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Seeking OSS at The Cable Show?

by Tim Young

In preparing for NCTA's *The Cable Show*, May 18-20 in New Orleans, we decided to approach a few key OSS companies who are heading to the show to find out what they're bringing to the table. In addition, we wanted to chat a bit about the state of OSS in the cable space, more generally. This was a great opportunity for Pipeline, as it serves as a handy preview for our June Issue: Cableco vs Telco.

First, we spoke to David Jacobs, CTO of the Amdocs OSS division. As you probably know, Amdocs announced its acquisition of Jacobs Rimell on April 8. Therefore, Amdocs was a sort of two-birds-with-one stone proposition for us. Here's what we found out:

Pipeline: First of all, what will you be exhibiting at the show?

Amdocs: Amdocs will be introducing its Customer Experience Systems (CES) packaged solution for mid-tier, multi-play providers. This solution provides multi-play service providers the revenue and subscriber management foundation they need to create a differentiated and intentional customer experience. We've leveraged the same expertise that drives the evolution of our CES portfolio, expertise that has been accumulated over 25 years of addressing service providers' most complex needs, and established a packaged solution that specifically matches the tactical and strategic needs of mid-tier operators and their customers

worldwide. This solution allows mid-tier service providers to offer Tier 1-level services and support to the market rapidly and at a low cost.

Jacobs Rimell will be demonstrating its full suite of business and residential product and service fulfillment solutions that allow multiple system operators (MSOs) to rapidly activate new subscribers for all products and services. Of particular interest at this year's Cable Show will be our demonstration of how service providers can rapidly create new product bundles that take advantage of Data Over Cable Systems Interface Specification (DOCSIS) version 3.0 that includes Internet Protocol (IP) version 6 to enable higher speeds and support for the new range of DOCSIS 3.0 compatible user devices. This ensures that cable providers can continue to deliver the fastest, most reliable and flexible Internet service in the world, and that these providers will be able to maintain service offerings across systems that haven't yet upgraded to DOCSIS 3.0. Additionally, we will demonstrate support for PacketCable 2.0 that allows MSOs to implement IMS-based services in a cable environment. These PacketCable 2.0 capabilities provide the necessary network foundation for consumer adoption of fixed-mobile convergence and other IMS-enabled services

Pipeline: Why did you decide to attend the Cable Show? Why should our readers, who are interested in OSS, do the same?

Amdocs: The Cable Show is an important gathering of the business people that drive our industry and is the one major U.S. show where MSO content as well as network and operations groups meet together in the same place. While more than 80 percent of the subscribers in North America are held by a handful of service providers, many of which we count among our best customers, we know that there are many other providers that serve the remaining 20 percent. In November 2007, we announced the Amdocs CES Blueprint – the first visionary outline of the operating environment service providers need to establish in order to deliver a seamless customer experience—personalized, participatory and timely, across any service, location, and device. In January, we announced the Amdocs CES 7.5 Portfolio – the products and services that we offer to enable a personal and consistently valuable customer experience at every touch point. In May at the Cable Show, we're introducing a solution that allows this same focus on the customer experience, but addresses the specific needs of mid-tier providers. We will also demonstrate how the Jacobs Rimell solutions can accelerate subscriber adoption rates, and help providers deliver an improved customer experience.

What differences do you see in the OSS space between the cable and telco fields? Is the difference merely semantic?

There are a host of differences between OSS deployments in the cable and telco spaces, going back to the significant difference in their network topologies and their use of actives and passives in the network. This leads to considerable differences at the operational level. At the consumer services level, there is much more commonality: both cable and telco have a long history of associating a service with a specific house address instead of a specific person. With number portability regulations, telcos have since been forced to become more user-centric in thinking about their customers. Cable, too, is leapfrogging to apply personal services identities.

At Amdocs, we think that the successful service provider of the future will be the

one which is able to effectively manage its next generation network with a next generation OSS platform. We are very excited to add the Jacobs Rimell products to our portfolio and position ourselves as the only OSS vendor that can truly support the converging, yet still unique, needs of both telco and cable; the only OSS vendor to provide a complete order-to-cash solution.

How do you see the cable industry growing and changing? Where do you see it headed in the next five to ten years, especially as competing technologies like FTTH continue to roll out?

Subscribers want content, applications, and services. They want these delivered more reliably, with better customer service and support, over a wider range of devices and access capabilities (e.g. home, wireless or remote). They don't understand or care about the enabling technologies. From this perspective, cable MSOs start with an advantage. They already understand subscriber needs and are good at service packaging and bundling.

We also took a moment to speak to several other firms: Openet, CSG, and Oracle. Here's what they had to say:

Openet:

Pipeline: What will you be exhibiting at the show?

Openet: We will not have a formal exhibit at the show; however, we will be making announcements about solutions for cable operators prior to the event, and conducting meetings with operators and vendors about those solutions during the show.

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Openet: The Cable Show brings together the operator and vendor community to discuss current trends, objectives, and activities. Simply put, it's one of a few times each year that everyone ceases their day jobs to look at the bigger picture. We step

out of the trees and take a look at the forest. The show also aggregates most of the key influencers and buyers into a single location. For vendors, this means two things: 1) You have an audience that is thinking, at least briefly, about the longer term and 2) That all of your possible buyers are in one place.

Pipeline: What differences do you see in the OSS space between the cable and telco fields. Is the difference merely semantic?

Openet: Cable Operators have a long history of repackaging content, while the telcos have viewed themselves primarily as end-to-end application providers. Those two worlds have been on a collision course for some time, and while their systems may be technically and semantically different, the business fundamentals are essentially the same. Cable clearly has a first-mover advantage in delivering video, and the telcos in wireless. Here the differences in OSS systems are very real because the architectures are different; they were designed for different purposes. Broadband is the common ground (or the battleground), but there are still significant differences between Cable Modem and DSL--they are not just semantic. The future for both platforms is the capacity to extract value from conducting business at the network edge. As such, the services provided--enabling, personalizing and measuring the delivery of entertainment and information--will begin to look more and more alike.

As the industry evolves one will borrow from the other and both will innovate, but the timing of the evolution will be different. For example, advertising, which is one form of content delivery for which all service providers seek to play a bigger role, is a near-term initiative for cable. There has already been a tremendous amount of work done with regards to the standardization of audience measurement and the delivery of highly-targeted, or "addressable," ads to that audience. These initiatives while also being pursued by broadband and wireless service providers for IPTV and mobile advertising respectively are months and perhaps years behind the "advanced advertising" initiatives in cable.

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The cable industry will continue to leverage its first-mover advantage in video to broaden the ability of its subscribers to access entertainment when and where they choose. This process has already begun. The natural progression to a multi-services converged environment will also fortify the position of cable operators in the advertising ecosystem. As more capacity is added to the network and services become more personalized, the correlation of anonymous subscriber data across platforms will enable operators to offer advertisers services similar to those provided by Google on the Internet today.

CSG Systems:

Pipeline: What will you be exhibiting at the show?

CSG: CSG leverages NCTA as a venue to reconnect with many of our clients. With 45% of North American cable/DBS providers leveraging CSG's solutions, this is obviously a big show for us. Our presence and focus at each years show is to

feature progress on our solutions and applications. This year, our focus will be on a key theme - "Build, Engage, Transact." Said another way, we want to illustrate how our solutions allow service providers to BUILD more compelling product/service bundles that well understand unique customers/requests...help service providers ENGAGE customers through any touchpoint (on- and off-line, call center, retail, device, etc.)...and finally exchange value with customers through intuitive TRANSACTION management capabilities. Specifically, we'll be talking about several new apps and solutions including...

- Product Management application - comprehensive product catalog capabilities
- Order Workflow - an application that automates and improves match a customer to the right bundle that offers the highest value to both service provider and customer
- Content Management - a video content engagement and monetization solution for owners (studios, aggregators, resellers) of video content
- INteractive Messaging - a set of solutions aimed at engaging customers with intelligent communications via SMS, email, voice, and (yes) fax.

Pipeline: Why should our readers attend the show?

CSG: I'd say increasingly the lines between cable/telco are blurring...and with that, lines are blurring between BSS/OSS. This is a must for any OSS/BSS player that's interested in seeing how information, communication, and entertainment services are being activated by existing cable companies as well as many new entrants...and of course, to discover the implications to OSS/BSS.

Pipeline: What differences do you see in the OSS space between the cable and telco fields. Is the difference merely semantic?

CSG: Its not semantics, but increasingly, I think you're seeing the two beginning to resemble each other more and more (and not simply from the perspective of what services/lines of business are they pursuing). In part, the commoditization of broadband is spurring new services...and new services being provided by the likes of Google, Yahoo, Joost, etc. This has put pressure on both cable and telco to innovate and look for new ways to engage the customer. That has meant rethinking the way they create, package, sell and service customers...and both cable and telco are investing heavily to do this better.

Oracle:

Pipeline: What will you be exhibiting at the show?

Oracle: This year at the Cable Show, Oracle will highlight its work with cable companies to help them transform their IT systems to deliver a superior customer experience, accelerate time to market for new services, and build new revenue streams. Oracle will demonstrate its comprehensive applications portfolio, including customer relationship management (CRM), billing and revenue management, order management inventory, service fulfillment/activation, and enterprise resource planning (ERP) applications. In addition, Oracle will highlight the Oracle Application Integration Architecture – pre-built, sustainable integrations between Oracle applications including Siebel CRM, Oracle Communications Billing and Revenue Management and Oracle E-Business Suite that help cable companies reduce implementation costs and risks – as well as the Oracle Service Delivery Platform (SDP), a standards-based software environment that enables rapid creation and deployment of new IP-based services.

Pipeline: Why did you decide to attend the Cable Show? Why should our readers, who are interested in OSS, do the same?

Oracle: Oracle has attended the Cable Show in the past and continues to attend in order to meet with providers in this important communications industry segment. Already a significant supplier and partner to many cable and TV companies, Oracle is attending to share its comprehensive offering and approach with forward-thinking cable companies, to help them differentiate and add value through enhanced customer interactions, streamlined product creation and better intelligence on their customers.

Pipeline: What differences do you see in the OSS space between the cable and telco fields. Is the difference merely semantic?

Oracle: In the OSS space, cable and telecommunications companies share many common requirements including efficient delivery and assurance, support for next-generation networks, billing for multi-play services, etc. In general, their business goals are the same – to deliver more value to customers by providing a superior customer experience and quickly deploying innovative new services. However, there are some notable differences, including:

- Cable companies are, in general, far more advanced and mature in video

service delivery, which tends to lead their solutions to market. This maturity is reflected in their OSS requirements in this area

- Both are focused on bringing multi-play services to market, but their current offerings and future plans are different, resulting in diverse OSS needs

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Oracle: Over the next few years, we see cable companies working to grow their businesses by:

- Expanding focus on the small, medium and large enterprise segment
- Delivering more flexible and interactive programming options, such as non-linear or unscheduled programming
- Introducing new, innovative IT-based services that leverage their high capacity network access
- Expanding into mobile and wireless services and potentially deploying fixed-mobile convergence to the enterprise
- Focusing on enabling the value chain of application and media partners to offer greater richness and innovation to their customers

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