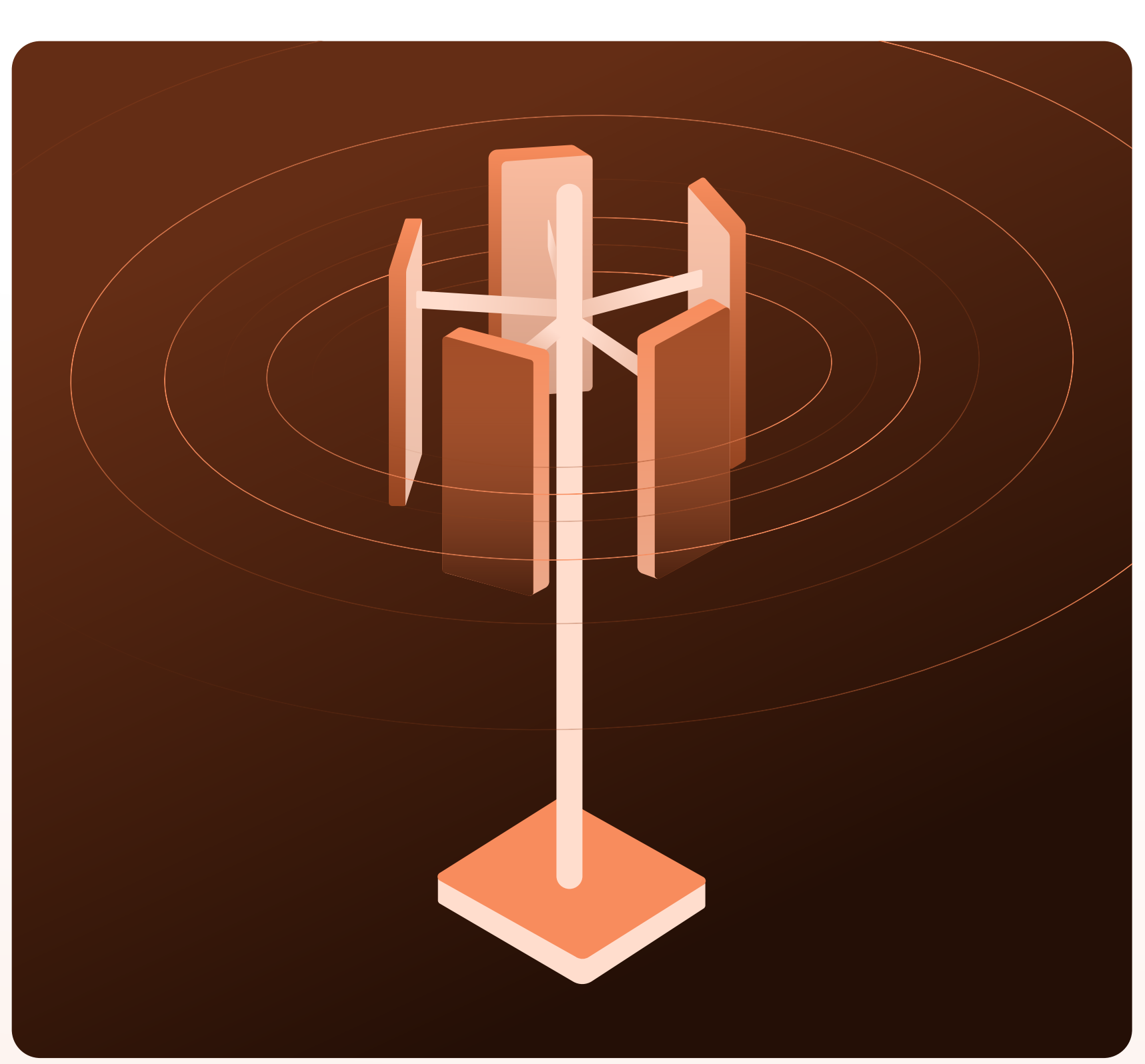


Enabling the Autonomous Telco:

Why Closing the Visibility Gap Matters Now



THE STAKES

Operating expenses consume more than 80% of telco revenues, leaving little room for growth or reinvestment. With costs this high, opacity is not just inefficient — it's a strategic risk that weakens competitiveness.

Sources: [PwC Telecom Outlook 2024](#)



THE COST OF DOING NOTHING

Inaction is expensive. Telcos that fail to automate core operations miss out on 10–30% OpEx savings (1). A mid-sized operator with 1.5 million customers loses over \$54 million annually from just 1% monthly churn (2). In optical networks, automation has cut OpEx for service delivery by up to 81% (3).

Sources: [1 Dell Technologies](#) [2 Blackdice](#) [3 The Fast Mode](#)

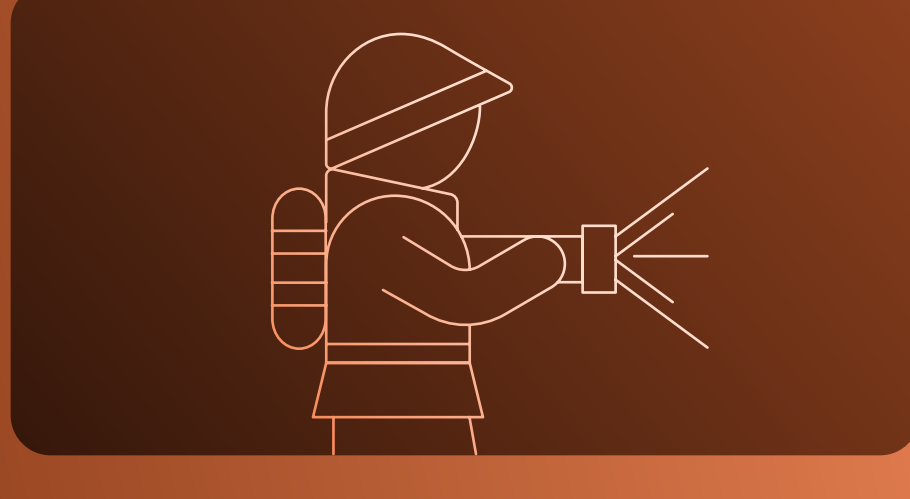

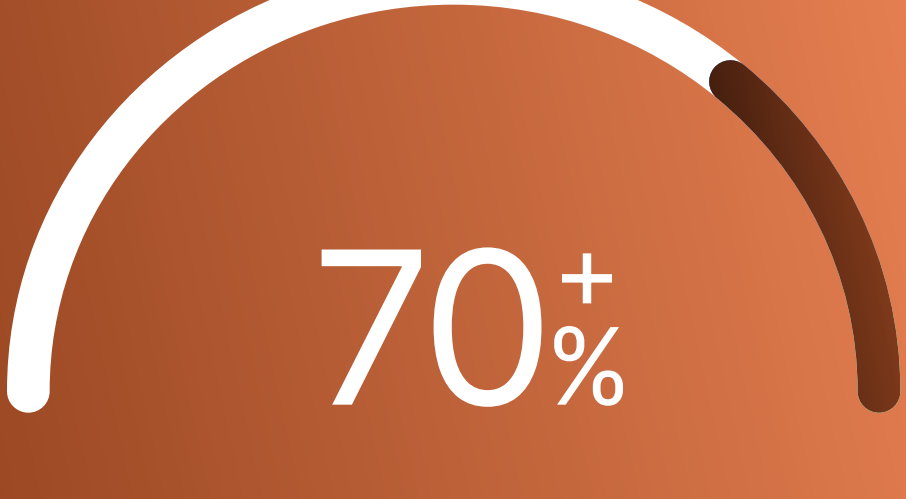
TRIGGERS TO ACT NOW

External forces are raising the stakes. New ESG rules in Europe (CSRD) and proposed SEC climate requirements in the US make inefficiency a compliance risk. US tariffs of ~10% on Chinese telecom equipment are pushing up procurement costs. With weak balance sheets, rising interest rates, and TSR trailing other sectors, investors are demanding efficiency gains. Compliance penalties are escalating too — one operator was fined \$206 million under FCPA rules. Delay is no longer neutral; it grows costlier every year.

Sources: [EU CSRD](#) [SEC climate disclosure](#) [Rimini Street](#) [KPMG](#) [BCG](#) [LexisNexis](#)

The 3 Stages of the Visibility Gap Index

Closing the gap is a journey, not a leap. The HTEC OpEx Visibility Gap Index charts three clear stages for telcos:

 <p>Reactive: Less than 30% of OpEx visible. Siloed systems, firefighting operations, and high downtime.</p>	 <p>Predictive: 30–70% of OpEx visible. AI pilots in maintenance and ESG dashboards begin to cut downtime and improve compliance.</p>	 <p>Autonomous: 70%+ of OpEx visible in real time. Agentic AI orchestrates operations, ESG is embedded, and double-digit OpEx savings are reinvested into growth.</p>
---	---	--

PROOF IN PRACTICE

Industry pioneers are already closing the gap. BT/MBNL used AI to predict tower failures weeks in advance, cutting downtime (Kortical). Vodafone applied AI to reconcile enterprise invoices, uncovering hidden costs (TM Forum). Colt and Ciena cut subsea network power use by 50% with advanced optics (Ciena). The technology works — the challenge is scaling it enterprise-wide.

Sources: [BT/MBNL](#) [Vodafone](#) [Colt & Ciena](#)

LEADERS VS LAGGARDS

By 2030, the industry will divide in two. Leaders will lock in 10–30% OpEx reductions, reinvest billions into 5G and edge, and turn ESG into a competitive advantage. Laggards will face churn losses, regulatory fines, flat margins, and declining valuations. Every year of delay compounds the disadvantage.

Sources: [Dell Technologies](#) [Blackdice](#)

Enabling the Autonomous Telco: AI-Powered OpEx for Intelligent Operations

The visibility gap is not just an operational weakness — it will decide who leads and who lags.

[Read the Executive Article](#)

[Download the Full Report](#)

HTEC helps you move from pilot to production and from potential to performance.

[Get in touch](#)

Palo Alto
101 University Avenue, Suite 301
Palo Alto, CA 94301, USA
Phone: +1 415 490 8175
Email: office-sf@htecgroup.com

London
Huckletree Bishopsgate, 8 Bishopsgate
London EC2N 4BQ, UK
Phone: +44 203 818 5916
Email: office-uk@htecgroup.com

Belgrade
Milutina Milankovica, 7D
Belgrade 11070, Serbia
Phone: +381 11 228 1182
Email: office-bg@htecgroup.com

