

tmforum

2023 Annual Meeting
of Members

welcome

28 June 2023

Antitrust Reminder:

Attendees are respectfully reminded of applicable Antitrust laws and the TM Forum Antitrust policy, which prohibits the discussion or exchange of information on pricing, business plans, or any other confidential or commercially sensitive data.

Agenda

CEO'S WELCOME & OPENING

Overview of today's agenda



Nik Willetts
CEO
TM Forum

CHAIR'S INTRODUCTION

Industry overview, the role of the Board, and proposed composition

Motion #1:
To approve minutes of the last Annual Meeting of Members (AMOM) meeting

Motion #2:
To appoint Trustees



Steffen Roehn
Chair of the Board

FINANCIAL REPORT

Report for the financial year April 2022 – March 2023

Motion #3:
To appoint Auditors



Michael Lawrey
Chair, Finance & Commerce Committee



Olga Martynov
CFO, Treasurer and Secretary
TM Forum

TM FORUM – LEADING THE INDUSTRY TO GROWTH & ANNUAL REPORT

Forum strategy, progress of key strategic programs and outlook for the next 12 months



Nik Willetts
CEO
TM Forum

RESULTS OF MOTIONS & Q&A

Please ask questions using the Q&A window

Including:



Tim Banham
CCO & EVP,
Membership
TM Forum



George Glass
CTO
TM Forum

introduction from **the chair**

Steffen Roehn

Chair of the Board, TM Forum

tmforum

A nighttime cityscape featuring prominent skyscrapers like the Petronas Towers and the CN Tower. The scene is overlaid with vibrant, glowing digital light trails in shades of blue, purple, and pink, suggesting a high-tech or data-driven environment.

state of the industry

Steffen Roehn
Chair of the Board

motion #1

minutes of the previous meeting

NOTE: Only Principal Contacts may vote.
Please do not vote again if you have already placed your vote in advance.

RESOLUTION

Propose that the available minutes shall be taken as a true and fair record of the Annual Meeting of Members held on 30 June 2022.

Proposed: Steffen Roehn, Chair

Seconded: Nik Willetts, CEO

Role of the TM Forum Board of Trustees

PROVIDE
LEADERSHIP

SET STRATEGY &
VISION AND DRIVE
EXECUTION

BALANCED TO
REPRESENT
FORUM
MEMBERSHIP

PROVIDERS AND
ENTERPRISES HOLD A
MAJORITY SEAT

ACT AS TRUSTEES OF
THE CORPORATION

TRUSTEES HOLD
A SEAT ON THE
TM FORUM
BOARD FOR A
TWO-YEAR TERM

Trustees for election to the Board in 2023

The Board members below are standing for election by the Membership at the Annual Meeting of Members in June 2023

Standing for re-election



Anthony Rodrigo
GCIO



Chair

Steffen Roehn
Partner



Vice-Chair

Harmeen Mehta
Chief Digital &
Innovation Officer



Li Huidi
Vice President



Peter Leukert
GCIO



Vice-Chair

Michael Lawrey
Independent
SME Member
Constituency Rep.



Koen Vermeulen
GCIO



Shankar Arumugavelu
Global Chief Digital
& Information Officer



Haiping Che
CDTO



New appointments



NEW

Enrique Blanco
CTIO



NEW

Kathleen O'Reilly
Global Lead and
MD Strategy



NEW

Amol Phadke
Managing Director
Communications Industry



Continuing Trustees of the Board

The Board members listed below were appointed at the Annual Meeting of Members 2022 for a two-year term and will be due for re-election at the 2024 Annual Meeting of Members. Ex-Officio Trustees are appointed by resolution of the Board of Trustees and reconfirmed annually at AMOM.

Continuing Trustees



Ruza Sabanovic
EVP & Chief
Technology Officer



Jan Karlsson
SVP & Head of Business
Area Digital Services



Jason Rutherford
SVP Communications
Applications



Scott Petty
Chief Digital & IT
Officer



Kiran Thomas
President



Sarit Assaf
General Manager NewTech
BU, Amdocs Technology



Ex-Officio Trustees*



Nik Willetts
CEO



Olga Martynov
CFO & Treasurer



*subject to reconfirmation
by the membership during
this meeting

Board of Trustees Slate for 2023-24

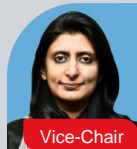
Board members for election 2023



Anthony Rodrigo
GCIO



Chair
Steffen Roehn
Partner



Vice-Chair
Harmeen Mehta
Chief Digital &
Innovation Officer



Li Huidi
Vice President



Peter Leukert
GCIO



Vice-Chair
Michael Lawrey
Independent
SME Member
Constituency Rep.



Koen Vermeulen
GCIO



Shankar Arumugavelu
Global Chief Digital
& Information Officer



Haiping Che
CDTO



NEW
Enrique Blanco
CTIO



NEW
Kathleen O'Reilly
Global Lead and
MD Strategy



NEW
Amol Phadke
Managing Director
Communications
Industry



Including the re-confirmation, as Ex-Officio Trustees, of

Nik Willetts
CEO
tmforum

Olga Martynov
CFO & Treasurer
tmforum

Board Members on a 2-year term from 1 July 2022



Ruza Sabanovic
EVP & Chief
Technology Officer



Jan Karlsson
SVP & Head of
Business Area
Digital Services



Jason Rutherford
SVP
Communications
Applications



Scott Petty
Chief Digital & IT
Officer



Kiran Thomas
President



Sarit Assaf
General Manager
NewTech BU,
Amdocs Technology





motion #2
appointment of trustees

NOTE: Only Principal Contacts may vote.
Please do not vote again if you have already
placed your vote in advance.

RESOLUTION

Propose that the eligible Members present hereby ratify the appointment of the persons listed on the Board slate and as appearing on the TM Forum website to serve on the Board of Trustees. Appointments will be for a period of two years and all those appointed shall be Trustees under the laws of New Jersey.

Proposed: Jan Karlsson, Trustee and Member of
Appointments & Governance Committee

Seconded: Ruza Sabanovic, Trustee

financial report & appointment of auditors

Michael Lawrey

Chair, Finance & Commerce Committee

Olga Martynov

CFO, Treasurer & Secretary to the Board

tmforum

FY22/23: Solid financial results, delivered against all financial targets

Best financial performance in over a decade. Continued upward trend boosts member equity above \$5.8m

P&L

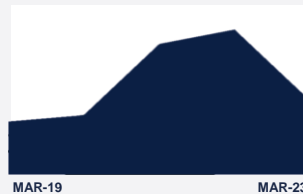
REVENUE
\$ 28,598,352
26% YoY



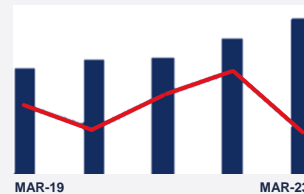
GROSS MARGIN \$
\$ 20,344,371
12% YoY



GROSS MARGIN %
71%
(11%) YoY



OPEX
\$ 18,772,908
14% YoY



NET INCOME
\$ 1,082,294
(21%) YoY

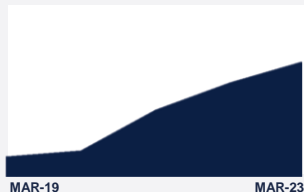


B/S

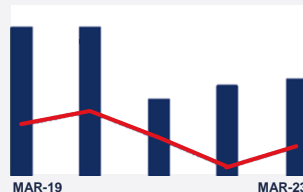
CASH
\$ 11,914,512
2% YoY



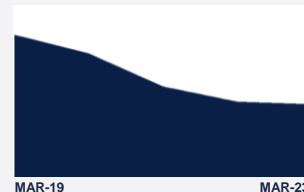
EQUITY
\$ 5,810,948
23% YoY



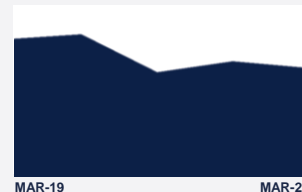
AR
\$ 4,219,915
7% YoY



DSO
63
(3%) YoY



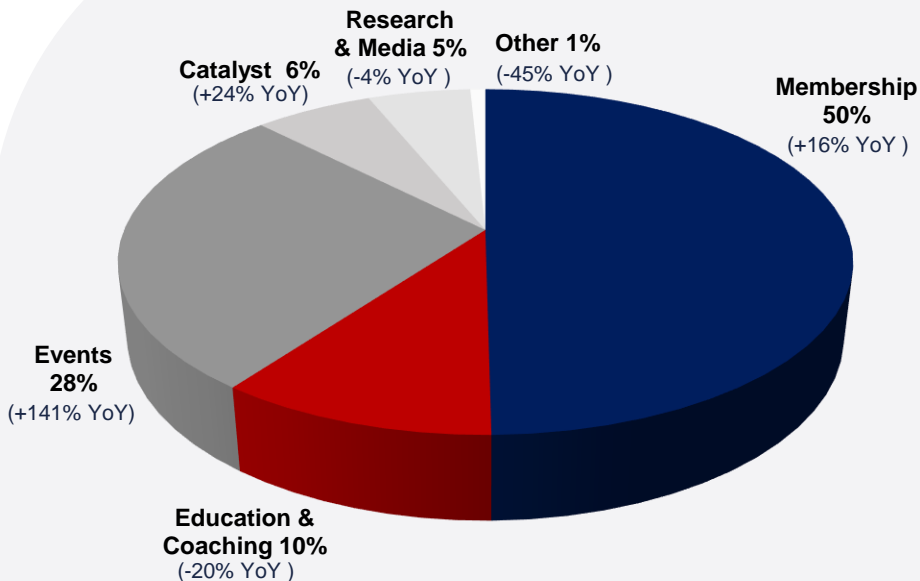
DEFERRED REVENUE
\$ 8,337,624
(5%) YoY



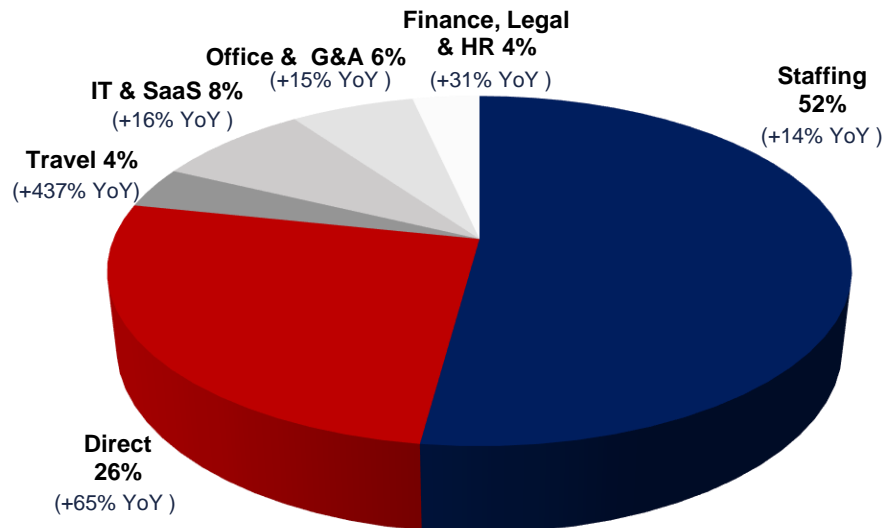
FY22/23: Sources and uses of funds (unaudited)

Positive momentum in FY22/23 positions us well to accelerate industry growth

FY22/23 Revenue of \$28.6M



FY22/23 Expense of \$27.5M



Investment for enhanced member value in FY22/23





motion #3
appointment of auditors

NOTE: Only Principal Contacts may vote.
Please do not vote again if you have already
placed your vote in advance.

RESOLUTION

Propose that Smolin, Lupin, & Co., PA shall be appointed as auditors for the corporation for the financial year 2023-24.

Proposed: Michael Lawrey, Chair, Finance & Commerce Committee

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

reigniting growth

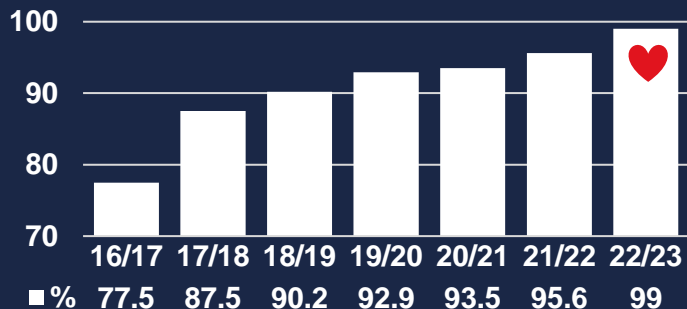
FY22/23 Results &
FY23/24 Outlook

NIK WILLETTS
CEO

tmforum

Record breaking member retention & rapid diversification

Member retention at **highest level ever**



110
new
members
in 22/23



10/10
largest global
CSPs are
active
members



Top 3
global
hyperscalers
are active
members



Continued growth & diversification of our member professional community



An Industry Disrupted

code RED

Our industry is facing challenges caused by 15 years of disruption

- Customer needs are outpacing industry's speed of change
- \$1 trillion invested for 0.9% growth in the past five years
- Asset-intensive, vertically integrated business models and legacy cultures
- Established marketplaces and aggregators will dominate B2B/B2B2X telco services go-to-market
- Legacy systems, processes and ways of working limit innovation, business velocity and operational efficiency

A Window of Opportunity

ignite growth

If we:

- De-layer the operating model, build to a composable architecture and implement AI at scale
- Partner to innovate
- Address the talent challenge

We will enable:

- Innovative pricing models & new value-added products through -as-a-Service delivery models
- CSPs to become 'local hero' partners for multi-national customers and global platforms
- Access to underserved direct and adjacent value pools by being truly customer and partner-driven

TM Forum's strategy focuses on taking practical action to unlock growth for our industry

Working together as a community to ignite growth

Cutting Edge Insights

tmforum.org/knowledge

- In-depth analysis
- Blueprints for growth



Tech, Data & Automation

tmforum.org/code-frameworks

Delaying the operating model

- Open Digital Architecture (ODA)
- Open APIs
- AI & automation at scale



Product & Partner Innovation

tmforum.org/labs

Partnering for Innovation

- Catalyst co-created solutions
- Next20
- Industry-wide initiatives
- Zero touch partnering



Operating Model: People & Culture

tmforum.org/training/accreditation

Addressing the talent challenge

- Tech Organizational Design (TOD)
- Diversity & Inclusion Score (IDS)
- Sustainability

Define the Future of the Industry at our Events

tmforum.org/tm-forum-events

- Be inspired by thought leaders
- Build the tech stack of the future
- Upskill and develop your career



Tech, Data & Automation: Open Digital Architecture & APIs

Driving the future through industry-led, user-driven composable solutions

Unifying the industry towards a common, AI-ready composable architecture and Open APIs for digital business

37,500+

total training courses completed since Jan 2021 by

11,500+

individuals

678,715

Open API downloads by 40,844 developers from 2,611 organizations. 62 organizations have certified 700 Open APIs

166,000+

downloads of our ODA code, frameworks and assets over the last 12 months



Ignites your strategy into real-world success

Revolutionized go-to-market strategy – reduced time to market and cost by 33%



Drives efficiency through effective AI-based automation

40% reduction in IT costs

First CSPs to achieve 'Running on ODA' status



2,200+

professionals from

385+

companies contributing to ODF development since 2021

40+

ecosystem catalyst projects used ODA principles/specs across different use cases & industry vertical scenarios

125+

Company signatories to the ODA manifesto



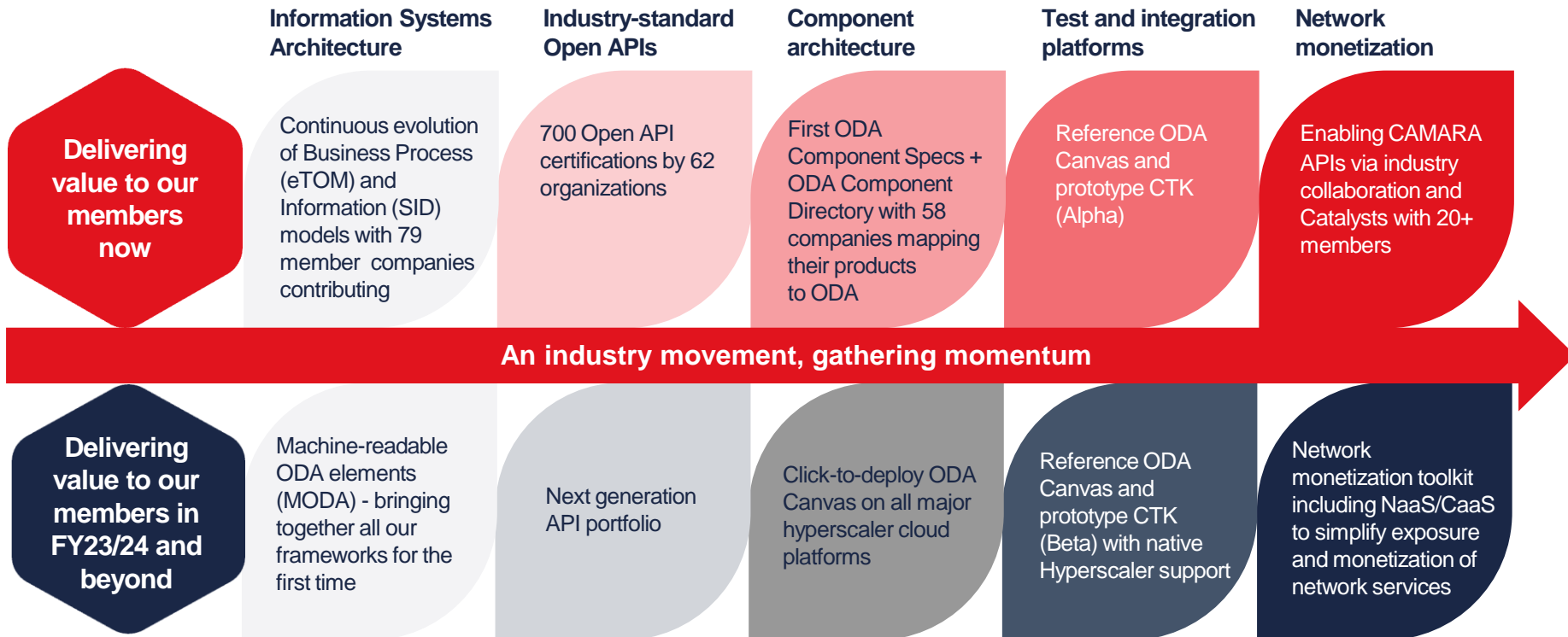
vodafone

Defines your E2E pathway from strategy to implementation

Digital sales increased by more than 50% - sales conversions by 30%

Our 'Ready for ODA' program for vendors is already in beta trials with our leading members

Tech, Data & Automation: Open Digital Architecture & APIs



An industry movement, gathering momentum

Tech, Data & Automation: Artificial Intelligence & Automation at scale

Delivering Value Now

- Autonomous Networks (AN) levels to assess maturity of AI-based network automation and effectiveness
- AN architecture for standardized approach to network automation
- World-first end-to-end intent suite, to tell networks what to do but, not how to do it
- CLADRA – standardized approach to enabling closed-loop operations

AI & Automation Framework (coming soon)

- Addressing Governance, Implementation & Applications to safely introduce AI at scale



Coming this year:

- Launch of AI/AN Framework including an AN Manifesto, to drive industry standardized adoption
- Enabling decision intelligence allowing networks to experiment with new technology using Digital Twins
- Delivery of MAMA, a methodology for measuring and managing autonomous operations initiatives
- Co-creation with Generative AI

Building a community of AI leaders through inspiring challenges

Product & Partner Innovation – Catalysts & Next20



900+
individuals taking part

160+ Unique Companies

45 Open Innovation Catalysts

11 Moonshot Challenge Catalysts

Taking our co-creation to the next level with Moonshot Challenges:

- **The Metaverse Challenge:** creating and capturing value in the Web3 era
- **The Energy Challenge:** cutting energy consumption by 25% by 2025

Open Innovation Catalysts

Focus areas:

- Data and AI
- Autonomous Networks
- People & Planet
- Cloud Native IT & Networks
- Ecosystems



**innovation
labs arena**



Next20 Startup Program

Injecting fresh thinking and energy into our community and supporting the companies of the future.

"One of the best decisions we took this year was to apply to the Next20 program. DTW was an inspiring and insightful event, and we came home full of new ideas and potential partnerships."

João Mestre, COOPTELCO

Rapidly co-creating innovative solutions to the biggest industry challenges

Product & Partner Innovation – Industry Problem Solving

Zero-touch Partnering

ODA provides solutions for:

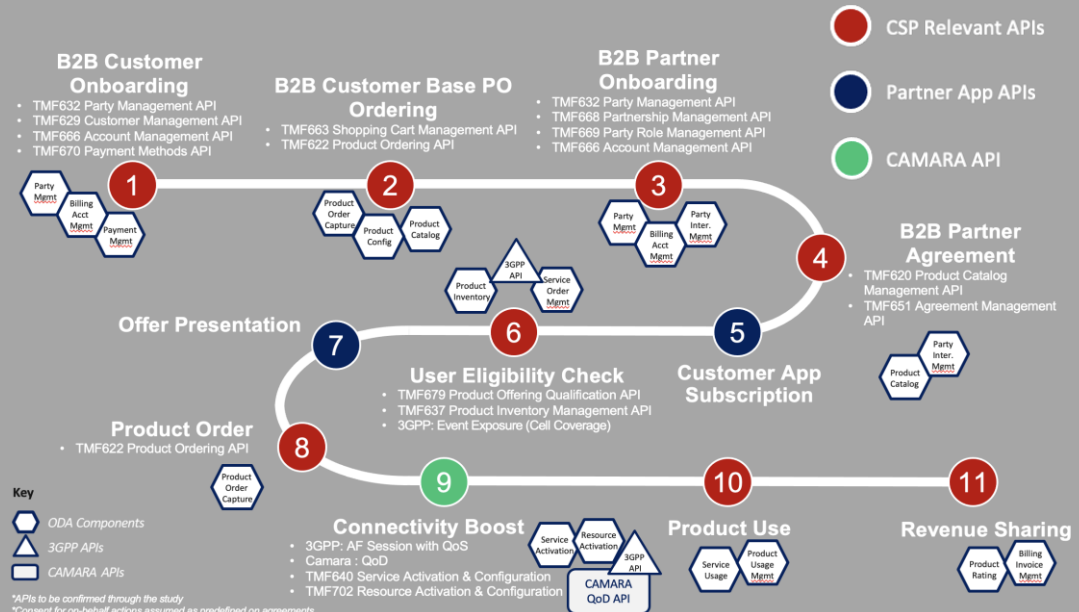
- Efficient on-boarding and integration of partners
- Open APIs for zero-touch partnering & operations (contract management, revenue share etc.)
- New value-driven approaches to product innovation

Wholesale Network B2B Products (coming soon)

- Today there is a non-standard process for trading broadband network services
- Transactions are subject to a sizable “integration tax”
- There is an opportunity to harmonize the process for wholesale (B2B) product management
- Our community is aiming to develop a worldwide set of APIs to support B2B product provisioning

Industry-wide Initiatives

Extending our collaboration with SDOs, we launched a ‘Boostable QoS’ Catalyst project with 25 member companies to illustrate the power of **ODA, Open APIs** and **GSMA Open Gateway/CAMARA** enabling trusted developers' direct access to network features via common APIs



Operating Model: People & Culture

The Talent program is focused on our communities need to upskill people, transform operations and culture

Upskilling the Industry

Progress in the past year:

- World-class upskilling & training
- 3,000 professionals from 186 companies completed 8,000 courses in 12 months
- 28,000+ professionals have received 78,000 certifications to date

Addressing the Talent Challenge

Progress in the past year:

- Talent Consortium assembled to understand and address talent needs
- Inclusion and Diversity Score (IDS) launched

This year

- TechCo Organizational Design (TOD) project launched
- Scaling of IDS underway



Delivering a Sustainable Future

This year:

- Addressing ESG through our Labs, resources, and component library
- Sharing intelligence through regional workshops



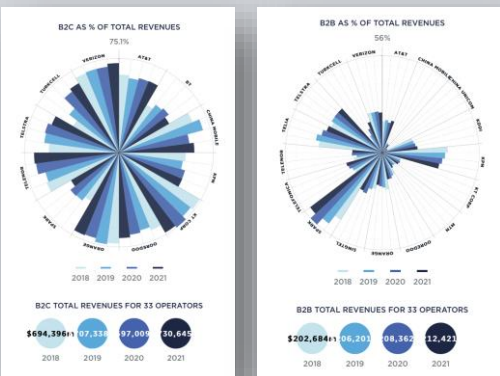
Being part of TM Forum labs projects helps develop your career

Cutting Edge Insights: TM Forum Inform

Shining a light on the hottest topics in telecoms - free access for TM Forum Members

2022-23 by the numbers

- 21 new research reports
- 13,000 downloads
- 31,000 participants on 42 webinars



Re-imagined Inform platform with data visualization now live!

Cutting-Edge Research Available Now!

- *CSP revenue breakdowns and spending patterns*
- *Growth strategies through partner ecosystems*
- *Demystifying the evolution towards autonomous networks*
- *The impact of the Metaverse and digital twins*
- *ESG - What it means for a telco to be sustainable*
- *The increased use of AI and ML to in telco IT*

Coming Soon:

CEO Playbook: Reigniting Growth



Upcoming Research Areas

- Generative AI
- The Metaverse
- Hyperscaler partnerships
- 6G
- The Delayed Telco
- Cybersecurity within CSPs



20-22 SEPT 2022
COPENHAGEN



"DTW22 highlighted real progress as well as existential challenges (and provided some decent coffee). It's clear the hyperscalers are wielding ever greater influence in the sector. And the path to viability is open to all, with the TM Forum playing a meaningful role."

Telecom TV

Where the industry drives real change: DTW23 – Ignite



ignite

19-21 Sept. 2023

- Focused on igniting growth at the intersection of telco, cloud and AI
- CSP, Hyperscaler, and AI headliners



3,500
delegates



185+
CSP companies



11,000+
sqm space



600+
companies



350+
speakers



50+
press & analysts



55+
Catalysts



20
start-ups



100+
countries

Join us in Copenhagen to find inspiration and real answers

A few of the industry leaders on stage in Copenhagen...



Allison Kirby
CEO
Telia Company



Manjot Singh Mann
CEO
M1



Tareq Amin
CEO
Rakuten Mobile



Kerl Gilder
CEO
Colt



Scott Petty
CTO
Vodafone



Harmeen Mehta
CDIO
BT



Ruza Sabanovic
EVP and CTO
Telenor



Marc Rouanne
EVP & CNO
DISH Network



Anna Yip
Deputy CEO &
CEO Business
Development
Singtel



Lee Huidi
EVP & Chief
Security Officer
China Mobile



Enrique Blanco
CTIO
Telefonica



**Dr Rainer
Deutschmann**
SVP & Group COO
Telia Company



Adolfo Hernandez
VP Global Telco
Business Unit
AWS



**Shankar
Arumugavelu**
Global Chief Digital &
Information Officer
Verizon

Taking on the challenge of helping our industry ignite growth

Unlocking endless opportunities across the communications ecosystem

01



Techco DNA

Creating a Blueprint for Reinvention

To ignite growth, telcos are transforming into “TechCos,” preparing to seize next gen connectivity and digital service opportunities.

02



Cloud-Native Software

Making IT your Business Advantage

The transition to open, cloud-native digital IT architectures enables telcos to rapidly introduce new services.

03



Future Networks

Driving the Automation Revolution

The network of the future will be built on open digital architectures, powered by AI and leverage open APIs.

04



AI at Scale

Delivering Growth and Operational Efficiency

GenAI has the transformative power to revolutionize our approach to network operations. We will address how to harness the tremendous power of this disruptive technology safely, ethically and securely to implement at scale.

05



Platforms & Partners

Capitalizing on New Growth Opportunities

As CSP's face the headwinds of slower business growth, diversifying beyond connectivity and implementing the right platform and partnership strategies are key to unlocking valuable new revenue opportunities.

You're part of an unstoppable movement!



- The TM Forum community is growing and diversifying
- By working together, we are addressing our industry's biggest challenges with real solutions

Together in the year ahead, we will focus on:

- Tech, Data & Automation
- Product & Partner Innovation
- Operating Model: Talent & Culture

Only by working together can we ignite industry growth

Get involved!

- Connect with your engagement manager today
- Register for DTW23 – Ignite in Copenhagen

tmforum

thank
you

**any
questions?**

Please post your questions in the Q&A chat

tmforum

results of motions

tmforum



closing reflections

Steffen Roehn
Chair of the Board



Q&A

DON'T FORGET: Save the date
DTW23 - Ignite is 19-21 September in Copenhagen