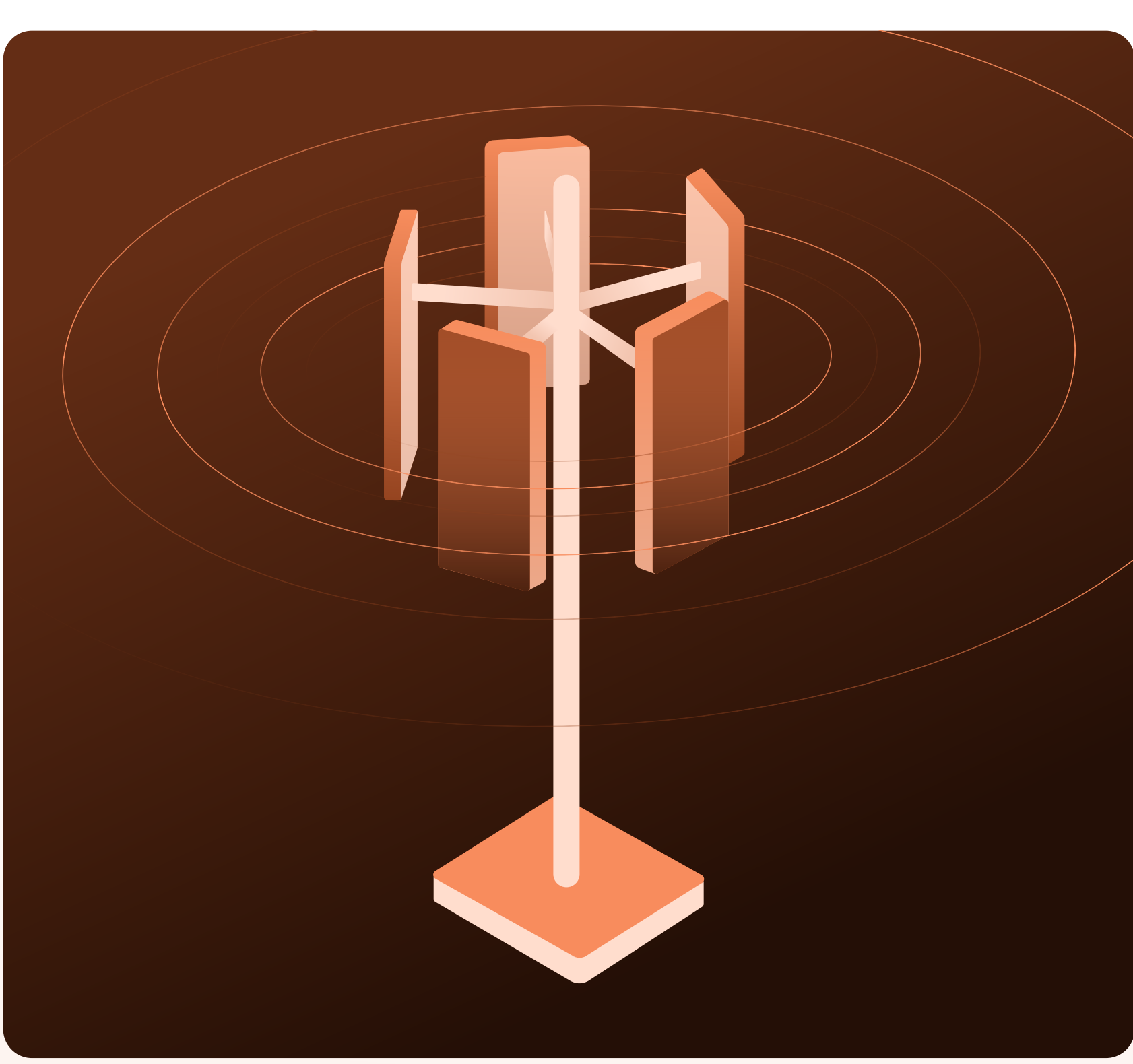


# Enabling the Autonomous Telco:

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](#)

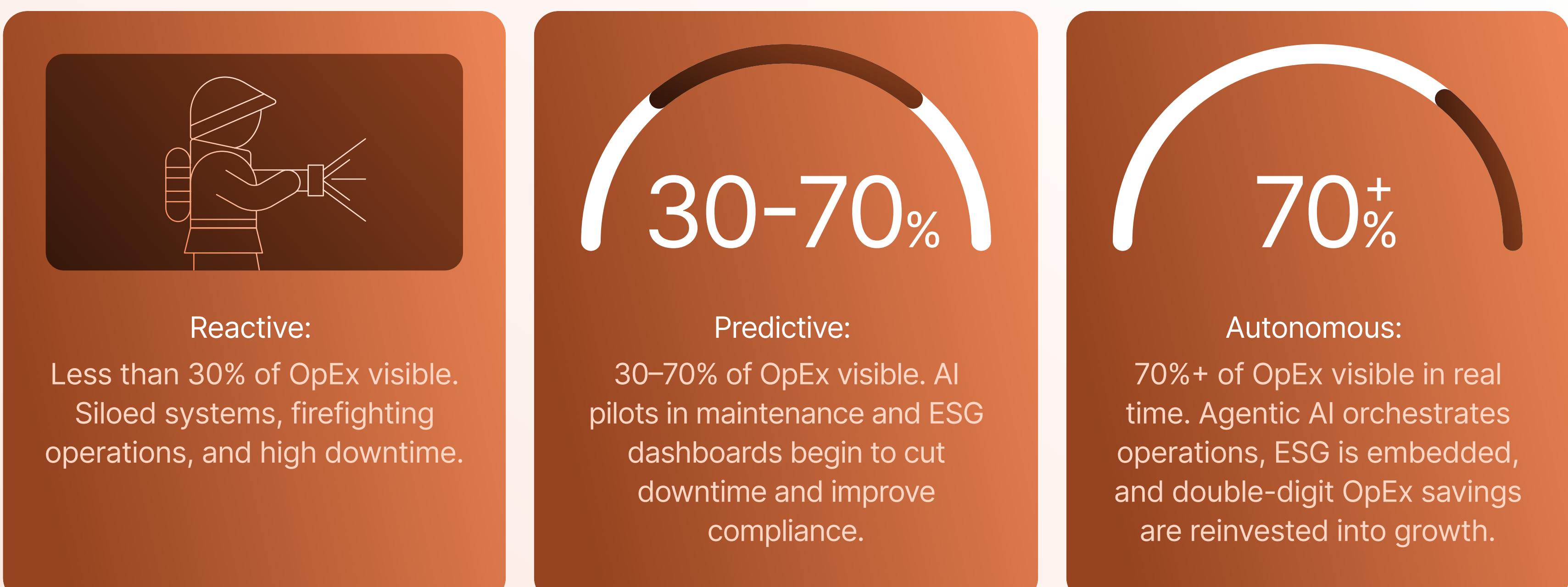
## TRIGGERS TO ACT NOW

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:



## 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.

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