

Digital Leadership Summit: Transforming and automating to deliver new digital enterprise services

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Vice President, AI, Data & Customer Experience

Digital Leadership Summit | Transforming and automating to deliver new digital enterprise services

Japan's contribution to the global B2B telecommunications market value is estimated to be over US \$15 billion by the end of 2026, which will be approximately US \$3 billion higher than the value of the B2B market place in Western Europe. To order for Japanese service providers to take advantage of this opportunity, they need to rapidly digitally transform, by taking a DevOps approach to launching new services, embrace new virtualized technologies, take a new micro-service, API, de-coupled based approach to their infrastructure and rapidly enable partnering. Attend this workshop to learn about what the future holds for operators delivering enterprise services including new revenue opportunities and how to overcome the technical and business roadblocks and the opportunities new technologies such as NFV, SDN-WAN, 5G, Automation and AI can bring. Allowing you to take a slice of the \$15 billion market opportunity.

14:00 – 14:10 – Welcome and introductions

Aaron Boasman-Patel, *Vice President, AI, Customer Experience & Data, TM Forum*
Jeff Sakkal, *General Manager, Head of APAC Business Unit, Amdocs*

14:10-14:30 – The enterprise of tomorrow in Japan: Key trends, challenges and opportunities

This session will set the scene for the day, highlighting the key forces shaping the future enterprise.

- What trends and technologies will transform the future workplace?
- What will the impact be on consumption of network and connected ICT services?
- Addressing the main challenges and success factors for network automation

Aaron Boasman-Patel, *Vice President, AI, Customer Experience & Data, TM Forum*

14:30-15:00 – Keynote presentation & fireside chat: Enterprise Conversations: What do enterprises really want from CSPs and where are they failing to deliver today?

This session will include a presentation and a Q&A from a leading Japanese enterprise who will discuss what services they have today, what they want in the future, and most importantly what their needs are from service providers for delivering their key services of tomorrow.

Aaron Boasman-Patel, *Vice President, AI, Customer Experience & Data, TM Forum*
Marcos Ota, *Executive Director, JPMorgan Securities Japan Co. Ltd*
Fatsuya Kawase, *Senior Vice President, Mars & Co.*

15:00 – 15:30 – Delivering the services of tomorrow by embracing virtualization, softwarization, and new technologies

A non-technical perspective of the key issues occupying communications industry executives' minds – including how to address changing customer needs within an advanced new technology environment (e.g. monetizing B2B 5G use cases and NFV/SDN based offerings), how to take a strategic approach towards support and ways to generate additional revenue.

Michal Sever, *Product & Solutions Marketing Manager, Amdocs*

15:30 – 15:45 Refreshments

15:45 – 16:15 – Spotlight session: The Role of the network edge in enabling new business opportunities

- Walkthrough on the emerging use cases based on multi access mobile edge computing
- The enabling technologies for MEC including 5G, NFV orchestration
- Monetizing edge technologies – business models for MEC
- Real life examples

Yosi Mig Yosef, *Product & Solutions Marketing Director, Amdocs*
Yoshiaki Kono, *Industry Technical Specialist in Network Communication Sales, Data Center Group Sales, Intel Japan*

16:15 – 17:30 – Enterprise Conversations: In this interactive session, we will discuss and introduce each of the following topics and show a demo on how these can be overcome. The audience will be split into three groups and will rotate between the different demos, spending twenty minutes at each table, discussing the issues and exploring the demo.

1. The potential role of 5G in introducing innovative B2B2X use cases

With edge computing, virtualized network elements, network slicing and more, 5G will enable the introduction of new services based on a differentiated quality of experience in the mobile network. In this session, we showcase how to practically operationalize leading B2B 5G-related use cases.

2. Leveraging NFV to differentiate and accelerate managed SD-WAN and security offerings

The race is on to implement SD-WAN solutions to ensure the integrity of existing revenue streams – and create new ones. In this session, learn how NFV enables you to create differentiated SD-WAN and value-added service offerings that enhance your competitive positioning – and at the same time, meet ongoing and future business, performance and cost requirements.

3. How to provide a seamless digitized B2B intelligent customer engagement

Enterprise customers' expectations are evolving with increasing expectations for faster, more efficient communications with their service providers. In this session, learn how to streamline and automate the lead-to-care process so that your B2B customers receive the advanced digital experience they demand – even in today's complex hybrid environment comprising both traditional and next-gen services.

17:30-17:40 – Key conclusions & wrap up

Aaron Boasman-Patel, *Vice President, AI, Customer Experience & Data, TM Forum*

17:40 – 20:00 – Networking cocktails & conversations

Sponsored by:



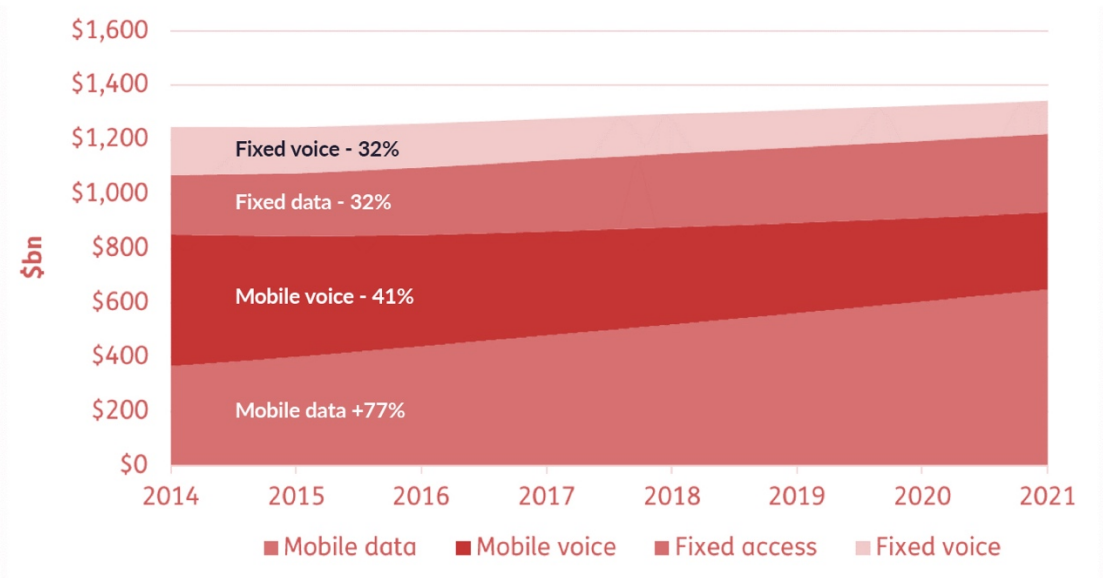


Changing attitudes to B2B market

Thinner margins, smaller revenues?

In the past, telecommunication companies gave less attention to the B2B market owing to its thinner margins and smaller revenues. This was due to legacy technology and the complexity of delivering enterprise grade services, traditionally based on hardware and offering fixed communication services... think PBX (private branch exchange).

Global communication revenues, 2014-2021



Source: Ovum

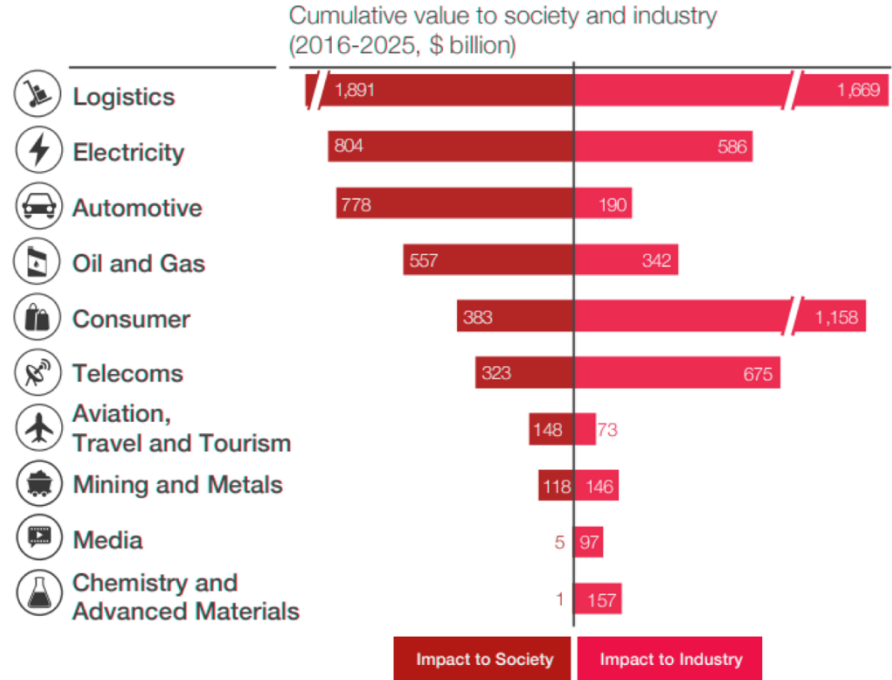
B2B growth to outpace B2C...

- Yet, as we see global communications revenues stagnating... we are now seeing a shift in this thinking as forecasts for B2B show that growth is to outpace B2C.
- The global B2B telecommunication market is projected to register an impressive growth at a double-digit CAGR of 13.6% during 2016 to 2026, to surpass US\$ 100 Bn by 2026 end. The market is anticipated to reflect an absolute \$ opportunity surpassing US\$ 77 Bn by 2026 (Source FMI)
- Yet, due to under investment in B2B Units, need to shift their resources, talent and technologies, improve their operations and experience to take a slice of the B2B opportunity and keep new, more agile, OTT players out of the way.

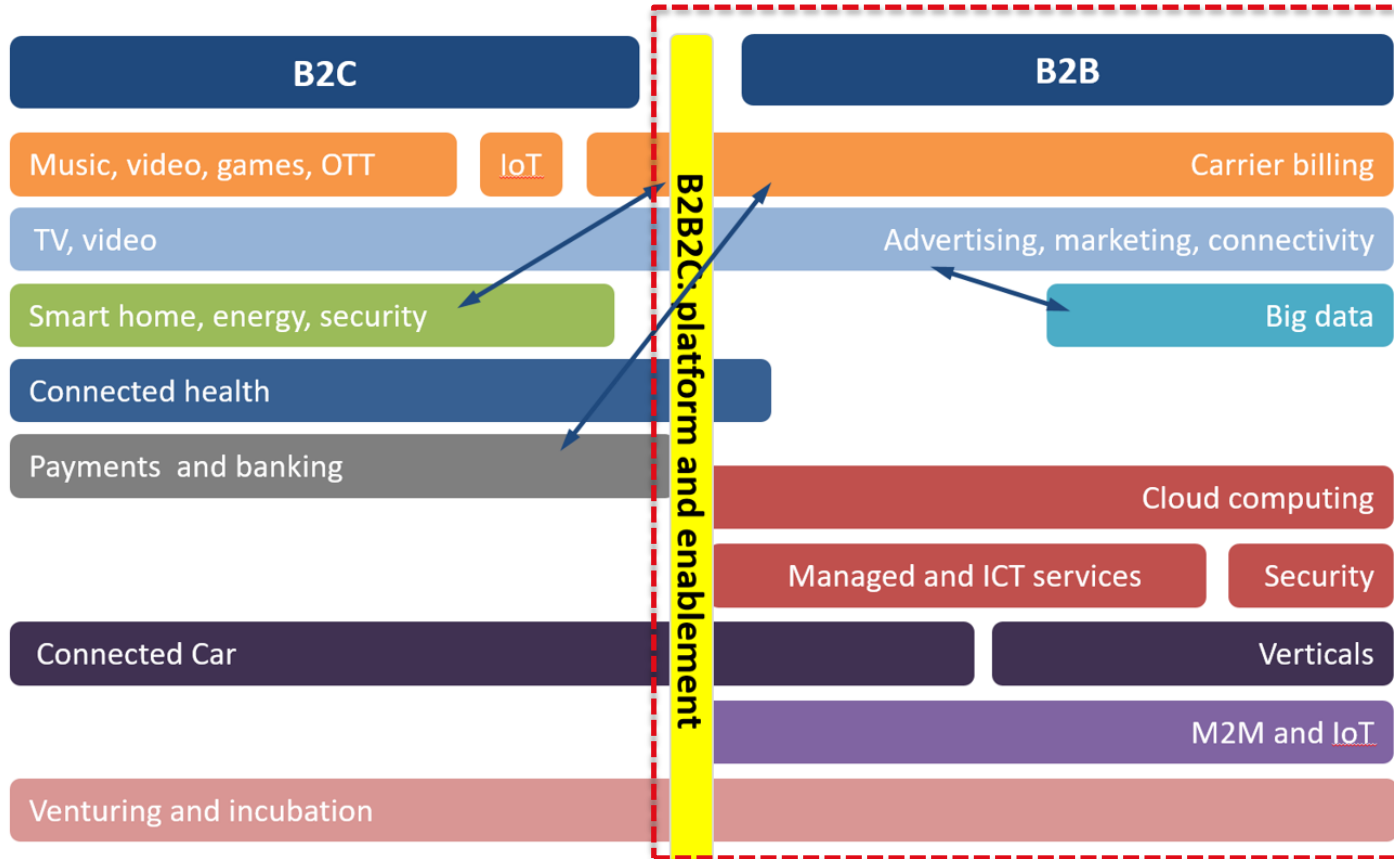


New technologies and digital transformation is accelerating the B2B opportunities ... Dawn of the platform economy

Sizing the opportunity in the B2B Platform -DTI research estimates the cumulative socio-economic impact of digital transformation at \$100 trillion between 2016 and 2025. It found that just over half of the initiatives relied on the enabling capabilities of B2B platforms, and that there is an estimated \$10 trillion in value that the B2B platform economy could generate for business and society through 2025. (Source: WEF)



Good news... Telco's are pursuing new opportunities to diversify away from their core comms business...



What's enabling it?




New technologies are enabling innovation and delivering new enterprise services, faster, cheaper and more efficiently

Pick your flavour....



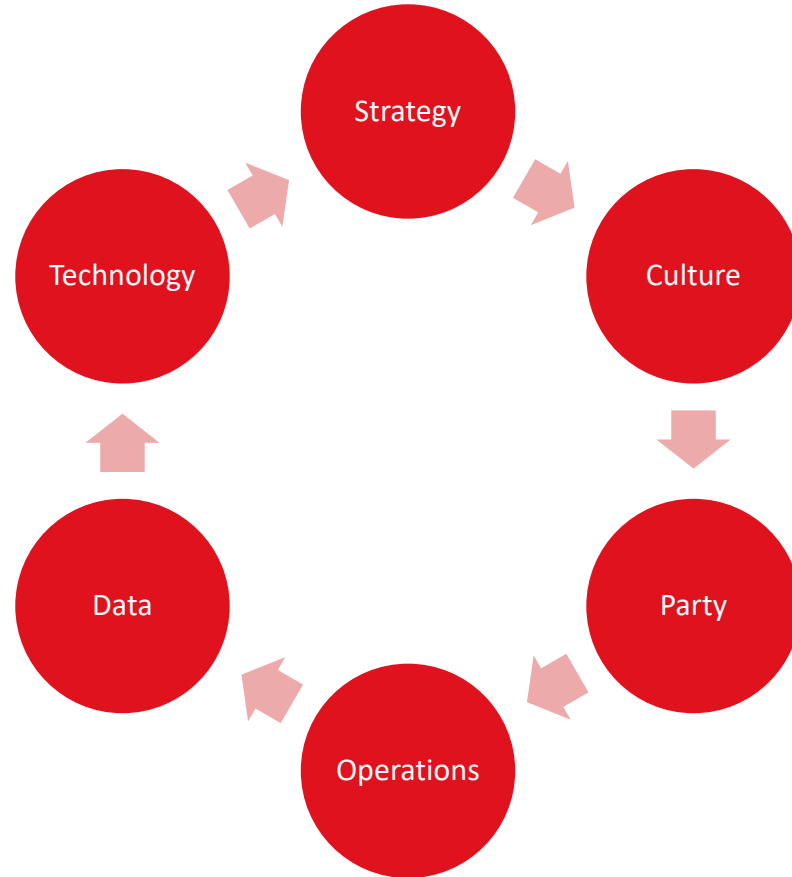
But it is not only about technology... we need to do business differently – Think and act differently

Digital native businesses do it differently...

		
Amazon can provision a service every 11 seconds	WhatsApp with 55 employees adds roughly 1 million users daily	giffgaff crowdsources customer service and has high NPS
10,000X	1,000X	100X
CSP takes 3-6 months to stand up a service	CSP with 38,000 employees adds less than 5,000 customers daily	CSP has thousands of customer service reps and low NPS

Incremental improvement in agility won't cut it

Readiness to deliver requires rethinking across your business...



Enterprises find the B2B buying journey hard...

- The typical buying group for a complex B2B solution involves six to 10 decision makers, each armed with four or five pieces of information they've gathered independently and must deconflict with the group. At the same time, the set of options and solutions buying groups can consider is expanding as new technologies, products, suppliers and services emerge.
- These dynamics make it increasingly difficult for customers to make purchases.

77%

of B2B buyers state that their latest purchase was very complex or difficult



Gartner.

Japan in focus



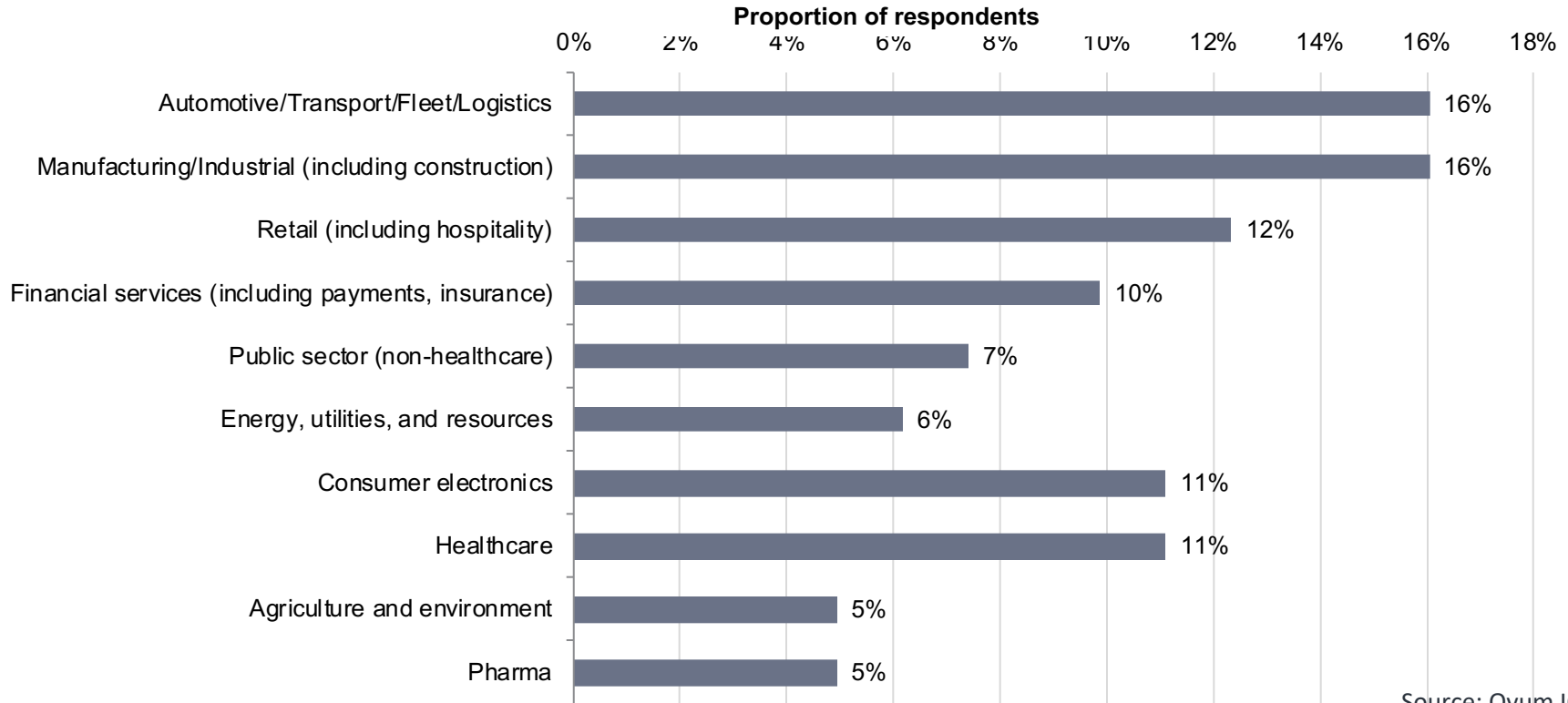
A \$15 billion opportunity ...

Japan's contribution to the global B2B telecommunications market value is estimated to be over US \$15 billion by the end of 2026, which will be approximately US \$3 billion higher than the value of the B2B market place in Western Europe... but unlocking that opportunity can be hard ...



Enterprise IoT Survey.... 81 different respondents across 10 verticals **tmforum**

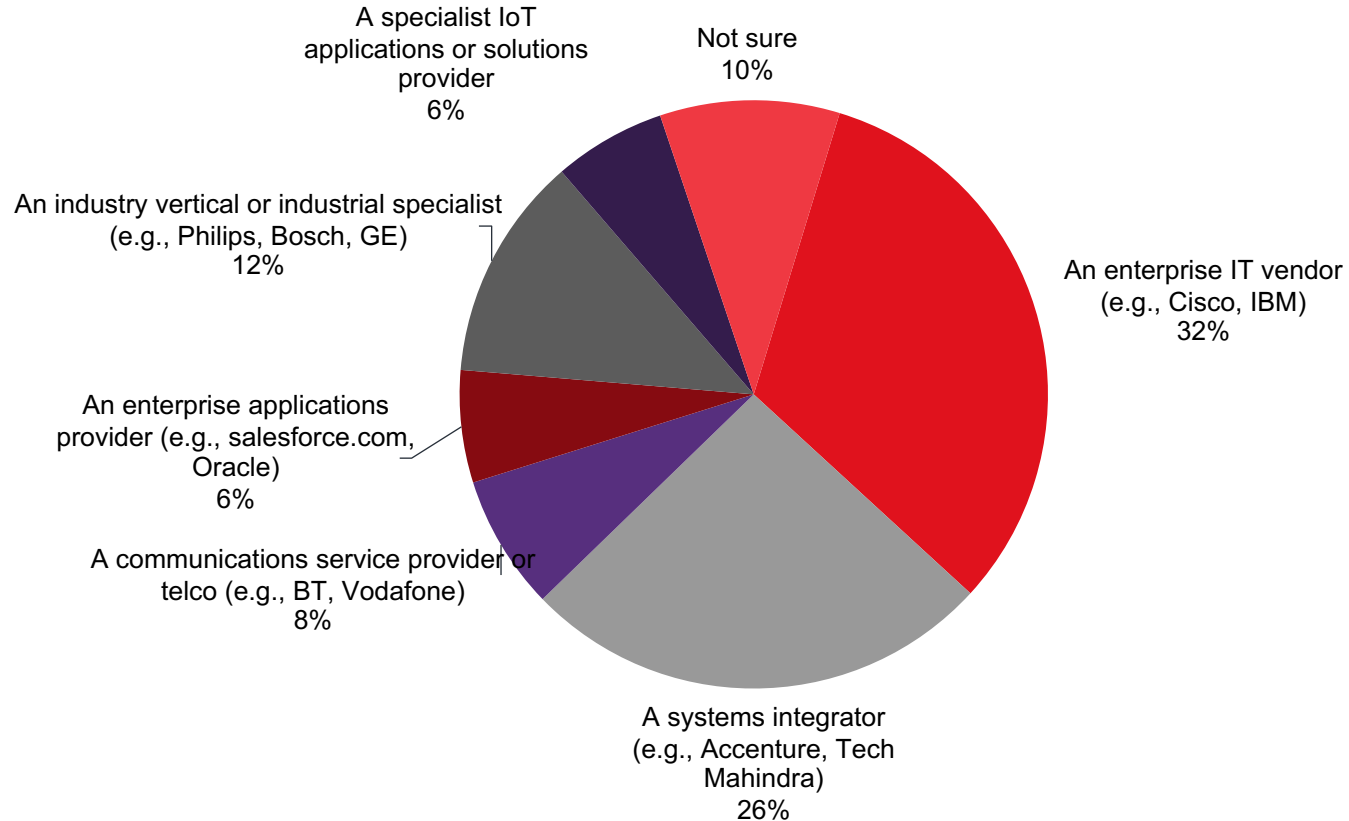
Which industry best describes your organization's primary area of business?



Source: Ovum IOT Enterprise Survey

B2B IoT space in Japan... Service providers are not the “go-to” provider ... In fact it is rather fragmented..

Who is the main party providing your IoT solution/who would you go to first for your IoT solution?

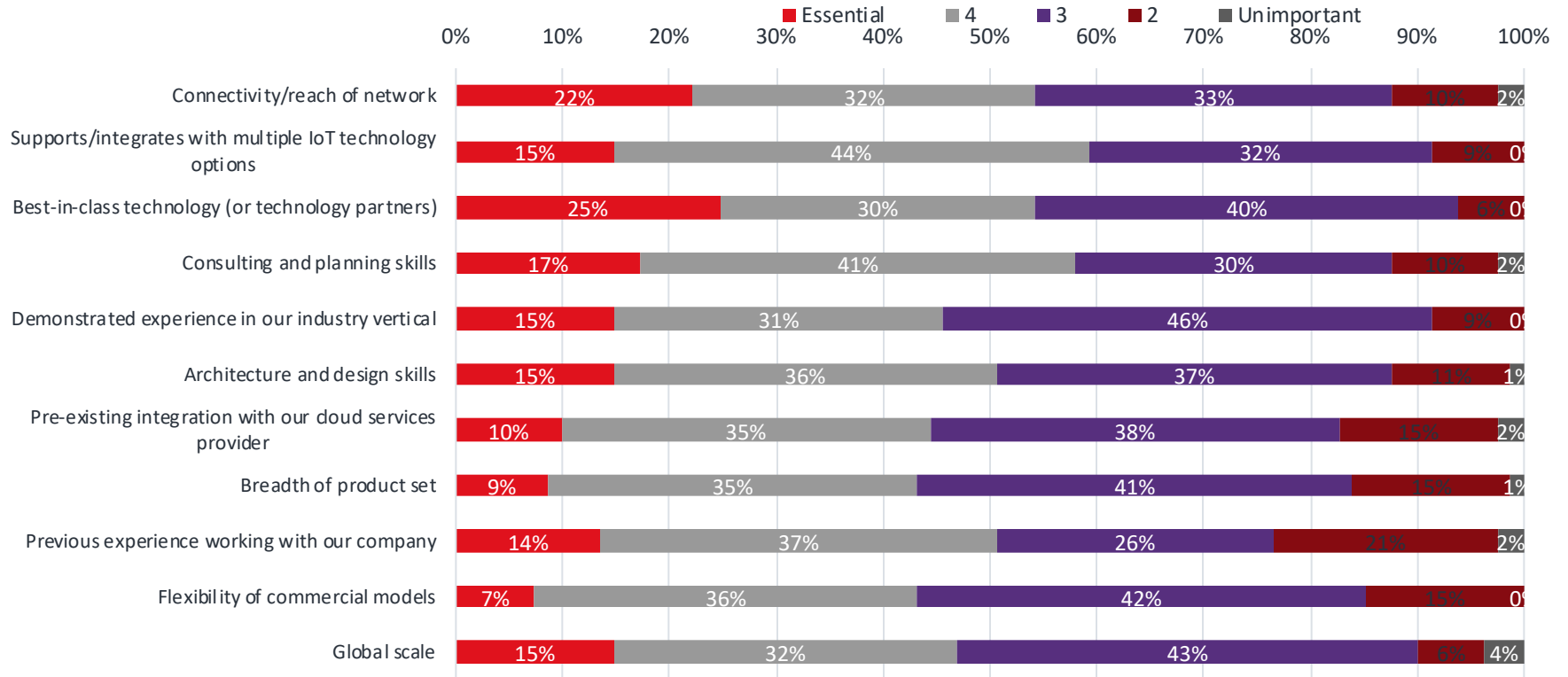


Source: Ovum IOT Enterprise Survey

But service providers do have a lot of solutions to the problems enterprises are facing

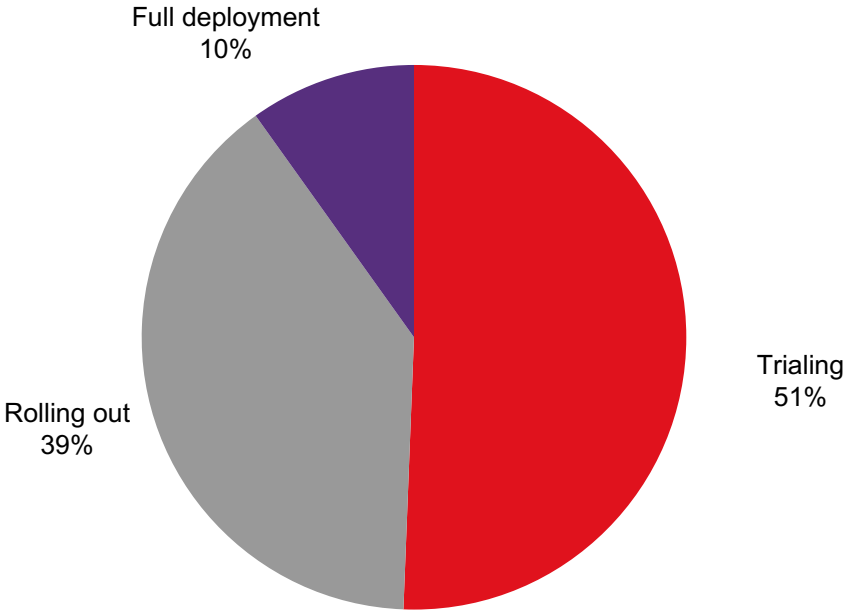
SPs have the potential attributes enterprises most value

When looking for an IoT supplier, what attributes do you most value?



The opportunity awaits... the majority of companies are still only in trial mode...

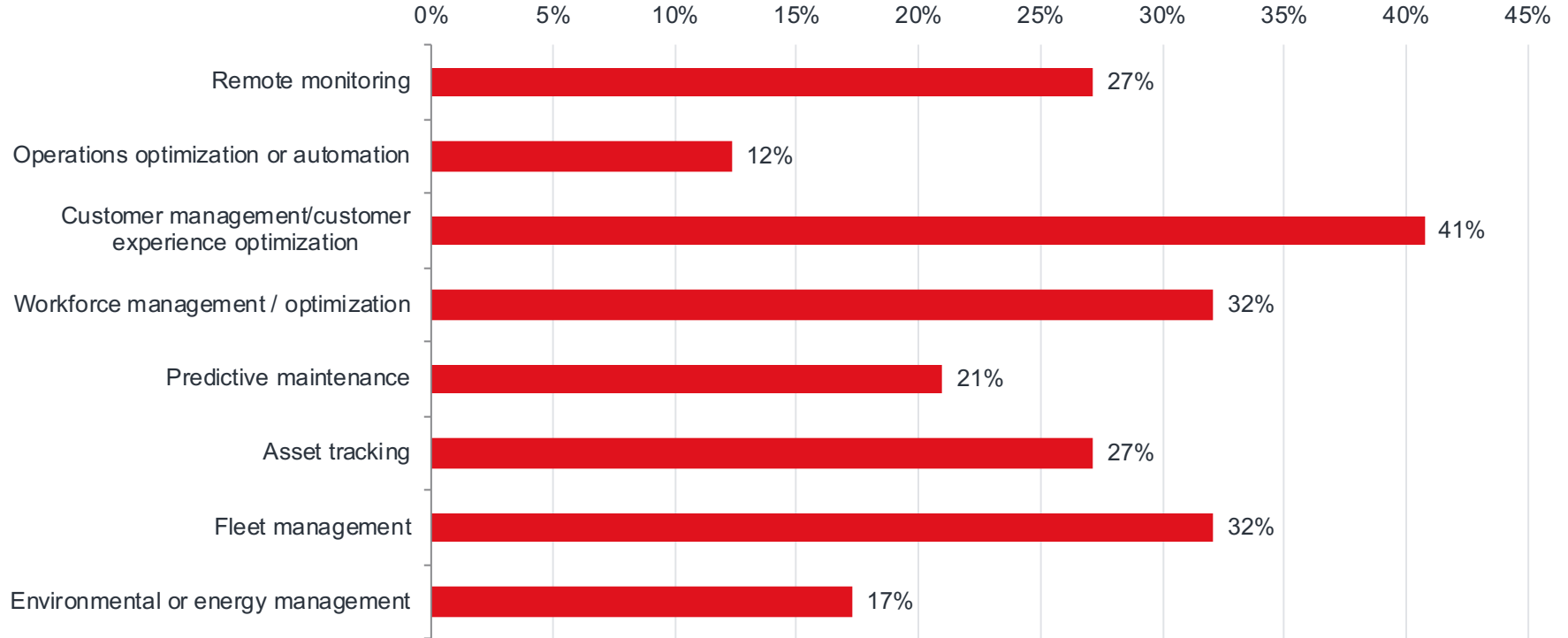
Q7. Is your organization already planning or deploying IoT projects?



Source: Ovum IOT Enterprise Survey

Where are Japanese Enterprises looking to deploy IoT solutions?

Proportion of respondents

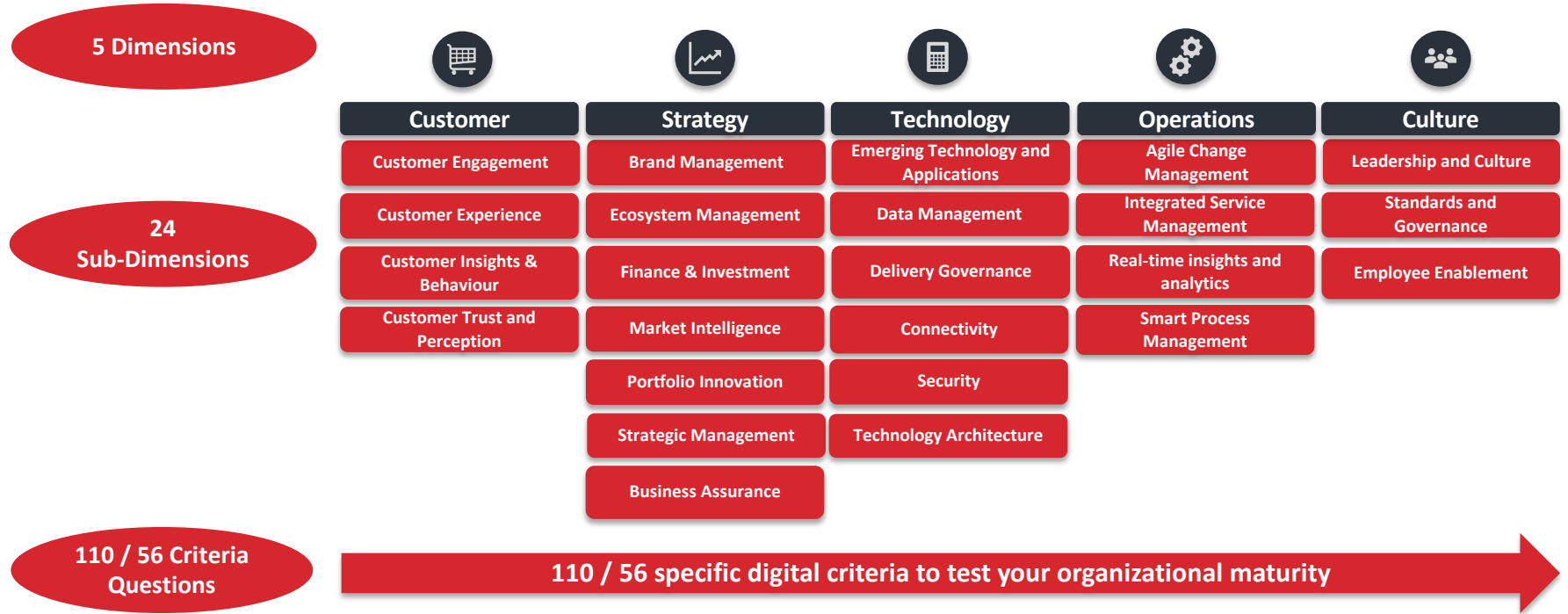


So... the opportunity is there, but if you want a slice of the \$15 billion opportunity, you need to:

- Truly become a more agile player – agility doesn't only effect operations but the whole company from people, processes, operations, technology, culture and having access to the right data. Company needs to digitally transform and be ready to do business differently in order to compete with more nimble, hyper-scale companies.
- Create the right culture – this is one of the major factors holding CSPs back
- Make the buying experience easier – 77% of people saw the buying experience difficult.
- Need to ensure you are investing in and embracing the latest technologies and virtualization – Cloud, AI, virtualisation and automation are gamechangers in enterprise services.
- Need to move from siloed technology stacks, to an architecture which is loosely coupled, data driven, flexible, using APIs and is increasingly managed using artificial intelligent and machine learning
- Partner – partner with the right companies who have the right expertise. You can't do this alone.

TM Forum can help guide you on that transformation journey with an industry standard and agreed maturity model

5 Dimensions + 24 Sub-Dimensions + 110 (Full Model) / 56 (Lite Model) specific digital criteria

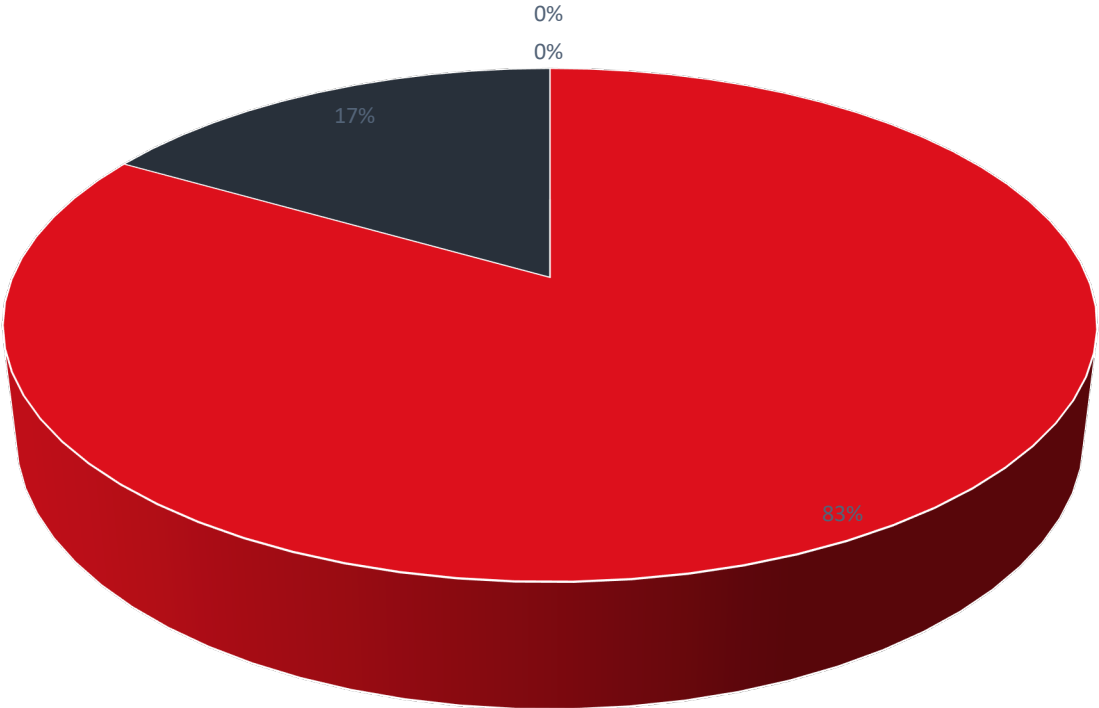


The delegates speak: Survey Results

EXPLORE.
COLLABORATE.
BECOME.



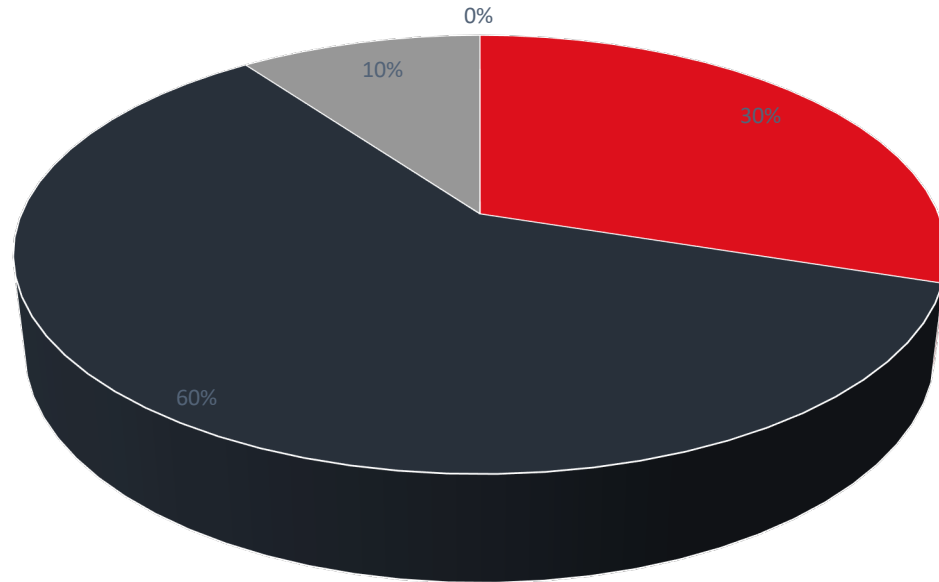
How important is digital transformation to your organisation currently?



■ Very important ■ Somewhat important ■ Neutral ■ Not at all important

What is the status of your digital transformation programme?

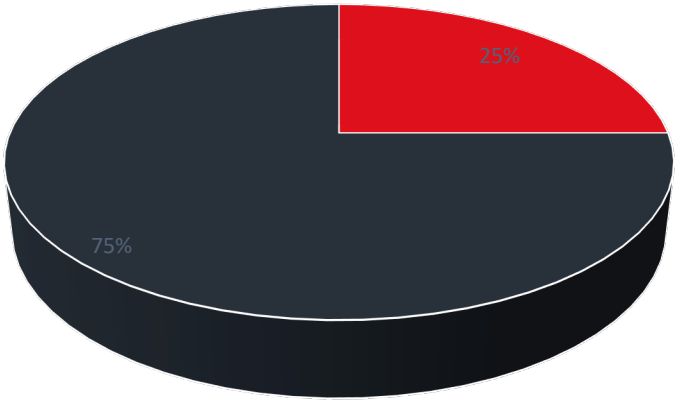
What is the status of your digital transformation programme?



- We are in the planning phase
- We are just starting implementation, but it's still early
- We are well along and reaping the significant benefits
- Transformation is unnecessary for success

Do you have a specific, dedicated transformation program for your enterprise line of business?

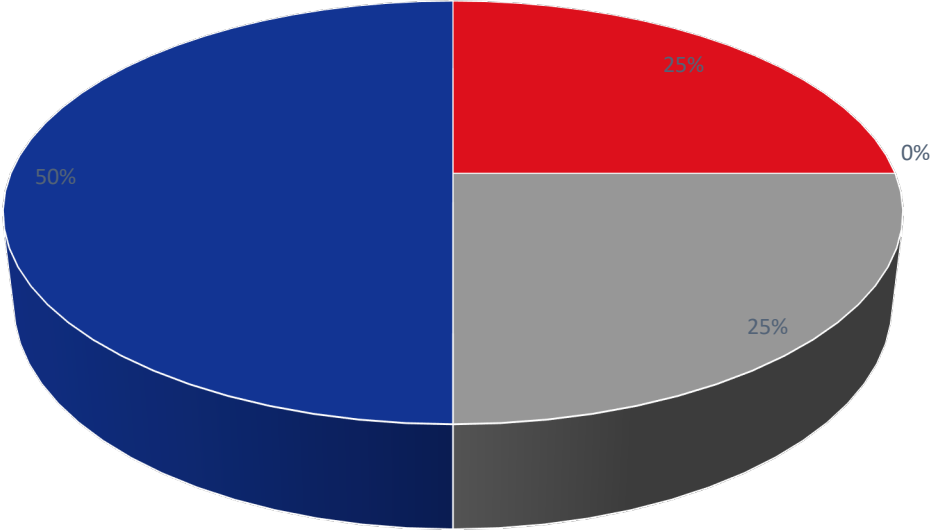
Do you have a specific, dedicated transformation program for your enterprise line of business?



■ Yes ■ No

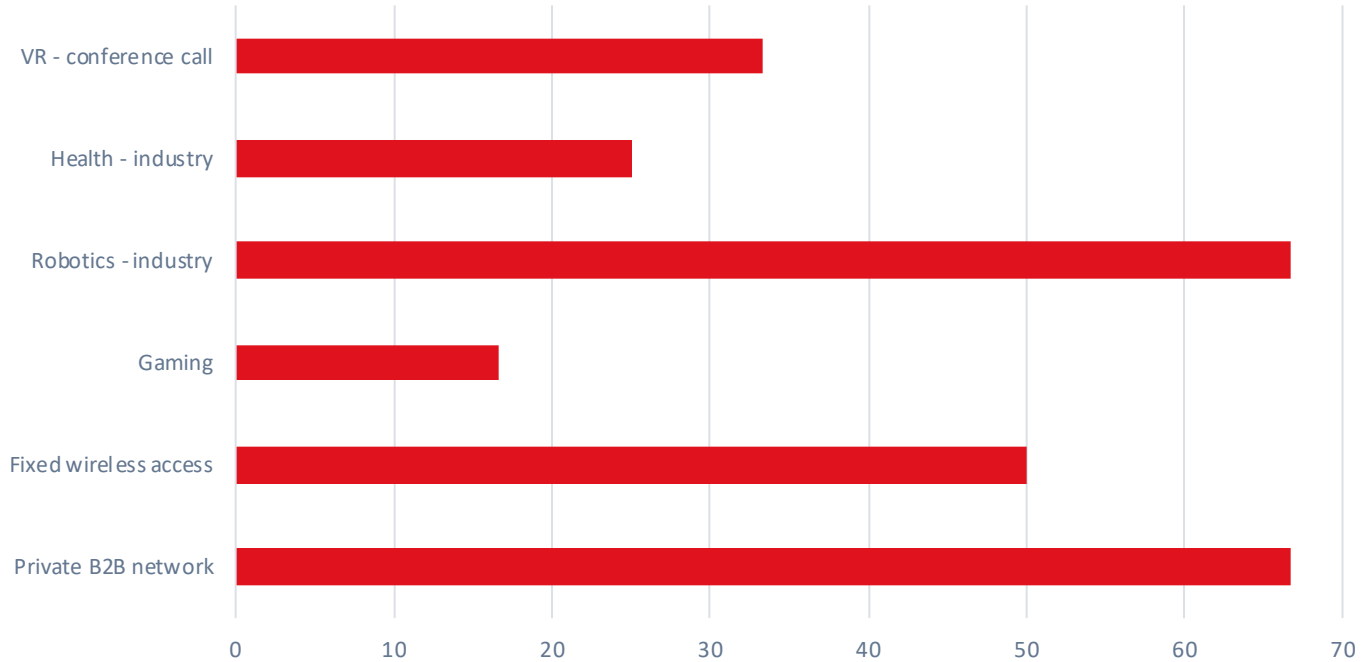
How much is your organization investing in B2B solutions?

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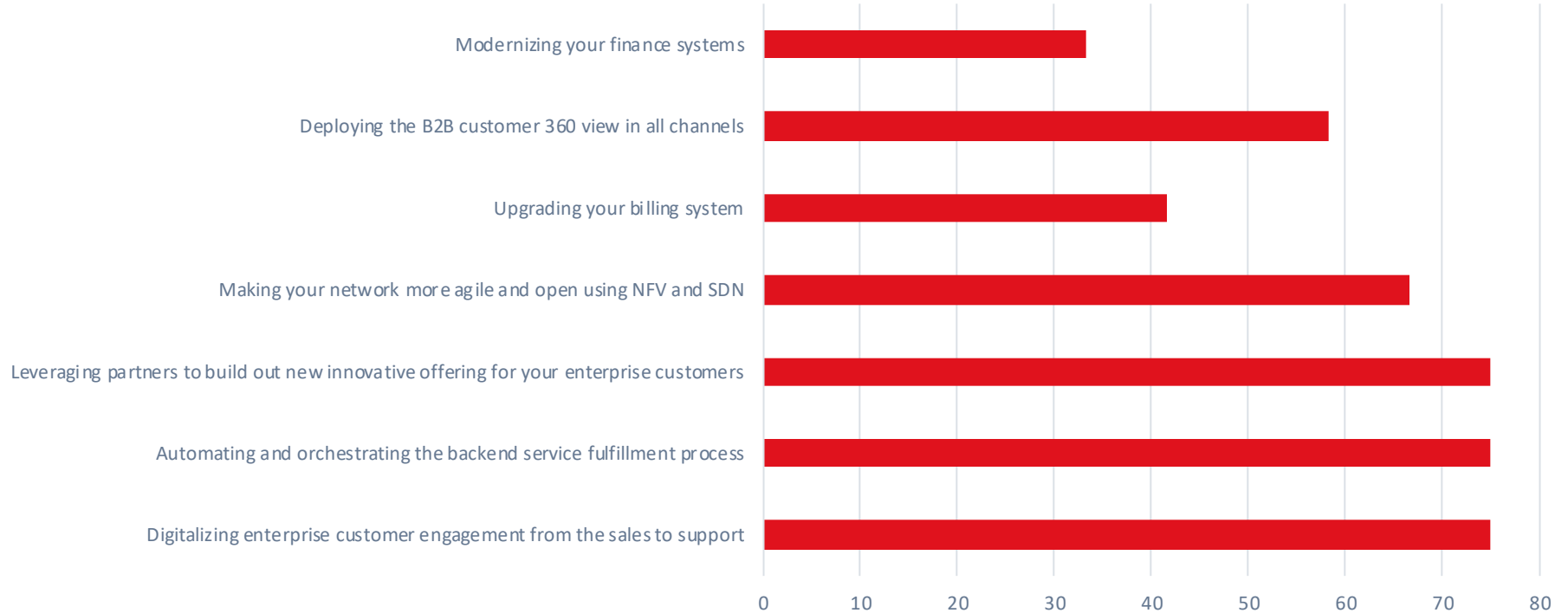


- Less than \$25 million
- \$26 to \$50 million
- \$51 to \$100 million
- More than \$100 million

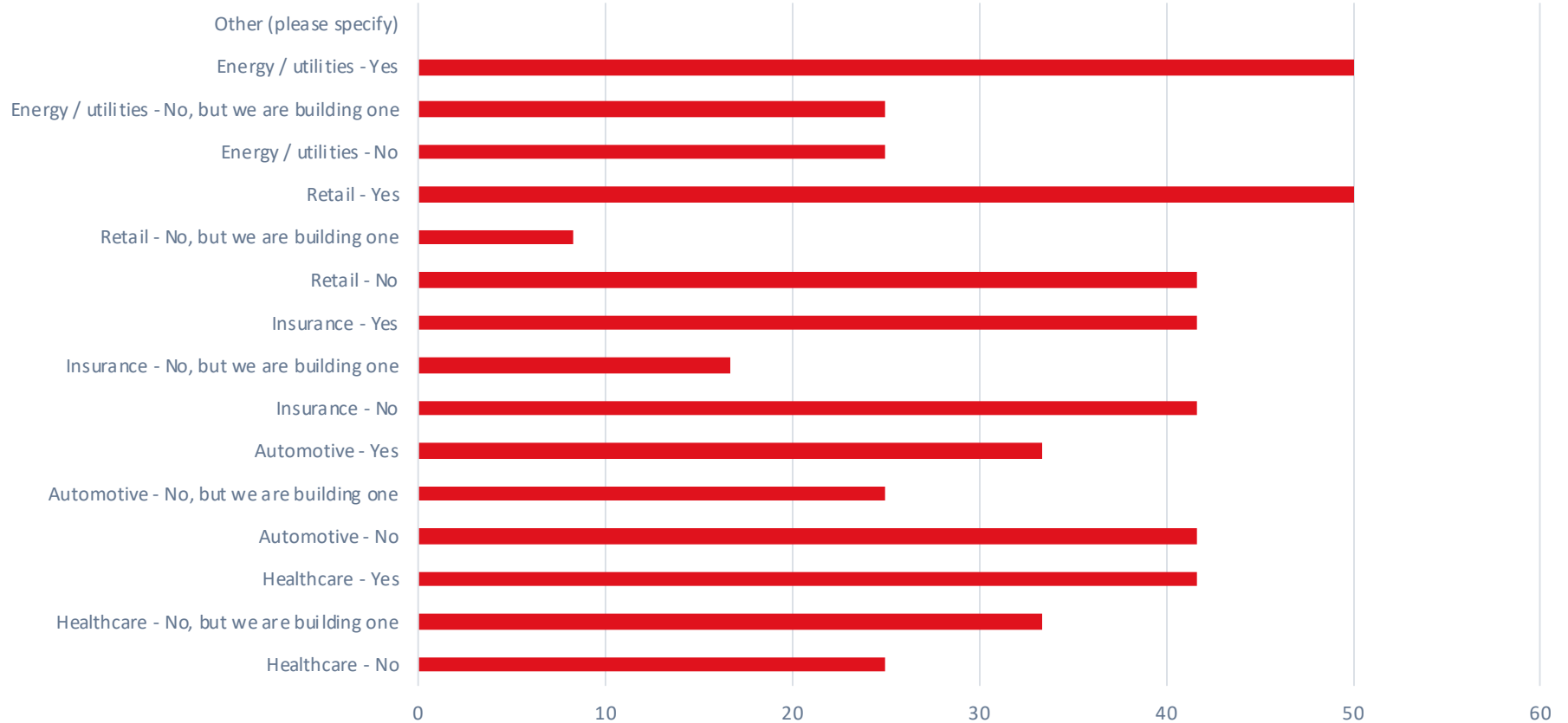
What are the main use cases you're considering in the 5G era?



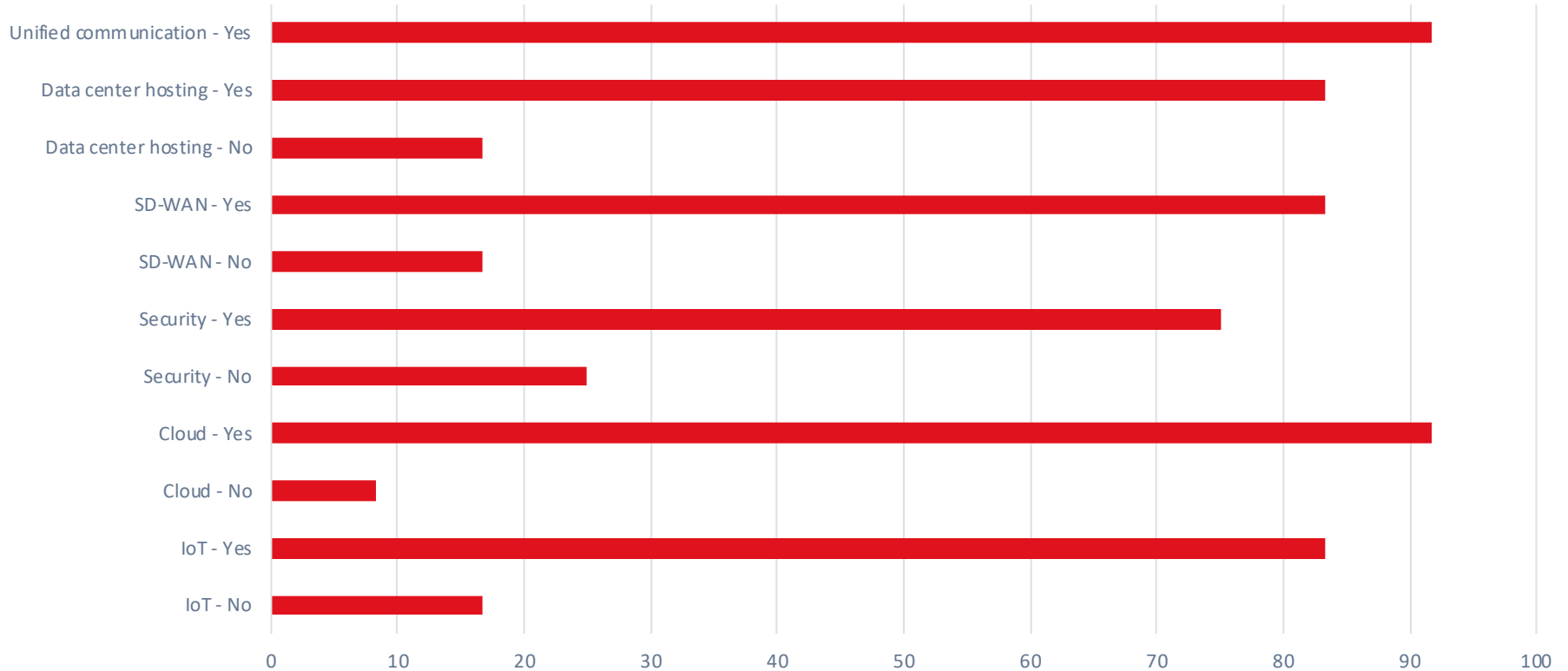
In your enterprise line of business, which of the followings would be considered as part of your digital transformation project



Do you have end-to-end ICT solutions for the following verticals



Do you have end-to-end ICT solutions in the following product areas?



Thank you