Turning autonomy into margin: Agentic AI and the autonomous RAN

Amdocs webinar

15th April

STL PARTNERS

Agenda

1	**Introductions**	15:00 – 15:05
2	**STL presentation**	15:05 – 15:20
3	**Amdocs presentation**	15:20 – 15:35
4	**Panel discussion**	15:35 – 15:55
5	**Wrap up**	15:55 – 16:00

Our speakers



Philip Laidler

Director

STL Partners



Kirsten Rachman

Consultant

STL Partners



Neil Coleman

Product Line Manager Open RAN Automation

Amdocs



Darwin Janz

Strategic Technology Planner

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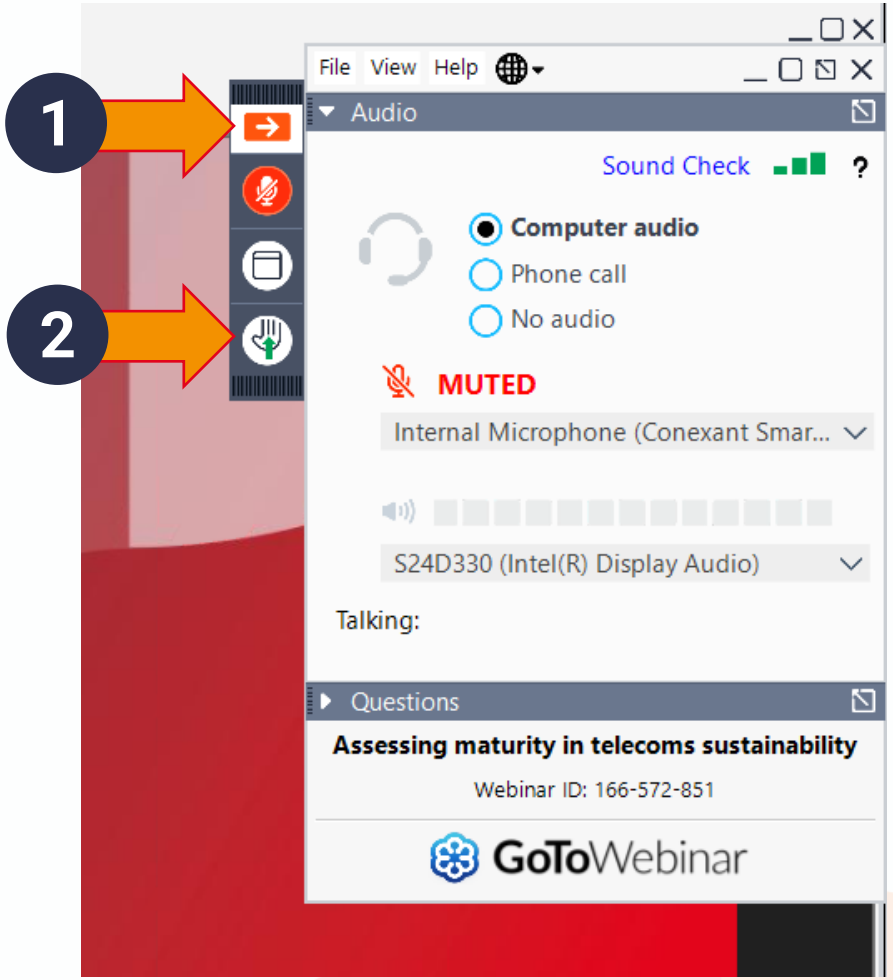
Terje Jensen

Global Business Security Officer

Telenor

GoToWebinar

- You’re in listen only mode
- If you need us, please type a comment
- Feel free to type questions throughout the session for the Q&A at the end
    - Any questions that we don’t answer live will be answered offline and shared in a summary Q&A document
- We’ll send you the slides and a recording shortly after the session, please do share with colleagues



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Market and financial pressures make RAN automation essential for operators – AI makes it viable

The challenge

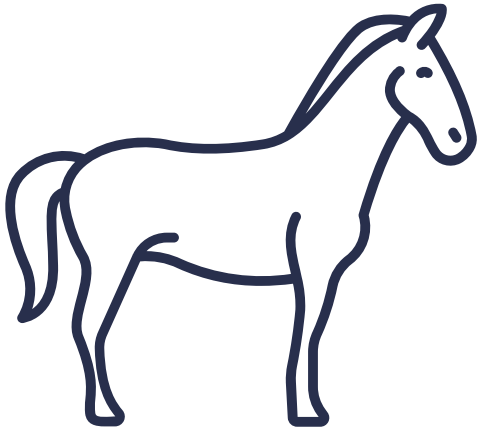
- Prolonged revenue stagnation
- Increasing commoditisation
- Intensifying competitive pressure from other MNOs and adjacent (NTN, eSIM)
- RAN is operators' largest, most invested asset

Strategic response

- Automation has moved to the top of the strategy agenda
- Board-level mandates to accelerate move to autonomous RAN
- TM Forum framework has enjoyed widespread adoption
- Formal targets and timeframes

Operators need to redefine their approach to RAN autonomy to maximise the opportunity

Without redefining the approach, operators risk investing heavily to build a “better commodity”



Traditional RAN

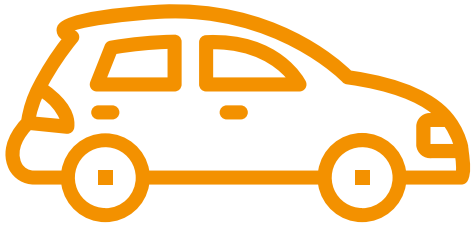
Automating existing activities



Improving efficiency, reliability, and automation within the existing operating model and cost-focus logic:

better commodity

Redefining the problem



Shifting autonomy toward customer outcomes and differentiated services:

changing the commercial role of the network.

RAN autonomy progress is constrained if approached in a fragmented way

Technology-led

Capability built ahead of demand
Technical sophistication outpaces use cases

No pricing logic for autonomy
Monetisation is assumed to emerge later

ROI becomes abstract
Strong tech capability but weak link to strategic impact

Commercial-led

Offerings exceed technical readiness
Network readiness lags commercial promises

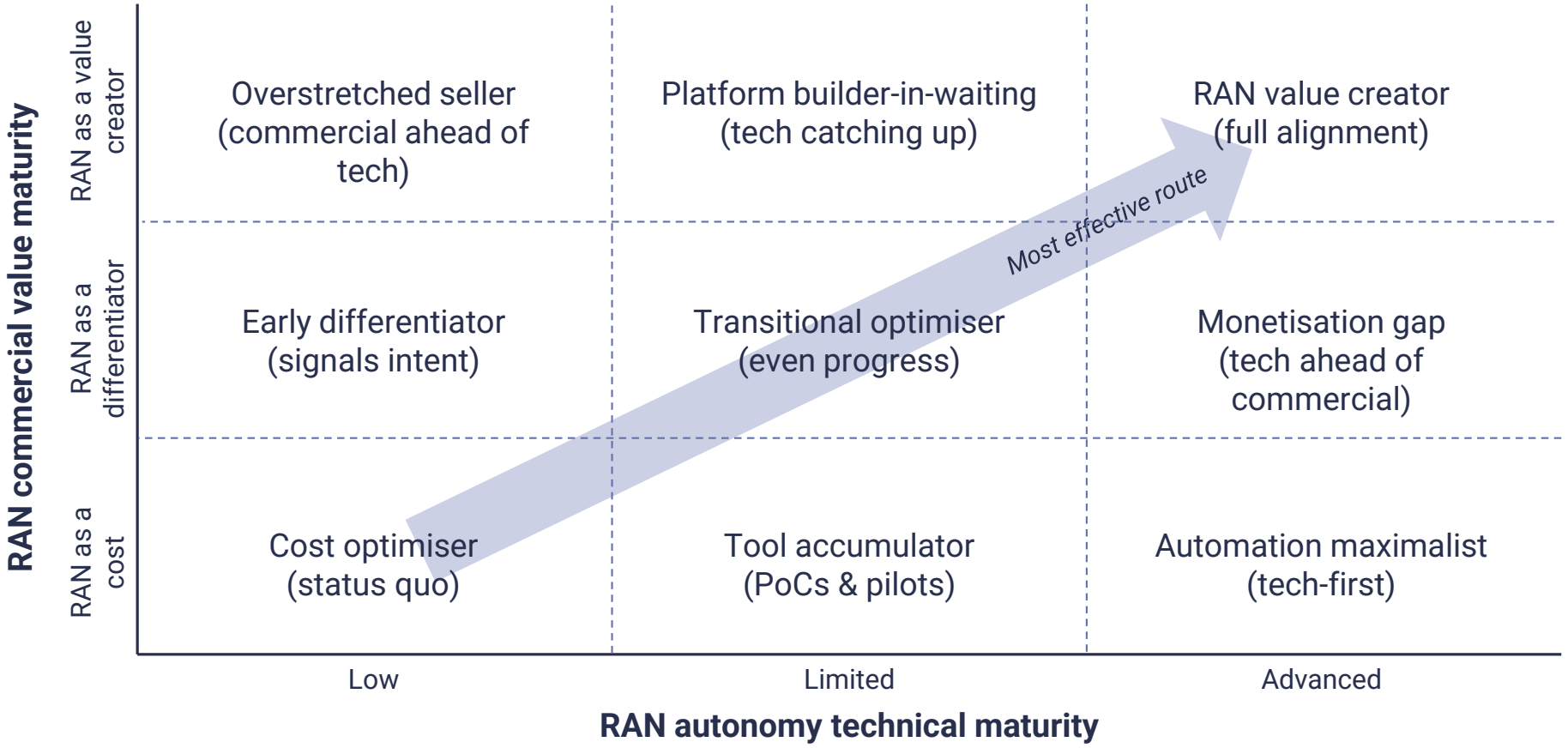
Manual workarounds entrenched
Temporary fixes become permanent solutions

Automation becomes reactive
Firefighting replaces strategic development

Key takeaway: A successful RAN automation strategy must integrate both technical excellence and commercial alignment from the outset

To accelerate RAN autonomy, operators need a framework combining technical maturity and value creation

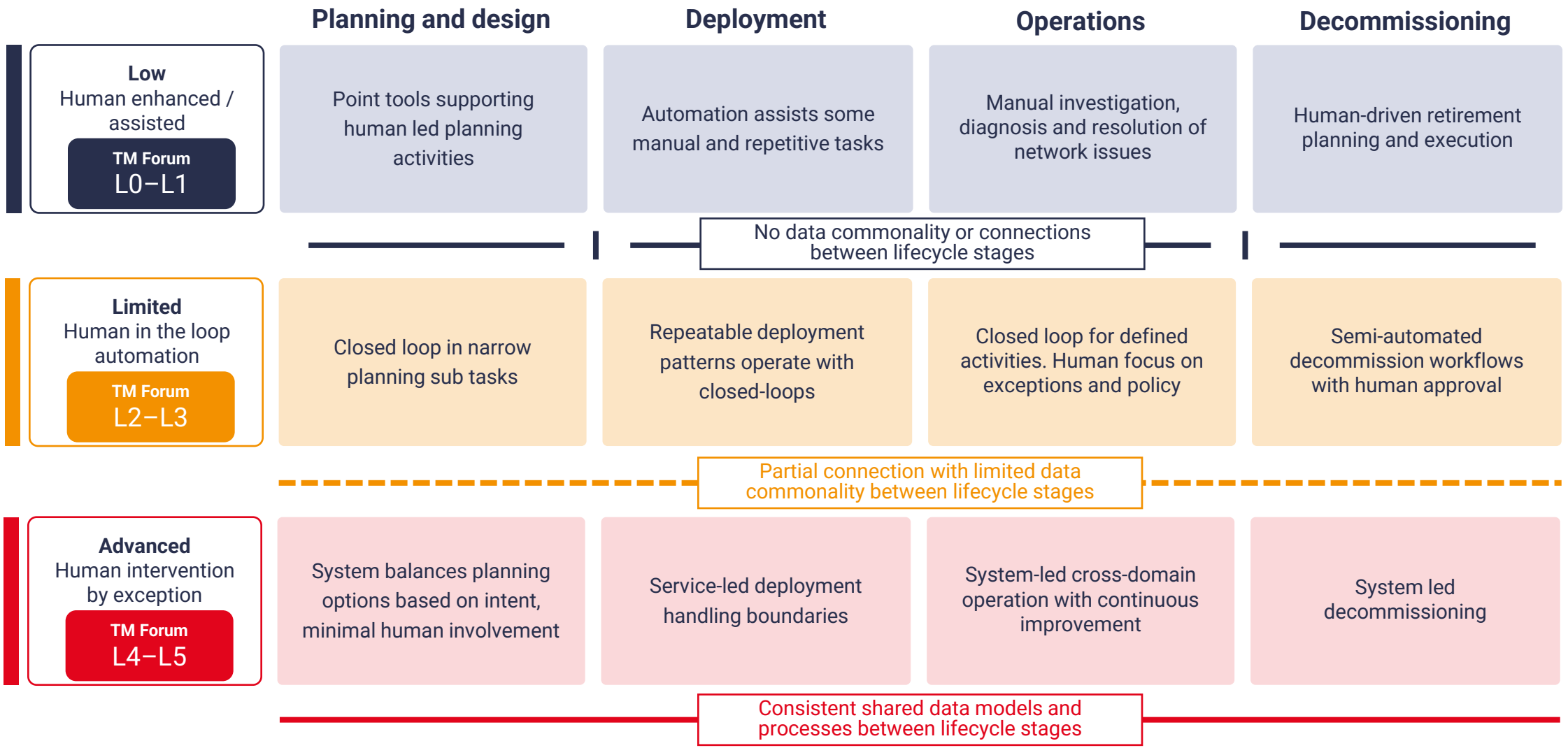
Our dual-axis framework is designed as a diagnostic and decision-support tool



*The framework has **nine distinct states** that operators can realistically occupy*

*These states explain why **similar technology stacks can yield different outcomes***

The technical axis builds on TM Forum levels to encompass all stages of the RAN lifecycle



RAN value creation axis captures how RAN evolves from a cost centre to a value creator

	Economic role	*Decision and operating logic*
Stage 1: RAN as a cost (Defensive mode)	**Unavoidable infrastructure cost**	• Strong preference for **manual control** driven by risk and accountability concerns • Network **decisions shaped by budget and compliance**, not business outcomes
Stage 2: RAN as a differentiator (Competitive mode)	**Influences user experience and retention**	• Decisions increasingly influenced by **customer segments and service priorities** • Engineering and commercial **teams collaborate**, but incentives remain misaligned • Automation **supports decisions in defined domains**, with human oversight
Stage 3: RAN as a value creator (Offensive mode)	**RAN generates standalone value**	• Decisions driven by **shared business objectives** rather than functional silos • **Clear ownership of outcomes** across network, product, and commercial teams • **Humans define intent and risk boundaries**, not individual actions

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At stage 3, RAN becomes a platform for innovation, enabling faster experimentation and customer and partner co-creation

Revenue-first network planning



Automating planning with customer data to project increased spend from coverage improvement

~10% uplift vs traditional manual (coverage-based) planning

Outcome-based contracts



Performance-based contracts with bonuses for achieving specific SLAs

~5% on contracted customer revenues vs normal contracts

RAN-as-a-service



Wholesale RAN service for other operators - permanent, pre-booked or on-demand

1-5% depending on arrangement (would require some additional investment)

RAN edge applications



Running non-RAN applications on RAN infrastructure for customers

~4% enterprise and/or **~1%** consumer revenues assuming some investment

(AI) RAN infrastructure



Third-party application workloads on shared RAN infrastructure

~5% enterprise revenues assuming some investment

Network-as-a-sensor



RAN as real-time intelligence layer sensing and feeding insights into decision-making

3-5% (requires compute infrastructure and new monetisation channels)

Which option best describes the operator you work for in regards to its aspiration for RAN autonomy?

1. RAN autonomy is pursued mainly to reduce operating cost, improve reliability, and meet technical performance metrics (e.g. 99.999 availability)
2. RAN autonomy is pursued to both reduce operating costs and to optimise customer experience
3. Through RAN automation we will transform our RAN ROI by reducing TCO across the RAN lifecycle and growing core revenues (ARPUs, churn, NPS)
4. RAN autonomy will enable us to achieve core and new revenue growth (innovation acceleration, APIs, network-as-a-sensor)

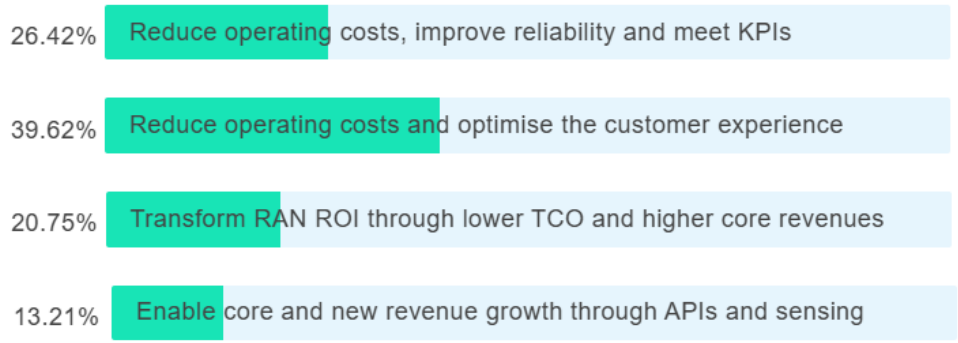
Which option best describes the operator you work for in regards to its actuality of RAN autonomy?

1. RAN autonomy is pursued mainly to reduce operating cost, improve reliability, and meet technical performance metrics (e.g. 99.999 availability)
2. RAN autonomy is pursued to both reduce operating costs and to optimise customer experience
3. Through RAN automation we will transform our RAN ROI by reducing TCO across the RAN lifecycle and growing core revenues (ARPUs, churn, NPS)
4. RAN autonomy will enable us to achieve core and new revenue growth (innovation acceleration, APIs, network-as-a-sensor)

Our poll results from the live webinar are as follows:

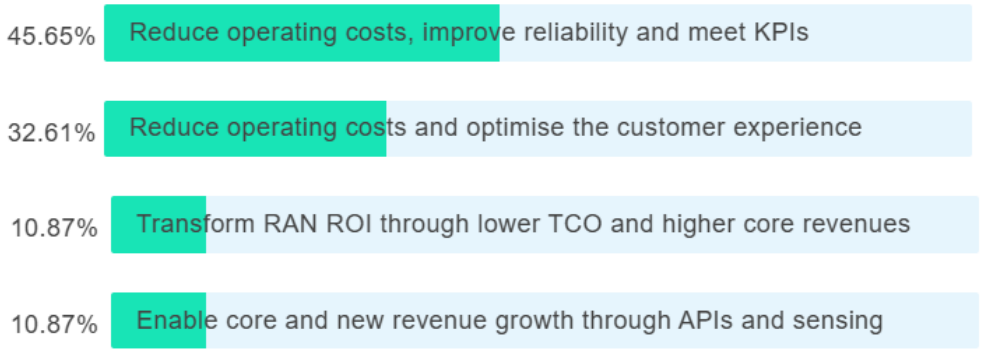
1 of 2. Which option best describes the operator you work for in regards to its aspiration for RAN autonomy?

Multiple choice with single answer



2 of 2. Which option best describes the operator you work for in regards to its actuality of RAN autonomy?

Multiple choice with single answer



Want to learn more?

Read our latest report “Breaking the RANcuffs: How operators can accelerate RAN autonomy”



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Amdocs

How STLs paper resonates with our customers

How automation looks today

Gaps operators are looking to close

Amdocs aOS



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How STLs paper resonates with our customers

Autonomous networks #1 priority for operators

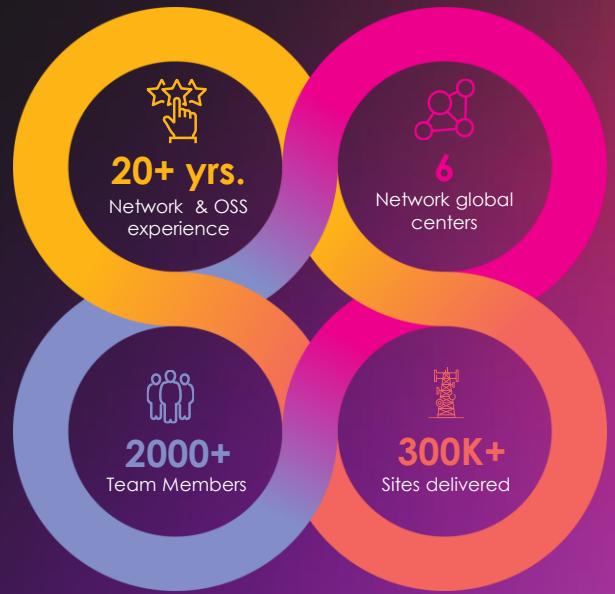
TMF has lit the automation touch paper

How does automation get paid for

It's not about business cases, but business approaches

Strategy, software, services

Over 100+ communications service provide network & OSS customers, 18 of 20 top Tier-1 CSPs



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How automation looks today

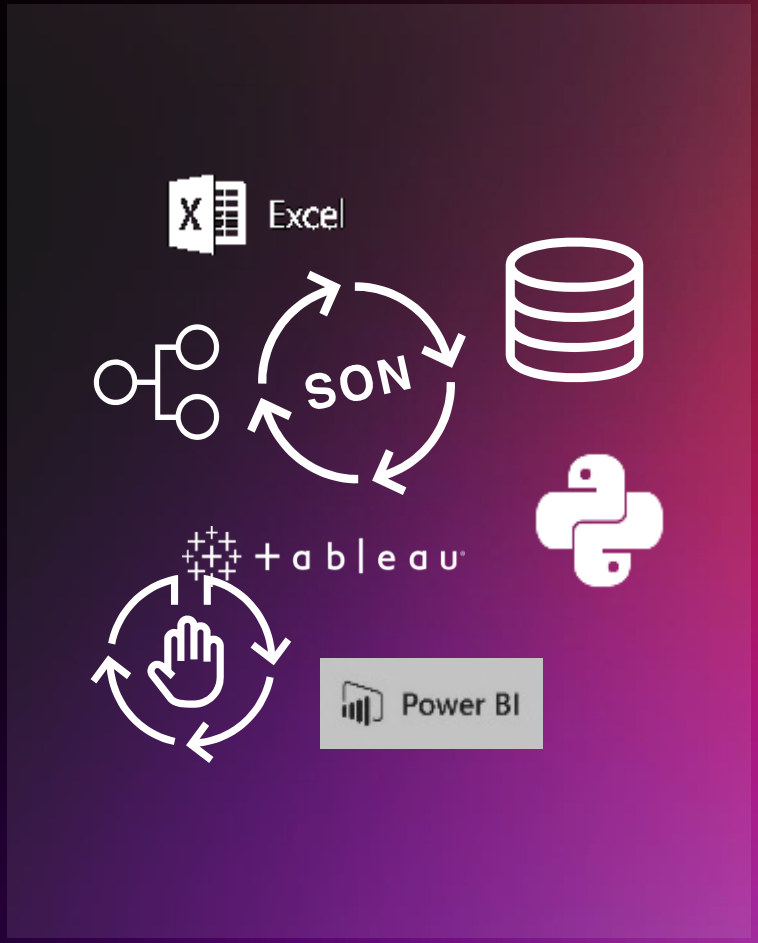
Technology alignment has been reached

Living with mature but limited SON platforms

100’s of automations spread across dozens of tools

Engineering self service is often overlooked

Operators looking where to start

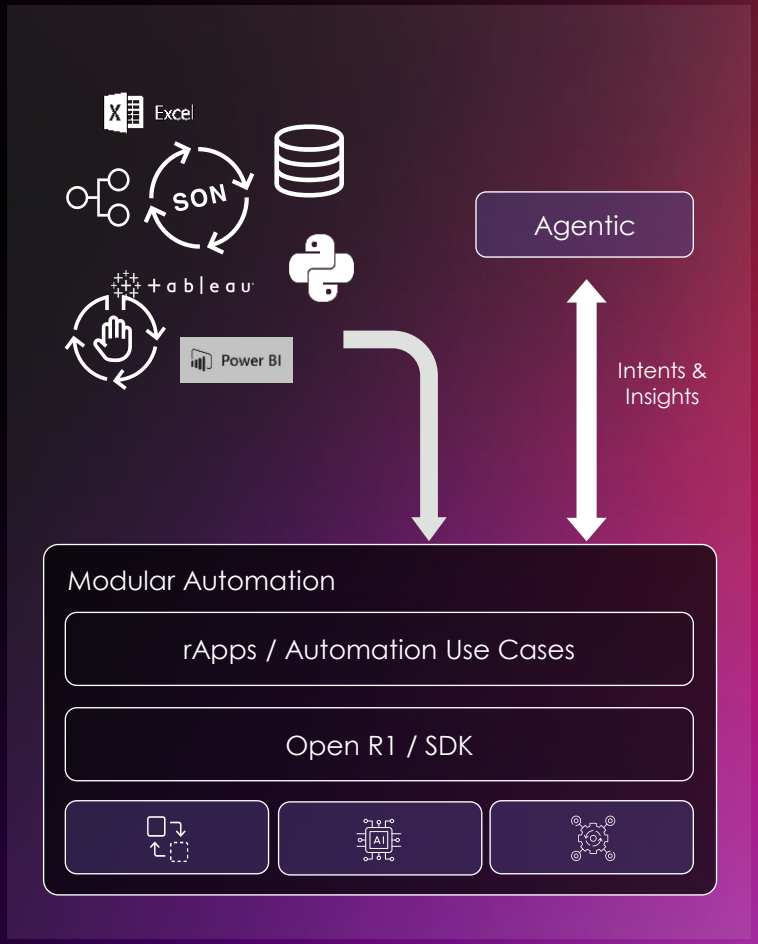


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Gaps operators are looking to close

Customer Case Studies:

1. **North America:** Tools consolidation
2. **APAC:** Cross lifecycle automation
3. **EU:** Systematic business intents



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a·OS
Agentic Operating System for Telco

CSP's
AI Ecosystem

Agentic **Network Workflows**

Agentic **Process Catalog**

Network Planning
Rollout and Deploy
Optimization

Network Problem Resolution
Preventive Operations
Network Change Management

Cognitive **Core**

Governance | Security | Observability

Pre-built Agent & Sub-agent Libraries

Network Engineering
Network Operations
Service Delivery

Telco Insights

Digital Twin

Telco Context
Telco Ontology
Telco Data

CSP's OSS Stack

Network

Network Planning	Network Rollout	Network Optimization	Network Inventory	Service Assurance	Service & Network Orchestration	3rd Party
NCM	NWM	CRA	NWI	SAS	SNO	

Agentic **Services**

- **Network Agent Development**
- **Model Training, MLOps**
- **Data Modelling & Ingestion**
- **NOC Automation**

Any service, network & cloud



amdocs

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Our panel discussion

Moderator



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Panellists



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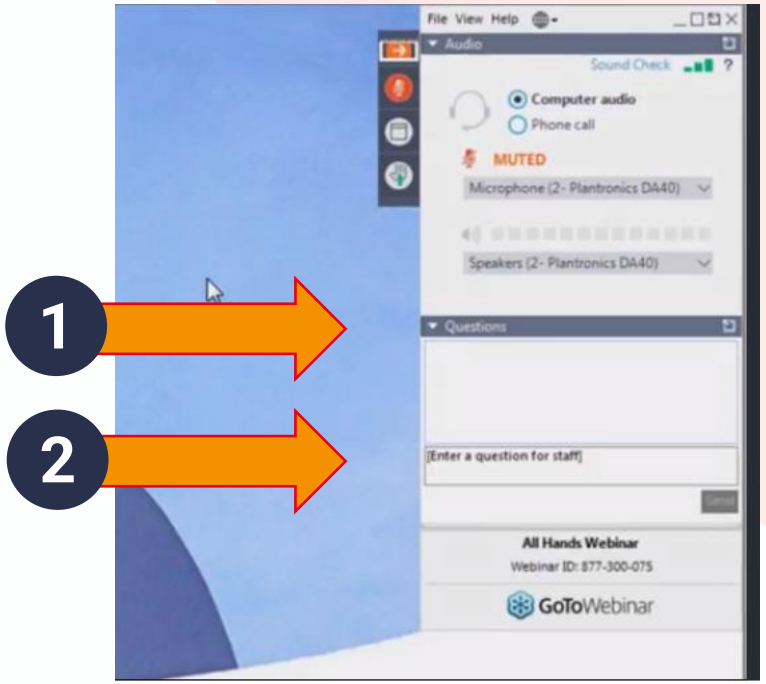
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For our Q&A...

Please submit any questions using the GoToWebinar control panel



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Thank you for joining!

All registrants will be receiving the link to the 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:

- Philip Laidler, philip.laidler@stlpartners.com
- Kirsten Rachman, kirsten.rachman@stlpartners.com