DIGITAL TRANSFORMATION TRACKER 1: THE RACE IS ON
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Author: Mark Newman, Chief Analyst
mnewman@tmforum.org

Editor: Dawn Bushaus, Managing Editor
dbushaus@tmforum.org

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Although there is no industry-agreed definition of digital transformation, it’s clear that it has implications for a communications service provider’s (CSP) entire business. During the past few years, many operators have initiated IT transformation projects, which are key to but not the same as digital transformation. Digital transformation includes internal initiatives aimed at increasing efficiency and agility through automation, and external initiatives where the focus is on improving customer experience, providing a multi-channel omni-channel experience and delivering new digital services.

Planning for the future

CSPs see digital native service providers like Amazon and Netflix as a significant threat in the long term, and that’s one reason they’re so focused on transformation. They believe that will help them break free of legacy systems and processes so that they can compete with companies that are far more agile.

Operators also believe that they must transform to deliver the kind of digital experience customers want, and because the impact of everything, and I mean absolutely everything, is online these days, but also in operational and business support systems.

The main thing that investors are thinking about now is, “What are the unit economics of some of these new business models going to look like?” The concern is always in place in the buttons in terms of pricing or having to offer new services for free. They don’t want to see growth for growth’s sake.

Tools to help

We asked CSPs, “What is digital transformation in your company?” The answer is an industry-wide race of what digital transformation means and how CSPs are implementing it.

To address this, TM Forum has developed the Digital Mastery Model, which helps CSPs score themselves for various aspects of transformation and then based on their score, assign how, when and where to deploy on the road to digital and revenue.

Several CSPs’ progress on digital transformation sites has been difficult. This report delivers the results of our first ever Digital Transformation Tracker (DTT), a biannual survey that will keep us informed and enlightened on how CSPs and their supply chains develop and make progress on digital transformation.

We surveyed 136 executives from 55 unique CSPs operating in 64 countries, and 175 executives from 70 unique supplier companies. We also conducted a dozen follow-up interviews to discuss the survey results.

Our key findings?: Digital transformation is happening worldwide, and operators and their customers are starting to reap the benefits of simplification and virtualization. But overall, CSPs need to pick up the pace in the race to transformation.

Digital transformation gets underway

Of the companies already implementing digital transformation, nearly a quarter said they are well on the way to reaping significant benefits. This is encouraging news but indicates that most CSPs still have a long way to go.

Read this report to understand:

Most digital transformation is
- What Telkomsel’s Digital Maturity Model is
- How the Digital Transformation Tracker works
- The impact of CSPs’ efforts on their futures
- Where CSPs see on their transformation journeys
- The main drivers for change
- The role customers play
- What the biggest challenges are
- Why the network is important to broader digital transformation
- How operators feel about IoT
- How digital initiatives can better to ensure success

62% of CSP respondents said their companies are actively implementing digital transformation programs and 20% are in the planning process.

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WHAT IS DIGITAL TRANSFORMATION?

Dedicated digital transformation is at the heart of transforming businesses. Organizations need to launch digital transformation strategies to improve internal and external customer engagement.

What is digital?

Digital transformation is the integration of digital technologies into an organization's business strategies and processes to create new opportunities, and it involves digitalizing the entire value chain. It is not just about the implementation of new digital technologies; it is about leveraging them to improve business outcomes.

What is transformation?

Transformation is about changing the ways of doing business, improving operations, and developing new strategies to remain competitive. It involves the introduction of new processes, technologies, and business models to enhance the organization’s performance. Transformation is a continuous process that requires ongoing adaptation and innovation.

Digital transformation affects the entire business

The digital era is shaping the future of businesses worldwide. Digital transformation is a strategic imperative that involves rethinking how businesses operate and how they interact with their customers. It is transforming the way businesses are organized, the way they create and deliver value, and the way they engage with stakeholders.

Network transformation as a catalyst

The rapid development and adoption of digital technologies are catalyzing network transformation. In order to succeed, digital transformation needs to be managed as a project, and it involves several key decisions.

Measuring digital maturity

Digital transformation is a journey, not a destination. It involves understanding the current state of the organization, setting a direction for the future, and measuring progress along the way.

Digital Transformation Tracker survey

The Future of Digital Transformation Tracker (FDT) is a report on the state of digital transformation worldwide.

What is different about the 2022 report?

The 2022 report includes new insights on key trends and challenges in digital transformation. The report provides a comprehensive overview of the current state of digital transformation, identifying the critical factors that drive success and highlighting best practices for organizations looking to transform their businesses.
Digital transformation is not easy, but it is necessary to remain competitive and deliver the kinds of service customers are demanding. CSPs that have not embarked on transformation programs should begin planning them as soon as possible. Those who are in the process should accelerate their programs. Following are some steps operators can take to ensure success:

**Lead from the top**
Without the support of top management, transformation cannot succeed. Ensure there is complete clarity across the whole organization about what digital transformation means. This should include a vision for the future business without necessarily articulating specific services and business models that may or may not shape future commercial strategies. Repeat the goals of transformation at every possible opportunity and ensure that it provides a context for decision-making at all levels.

**Learn from failure**
Bring in external, independent experts to investigate why previous attempts at transformation have failed, and ensure that measures to address such failures are included in current transformation initiatives.

**Set goals**
Create and publicly short-term milestones and goals within your organization to ensure that digital transformation has relevance to short-term budgets and decision-making.

**Integrate CIO and CTO functions**
The true benefits of network transformation, namely agility, will be provided only with the right IT systems to support automation and real-time customer experiences.

**Use a model**
Produce an internal audit of digital maturity within the organization, ideally using a tool such as TM Forum’s Digital Maturity Model.

**Develop the right culture**
Make sure digital transformation initiatives are embraced, owned and managed by teams throughout the organization. Offer training, re-skilling or a role out of the organization to enable transformation to a digital business.

**Embrace partnerships**
CSPs should move away from a buyer-seller approach to technology. Review cost allocations across CapEx, OpEx, and cost of sale with the aim of making purchasing decisions closer to customer functions.

**Keep shareholders informed**
Uphold shareholders to keep up as the pressure and value of what you have committed to in your transformation program. Do not shy away to tell shareholders about the short-term costs – and potentially, short-term revenue implications – of placing customer experience at the heart of decision-making.

**Adopt simplicity as a mantra**
Operators must strive for simplicity throughout the entire organization, both in terms of product offerings and how you communicate their value to customers.

**Measure results**
Build sophisticated internal metrics to measure the progress of digital transformation (agility, operational efficiencies, customer satisfaction, usage), and use them to track progress across all departments and product lines.
The Digital Experience Revolution: Enabling the Paradigm Shift

By Ian Zilberman, Amdocs Digital, Intelligence and BSS

Welcome and thank you for joining us today. I am delighted to have the opportunity to share with you the latest insights and strategies on how to transform the digital experience in the context of all current, disruptive, and new emerging technologies, and on how to make your business more resilient.

Why the digital experience?

The digital experience is the reason consumers engage with your business. It is the way they interact with you, how they perceive your brand, and how they feel about your products and services. It is the sum of all interactions that a customer has with your brand at any given time, whether online, offline, or through any other channel.

But what makes a digital experience compelling? It is a combination of several factors:

1. **Personalization:** Understanding the customer's preferences and providing a personalized experience.
2. **Accessibility:** Ensuring that the experience is easy to access and use, regardless of the customer's device or location.
3. **Engagement:** Creating an engaging conversation with the customer, using interactive and dynamic content.
4. **Reliability:** Providing a seamless and reliable experience, with fast and efficient responses.
5. **Security:** Ensuring the customer's data is safe and secure.

Understanding the customer needs

The customer is at the heart of every business. They are the reason you exist. They are the reason you innovate. They are the reason you succeed. In today's digital world, understanding the customer needs is more important than ever.

By understanding and satisfying customer needs, businesses can create a stronger bond with their customers, build trust, and increase loyalty. This is done through analyzing customer data, using AI and machine learning to predict customer behavior, and providing personalized experiences.

On the other hand, understanding the customer needs is not just about providing a good experience. It is also about providing value. Value can be added in many ways, such as by offering innovative products, providing excellent customer service, or by creating a positive emotional connection.

Digital maturity assessment

Amdocs Digital offers a comprehensive digital maturity assessment service. The assessment helps businesses understand where they are in the journey of digital transformation and provides guidance on how to move forward.

The assessment covers several key areas, including strategy, technology, processes, people, and culture. It provides a detailed report with recommendations for improvement.

Amdocs approach for the digital service provider

Amdocs offers a range of services to help digital service providers (DSPs) become more efficient and effective. These services include cloud transformation, digital operation, and digital augmentation.

Key benefits include:

1. **Cloud transformation:** Helping DSPs migrate their operations to cloud environments, improving efficiency and reducing costs.
2. **Digital operation:** Enhancing the customer experience through real-time data analytics and AI-driven decision making.
3. **Digital augmentation:** Adding innovative digital services to the existing portfolio, expanding the service offering and increasing revenue.

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One goal, three paths

Business objectives and digital maturity dictate the path to transform from DSP to CSP.

- **Digital transformation:** Focusing on technology and process improvements to improve the customer experience.
- **Digital operation:** Enhancing the business model by leveraging data analytics and AI for better decision making.
- **Digital augmentation:** Expanding the service offering through new digital services and platforms.

The journey to intelligent DSP

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Sponsors Profile

Amdocs

Amdocs is a leading provider of customer experience and digital transformation solutions for communications and technology companies worldwide. Amdocs offers a comprehensive suite of products and services, including cloud transformation, digital operations, and digital augmentation.

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The Path of Digital Transformation

Digital Transformation requires a leap of faith capability necessary to reach out to success.

Stage 1: Build your internal capability

Sponsor executive sponsors replacing annual processes with automation

Digital operation transparents the digital interaction and business logic, integrating the interfaces and streamlining the business logic process. Processes are automated, and procedures and cost structure, resulting in a more efficient operation and improved cost savings.

Stage 2: Energize Analytics and AI

Sponsor executive sponsors building a supply and demand relationship.

A detailed data base and process AI redefines the data availability to the stakeholders, which is the key to the Digital Service Providers to manage the interrelated content within the business context.

Real-time BI & Predictive Analytics to provide timely insights

Integration of processes and a unified approach enables the process to be tracked and traced. Data analytics technology models the optimization process, and algorithms provide the insights into the data. Business service providers see the operational excellence by identifying the bottlenecks in earlier stage or even being able to predict the impact of the costs and revenue implications.

Stage 3: Empower your users and customers

Event Channel for delivering the right experience:

The unified data theme ensures the customer interface and preferences are available across all devices. (interactive experience).

Unifying contextual understandings as the user engages and associates interactions, Gateway channel enables a secure access to the customer as they are digi-merged with right-value propositions and interactions. Unique design principles for the interactive platform ensures a seamless experience regardless of the device.

Foster Empowerment: Customer Self-service Management to improve the service efficiency:

For instance, the Digital Life and Digital Businesses: 5G and AI will strengthen the customer interface and customer experience. With 5G, the experience will be enhanced, and the services will be more personalized.

Customer Journey Simplification to boost the experience and customer perceived value:

Regardless of the complexity of the interaction or technology, the customer journey must be prioritized simply to use without obvious hardships.

Stage 4: Generate Value Growth

New Revenue Models integration with Customer Understanding & Lifetime Value

Digital assets have their ecosystem built up on the unified data layer and an open, 5G offers a range of services at a lower cost, which will need to be reinvented and personalized. 5G, 5G is a simple technology that makes the preparation in the digital economy is necessary, the micro and macro service, enabling e-commerce, digital service, digital interaction, and personalization.

Figure 2: Digital Life & Digital Businesses

The role of B2B in digital interactions is to seamlessly and empowering the digital data in the digital landscape to bring in the services that drive digital consumers and businesses.

An analog approach has been established to represent the core dimensions of the Digital Economy. By connecting the customer experience, the value is made available, which will enable the relationships and the experiences, where the applications will be empowered to connect in different ways.

Sponsors Profile

Digital Life is driving the network 5G Digital Transformation with our pioneering cloud-based Business Support Solutions. Our cloud-based company 5G and Digital Transformations is driven to create business efficiency, reduce cost operation, and be able to provide a better customer experience.

www.treforum.org
The digital economy and the digital natives are making it impossible to Communicate eBusiness Services of the 2000s where their core. All that the customer of today cares about is a seamless, transparent experience, not any one point of the journey. The choice is not about being digital first, but about being digital well.

As CSPs gear up to combine speed of delivery with adoption of cloud technology to deliver relevant, user-based data over the next few years, they will continue to be involved significantly on one side and also utilize data connectivity for monitoring various voice and messaging services, and even to a CSP on data on-time, and being responsive to the innovative digital services providers the Webhooks, SMS, Voice, WhatsApp and Telegram.

Voice and messaging services are expected to tip around by 2025. Digital services are going to be the growth engine.

Bridging the gap between traditional operators and mobile handset manufacturers is expected to grow the current average of 30% to 55% in the next 5 years. It’s unlikely that CSPs would want to be left unattended by the implication of these trends.

TUNING IN TO NEW SERVICE EXPECTATIONS

While many operators have been preparing to meet the challenges of the digital economy, there are some key issues to be managed in the short-term.

CSPs would want to first identify that services customers find reliable and are willing to pay for. This means understanding customer expectations, which differ significantly from one category to another. Each category has its own requirements, in terms of features, capabilities, and how the service is perceived.

- **Voice-first interaction**: Service should be available on every single end with voice and multi-channel processes.
- **Seamless experience**
- **Customer Service**: On-time service, trust-based personalization, ability to scale down & up, deeper penetration


Figure 1

A customer, for example, may want a longer-than-average experience on their phone. For a transactional application, the most important thing that is not a feature. The satisfaction gap between what customers expect and what they actually receive is the difference in the gap between what service providers are delivering and what customers are expecting. 한미 국방안보기구는 이러한 검증에서, dropped calls and service disruptions can result in a loss of customer confidence and revenue.

Achieving three customer-focused goals will be critical for the CSPs to complete the transition to a full digital experience, better understanding of customers by identifying them:

- **Commodity**: OaaS + BaaS + SaaS + API (SMS, VAPI, PiPAPI can be leveraged on-site or off-site)
- **Service Relationship**: Identify the pathways that makes service possible and retain them while ensuring the communication with the customer.
- **Consumer Experience**: Delve into the proposition and continue to learn from and with the customers. The three major lessons will be:

- **Engagement**: By engaging customers through personalization and service, different levels of customer engagement and depth of customer experience are achieved.
- **Service Delivery**: By delivering services that are tailored to the needs of the customers, the service is provided in a more personalized and meaningful way.
- **Analytics**: By analyzing customer data, the CSPs can improve their service quality and customer experience.

In essence, a CSP’s job is to become a solution provider using voice and messaging services as a core feature to deliver a seamless customer experience.

DONNING THE HAT OF A DASP

A DASP (Digital Application Service Provider) to have a service experience management service. How to work with partners and CSPs to design the solutions for customers and how to manage the services. The customer experience is becoming the differentiator for the CSPs going forward. The service experience management (SEM) is the key to success.

- **‘CAUSE’ AND EFFECT

There is no silver bullet to the transformation from a digital service provider. Close segment integration with CSPs and partner ecosystem is key to the success of the CSP. DASP in the future must do this and CSPs have an opportunity to take the lead in this transformation. The CSPs will need to design the solutions that are tailored to the needs of the customers. The success of a DASP depends on the ability to succeed in these areas.

Typically, a DASP will be tasked with the responsibility to optimize large-scale programs that are integrated across different processes. The DASP must be able to scale the solutions that are tailored to the needs of the customers.

The DASP will be expected to provide a seamless experience to the customers. This means that the DASP will be responsible for the overall experience of the service. In order for the DASP to be successful, it needs to be able to understand the needs of the customers and how to deliver the service in a meaningful way.

- **‘SUCCESS’ AND EFFECT

The DASP will need to adopt a data-driven approach to service and experience management. The responsibility will be to design the solutions that are tailored to the needs of the customers. The success of a DASP depends on the ability to succeed in these areas.

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- **Sponsors Profile

Wipro Limited is an IT, ITeS, and Business Process Outsourcing (BPO) company.

Wipro is a leading global information technology, consulting and business process outsourcing company with operations in 20 countries including India, the Philippines, the United States, the United Kingdom, Australia, and South Africa. Wipro serves clients across various industries, including financial services, retail, manufacturing, and healthcare. Wipro's services include application development, infrastructure services, and consulting. Wipro is headquartered in Bengaluru, India.

Wipro’s core services include consulting, business process outsourcing, and information technology to other companies. In addition, Wipro's BPO business has seen significant growth in recent years, and the company has expanded its offerings to include a broader range of services, including business process outsourcing and managed services. Wipro is committed to sustainability and has set targets to reduce its carbon footprint and improve its environmental performance, including a commitment to sourcing 100% renewable energy by 2025.
TM Forum Digital Maturity Model

The DMM is a ‘living’ maturity model and evolves to help companies measure their true digital maturity. Members can access a guided toolkit as well as an Excel spreadsheet containing the actual model. It is also available as an iOS app.

Agile & Virtualized

Agile OSS/BSS Toolkit

This toolkit includes a complete blueprint for a platform that will enable a multi-tenant web-scale IT infrastructure, which includes open APIs, information models, best practices, and deployment guides.

ZOOM NFV User Stories Suite

This suite of documents looks at the end-to-end management of virtualized networks. It includes a guide to NFV, user stories, and an overview of the ZOOM NFV platform.

Open & Partner Effectively

Open APIs

The Forum offers more than 42 APIs to manage a complete lifecycle throughout their lifecycle in a multi-partner environment.

Digital Trust Challenges and Opportunities Standard

This technical report outlines the key enablers of digital trust and identifies the top seven digital trust challenges.

Monetizing the Internet of Everything Guide

This information guide describes a standards-based approach and a monetization template for new, innovative services.

Customer Centricity

Customer Experience Implementation Suite

This set of tools includes a playbook, hundreds of metrics, a toolkit, model, and more than 250 implementation use cases.

Big Data Analytics Solution Suite

This set of tools includes a big data reference model, a guidance framework, more than 50 use cases, and 150 use case definitions.

360 Degree View of a Customer

This guidebook offers a 360-degree view of a customer and enables firms to put customers at the center of their strategies and operations.

Research & Media

ebooks

Platforms: How to use the internet
Open API: Enabling business innovation in a world
Consumer: Navigating our digital

Trend Analysis

Cloud OSS/BSS: The opportunity begins
Digital transformation: Navigating the way to success

Insights Research

Cloud OSS/BSS: The opportunity begins
Digital transformation: Navigating the way to success

Quick Insights

An online source of customer service
Micronetwork: Focusing together a world
Data analytics & AI: Key to end-to-end management
Hundreds of individuals from a diverse range of member companies have worked in TM Forum’s unique collaborative environment to deliver new features in TM Forum Frameworx™ 17. The projects were all within the context of the Digital Maturity Model, Open API (Application Program Interfaces), Agile Business & IT, Internet of Everything (IoE) and Customer Centricity & Analytics programs, and the Smart City Forum.

TM Forum Digital Maturity Model

We’ve brought together expertise and models from leading communications service providers (CSPs), consulting firms and solution providers to create a ‘living’ maturity model and set of metrics which help companies measure their true digital maturity. The TM Forum Digital Maturity Model includes a guidebook as well as an Excel spreadsheet containing the actual model. It is also available as an iOS app.

Open API

TM Forum’s Open API collaborative team has added 13 new API specifications to the portfolio of Open APIs and a new Open API Map. This brings the total number of Open APIs to 44. The latest release includes:

- The first network management API, Resource Function Activation and Configuration Management API. This was developed closely with the Zero Touch Orchestration, Operations and Management (ZOOOM) project team and is used for provisioning and lifecycle management of resource functions.
- New APIs to ensure consistent management of the relationship with a customer across different channels (Customer Management API), Account Management API, Payment Method API, Pay As You Go Management API, Loyalty Management API, Shipping Cart API and Promotion API.
- Enhancements and new APIs to improve end-to-end management with other service providers or third parties in B2B and B2BEC contexts (Party Role Management API, Partnership Type Management API, User Roles and Permissions API).
- The Entity Catalog Management API enables management of the entire lifecycle of catalog elements during several processes such as ordering, campaign management and sales management.
- Mapping and alignment from the Digital Services Reference Architecture (DSRA) to Open APIs to make it easier to develop platform boundaries in a digital ecosystem.

Agile Business & IT

The Agile OSS/BSS Toolkit includes a complete blueprint for a platform to manage multi-vendor hybrid/NFV infrastructure. It includes key practical assets such as Open APIs, information models, best practices and deployment guides. The toolkit goes beyond basic network functions virtualization (NFV) management to include resource function activation and configuration, inventory management, catalog management and assurance.

The ZOOM NFV User Stories Toolkit looks at end-to-end management of hybrid environments from the perspective of multiple teams within a CSP, such as business and operational management, design and development. User stories for key virtualization challenges are necessary to drive the specification of APIs. These APIs help to integrate operational support systems for virtualization management in a hybrid environment.

Internet of Everything

The first ever Digital Trust Challenges and Opportunities Standard was developed based on workshops and interactions with TM Forum members, and research from various industries, academia and government organizations. It outlines the key requirements for digital trust and identifies the top seven challenges. This will be a central pillar of TM Forum’s future work on coordinating all elements of digital trust.

The Moreilling Internet of Everything Guide provides a standardized approach and monetization template for new, innovative digital services. It includes definitions of monetization models, how to build a monetization model using the template, an outline and examples of typical monetization patterns.

The widely successful Online Business Partnering Step-by-Step Guide and B2B Customer journey Template are key tools for achieving agile, repeatable ecosystem partnerships. They have been extended with invaluable new templates for monetization models and a standardized use case template. Applying the best practices in these guides enhances the ability of producers and consumers in the platform economy to add value to their interactions.

The Revenue Assurance Solution Suite of documents defines the KPIs that provide a common framework to measure three important aspects of revenue assurance: revenue leakage, revenue assurance related process efficiency and data quality. Release 17.0 includes additional revenue leakage examples associated with NFV.

Customer Centricity & Analytics

The newly published TM Forum Big Data Analytics Solution Suite includes an update to the Analytics Big Data Repository (ABDR). The updates build on research TM Forum has conducted with members looking at the primary challenges to adopting analytics.

The Customer Experience Implementation Guide is a collection of use cases that represent business challenges. It includes three new use cases relating to KPI and monetization, bringing the total to 54 (9 focusing on customer experience management and five on customer analytics and management).

Smart City Forum

TM Forum’s Smart City Forum has released three new reports:

- City as a Platform Case Study and Success Criteria is an easy-to-follow architecture outlining key components and building blocks in a smart city platform.
- City as a Platform Architecture and Supporting Capabilities defines a conceptual platform architecture for a data hub to help cities and other ecosystem participants move data monetization.
- City as a Platform Business Model provides a simple way of understanding a city-as-a-platform ecosystem and a simple set of ideas to help a city determine what is needed to develop a sustainable and scalable city data exchange platform business.

You can learn more about Framework Briefs. If you have questions or would like to get involved in a project, please email us.

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Download as a PDF
TM Forum is pleased to announce the launch of the second ‘Digital Transformation Tracker’ survey that will focus on the key cultural, skills, organization and leadership issues that digital transformation needs to overcome.

The Digital Transformation Tracker 2 survey will focus on:

- the status of CSP transformation around the world;
- what CSPs really mean when they talk about changing their cultures;
- what skills CSPs will need to recruit over the next 12 months; and
- the status of CSPs’ network transformation and their key business and technology challenges.

Take the survey - communications service providers

Take the survey - technology suppliers and partners to CSPs
Connecting digital ecosystems

TM Forum is the global member association for digital business. Our hundreds of members from across a wide range of industries collaborate and partner to create, prototype, deliver, and monetize innovative digital services for their billions of customers. All TM Forum members, and entire industries by extension, benefit from the collaborative work that takes place within the Forum.

There are many ways to engage with the Forum and our diverse members – join a digital community or project, participate in our Catalyst rapid prototyping program, contribute your thought-leadership, network with your peers at our world-class events, train your staff on the latest digital business best practices and standards, and more.

Won’t you join us on this crucial journey?

Find out more