Navigating network transformation & automation: Are you an early stage, data first, cloud first or fast moving transformer?

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To unlock revenue streams beyond connectivity, operators must navigate the **shift from legacy to next-generation networks & automation**. This requires transformation across **four key pillars**:

- **Data & AI**
- **Cloudification & programmability**
- **Automation**
- **API Exposure**

…but **there is no clear pathway from legacy to next-gen**; operators have evolved various capabilities at different paces depending on their:

- Regulatory environment
- Customer expectations
- Organisation culture & skills
- Strategic priorities
- Competitive landscape

This can make it difficult for operators to identify and enact strategic recommendations that apply to their specific transformation journey

To overcome this **& enable operators to find their transformation peer group**, STL have identified the four most prevalent operator transformation pathways through analysis of:

3500+ data points from **100+** operators analysing Progress across the four pillars

Early stage transformers

48% of operators fit this profile

Situation
- Active in growth markets or challengers elsewhere
- Progressing towards virtualisation and basic automation

Complication
- Combatting commoditisation
- Balancing speed with in-house skills

Key question

"Where should I prioritise network transformation resource to compete in the ecosystem?

Data first transformers

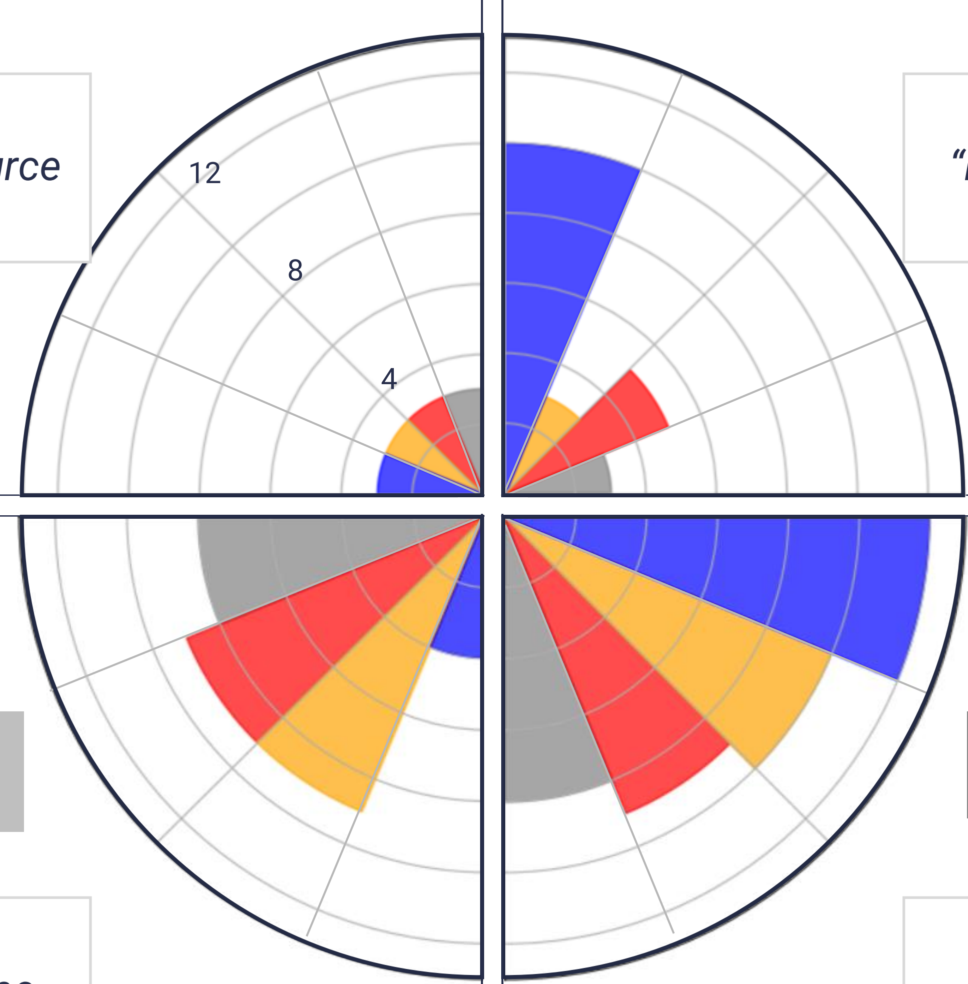
21% of operators fit this profile

Situation
- Leading operators in growth markets
- See data skills as the foundation for transformation

Complication
- Automating legacy network
- Difficulty moving to NaaS models

Key question

"How to accelerate network transformation to feed strong data practice and leverage skills?"



Data & AI | Cloudification | Automation | API exposure

Cloud first transformers

17% of operators fit this profile

Situation
- Tier-1 operators who have invested heavily in the network
- Focused on disaggregation and programmability

Complication
- Difficulty scaling a platform play
- Lack of customer centricity

Key question

"How can I build out my data capabilities to understand my customers better and innovate services that they need!

Fast moving transformers

14% of operators fit this profile

Situation
- Global Tier-1 operators with large R&D budgets, or
- Greenfield operators entering entering markets as agile challengers

Complication
- Competition with technology players
- Industry perception

Key question

"How to leverage the network as a platform to change perceptions, enabling to compete in the space beyond connectivity?"

Find out more in our full length report:

Download report