POLICY

Are CSPs back in the game?

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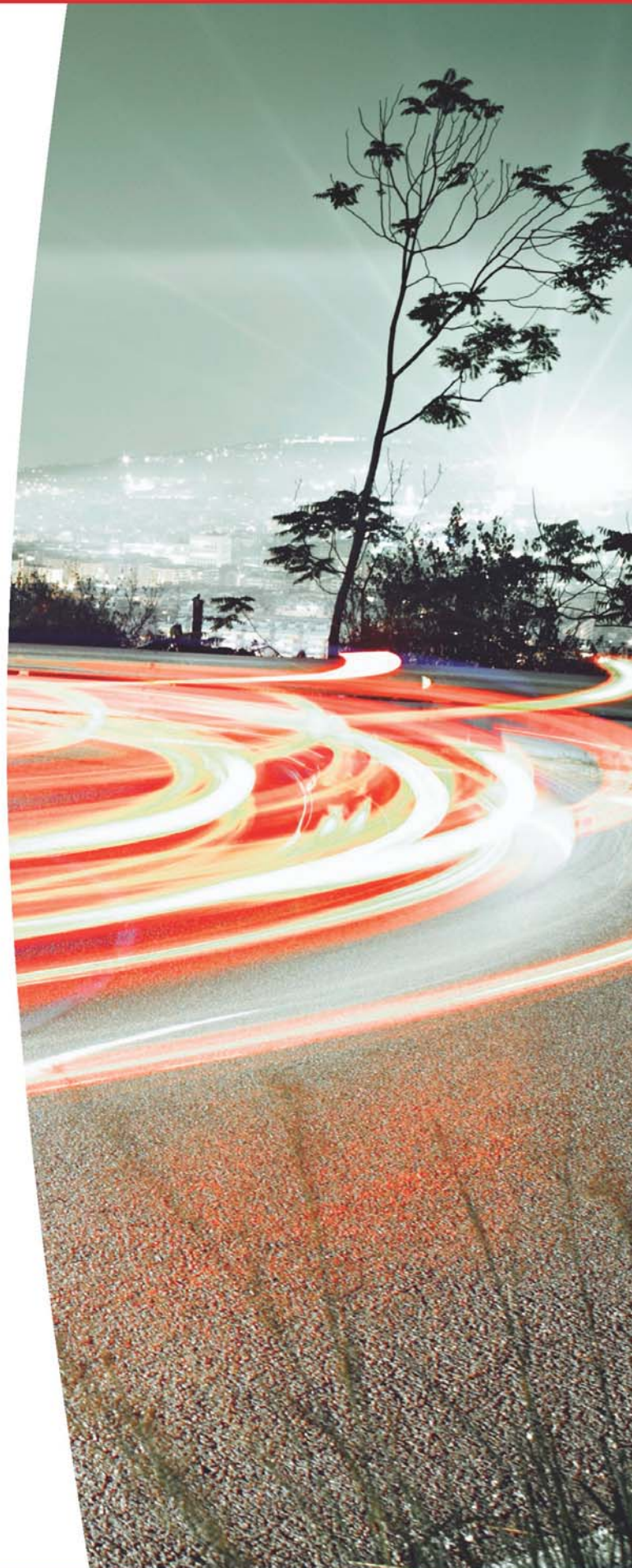
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Manage decline or double down for a gusher

CSPs are faced with difficult decisions as they look at their operations. Even though some, those in high population density developing markets, manage to turn a modest profit on ARPU of about $3, most are finding the costs of building and running networks aren't keeping in touch with the revenue they can generate.

New sources of profit are therefore needed if they are to continue to invest in the network and generate a sufficiently attractive return on capital invested to keep investors happy. The industry doesn't need a wake up call; it has seen this coming for a decade and it has certainly tried to rebase the business model away from commoditised network capacity into value-added services.

The efforts made have been substantial but many have failed. CSPs as content providers, media companies and retailers never really delivered the expected success but they did cost time and money to try out. Now, there's a feeling that there isn't another five or ten years for CSPs to turn things round.

The good news is that it is now recognised that the network is worthy of greater respect than being just a dumb pipe and it is also recognised that CSPs have more to offer. They can bill, they can support customers or third parties and they have significant valuable data about their users that can be monetised.

The bad news is that ten years have gone by and substantial, unsuccessful bets have been made on new services. That, as several delegates at the recent Management World Conference in Nice told me, means they are constrained in what they can do to transform their businesses today.

Some face the difficult decision of either deploying technology to enable new revenues or deploying systems that create greater operational efficiencies. In an ideal world, both would go hand in hand but for at least some CSPs there is neither enough time nor enough money available.

Operational efficiency gains seem to be the obvious conservative bet. Costs will be saved, improving profitability. However, that's a finite activity and quite quickly, if done well, efficiency projects will run out of areas to make more efficient. A good analogy is oil exploration. An oil company can invest in making the exploration and drilling process more and more efficient but, ultimately, if the well turns out to be dry, there is no profit, only minimised loss.

Conversely, doubling down on investment in new revenue generative propositions, provides the potential to hit, in oil terms, a gusher, totally transforming the profitability of a CSP. It's higher risk and may hasten the demise of a company into acquisition or bankruptcy but success could make the same CSP the acquirer.

The choice for those CSPs that are running out of time is stark. Act conservatively and focus on efficiency and you have essentially chosen a strategy of managed decline or take a further gamble on developing your service portfolio into adjacent areas and maximising the income you generate from the functions you are good at. If it works out, you can always loop back and address the operational efficiency issues later.

Enjoy the magazine!

George Malim

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Starhome to acquire MACH European data clearing and NRTRDE business from Syniverse

Syniverse, led by president and chief executive Jeff Gordon, has reached an agreement to sell, almost in its entirety, MACH's data clearing and NRTRDE business within the European Economic Area – the European Union countries plus Iceland, Liechtenstein and Norway, to Starhome after completing its acquisition of MACH. The terms of the deal were not disclosed.

On 29 May, the European Commission granted conditional approval of Syniverse's proposed acquisition of MACH with the commitment that Syniverse must divest certain assets supporting MACH's data clearing and NRTRDE business in the EEA, including technology platforms, necessary employees, customer contracts and the MACH brand.

MACH provides cloud-based managed communication services worldwide. The acquired business is a completely functional, independent entity comprising 76 mobile network operator customers, an experienced management team, dedicated employees, a fully operational service platform in Europe, and a research and development and operations centre in India.

The acquisition includes full worldwide ownership of all intellectual property rights of the MACH brand, trademarks and logo;

MACH Data Clearing and NRTRDE processing applications and platform; MACH MDS framework layer, MACH Smart including MACH Dashboards, MACH Roaming Management Services and the MACH Optimiser. The acquisition is contingent upon approval of Starhome by the European Commission and other applicable jurisdictions.

During 2013, Starhome and the acquired business will continue to operate as separate business units to best serve their respective customers. A mutual roadmap will be developed for 2014 and beyond. The acquisition strengthens Starhome's position as a leader in the mobile roaming value-added services industry with the addition of MACH's cloud-based solutions: data clearing, reporting, NRTRDE and business management tools.

"Acquiring the MACH divestment business is a strategic growth step for Starhome," said Tal Meirzon, CEO of Starhome. "This move will enable us to grow in new directions and to better assist our customers with their multi-network challenges and competitive strategies. We plan to exploit the synergies between Starhome's network solutions and footprint of over 200 mobile network operators worldwide with MACH's IT services and technologies to create an end-to-end solutions and services portfolio, while

Jeff Gordon: Divesting MACH assets for Commission approval

bringing enhanced value to our customer base. We are very excited about the MACH management and employees who will be joining Starhome and enriching our extensive business coverage and innovation."

"We are fully committed to the high-quality service continuity and expansion of the data clearing and NRTRDE services for MACH's 76 divested business customers, as well as for MACH customers in other regions who wish to remain with the excellent MACH platform and services," added Meirzon. "With Starhome's global reach, our new MACH business will operate in all regions."

Equipment vendors sign memorandum for OSS interoperability initiative

Network equipment vendors Nokia Siemens Networks, Ericsson and Huawei have initiated and signed a memorandum of understanding enabling utilisation of OSS innovations across the industry. To help operators simplify network operations and reduce costs, the companies have agreed to cross-license the OSS interfaces used for multi-vendor network management.

By enabling multi-vendor interoperability between the OSS of all three vendors, OSSii – the OSS interoperability initiative – will promote competition by simplifying operations, reducing the overall integration costs as well as speeding up the time-to-market of new services. The reciprocal agreement will cover fault, performance, configuration and basic network event and trace management for the northbound

interfaces from radio access, circuit core and packet core network management systems. Under the terms of the MoU, the signing parties are committing to bilateral cross licensing agreements for multi-vendor network management.

"The OSS marketplace is a patchwork of standards and proprietary interfaces that are controlled by the IPR owners. With cross-license agreements, we want to help operators take full advantage of the best available products in our industry," said Peter Patomella, head of operations support systems (OSS) business at Nokia Siemens Networks. "Openness and fairness have been the guiding principles in the agreement of the OSS Interoperability Initiative."

Jiang Wangcheng, president of Huawei's

OSS & Service Wireless Networks Business Unit said: "We at Huawei believe the OSSii agreement will greatly forward OSS development, and will provide operators in all markets the ability to fully capitalise on the best OSS solutions available. We are also extremely happy to take part in such an important initiative that takes transparency, openness and fairness as its guiding values."

Thomas Norén, vice president and head of Product Area Radio at Ericsson, added: "As a leader in the OSS industry we are pleased to be part of this initiative that is a practical approach to reducing the hurdles to OSS interoperability. OSSii shows the industry commitment to reducing OSS interoperability costs. It will stimulate innovation in network management, and cut cost for our customers, which is great."

Amdocs unveils Elastic Policy Control for virtualised network control

Rebecca Prudhomme: System will drive down costs and accelerate time to market

Amdocs has announced the industry's first complete, virtualised network control offering. The new virtualised deployment options for Amdocs' suite of network control products are set to enable service providers to accelerate the introduction of new services while taking full advantage of standard off-the-shelf hardware to reduce costs. The virtualisation solution will be supported on Amdocs network control products widely deployed, including Amdocs Policy Controller (PCRF), Amdocs Home Subscriber Server, and Amdocs Subscriber Data Broker.

Amdocs' modular, virtualised environments offer CSPs improved elasticity around performance and scalability at a lower cost by breaking the traditional linkage between function and hardware. This virtualised environment – characterised by distributed software architecture, self-contained application clusters with no scale limitations, and no dependency on centralised session/state storage – also enables easy expansion, operation and in-service upgrades.

In addition to performance and scalability benefits, Amdocs' virtualised network control solutions will enhance service agility, allowing for rapid introduction of services that can be targeted at specific subscribers and/or geographies.

Consistent with Amdocs' approach, these products offer multi-network support and extensive interoperability with network elements, enabling ease of deployment in mixed vendor heterogeneous network (HetNet) environments.

Rebecca Prudhomme, Amdocs vice president for product and solutions marketing, added: "As part of the first complete virtualised network control plane suites to reach the market, our elastic policy control solution will drive down ongoing costs and enable faster time to market for new service offerings. Following the introduction of Amdocs Elastic Online Charging and certification of our customer experience systems portfolio on VMware as part of our latest CES 9 release."

Subex launches ROC Asset Assurance for reduced capex across network assets lifecycle

Subex has introduced ROC Asset Assurance to address the growing concerns of CSPs worldwide when it comes to effectively managing and reducing capex across the lifecycle of network assets.

The network capex conundrum is becoming a serious cause for concern with 20% of assets failing to return their cost of capital. While lack of visibility in understanding asset dispositions, poor data integrity and eroding asset contribution after purchase are some of the reasons for this situation, the key issue has always been lack of true governance required for a repeatable, sustainable programme to work effectively.

Subex has launched the ROC Asset Assurance solution to monitor, manage and optimise capital expenses throughout the asset lifecycle, which then extends beyond analytics to drive actions and changes in critical business processes that control or consume capex.

Vinod Kumar, chief operating officer of Subex, said: "CSPs are concerned about shrinking EBITDA margins and want to not just focus on revenue, but also on reducing their significant annual capex burdens. With the launch of the ROC Asset Assurance, we are taking an enterprise programme approach to reducing capex. With predictive modelling, pattern analysis and quality controls, the solution ensures

deliberate capex control at each stage of the asset's lifecycle."

John Brooks, vice president of product management at Subex, added: "Network capital budgets are the largest line items with virtually every CSP today, and the greatest assets on every carrier's books are the to-date network investments that have been made. With ROC Asset Assurance's key ability to give all capex stakeholders visibility into true asset optimisation, operators will experience capex savings and free cash flow increases at levels never before seen in other Assurance programmes."

Vinod Kumar: CSPs are concerned about shrinking EBITDA

NEWS IN BRIEF

Empirix launches roaming and intercarrier assurance analytics suite

Empirix has announced Roaming and Inter-carrier Assurance Analytics, a new suite that combines service assurance and network analytics to provide performance and business intelligence insights on inter-carrier traffic. With the suite, mobile operators can ensure the roaming experience and maximise partnership revenues for voice, data and SMS traffic.

"Tracking, ensuring and analysing

intercarrier traffic – be it inbound or outbound, voice, video or data – is vital to extending coverage, maximising CSP profits and providing a seamless customer experience. However, gaining visibility into roaming and call routing across multiple networks and environments can be difficult," said Franco Messori, chief strategy officer of Empirix. "With Empirix Roaming and Intercarrier Assurance Analytics, CSPs benefit from new insight into quality as they pass calls, data and roamers to partner networks to assure performance and capitalise on new revenue opportunities."

MACH launches My Visuals for roaming data

MACH has launched My Visuals a system that provides mobile network operators with insight into the behaviour of roaming subscribers in a graphical format. By capturing subscriber activity around preset KPIs in a simple dashboard, My Visuals claims to help operators avoid lengthy and complex data analysis, to enable fast, informed decisions about their roaming business strategy. CSPs worldwide are increasingly aware of the business value of subscriber data.

Telefónica UK chooses Tekelec Policy Server for 3G and LTE

Tekelec's Policy Server product has been selected by Telefónica UK to provide the Policy and Charging Rules Function (PCRF) in its 3G and LTE core networks. The Policy Server will combine with Tekelec's Subscriber Profile Repository to enable Telefónica UK to offer advanced digital lifestyle services for smartphones, tablets and other mobile data devices, while lowering network operating costs.

The Policy Server will help create new mobile data services and tariff plans using a variety of criteria, including volume of data, speed, time and applications. In addition, the CSP could offer personalised loyalty

programmes, mobile advertising and time-based plans.

"Our customers have a huge desire to use mobile technology to help manage their lives, as evidenced by smartphone uptake. We expect this to grow as we launch 4G services in the summer. We're focused on giving customers rich content and a superior mobile data experience across all 3G and 4G devices," said Tim Parker, mobile data product manager – networks for Telefónica UK. "Tekelec's Policy Server has the innovative features, scalability and flexibility to meet the diverse needs of network operations, IT and marketing to

easily implement new policies."

Doug Suriano, CTO of Tekelec, added: "Telefónica UK is at the forefront of new uses for mobile devices with innovative services like O2 Refresh, O2 Rewards, O2 Travel and O2 Wallet. Tekelec's Policy Server gives them the foundation for unprecedented uses of mobile devices as a cornerstone of the mobile digital lifestyle." 🌐

Doug Suriano: Policy Server to support digital lifestyle services

Manx Telecom selects Cerillion online charging platform

Manx Telecom, the leading CSP on the Isle of Man, is to procure Cerillion's real-time Convergent Charging System (CCS) to enable the monetisation of online data transactions traversing its next generation LTE infrastructure.

The convergent capabilities of the Cerillion CCS will enable Manx Telecom to run both prepaid and postpaid data transactions in concert to deliver a real-time experience to both customer bases. As a part of this solution, the Cerillion CCS will also be integrated with a media messaging platform which will deliver real-time service information and opportunities to end consumers.

Cerillion's Convergent Charging System is the result of an extensive product development programme and has been built, from the ground up, according to the latest 3GPP standards. The solution has been designed to interoperate with network elements over Diameter and other industry standard protocols, as well as downstream to the BSS/OSS domain with either Cerillion's own pre-integrated BSS/OSS product suite, or with third party BSS/OSS components.

"With the introduction of new data network elements with native Diameter protocol capability, this deployment at Manx Telecom will cause very low business

disruption and have a short lead time. This is one of the many great advantages our CCS can deliver to our customers," said Louis Hall, CEO of Cerillion.

Mike Dee, CEO of Manx Telecom, added: "We are delighted to be able to capitalise on Cerillion's leading edge technology to support us in the deployment of our ground-breaking LTE network infrastructure, which will deliver significant long-term benefits to our customers in the Isle of Man. Going forward, we expect to use Cerillion's solution to maximise the return on this significant investment and deliver a superior customer experience." 🌐

NEWS IN BRIEF

Elisa selects Ciqual for 4G customer insights

Finnish CSP Elisa has chosen Ciqual to provider its Customer Experience Measurement system. In the deployment, the Ciqual system will be used to ensure critical user-affecting problems are identified, prioritised and quickly resolved through correlation of individual customer service performance measurements and customer subjective feedback.

"The Ciqual system has provided insights on 4G end-customer experience that are difficult to gather from traditional network-based data sources", said Matias Castrén, the director of Elisa's Broadband Subscription Business. "We are already

delivering specific improvements as a result of using Ciqual, including network software enhancements and engagement with individual customers to improve their user experience."

Grupo Éxito deploys Redknee

Redknee has launched its cloud-based converged billing and customer care solution for Éxito Mobile, the first MVNO in Colombia to be launched by a retailer. Éxito Mobile is part of Grupo Éxito, and is owned by the French multi-national corporation, Groupe Casino.

The launch signifies an emerging approach by retailers and consumer brands in the

Latin American market to drive new revenue and launch innovative services through an agile Software-as-a-Service-based (SaaS) converged billing and customer care solution, which provides a low-risk investment strategy.

Carlos Bedoya Gómez, Éxito Mobile´s Director commented: "The launch of Éxito Mobile is a major milestone in Grupo Éxito's strategy to develop a one-stop shop for all of our customers' needs. In order to achieve the best possible launch to the market, we selected Redknee for its unparalleled domain expertise, scalability and flexibility, and combined technology and managed services support."

VanillaPlus Hot List: July/August 2013

The Hot List below shows the companies informing us of recent contract wins or product deployments.
If your contract is not listed here email the details to us now marked "Hot List" <**editorial@vanillaplus.com**>

Vendor(s)	Client Country	Product/Service	Awarded
Aircom International	ON Telecom, Brazil	Aircom selected to provide software for the design and optimisation of new Brazilian wireless broadband access provider's LTE network	5.13
Amdocs	Aio Wireless, USA	Amdocs Global Strategic Sourcing (GSS) to provide managed services to support new, no-annual-contract US mobile provider's BSS, web portal and mobile applications	6.13
AsiaInfo-Linkage	Shanghai Mobile, China	Deployment of the international version of AsiaInfo-Linkage's Veris Billing and CRM product suite at China mobile operator	5.13
Cerillion	Manx Telecom, UK	Isle of Man CSP chooses Cerillion real-time Convergent Charging System to enable monetisation of online data transactions traversing its LTE infrastructure	5.13
Ciqual	Elisa, Finland	Finnish CSP chooses Ciqual customer experience measurement system for 4G customer experience insights	
Clarity	Axiata Group, pan-Asia	Group-wide deal to provide CEM system composed of Clarity's Unified OSS and Business Quality Management products	5.13
Comptel	Avea, Turkey	Turkish mobile CSP deploys Comptel provisioning and activation to automate its order-to-activation processes	6.13
CSG International	ALBtelecom, Albania	Implementation of CSG International Wholesale Billing Management Solution for ALBtelecom's fixed line business and mobile brand Eagle Mobile	5.13
FTS	daPhone brand, Romania	Provision of Leap billing, customer care and policy control to aid expansion of services of daPhone as an MVNO and MVNE provider	5.13
Intersec	Mauritel, Mauritania	Selection of Intersec Loyalty Management Suite to provide real-time promotions for targeted subscribers based on actual usage patterns	6.13
Intersec	Portugal Telecom, Portugal	Selection of Igloo geolocation solution to help generate new sources of revenues through location-based services	5.13
Kapsch	Telekom Austria Group, Austria	Project to prepare Telekom Austria Group core network for operators in Austria, Slovenia and Lichtenstein for future convergence requirements	6.13
MDS	TalkTalk Business, UK	MDS selected to deliver wholesale billing system to consolidate CSP's existing wholesale rating and billing systems	5.13
MDS	eircom, Ireland	Deployment of next generation managed BSS to support business and government customers in Ireland	4.13
Mycom	T-Mobile, Austria	Deployment of NIMS-PrOptima performance management system for expansion of T-Mobile LTE network across Austria	5.13
NetCracker Technology	Canal Digital Kabel-TV, Norway	Selection of next generation BSS for transformation of billing environment. NetCracker Rating and Billing systems to replace existing revenue management system	6.13
Nokia Siemens Networks	Zain, Kuwait	Deployment of Nokia Siemens Networks customer experience management to ensure service experience of mobile broadband customers	5.13
Nasctech	Globe, The Philippines	Nasctech Streamline field operation support system chosen to reduce opex and achieve enhanced visibility and control over field operations	5.13
Netadmin Systems	Gigaclear, UK	UK rural broadband provider chooses Netadmin OSS platform to accelerate delivery and automate processes	5.13
Openet	Mobinil, Egypt	Openet Policy Manager and Interaction Gateway selected to deliver advanced user controls and real-time usage information for interaction with the 35 million subscriber base	4.13
Openet	T-Mobile, Netherlands	Deployment of Openet Evolved Charging as CSP's future charging platform for mobile services to enable rich customer engagement, real-time control and price plan innovations	6.13
Orga Systems	Entel, Chile	Agreement of four-year contract to manage corporate customers with advanced VPN functions. Extension to existing partnership.	5.13
PacketFront	Com Hem, Sweden	PacketFront BECS Network Management System chosen to automate access network roll-out for FTTG programme	6.13
Redknee	Grupo Exito, Colombia	Deployment of cloud-based converged billing and customer care for the first MVNO in Colombia to be launched by a retailer	6.13
Sigma Systems	Ziggo, Netherlands	Dutch cable operator selects Sigma Service Management Platform for service activation and provisioning of triple play and value-added services	5.13
Sigma Systems	Tiscali, Italy	Sigma Cloud ServiceBroker selected for the provisioning and management of cloud services for business and residential subscribers	5.13
Syniverse	Idea Cellular, India	Multi-year agreement for data clearing, financial clearing and fraud prevention at India's third largest CSP, which has 122 million subscribers	6.13
Tekelec	Telefónica, UK	Tekelec Policy Server chosen by UK CSP to provide Policy and Charging Rules Function (PCRF) in 3G and LTE core networks	5.13
Telefónica Digital	Samsung, global	Samsung to integrate directly with Telefónica's billing capabilities via its Blue Via payment APIs, enabling Samsung device users to purchase apps and content	5.13
Tribold	Com Hem, Sweden	Swedish triple play operator implements Tribold Enterprise Product Management (EPM) software to underpin service and innovation programme	5.13

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Günther Ottendorfer appointed CTO at Telekom Austria Group

The Supervisory Board of Telekom Austria has unanimously appointed Günther Ottendorfer as chief technology officer of the **Telekom Austria Group**. Ottendorfer will now complement the current management board which consists of CEO Hannes Ametsreiter and CFO Hans Tschuden.

Ottendorfer has enjoyed a successful international career in the telecoms industry over the last 20 years. Between 1987 and 1992, he studied computer science at the Technical University in Vienna, graduating with distinction. In 1996, he became a founding member of **max.mobil** in Austria. He gathered comprehensive management experience as CEO and CTO of T**-Mobile Austria**, as CTO of T-Mobile Germany and

as European Technology Director of T-Mobile International at a group level.

Since March 2011, he has been on the Board of **Optus Singtel**, the second largest telecoms provider in Australia, with more than 11 million customers.

"With today's appointment of Günther Ottendorfer, the Supervisory Board has succeeded in recruiting a top manager with extensive international experience in the areas of technology, convergence, IT and operations," said Rudolf Kemler, chairman of the Supervisory Board of Telekom Austria AG. "More than ever before, Telekom Austria is operating in a technology-intensive market environment marked by

fierce competition. The expansion of the Management Board's core competencies to include a key area such as technology is an important step for the company and I'm thrilled that the Supervisory Board has been able to appoint such a high-caliber candidate in such a short time."

Ottendorfer: Former CTO of T-Mobile Germany

Ottendorfer will begin his role as CTO of the Telekom Austria Group in the coming months. The exact date will depend on the termination of his current contract. He has been appointed for a three-year term with the option to extend it by another two years.

Former Alcatel-Lucent HR director joins executive coaches at Telco Exec recruitment service

Telco Exec, the recruitment and careers advice service for executives in machine-to-machine (M2M) communications, has added Andrew Martin to its panel of Executive Coaches. Martin is one of the telecoms industry's foremost experts in human resource (HR) management, and was until recently HR director for sales at **Alcatel-Lucent**.

Announcing the news, **Telco Exec**'s managing director, Jason Bandy, commented: "Our job board and careers

service offers a unique human touch, and it is vital that our paid candidate members have access to the best minds in telecommunications talent and career development. Having Andrew join us, to support our candidates to find and secure the best jobs, is great news. He brings so much experience and wisdom with him; we very much look forward to working with him and we know that our candidates will benefit enormously."

As Lucent's UK HR director, Martin led a

team supporting 4,000 employees in R&D, sales, and customer services functions. During difficult times in the telecoms industry, he played a major role in managing acquisitions, divestments, outsourcing programmes, and restructuring projects. He was a Board director of Lucent UK from 2003 and, as EMEA HR director for Sales, supported the Regional President and his organisation across 40 countries. Following the creation of Alcatel-Lucent he managed post-merger restructuring projects in Europe, the CIS, and the Middle East.

Tony Sceales to lead product management at SunTec

SunTec, a provider of revenue management and business assurance systems has appointed Tony Sceales head of product management for digital and communications services.

Sceales has developed digital services in both innovative start-ups and major blue-chip companies in the telecoms, IT and insurance sectors. In addition to extensive experience as a CTO, he founded **Celona**

Technologies, a leading provider of information control software, and has worked as a systems architect for **Aon, BT, IBM** and **Prudential Assurance**.

"Tony has a deep understanding of how digitisation is driving convergence across the communications and financial services sectors, enabling new and disruptive business models," said Nanda Kumar, president and CEO of SunTec Business

Solutions. "His experience and insights will be invaluable in guiding the evolution of SunTec's products and platforms, thereby enabling the next wave of exciting new digital services."

An Executive Committee Member of the **TM Forum**, Sceales is chair of the Forum's Product and Architecture Governance Working Group and a member of the Digital Services Steering Group.

Hubble joins Sigma Systems to lead EMEA and APAC

Tim Spencer: Appointment enhances regional sales, support and service

Richard Hubble has joined **Sigma Systems** as vice president and managing director for its Europe, Middle East and Africa (EMEA) and Asia-Pacific (APAC) regions. Hubble assumes full leadership responsibility for sales, account management,

partners and alliances.

"Sigma has significantly enhanced our regional sales, support and service capabilities to reflect the global demand for our OSS solutions," said Tim Spencer, Sigma's president and COO. "Richard brings a wealth of industry and leadership experience to the team and will be a valuable resource for our customers

throughout the region as they leverage Sigma's solutions to support their evolving business models."

Hubble has held many international sales, strategic marketing, business development and general management roles within the BSS and OSS segments of the global telecommunications industry. He joins Sigma from **Hewlett-Packard**.

Sales-to-order dexterity may decide who wins in the cloud

Mobile is the clear focal point of telecom investments today but a few years down the road, will that still be true? Can communications service providers (CSPs) dominate small cell wireless as thoroughly as they have big tower wireless? And after the handset and content guys have devoured most of the smartphone pie, will the leftovers be enough to satisfy the bellies of hungry telecoms providers, asks Dan Baker

It's this uncertainty over mobile's long-term financial contribution that's fueling big telecom investments in the cloud. And when I say cloud, I refer to the full mix of private and public cloud, managed services, and virtual infrastructure, in short, the bid by CSPs to become full-fledged ICT suppliers to large and medium enterprises.

Opportunities and dangers in the cloud for CSPs

CSPs see riches to be won as enterprise IT chases the cloud. Sadly, the once profitable era of selling CPE boxes and simple connectivity is fast disappearing. That market is now a pure commodity play: the excitement has instead shifted to the much broader field of enterprise clouds and data centre build-outs.

Yet other CSPs are not the only competitors in this race to the cloud. They compete just as strongly with cloud providers, such as Amazon, and systems integrators such as IBM and Cap Gemini.

Whenever systems integrators become the prime integrator and control the enterprise account, the CSP is in danger of being relegated to a minor, marginally profitable role. The same goes if the roles are reversed. The race is on to see who gets to own the enterprise customer relationship, for the owner is the one who makes the most money and gets to insert its services and products into the enterprise's ICT fabric.

How can CSPs gain an edge?

So who will win the battle of the cloud? The richest prizes are likely to go to the CSPs with faster and more efficient sales-to-order workflows. Here a telecoms provider must not only synchronise its sales and engineering teams, it needs to speed infrastructure proposals out the door and reduce design errors to eliminate provisioning troubles and customer stress.

Unfortunately, most CSP teams serving enterprises lack the necessary back office systems to get the job done profitably. For instance:

- **Sales** lacks access to the design knowledge needed to fully qualify and guide prospects;
- **Engineers** are slowed by out-of-date product catalogues and design requirements scattered across many spreadsheets; and
- **Senior design experts** are overloaded and lack a mechanism to delegate tasks and guide the work of less-qualified engineers.

The result is that CSPs lose business they should rightly win because their designs: take too long to complete and quote; lack sufficient accuracy and options; and can't be changed on-the-fly to meet the customer's price point or last minute requirements.

A collaborative design system for cloud

When you boil it all down, the complexity of cloud solutions and much greater competition in sales-to-order point to the need for a superior collaborative design system that manages complex projects and enables the sales and engineering team to share information and thereby accelerate the number of quality proposals it can deliver to prospects.

So what should CSPs be looking for in a collaborative design system? Well, getting answers to that question is the goal of a new paper I've authored entitled, 'The Data Center and Cloud Infrastructure Boom: Is Your Sales/Engineering Team Equipped to Win its Share of the Business?'. To view the paper visit: www.netformx.com/TRI-Whitepaper

The paper paints a picture of what an ideal collaborative design system should look like, narrowing the requirements down to seven key capabilities and explaining over three dozen specific benefits in a workflow diagram. The paper serves as a guide for telecoms providers arming themselves to fight in the battle for the cloud.

The author, **Dan Baker** is director of the Technology Research Institute and has written this article on behalf of Netformx

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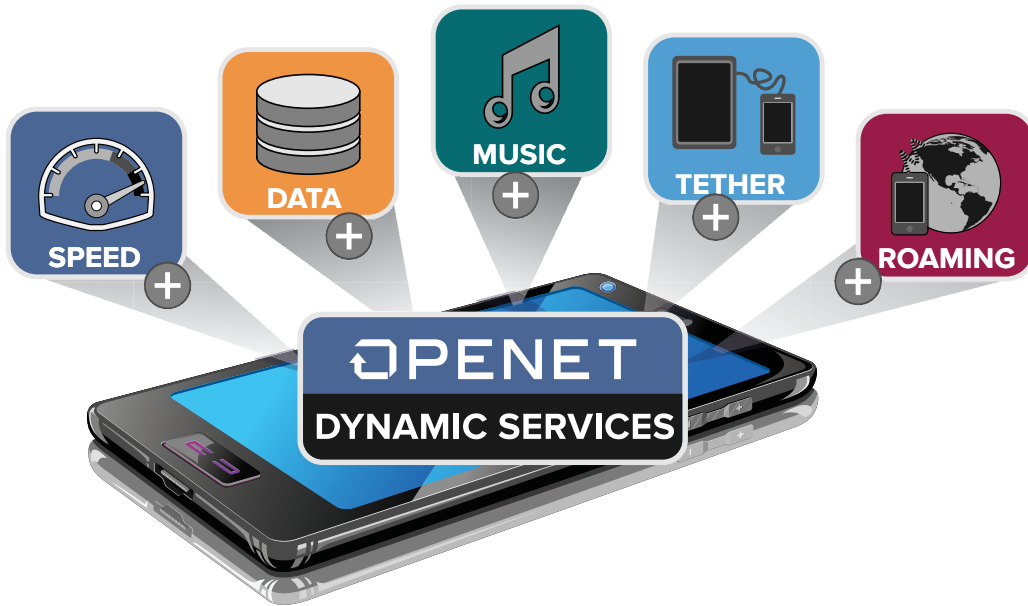
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What sort of policy downgrades voice?

EE is now the top ranked communications service provider (CSP) in London, according to Rootmetrics. Three has been pushed down to second and Vodafone is last, according to the reports. Here, Nick Booth tries to make sense of what that means to users

The ranking gives some insight into the performance of the CSPs but it's more interesting to consider how the company arrives at this conclusion. All the variables measured are collated to create a value judgment about the quality of communication over mobile.

What if this yardstick was applied to other apps we take for granted? For example, there is one brilliant app available that knocks spots off all other forms of communication. It instantly conveys far more information – such as age, gender, identity – better than any data service. It also expresses values that no technologist has ever managed to capture: emotion, nuance and alternative meanings can all be expressed. It even tells you whether the speaker is standing or sitting, smiling or frowning, enthusiastic or going through the motions.

Yes, the human voice is far and away the most sophisticated communications protocol that has ever been produced. It can signal so many things in so many different ways. You can say 'no', in such a tone that the other caller knows you really mean 'yes'.

If the human voice had only just been invented, every CSP and broadcaster in the world would be devising policy to give its sound waves priority over their networks.

But instead, it's been on a slow back burner for decades. Our ears, vocal chords and brains are the product of centuries of development work, involving billions of human lives. They're still a work in progress, with new accents, languages and conversational styles being thrown up all the time.

The human voice is a form of biometric security that is virtually unhackable. The sophistication of human spoken word massively overshadows anything ever achieved in telecoms, IT or even science. The Hadron Collider, by comparison, looks a pretty simplistic bit of kit.

And yet, we seem to do everything possible to undermine the potency of mankind's most brilliant business tool.

It may be true that there are no margins in selling voice, but surely that does not mean there is no value in it. Maybe we just haven't found the right way to exploit its potential. In the meantime, we treat this legacy as if it's some kind of millstone around our neck.

It's well established that the quality of sound in a voice conversation makes all the difference in the way the other person is perceived. People who speak too quickly, or quietly, are judged to be furtive and lacking in confidence and possibly untrustworthy, thanks to centuries of conditioning in the human brain.

So logically then, you could expect the voice quality of every conversation over a network to be of utmost importance. But it rarely is. How often are business phone calls conducted over really flakey connections? Maybe it's just journalists who suffer this treatment, but I often get the impression that half the people I speak to during the day really couldn't be bothered to speak to me. That's the immediate conclusion I draw when they insist on a conference call, where they're dialing in via some dodgy VoIP connection.

Phone conferences are dreadful for more than just their inaudible connections. They also create the all the right conditions for the ultimate pointless meeting. They are usually packed out with too many people, so nothing gets done, nobody knows who is speaking and whether they ought to agree with them or not. The quality of the sound will always be dreadful and the most important person in the conference will inevitably have the worst connection. They're more than likely to be speaking in their second language too. The majority of the people don't need to be there, so a similarly large majority of the people on the call won't be paying any attention. Someone will inevitably forget to mute their phone while they are filling the kettle, running a tap or pulling a chain.

Even with a perfect voice quality conditions – if, say, two people are forced to talk to each other over a landline or, more radically, face to face – there are still ways to neutralise the potency of our greatest communications tool.

We should take the lead on communicating effectively. After all, we are the communications industry.

The author, **Nick Booth**, is a contributor to VanillaPlus and a technology journalist