2021 Annual Meeting of Members

We will begin in a few minutes

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.
Today’s agenda

WELCOME & CHAIR’S INTRODUCTION
Motion #1: Minutes of last Annual Meeting of Members (AMOM) meeting

INTRODUCTION OF DIRECTORS
Overview of the role of the Board and proposed composition
Motion #2: To appoint Directors

FINANCIAL REPORT
Report for the financial year April 2020 – March 2021
Motion #3: To appoint Auditors

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

ANY OTHER BUSINESS AND Q&A
Please ask questions using the Q&A window
Introduction from the Chair

Steffen Roehn
Chair, TM Forum
Propose that the available minutes shall be taken as a true and fair record of the Annual Meeting of Members held on 1 July 2020.

PROPOSED: Steffen Roehn, Chair, TM Forum

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
Role of the TM Forum Board of Directors

- 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
- Directors hold a seat on the TM Forum board for a two-year term
Continuing members of the board of trustees 2021-2022

The Board members listed below were appointed at the Annual Meeting of Members 2020 for a two-year term and will be due for re-election at the 2022 Annual Meeting of Members. Directors & Corporate Officers are appointed annually by resolution by the Board of Trustees.

Ruza Sabanovic
EVP & Chief Technology Officer

Craig Wigginton
Global Telecoms Lead

Jan Karlsson
SVP & Head of Business Area Digital Services

Jason Rutherford
SVP Communications Applications

Nik Willetts
CEO TM Forum

Olga Martynov
CFO & Treasurer TM Forum
Board members for re-election in 2021

The Board members listed below are standing for election by the Membership at the Annual Meeting of Members in July 2021

NEW APPOINTMENT

The Board of Trustees are pleased to welcome the person listed below as a new member for election to the Board of Trustees by the Membership at the Annual Meeting of Members in July 2021

Koen Vermeulen, GCIO
RESOLUTION

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

PROPOSED: Nik Willetts, President & CEO, TM Forum

SECONDED: Ruza Sabanovic, Director, TM Forum Board of Trustees

NOTE: Only Principal contacts may vote
Please do not vote again if you have already placed your vote via the online survey
Financial Report & Appointment of Auditors

Michael Lawrey
Chair, Finance & Commerce Committee

Olga Martynov
CFO, Treasurer & Secretary to the Board
2020-21 delivered healthy financial results, underpinned by a strong core business, operational efficiencies and multi-pronged COVID-19 response focused on all stakeholders.

- Revenue 5% YoY decline primarily due to reduced profitability of Events
- Proactive cost reduction helped offset COVID-19 impacts
- Combined with over-performance in other lines of business, equity reserves grew to $3.3m

- Key growth engines were direct member value products: Membership (+5% YoY) and Education & Coaching (+ 71% YoY)
- Growth underscores focus on member value, Member Retention and successful pivot to monetize the digital delivery
FY20-21 Sources and Uses of Funds (unaudited)

Proactive actions taken in addressing COVID impact and covering all our stakeholders in a balanced way.

**FY 20-21 Revenue of $20.3M**
- Membership: 54% (+5% YoY)
- Education & Coaching: 15% (+36% YoY)
- Catalyst: 6% (+27% YoY)
- Research & Media: 6% (+105% YoY)
- Events: 15% (-50% YoY)
- Other: 4% (+105% YoY)

**FY 20-21 Expense of $18.3M**
- Staffing: 59% (-3% YoY)
- Office & G&A: 3% (-13% YoY)
- Travel: 1% (-84% YoY)
- Direct: 23% (-45% YoY)
- IT & SaaS: 10% (-38% YoY)
- Finance, Legal & HR: 4% (-45% YoY)
## FY20-21 Results: Balance sheet position strong as of 31 March 2021

<table>
<thead>
<tr>
<th>March 31, 2021</th>
<th>March 31, 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cash and Investments</strong></td>
<td><strong>5,586,679</strong></td>
</tr>
<tr>
<td><strong>Net Accounts Receivable</strong></td>
<td><strong>6,435,258</strong></td>
</tr>
<tr>
<td><strong>Net Fixed Assets</strong></td>
<td><strong>722,098</strong></td>
</tr>
<tr>
<td><strong>Event Prepaid</strong></td>
<td><strong>913,176</strong></td>
</tr>
<tr>
<td><strong>Deposits &amp; Prepaid</strong></td>
<td><strong>597,999</strong></td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>14,255,210</strong></td>
</tr>
<tr>
<td><strong>Accounts &amp; Taxes Payable</strong></td>
<td><strong>1,051,577</strong></td>
</tr>
<tr>
<td><strong>Deferred Revenue</strong></td>
<td><strong>10,842,397</strong></td>
</tr>
<tr>
<td><strong>Future Expense Accruals</strong></td>
<td><strong>1,018,115</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>12,912,089</strong></td>
</tr>
<tr>
<td><strong>Total Equity</strong></td>
<td><strong>1,343,121</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities &amp; Equity</strong></td>
<td><strong>14,255,210</strong></td>
</tr>
</tbody>
</table>

- Strong cash generation based on outstanding LoB performance amid COVID, timely collections and leveraged governmental support programs
- Overall A/R decreased by 48% and DSO at 79 (vs 119 5 years average) in proportion to Sales decline of 5% YoY
- Fixed assets down 44% as reduced Capex buildup
- 95% of Event prepaids represent Events shifted commitments to 2021-22
- AP down as lower obligations on Events related expenditure
- Deferred revenue down mainly due to reduced backlog on Events & Catalysts commitments into 2021
- Accruals increase driven by healthy reserves and future event obligations
- Equity increased by $2m thanks to excellent commercial performance in FY20-21 despite COVID impact and proactive cost reduction measures taken to address the pandemic

*FY20-21 Preliminary unaudited results*
Motion #3 – Appointment of Auditors

RESOLUTION

Propose that Smolin, Lupin, & Co., PA shall be appointed as auditors for the corporation for the financial year 2021/22.

PROPOSED: Michael Lawrey, Chair, Finance & Commerce Committee, TM Forum
SECONDED: Olga Martynov, CFO, Treasurer & Secretary to the Board, TM Forum

NOTE: Only Principal contacts may vote
Please do not vote again if you have already placed your vote via the online survey
Collaborating with intent: A remarkable year for your Forum

Thanks to our members’ support and loyalty, we were able to pivot rapidly to embrace the potential of digital collaboration.

Outstanding member collaboration
1,100+ member professionals from 285 companies collaborated virtually.

New Hard Talk Series
7,000+ joined our new hard-hitting debate series.

Global Architecture Forum reached new heights
2,500 member professionals joined Chief Architects from around the world.

Award-winning Digital Transformation World Series
- 120 hours of unique, high-quality content
- 8,000+ member professionals worldwide

Open API adoption accelerated
60+ Open APIs downloaded 115,000+ times.

Open Digital Architecture Component Accelerator
launched with 11 founding members.

Upskilling the industry, faster than ever
More than 10,000 professionals gained 31,000+ knowledge certifications.

CxO and Digital Leadership Summits went virtual
Decision-makers from around the globe came together through 15 digital summits.

Catalysts showcase rapid remote innovation
- 158 companies
- 30+ Catalyst projects
- 4,000+ global attendees

Global Architecture Forum reached new heights
2,500 member professionals joined Chief Architects from around the world.

WINNER
Best Digital Conference

Award-winning Digital Transformation World Series
- 120 hours of unique, high-quality content
- 8,000+ member professionals worldwide

Open API adoption accelerated
60+ Open APIs downloaded 115,000+ times.

Open Digital Architecture Component Accelerator
launched with 11 founding members.

Upskilling the industry, faster than ever
More than 10,000 professionals gained 31,000+ knowledge certifications.

Catalysts showcase rapid remote innovation
- 158 companies
- 30+ Catalyst projects
- 4,000+ global attendees

Collaborating with intent: A remarkable year for your Forum

Thanks to our members’ support and loyalty, we were able to pivot rapidly to embrace the potential of digital collaboration.
"Without knowing the trends of global players, we cannot work efficiently. Without interaction with global players, there is no progress."

Takashi Kato, VICE PRESIDENT, NTT Group
Providing the headlights in the road to a platform business

Across four key areas – software, operations, people, and future business models, members collaborated on research and ‘north star’ visions.

**Setting the Vision for the Future of Telco**
- Future software market the telecom industry needs to survive
- Roadmap to Autonomous Networks

**Leading Industry Research on Critical Challenges**
23 new research reports, including:
- How to Build and Operate at the edge
- What is Connectivity-as-a-Service?
- Enterprise 5G: The role of the Telco

**Collaboratively Unlocking Growth Beyond Connectivity**
- 5G Enabled Manufacturing (5GEM) testbed project
- Connectivity-as-a-Service and Zero-touch Partnering projects launched

**Upskilling the Industry with a Focus on People and Culture**
- Business-ready career journeys
- Diversity and Inclusion Council research on culture in the industry
- Industry-first inclusion and diversity score (IDS) pilot

"The goal of the Diversity & Inclusion Council is to transform the face of the telecoms industry to be a world leader in D&I."
Keri Gilder, CEO, Colt and Chair, TM Forum D&I Council
Making it happen: 30+ rapid innovation projects delivered and showcased
Members of our Catalyst projects delivered remarkable results, despite never meeting in person

158 Unique companies collaborated on a diverse range of topics:

- CLOUD NATIVE IT & NETWORKS: 4
- AI, DATA & INSIGHTS: 8
- AUTONOMOUS OPERATIONS: 11
- CUSTOMER EXPERIENCE & TRUST: 2
- BEYOND CONNECTIVITY: 8

9 AWARD-WINNING CATALYSTS, INCLUDING:

- AIOps autonomous service assurance: How AI can drive closed-loop service assurance for network services
- Trusted Data-Sharing for Smart Emergency Management: How telco and other public data can help cities respond in emergencies

Catalyst champions for 2020 include:
Delivering vital how-to knowledge
Authentic, industry-sourced knowledge shared through research channels, case studies and peer-to-peer exchange

INDUSTRY LEADING RESEARCH
80,000 subscribers to Inform and 23 new research reports

COLLABORATIVELY-SOURCED INSIGHTS
“Participation in TM Forum’s work gives me a unique opportunity to work with architects from all geographies and all industries to develop truly useful assets.”
RADEK ODROBINA, IOT CTO, EMEA, ERNST & YOUNG

CONNECTING A CXO COMMUNITY
Virtual CxO Summits: 100+ senior executives from 59 companies
“The format of the Summit was amazing […]. TM Forum has clearly demonstrated continuous innovation in terms of the delivery and interaction achieved across the entire event.”
IBRAHIM GEDEON, CTO, TELUS

AUTHENTIC SHARED LEARNINGS
50+ case studies to share transformation journeys
• ODA and APIs help M1 transform into cloud native DSP
• MTN uses TM Forum assets to configure a commercial product in just 10 minutes
• stc introduces first-in-region platform for B2B2X solutions using digital transformation know-how

PEER-TO-PEER KNOWLEDGE SHARING
Through member meetings, peer-to-peer introductions and executive think tanks

Industry whitepaper sets the vision for our 5G future
Building critical code and frameworks to drive our industry forward

Over 1,100 member professionals contributed to collaborative projects from 285 member companies around the world.

“Above all else, I value the power of collaboration and the different perspectives that the working group fosters.”
Shankar Kasturirangan, Managing Principle, Nokia
Leading members collaborated to address the real-world challenge of automated network error detection and resolution, which represents a $9bn problem for service providers.
Open Digital Architecture: taking the cloud-native revolution from theory to reality

ODA is a living architecture blueprint, enabling plug-and-play cloud-native software for connectivity and digital service providers to unleash growth, profitability and a cutting-edge customer experience.

| ODA is formally supported by 53 of the world’s leading CSPs and technology vendors, with over 250 contributing companies |

<table>
<thead>
<tr>
<th>Industry-agreed Open API suite</th>
<th>Functional architecture</th>
<th>Component architecture</th>
<th>ODA success framework</th>
<th>Component test and integration platform</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry-created blueprint to support multi-generational leap into the cloud-native era</td>
<td>ODA Component Accelerator’s environment to test components</td>
<td>Tools, knowledge and experience to deliver the full potential of ODA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✓ 60+ co-created open APIs to date and &gt;117,000 APIs downloaded</td>
<td>✓</td>
<td>In progress</td>
<td>In progress</td>
<td></td>
</tr>
</tbody>
</table>

Future

MANIFESTO SIGNATORIES

✓ ✓

Technical platform to prove real-world value of and certify ODA components

<table>
<thead>
<tr>
<th>ODA is already driving significant impact for our members globally</th>
<th>Increase in digital sales of 50%+, sales conversions by 30% and 3x improvement in NPS</th>
<th>Multimillion-dollar savings, and reduction to onboard new network capabilities from 18 months to less than a week</th>
<th>$12.6m increased revenue and cost optimization, 1.6% uplift in EBITDA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>vodafone</td>
<td>BT</td>
<td>CHINA TELECOM</td>
</tr>
</tbody>
</table>
Vital upskilling for >10,000 professionals

1700% more TM Forum courses taken thanks to a focus on self-learning through remote training

Over 10,000 professionals from 155 companies completed more than 31,000 Knowledge Certifications

1,700% growth in number of courses taken

Accelerating upskilling and career development

• Prototyping new ODA based training for enterprise architects, developers and business professionals
• Developing internal universities with members to upskill broader staff teams

and formal conformance to Open APIs

77 Open API conformance certifications delivered, with first companies achieving Platinum, Gold and Silver status

77 Open APIs certified by 13 companies

Congratulations to our Platinum, Gold and Silver certified members

“Our support agents and customers benefit most from these APIs. All the complexity has been removed from the agents’ view.”
Ana Ristevski, Product Owner of Converged Service Assurance, Product Enablement Technology, Telstra

TELSTRA

Open APIs certified by 13 companies

Whale Cloud

Comviva

HUAWEI

TECH Mahindra

BearingPoint

PCCW Solutions

Oracle
We are focused on driving critical outcomes for the industry, delivering even greater value and impact for our members every day.

Looking ahead: TM Forum focus and strategy 2021-24

INDUSTRY OUTCOMES

Customer Obsessed
- Capable of delighting customers with every action

Fit to Compete
- Defend today’s profits and unlock tomorrow’s

Unlock Ecosystem Growth
- Able to create and capture ecosystem value

Delivering Impact
- Contributing to UN SDGs in a meaningful way

STRATEGIC OBJECTIVES 2021-24

1. ENABLE PLUG-AND-PLAY IT & NETWORKS
   - Make ODA and Open APIs the industry-standard blueprint for cloud-native IT and network software components, achieving zero-touch interoperability
   - Deliver the frameworks, how-to knowledge and standards to help deliver the agility, cost and experience required for growth

2. MAKE ZERO-TOUCH OPERATIONS A REALITY
   - Leverage AI to deliver zero-touch operations at scale to underpin agility and growth of new services at scale
   - Deliver the frameworks, foundational standards and know-how required for next-generation operating models

3. UNLEASH GROWTH BEYOND CONNECTIVITY
   - Provide the blueprint to deliver Connectivity-as-a-Service
   - Provide the framework, foundational standards and how-to knowledge required to enable zero-touch partnering
   - Provide the blueprint for ecosystem marketplaces and federated business models

4. HUMAN FACTOR
   - Drive practical action on Diversity, Equality & Inclusion as a critical element of future industry success
   - Provide frameworks and essential how-to knowledge to underpin the human aspects of new operating & business models
Your Forum: Ways to engage

Delivering value to our members through how-to knowledge, member projects, real code and frameworks and accreditation

**labs**

**MEMBER PROJECTS**
Join working projects on AI, Open APIs, Open Digital Architecture, Autonomous Networks and more

**CATALYSTS**
Follow Catalyst projects on topics including 5G manufacturing, digital twins, ecosystem management and more

**KEY DATE | September 22nd**
Visit the Catalyst Arena at Digital Transformation World Series 2021

**knowledge**

**RESEARCH + WEBINARS FROM OUR IN-HOUSE ANALYSTS**
Industry-leading research and monthly webinar series on industry topics

**JOIN THE GLOBAL ARCHITECTURE FORUM**
Hear Chief Architects from around the world share their experiences

**CxO SUMMITS**
Invitation-only summits taking place across Digital Transformation World Series 2021

**KEY DATE | September 2021**
Latest research release: What will the 2025 technology organisation look like in a CSP?

**code+frameworks**

**ODA**
- Download and use Open APIs
- Sign the Open API and ODA manifesto

**JOIN MEMBER PROJECTS TO BE A PART OF**
- Connectivity-as-a-Service API Suite
- Our Inclusion and Diversity Score (IDS)

**KEY DATE | July 7th**
ODA Component Accelerator - call for participation

**training+accreditation**

**TRAINING**
- Self-serve online courses to upskill yourself and your team
- New Open Digital Framework based training program launching soon

**ACCREDITATION**
- Gain accreditation from our certification and conformance services

**KEY DATE | July 30th**
Read the latest Open API Adoption Assessment Reports
DTWS 2021: Now is the Time
Real Answers. Real Growth. Real Impact.

With 120+ hours of live streamed content, a stellar headliner line-up, interactive masterclasses, lively debates, invitation-only CxO summits and more.

CAPTIVATING CONTENT
Sessions specially curated for business, tech and leadership audiences

WEEK 1: Make the vision a reality
• Capturing value in new ecosystems
• Transforming the telecoms business & operating model

WEEK 2: Leveraging digital ecosystems
• Zero-touch automation
• IT & network convergence & innovation

WEEK 3: Power growth with cloud, data and AI
• Succeeding with AI at scale
• The cloud-native journey

WEEK 4: Future proof your business
• Seizing the B2B2X opportunity
• Making cultural change happen

HEADLINERS ANNOUNCED SO FAR

Ronan Dunne, Group CEO for Consumer Group, Verizon
Dato Izzaddin Idris, Group CEO, Axiata
Kent Gilder, CEO, Colt
Angie Klein, CEO, Visible

Hideyuki Tsukuda, Executive VP & CTO, Softbank
Harleen Mehta, CDIO, BT
Shankar Arunugam, Global CIO, Verizon
Enrique Blanco, CTO, Telefonica

Anthony Rodrigo, Group CIO, Axiata
Benoit Harssem, CTO, Wind Tre
Andrew Ward, SVP New Business & Innovation, Du
Ritesh Mukherjee, VP Enterprise Products, Reliance Jio
thank you

Contact your Engagement Manager for more information
any questions?

Please post your questions in the Q&A chat
results of motions
Please continue to post your questions in the Q&A chat