

# Introduction & Market Context

*Are we rowing in the same direction?*



Nik Willetts  
Action Week USA, July 20, 2015





# TM Forum: A Brief Introduction

TM Forum is a non-profit global industry association which brings together the collective genius of our diverse members to collaborate to build highly successful digital business ecosystems



**90,000+**  
Member Professionals

**950+**  
Member Companies

**Global**  
Coverage



# Digitization of Industries

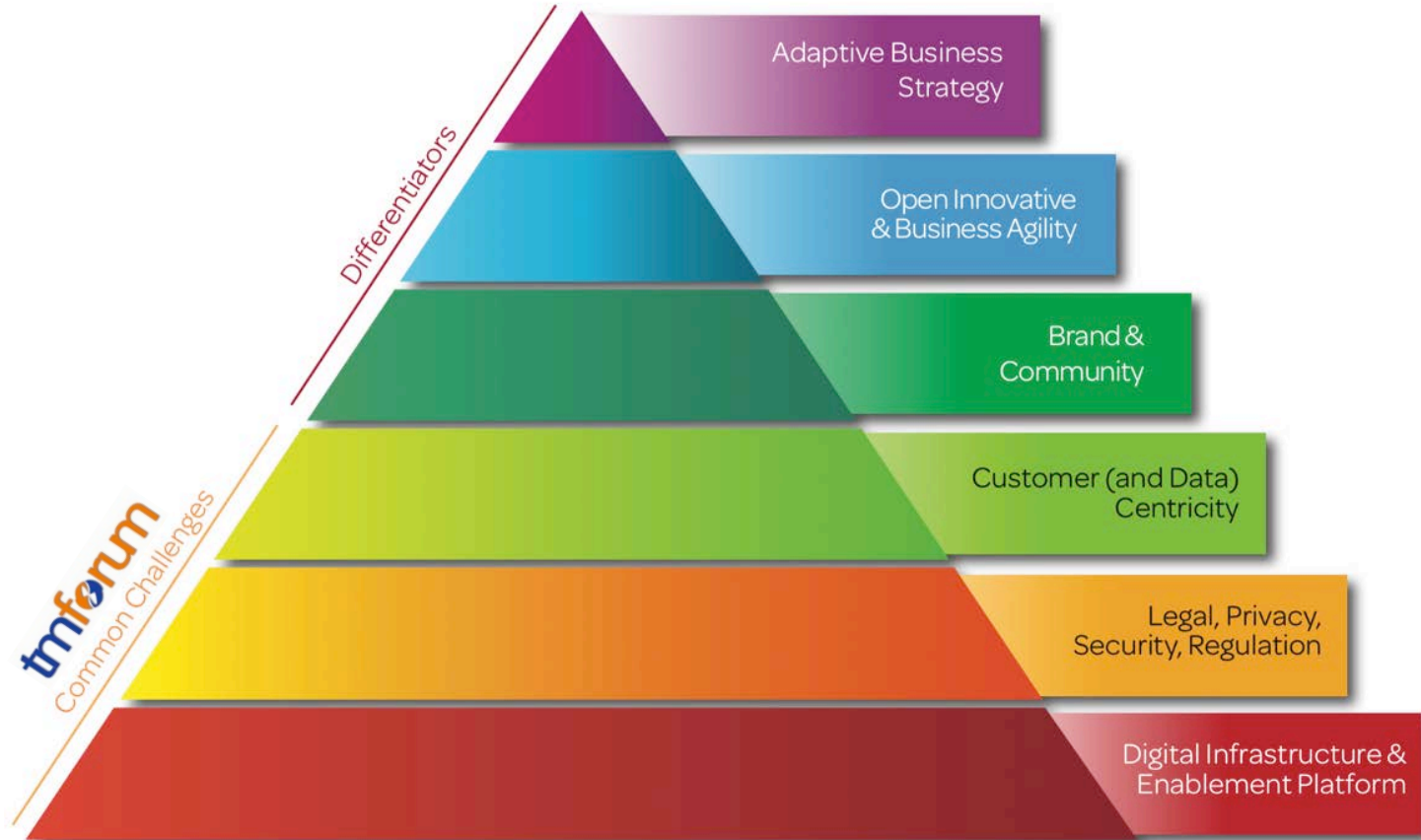
*Everything that can be digitized, will be*



Telco ➡ Digital Business Enabler



# The Hierarchy of Digital Business Needs Identifies Many Common Challenges







**The value chain is now a  
complex value fabric of partners –  
a series of ecosystems**



‘Ego-system’



Eco-system



# The Interface is Where the Profit Is





# Alibaba – the 9<sup>th</sup> Most Valuable Company in the World – is an Ecosystem Business

There's an  **Alibaba** for that

**Alibaba Entity** — Deals in — Is kind of like

**Alipay** — Online payments — 

**Aliyun** — Cloud services — 

**Aliyun App Store** — Mobile apps —  Google play

**Aliyun OS** — Mobile OS —  안드로이드

**AutoNavi** — Maps and navigation —  Google maps

**InTime** — Retail outlets —  JCPenney

**Juhuasuan** — Group buying —  **GROUPON**

**Kanbox** — Cloud storage —  **DROPBOX**

**Laiwang** — Mobile messaging —  WhatsApp

**Alibaba Entity** — Deals in — Is kind of like

**Lyft, Kuaide** — Car service, ride sharing —  **UBER**

**Taobao** — C2C e-commerce —  **eBAY**

**Taobao Travel** — Online travel booking —  **ORBITZ**

**Tmall** — B2C e-commerce —  **amazon.com**

**TutorGroup** — E-learning —  **KAPLAN**

**Weibo** — Microblogging —  **twitter**

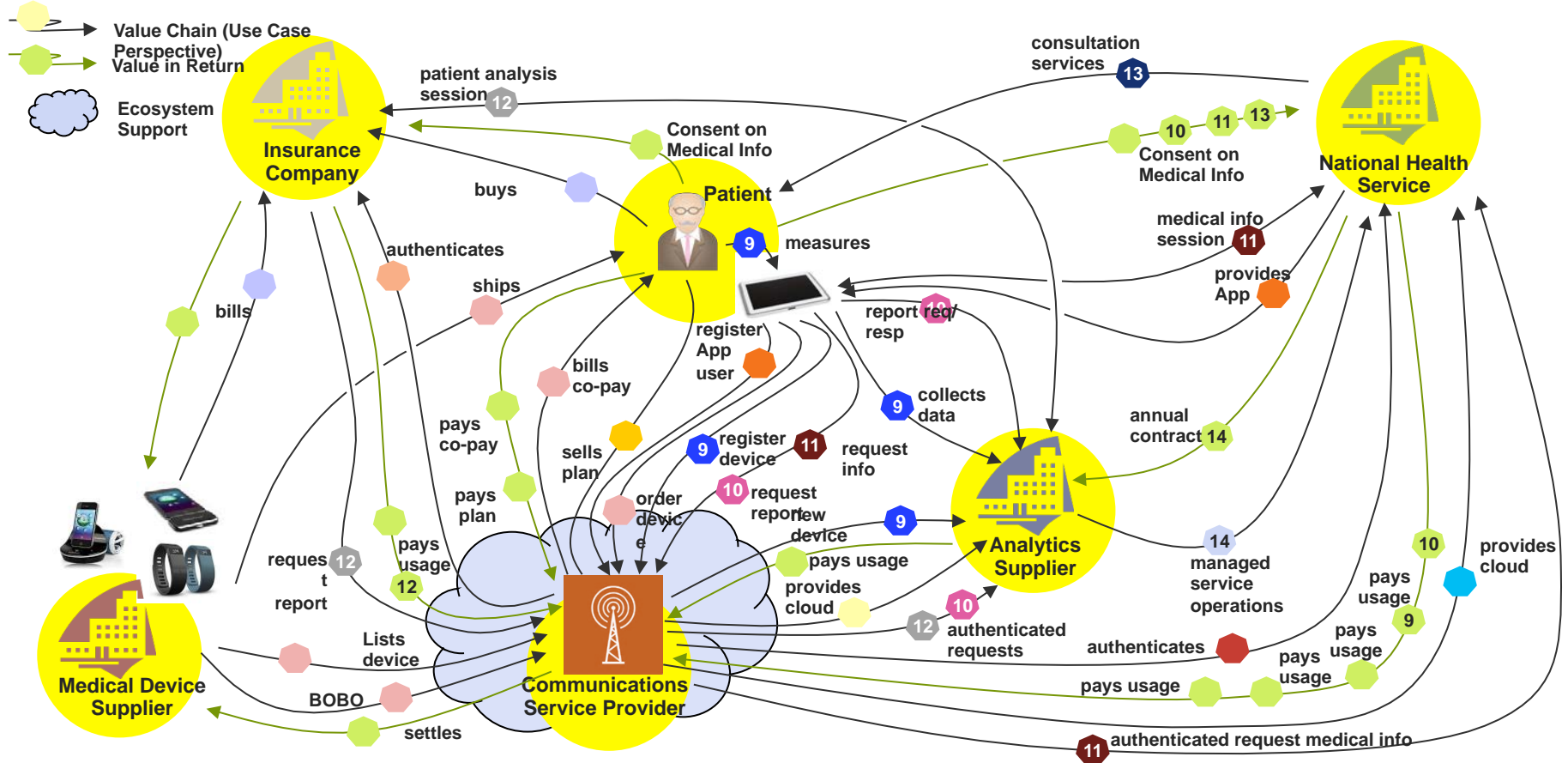
**Xiami** — Music streaming —  **Spotify**

**Youku Tudou** — Streaming video —  **hulu**

**Yu'e Bao** — Money-market funds —  **ING DIRECT**

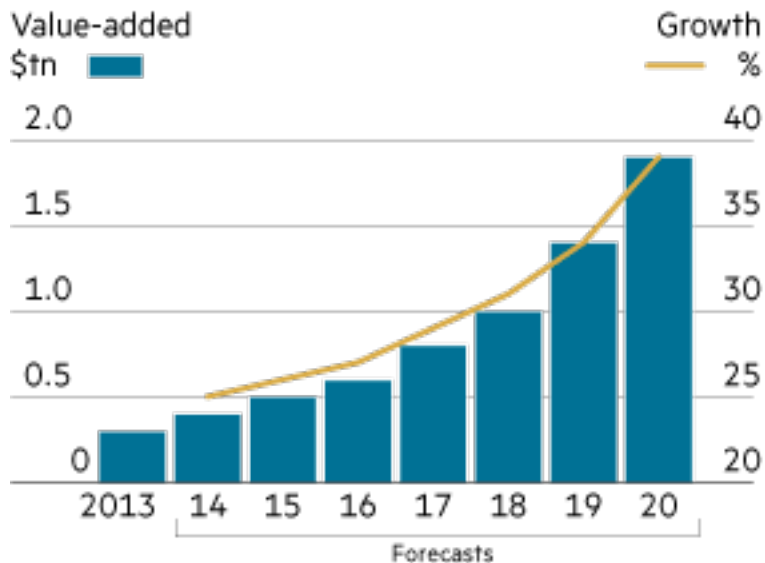


# And Our Ecosystems Are Getting More Complex



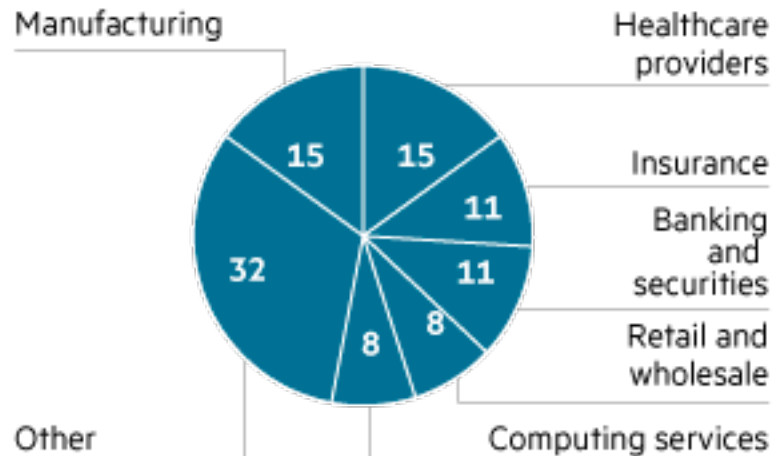


## Economic value added from 'internet of things'



Sources: Gartner; Analysys Mason

### By industry sector 2020 (%)



FT



# End-to-End Ecosystem Services Present Significant Opportunities for CSPs...

Requirement	Infrastructure Opportunity	Platform Opportunity
Security	✓	✓
Privacy		✓
Reliability	✓	✓
Analytics		✓
Accuracy	✓	✓
Latency	✓	
Timeliness	✓	✓
Legal/Regulatory		✓

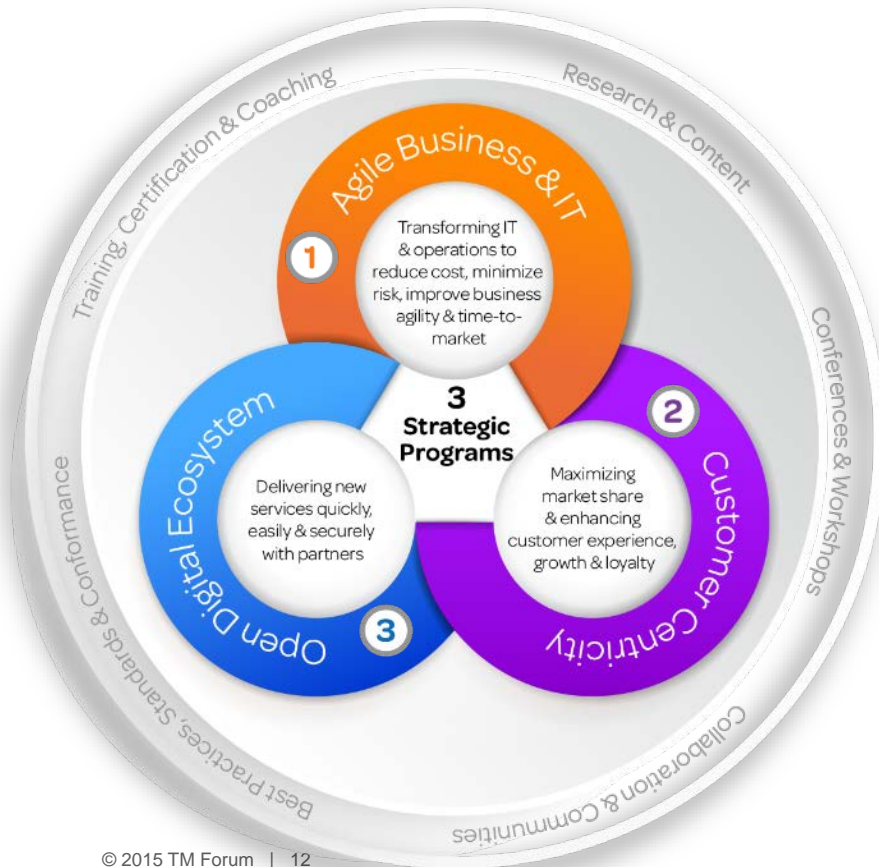
... but you have to move fast!



# Our Strategic Focus – Enabling Your Digital Ecosystem

The Forum guides our members on their digital transformation journey via  
**3 Strategic Programs**

- 1 Agile Business & IT**  
NFV & SDN (ZOOM)  
Digital Transformation  
Revenue Management
- 2 Customer Centricity**  
Customer Experience (CEM)  
Data Analytics & Metrics  
Security & Privacy
- 3 Open Digital Ecosystem**  
Internet of Things (IoT)  
B2B2X, Partnering, & APIs  
Open Digital Management





**If we all pull in the same direction  
together...**



**...we can achieve great things!**





Thank you!

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