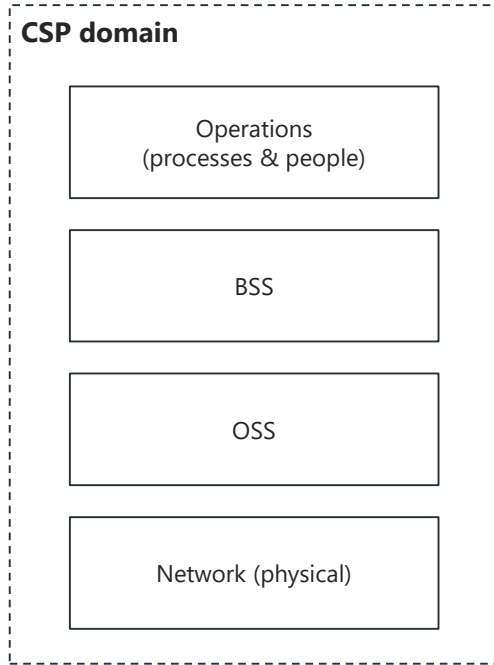
- Zero-touch, closed-loop automation of business and technology operations, enabled by machine learning and artificial intelligence

CONTINUOUS IMPROVEMENT & INNOVATION

3/5 And demands we reimagine OSS & BSS

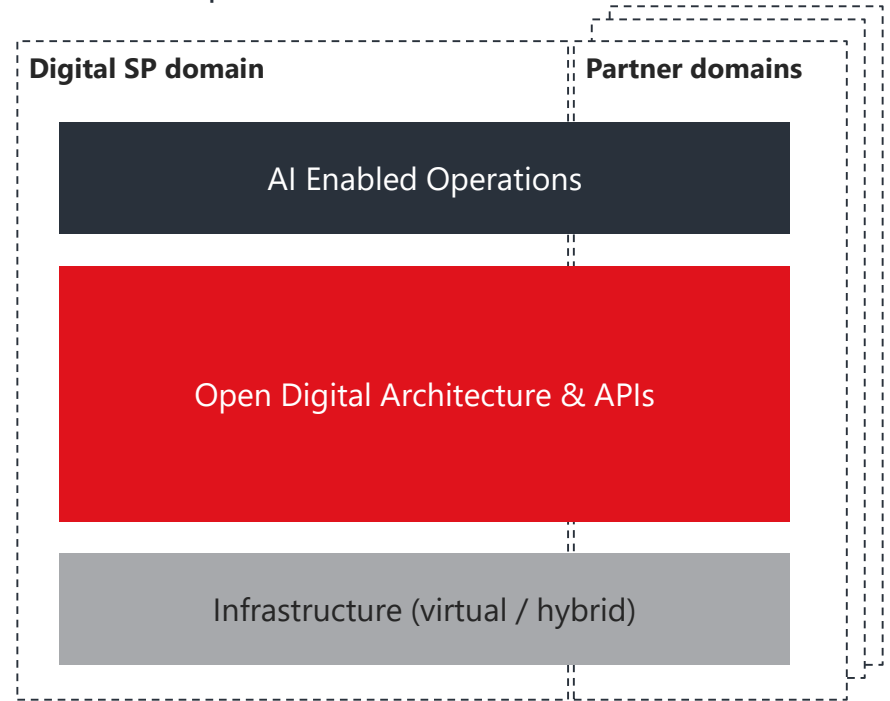
1990s IT Mindset

Cost-centric "Reduce the 5%"



2018 IT Mindset

Impact-centric: "Transform the 95%"



Open Digital Architecture

A blueprint for success in the digital markets of tomorrow

Whitepaper available now
media launch in early February

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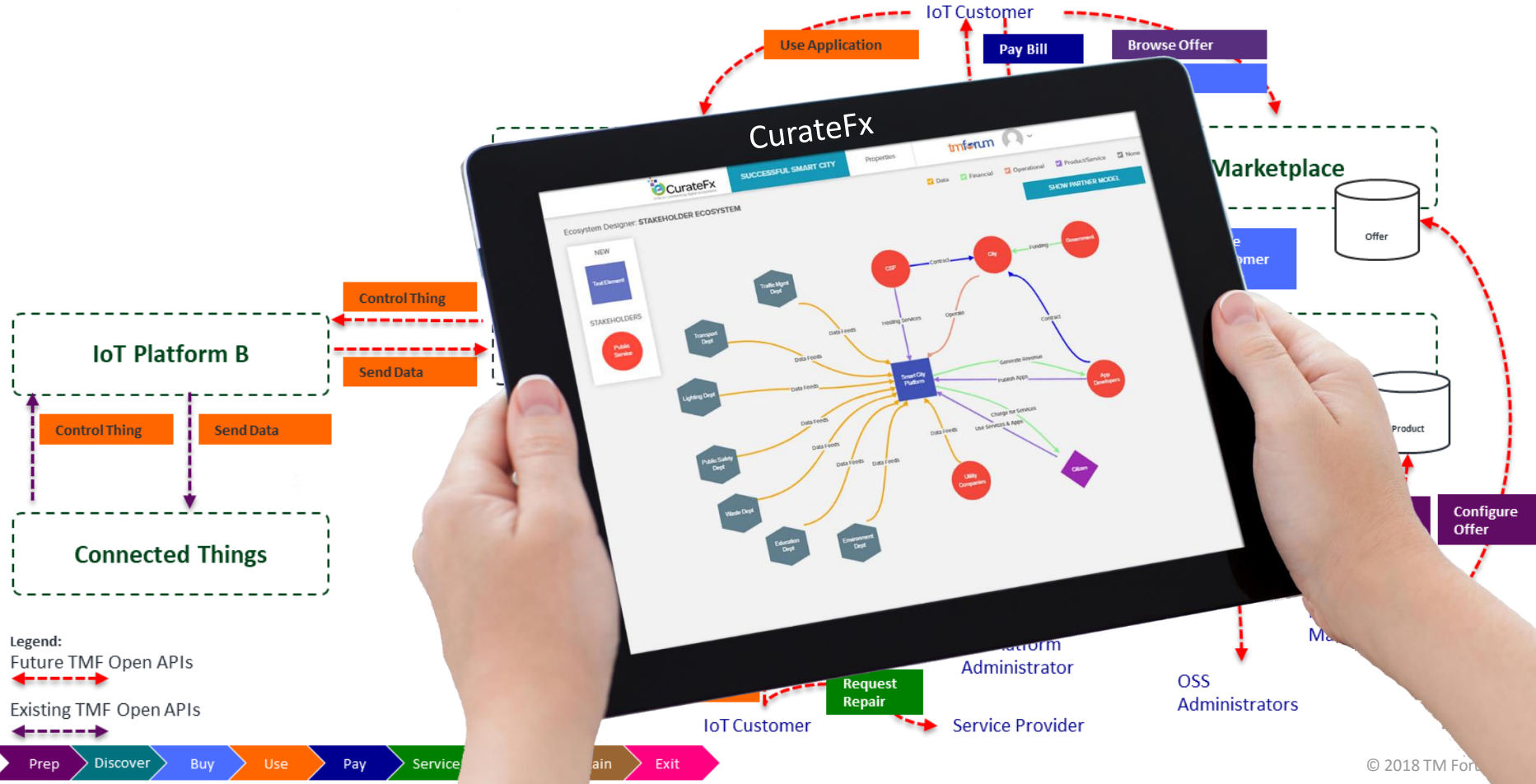
SECTION 6
Appendix: Foundations of the Open Digital Architecture
6.1. Marketplaces and ecosystems
6.2. Integration with TM Forum Open APIs
6.3. Hybrid platform architectures
6.4. City as a platform





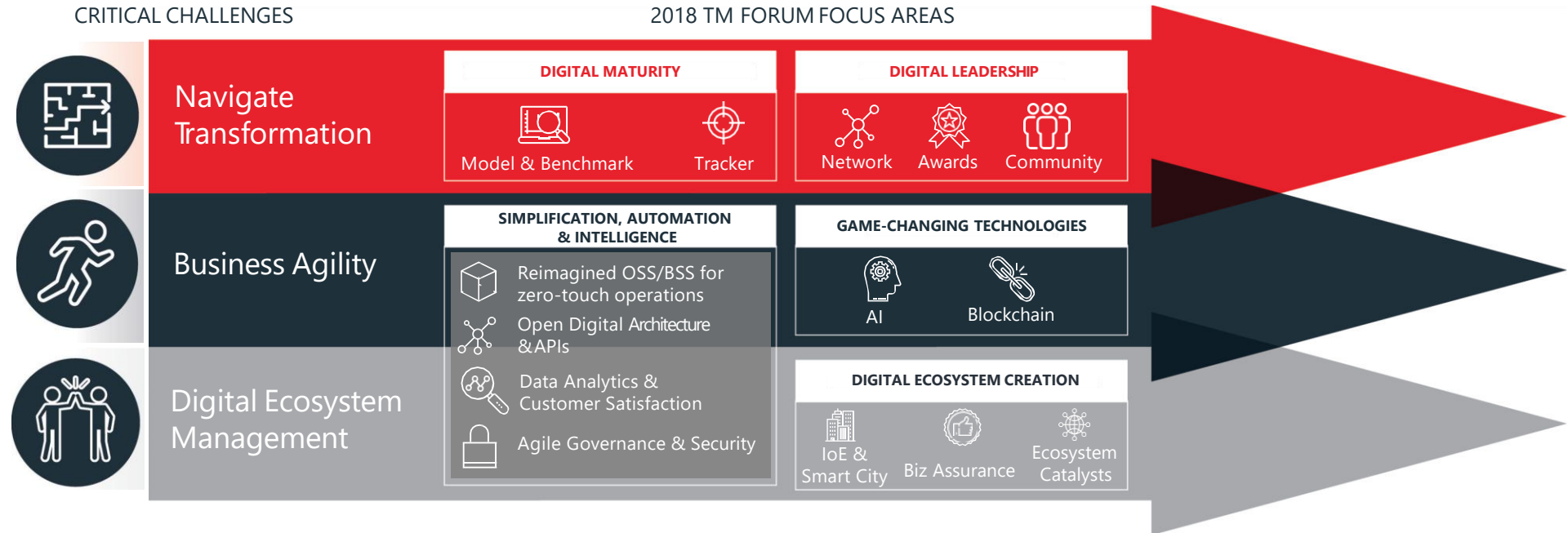
- Artificial Intelligence (AI)
 - 10 current Catalyst projects are using AI
 - New AI collaboration project initiated for Release18, aims to bridge the AI and telecoms ecosystems
 - Moving beyond simple automation to autonomic orchestration through machine learning / AI
 - Applications to management of virtualized networks | customer experience | service optimization | fraud...
 - ODA single data architecture and intent principle
- Blockchain
 - Five current Catalyst projects are using Blockchain
 - Catalysts ongoing work will examine impact to Framework and other Forum assets
 - “Sandbox” environment demonstrated use cases that are highly relevant to Forum members and highlighted the advantages and limitations of smart contracts and distributed ledgers

5/5 Managing Digital Ecosystems



CRITICAL CHALLENGES

2018 TM FORUM FOCUS AREAS



Let's collaborate!

Global event program

‘TM Forum Live!’ is now ‘Digital Transformation World’

- Action Week, Lisbon, 5-9 Feb
- World: Nice 14-16 May
- Americas: Dallas, 13-15th Nov
- Asia: Kuala Lumpur, 4-5th Dec
- ME: Dubai 21-23 Jan '19

Our events profile Catalysts our
Research & Media work and more

tmforum
DIGITAL
TRANSFORMATION
WORLD
NICE/FRANCE
14-16 MAY 2018

tmforum
DIGITAL
TRANSFORMATION
ASIA
KUALA LUMPUR
MALAYSIA
13-15 NOVEMBER 2018

tmforum
DIGITAL
TRANSFORMATION
AMERICAS
DALLAS/USA
4-5 DECEMBER 2018

tmforum
DIGITAL
TRANSFORMATION
MIDDLE EAST
DUBAI/ UAE
21-23 JANUARY 2019

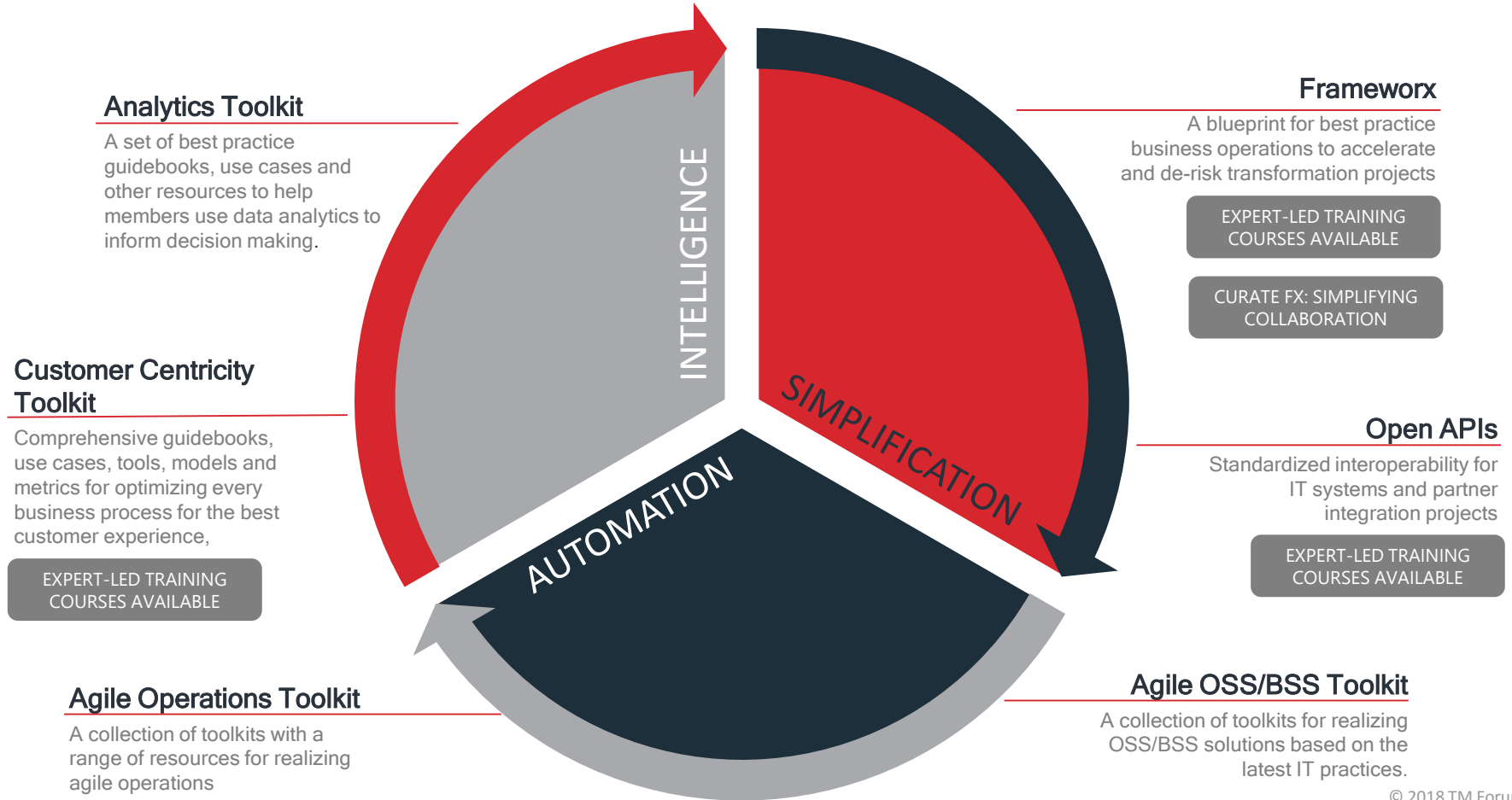
EXPLORÉ.
COLLABORATE.
BECOME.

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BECOME.

EXPLORÉ.
COLLABORATE.
BECOME.

EXPLORÉ.
COLLABORATE.
BECOME.

EXCELLENCE
AWARDS 2018
ENTRY FORMS NOW OPEN ENTER NOW!



Any Questions & Any Other Business?

Please type your question in the question window now

Thank you for your participation!

Contact us:

- Nik Willetts, nwilletts@tmforum.org
- Olga Martynov, omartynov@tmforum.org
- David Pleasance, dpleasance@tmforum.org