

Seizing the 5G enterprise opportunity: How to drive operator agility

Webinar

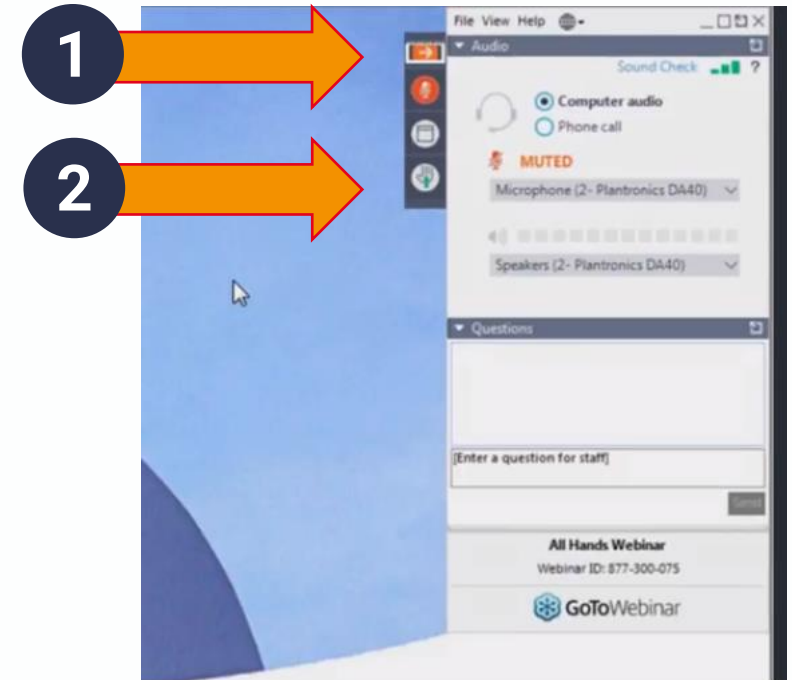
16th June 2021

Agenda

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|----------|---|---------------|
| 1 | Introductions and notes | 15:00 – 15:05 |
| 2 | Seizing the 5G enterprise opportunity: How to drive operator agility | 15:05 – 15:20 |
| 3 | Our panel session and Q&A | 15:20 – 16:00 |

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- On Twitter? Tweet us @STLPartners #STLthinks



Our presenters and panellists



Phil Laidler
Consulting Director,
STL Partners



Yesmean Luk
Senior Consultant,
STL Partners



Yannick Mayaud
Consultant,
STL Partners



Rose-Marie Jurinic Nyman
Head Agile Transformation Product
Area Communication, Telia



Ehtisham Rao
Ecosystem Architect and lead of the
TM Forum Catalyst Project



Miriam Deasy
BSS Senior Solutions Marketing Manager,
Ericsson Digital Services

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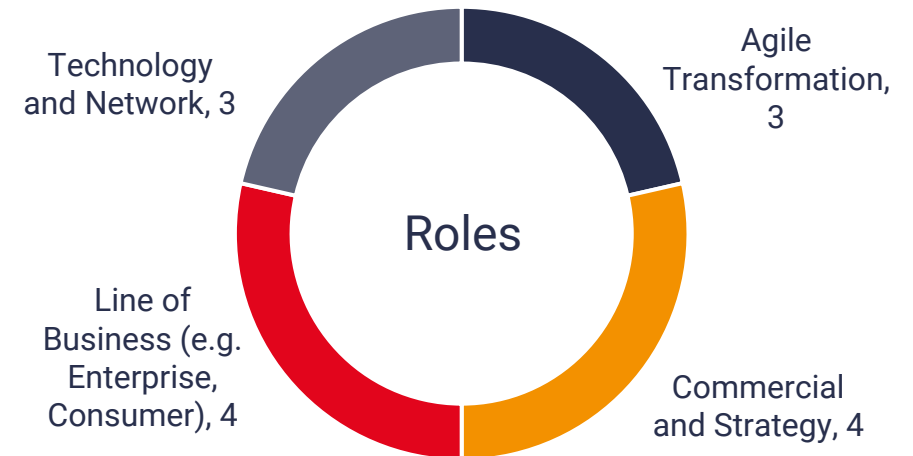
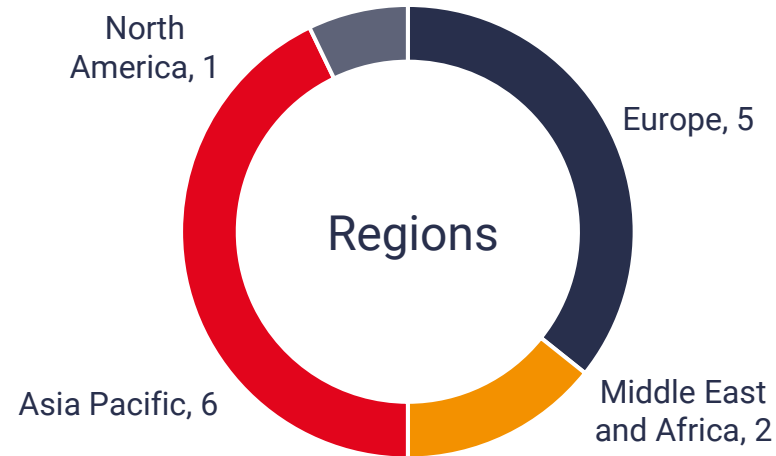
Seizing the 5G enterprise opportunity: How to drive operator agility

Presentation on our research findings

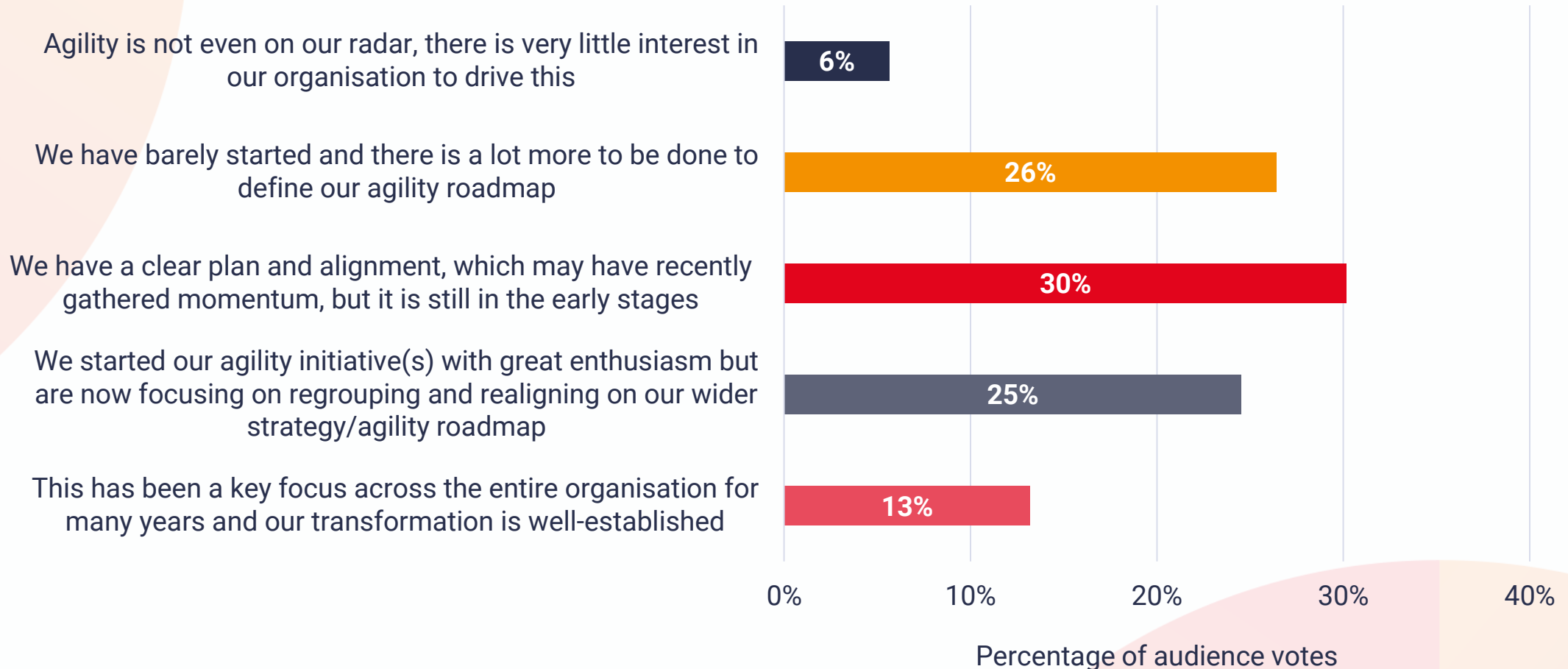
Yesmean Luk, Senior Consultant

Yannick Mayaud, Consultant

Our research findings are based on a research programme with telco operators globally on the role of agility



Audience poll: Where do you see your organisation in its agility journey?



Key findings from our research programme

Why now?



Agile is a still hot topic, arguably more than ever

Agility as a term has crystallised in meaning and is now a 'must-have' for operators, and has therefore seen an acceleration of agile initiatives in the past year

What does agile look like?



Agility is a balance of flexibility and stability

Agility today is a pervasive philosophy of flexibility and speed of innovation that is achieved through structured practices and architectures to maintain carrier-grade resilience. In this new model, agile BSS connects the agile organisation together

How to get there?



Operator transformations must themselves be agile

Operators' rapid progress requires iterations through the 'agility flywheel':

- Technology rationalisation,
- Portfolio simplification,
- Organisational, cultural and process transformation

Key finding 1: Agile is still a hot topic for operators

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Agility is relevant now more than ever with cloudification changing the landscape, especially for enterprise services



Competition

- Start-ups, software companies and hyperscalers (e.g. Twilio)
- Cloud-native from the ground up
- Extensive developer communities:
 - Headstart in ecosystem building
 - Knowledge of selling to developers vs. traditional telco sell to CIO / procurement



Customer demands

- Customers are demanding:
 - Flexibility (on-demand)
 - Self-servicing (APIs)
 - Automation
- Market heterogeneity means reaction to enterprise requirements must be faster
- Enterprise customers are becoming programmers themselves

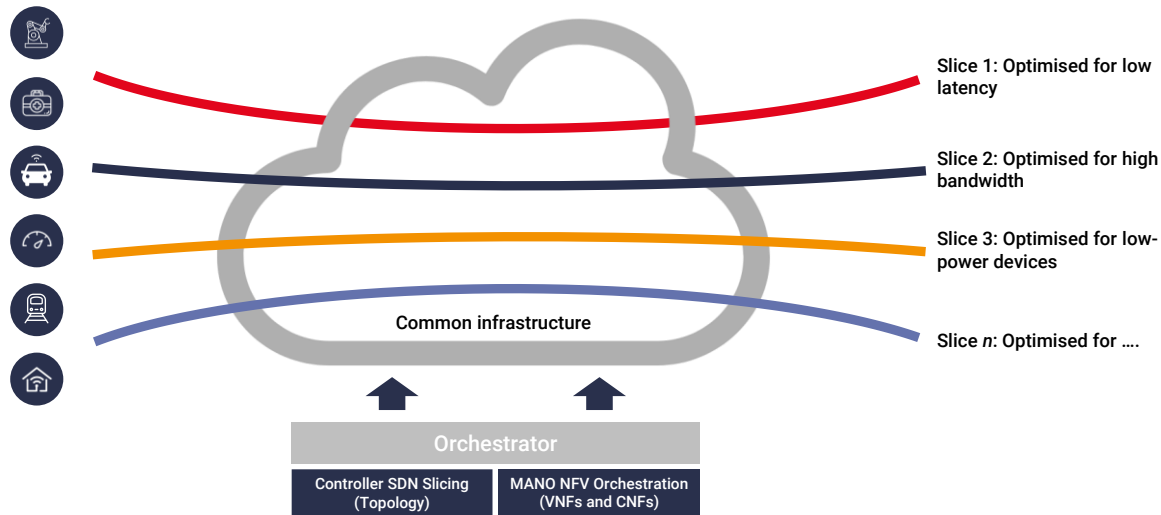


Complex value chains

- The market is moving away from traditional linear supplier models towards partnerships and ecosystems
- Management of these requires:
 - New infrastructure
 - New skillsets
 - Allowing partners and customers in safely (programmable interfaces)

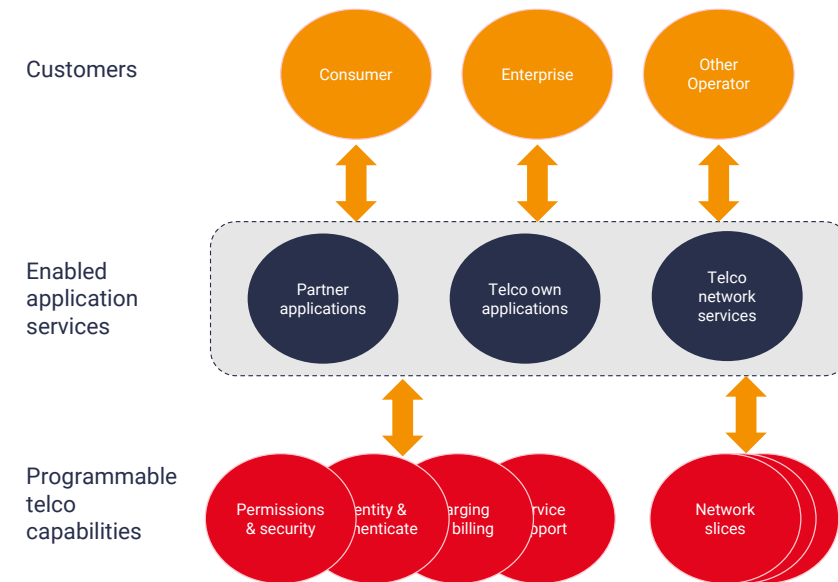
Becoming agile now will be the only way for operators to seize the as-yet-unproven enterprise opportunities with 5G

Network slicing



Though still nascent, slicing will play a key role in monetising 5G. Agility will be needed to **manage** the deep levels of customisation of systems implied, while keeping it **cost effective**

Application-network integration



Today, applications that run OTT are seen as constraints to **engineer around**. With greater instructability, networks can become more **relevant** and **dynamic** for enterprise customers

Key finding 2: Agility means structured practices and architectures that encourage flexibility

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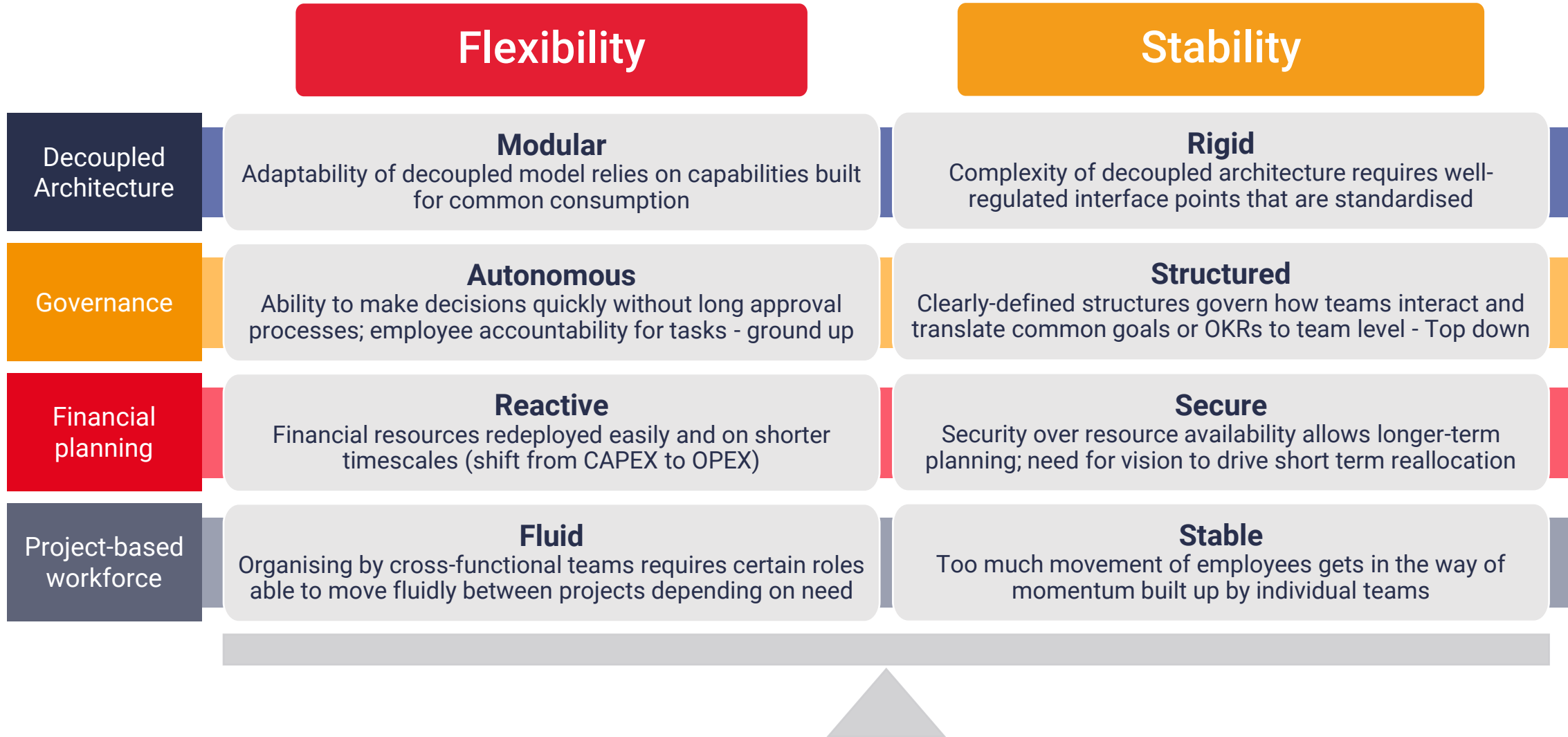


Operator transformations must themselves be agile

Operators' rapid progress requires iterations through the 'agility flywheel':

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Adopting agility at the core of operations means balancing counter-intuitively linked concepts of stability and flexibility



Key finding 3: Telcos need to drive the agility flywheel

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Transformations themselves need to be agile otherwise they fail: Agility is achieved stepwise across three fronts

Agile transformations fail when..



...they target technological or organisational change **alone**



...they attempt **simultaneous** change across-the-board

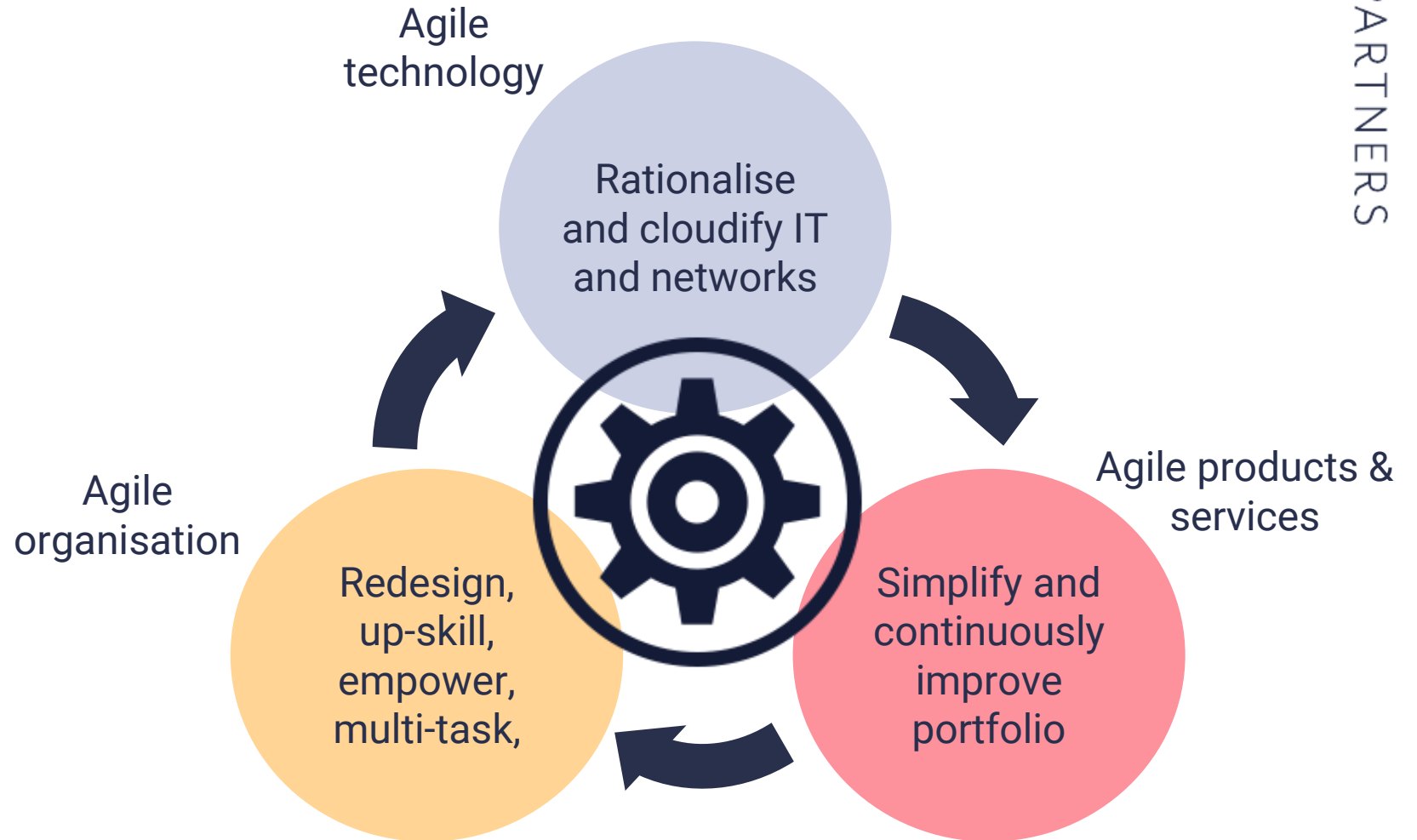


Agility transformations need to be **stepwise** and **incremental** across three fronts **in turn**

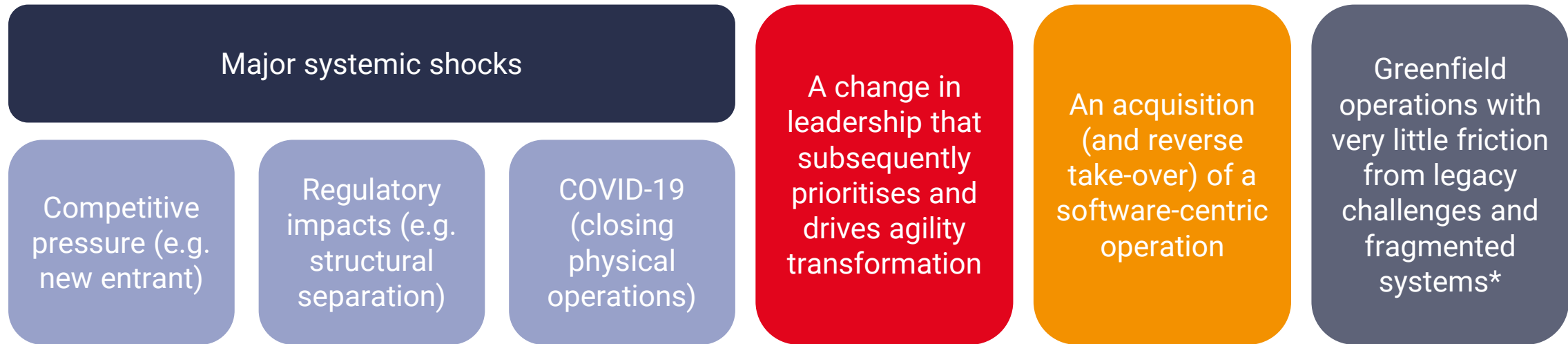
flywheel

noun

A mechanism driven by rotational speed. It requires significant initial effort to kickstart the motion and build momentum, but once that initial inertia is overcome, it is designed to efficiently accelerate to much greater speeds in a stable manner

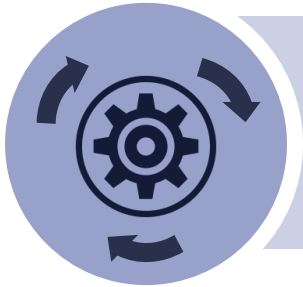


Significant external impacts can act as stimuli to get the agility flywheel moving



*Although where this has been created by an operator alongside the ongoing legacy operations, it is not clear if/how this can help to drive transformation across the organisation

We set out three key recommendations for operators



Develop a stepwise plan and roadmap to drive the agility flywheel

1. Update, modernise and modularise tech stacks
2. Balance releasing new vs evolving existing products and services
3. Establish structures, incentives and practices to empower employees



Prioritise agility efforts in areas that require high levels of cross-team/function collaboration

Areas such as product development, where innovation requires input and alignment from many parts of the organisation, will benefit most from agile modes of operation



Secure support from senior leadership

They should drive and champion the programme and also communicate the agile vision with clarity across all levels of the organisation

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Our live panel session

Our guest panellists



Rose-Marie Jurinic Nyman
Head Agile Transformation
Product Area Communication,

Telia



Ehtisham Rao
Ecosystem Architect and
Lead of the TM Forum
Catalyst Project

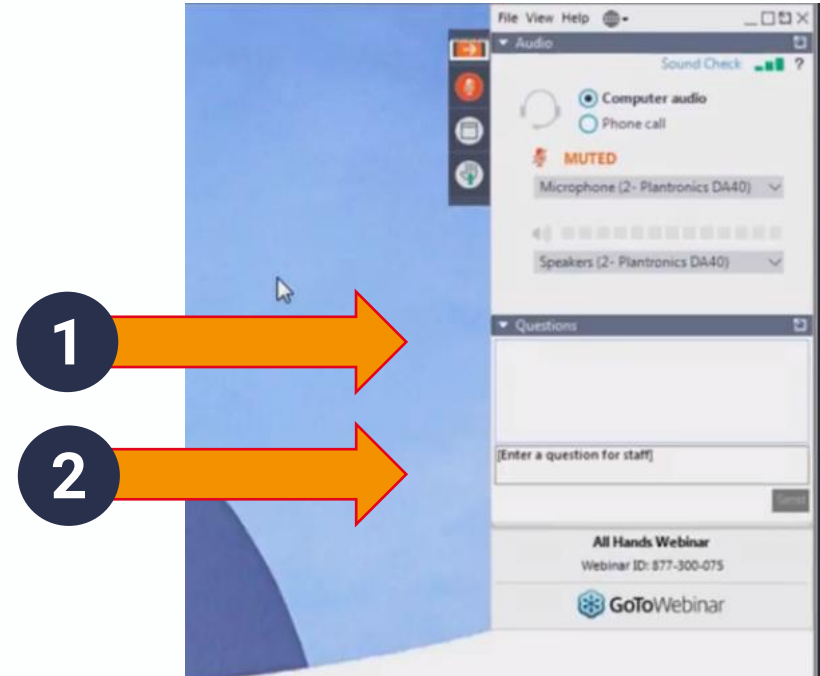


Miriam Deasy
BSS Senior Solutions
Marketing Manager

Ericsson Digital Services

Q&A session

Please submit any questions using the GoToWebinar control panel



Thank you for joining!

All registrants will be receiving the link to the research report, recording and slides shortly to watch back or to share with colleagues, plus a Q&A write up in due course.

For any other questions, please contact:

contact@stlpartners.com

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Executive Briefing

**DRIVING THE AGILITY
FLYWHEEL: THE STEPWISE
JOURNEY TO AGILE**

We evaluate how the concept of agility has changed, its relevance to telecoms and what telco operators are doing to transition to more agile operating models.



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