

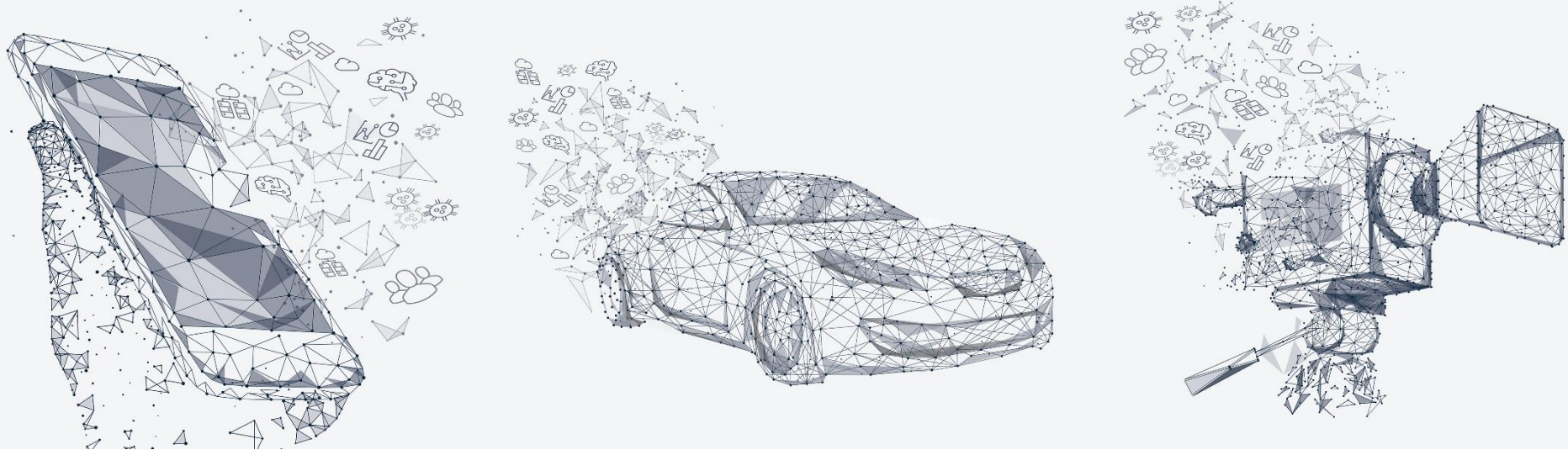
Towards a 5G-enabled Real-Time Enterprise

Nik Willetts

President & CEO

TM Forum

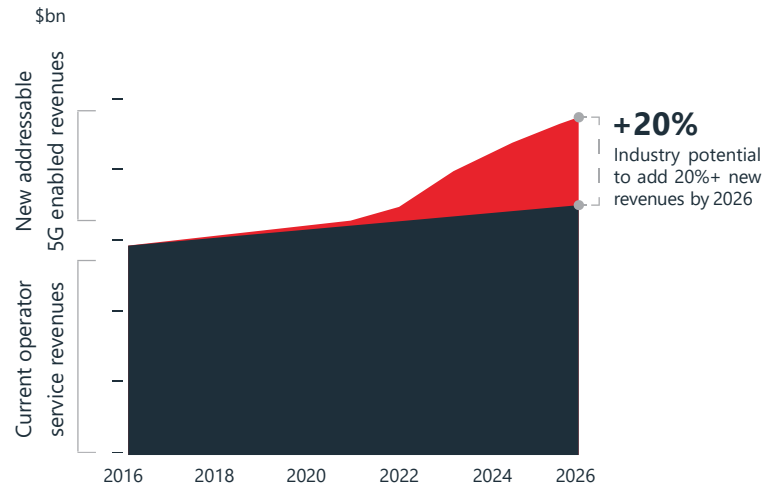
26th June 2019



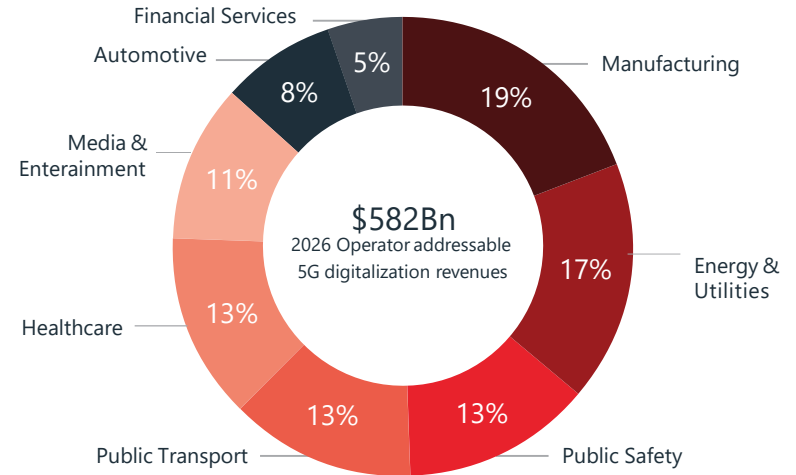
- Continuously innovating: real-time, data-driven business leveraging augmented intelligence
- Demand true partnerships: trusted; agile; innovative domain experts
- Dependent on partner-based platforms and **open** ecosystems

5G ecosystems will be a \$ multi-billion opportunity for those who can move fast enough...

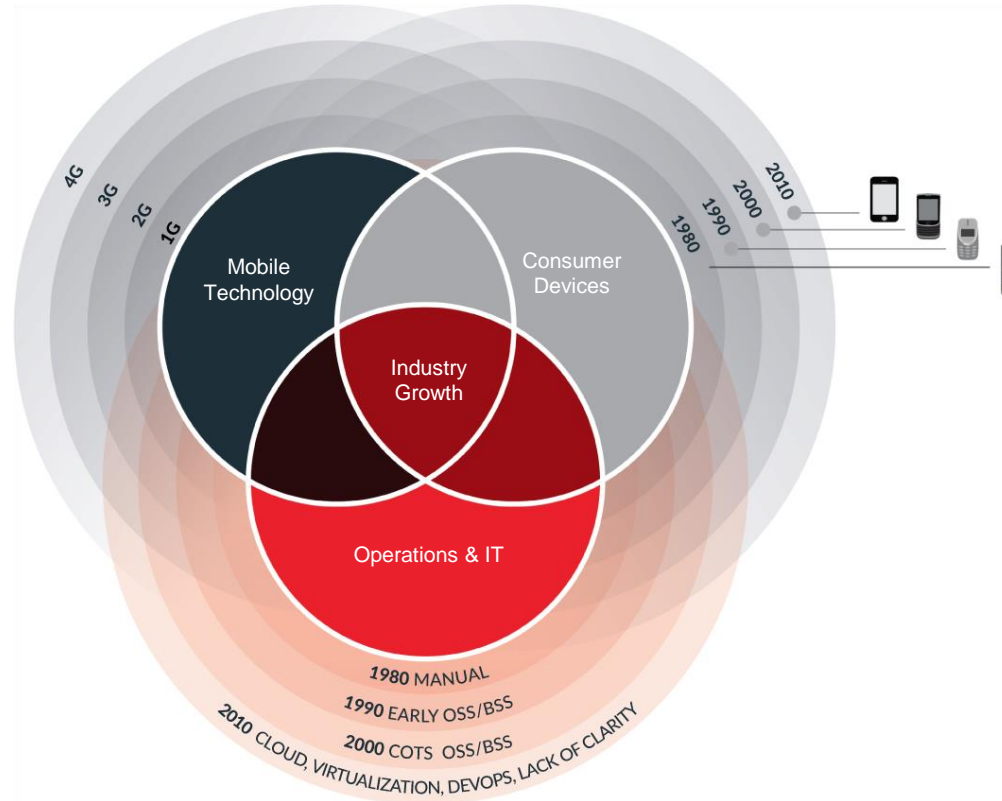
CURRENT OPERATOR + 5G ADDRESSABLE REVENUES



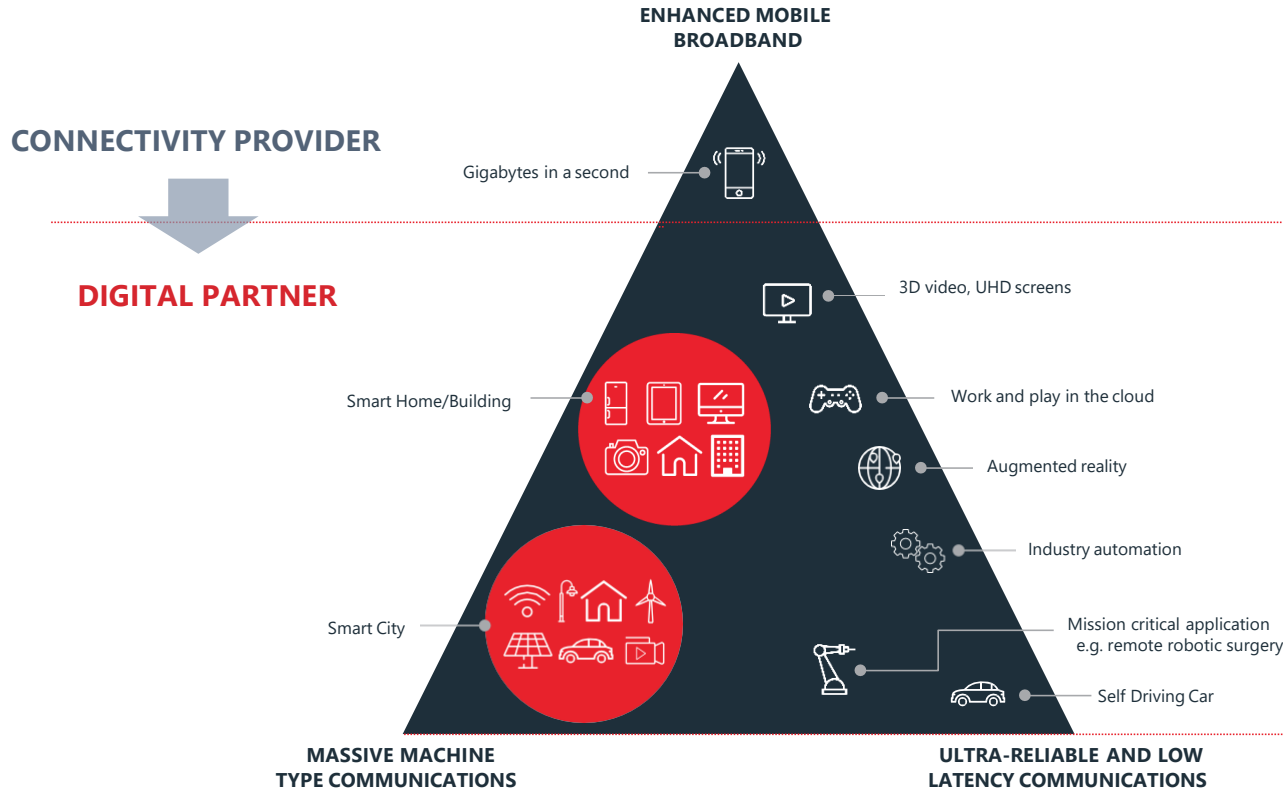
INCREMENTAL \$582BN SPLIT BY INDUSTRY (2026)



The first 4 generations of mobile followed a repeatable recipe The fifth generation is not a repeat



Unlocking the next decade of growth requires business and operating model transformation



72%
OF 5G GROWTH
POTENTIAL REQUIRES
**OPERATING MODEL
TRANSFORMATION***

* Source: TM Forum Research
'5G Triangle' Diagram Source: ITU

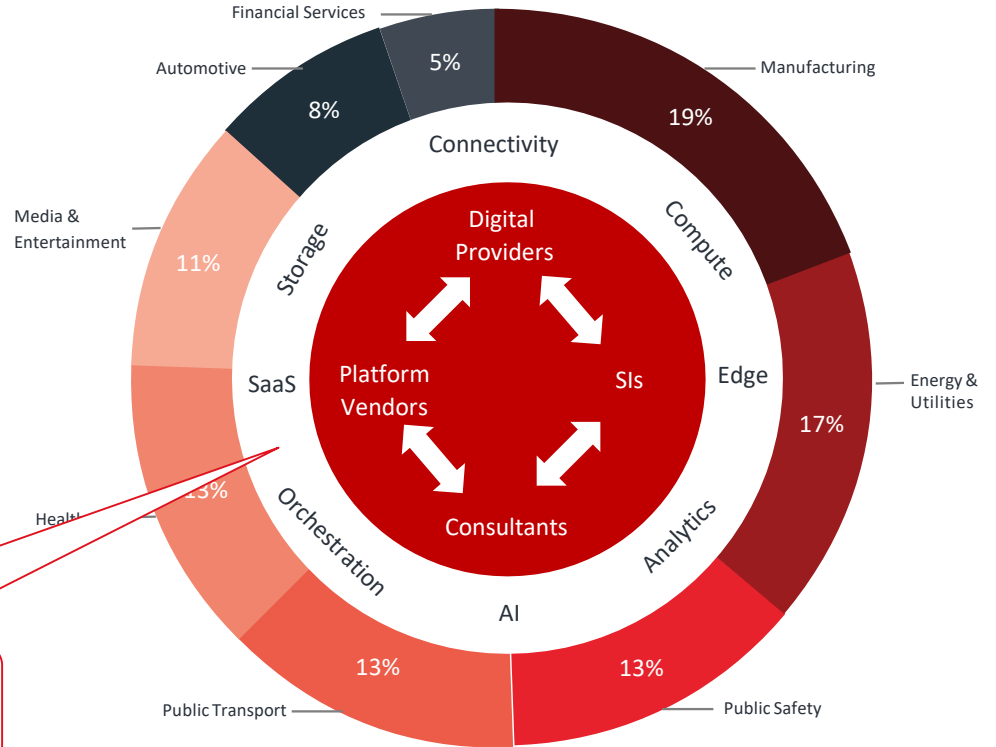
Open Digital Ecosystems will fundamentally reshape every industry

TRADITIONAL TELECOMS BUSINESS



At least
+\$582bn

5G ECOSYSTEM PARTNER BUSINESS

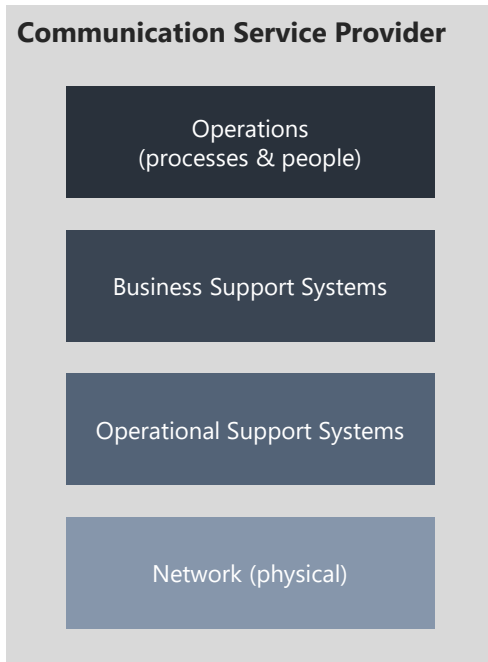


What's your role?

Traditional operations are moving to the cloud

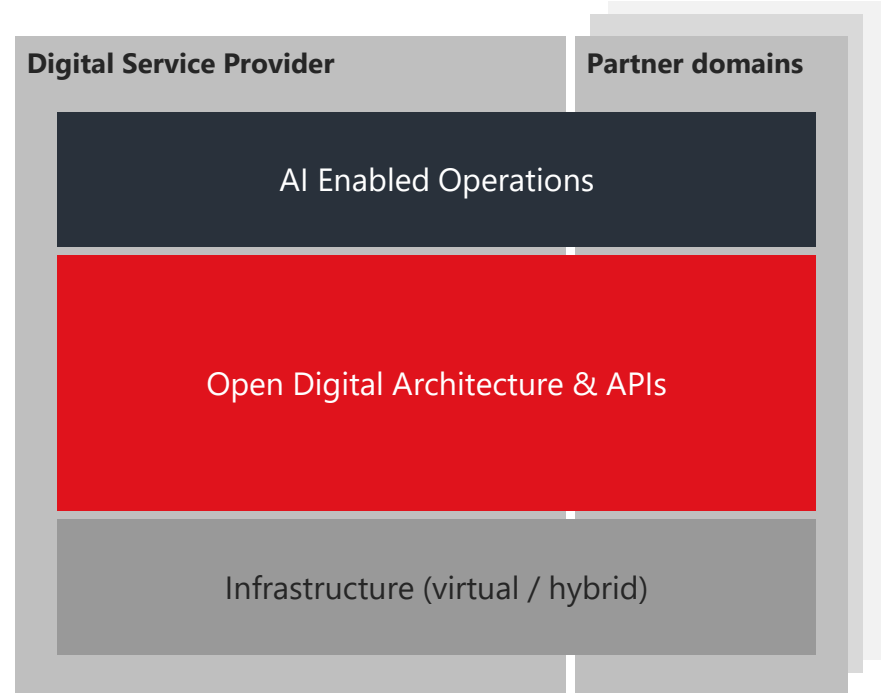
1990s IT Mindset

Cost-centric "Reduce the 5%"




2019 IT Mindset


Impact-centric: "Transform the 95%"



7/top 10, half of top 20 CSPs now require TM Forum Open APIs

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

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