

Letter From The Editor

By *Tim Young*

“It is said that if you know your enemies and know yourself, you will not be imperiled in a hundred battles.”

- Sun Tzu: The Art of War

Competition is a brutal, beautiful thing. It rewards the strong and punishes the weak (and, along the way, creates opportunity for the clever and the lucky). It rips through market segments like wildfire and, like those deadly blazes, allows the strongest and sturdiest to emerge victorious.

It's like that in the communications space. Telcos and cablecos have been battling for market share for years. However, it's not a straightforward competition. As these behemoths fight it out, new competitive threats emerge and subside. CSPs must be diligent to protect against (or, when advantageous, embrace) these competitors while also engaging their respective rivals.

Political Scientist Robert Putnam might characterize it as a two-level game, in which players must have a spot at two game boards simultaneously, and play both games with the other in mind.

It's a complex situation.

In this issue of Pipeline, we analyze a few aspects

In the communications space 2026 it's not a straightforward competition.

of this cableco/telco row, and how its complexities are being worked out in the real world. We hear from some giants of the telco and cable worlds, and we take a look at how the latest news is affecting their respective fortunes.

We'll have some expert commentary from Nakina Systems on why the OSS approach to cable MSOs needs special consideration; and from Info Directions on why OSS/BSS providers need to overhaul the entire application architecture. Ed Finegold tells us how the same over-the-top providers that complicate the home voice, video, and data landscape are also reaching special new



agreements in the mobile world.

Finally, we'll bring you news of two major shows coming up in the next few weeks: TM Forum's Management World 2010 in Nice and The Cable Show in Los Angeles. Both promise to be fascinating moments in this fascinating time.

Enjoy "Cableco vs. Telco vs. EVERYONE." We hope you learn a bit about yourself, and a bit about your enemy.

Best,

Tim Young, Editor-in-Chief

P.S. Pipeline welcomes your comments and feedback.

Write to me at editor@pipelinepub.com.

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