

# Pipeline

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## Unpacking Management World

By Tim Young

Last month, OSS/BSS types from around the world made their annual trek to the sunny shores of the Riviera for TM Forum's Management World 2009. The show has, at times, been a bit of a bacchanal, with vendors pouring the drinks heavy, seemingly intent on getting any attention at all, rather than getting specific, focused attention from potential customers. And this year? In the light of all the economic goings-on?

It should be said, for starters, that the entire show had a somewhat humbler feel, on the whole. As recently as last year, there were nightly parties on the beachfront and at chateaus, on hotel rooftops and in nearby Cannes. This year, these celebrations, if present, were far less obvious. Rest assured, there were plenty of dinner parties and no shortage of enjoyment of the Mediterranean air. Still, the whole event seemed taken down a peg from previous shows... and that's only appropriate.



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The economy *was* the elephant in the room the entire event... though not always in the ways I had expected. There seemed to be a sense of measured optimism among vendors. After all, the key word underlying the vast majority of OSS/BSS companies is *efficiency*. In an era of reduced revenue and shaky future prospects, now is the *perfect* time to look at driving out cost, reducing revenue leakage, streamlining processes, etc.

"It's surprising, but there's really not a lot of gloom and doom about economic woes, and the industry is already looking beyond the recession," said Keith Willetts, TM Forum Chairman. "They are seeing the need to invest in service innovation, but it's not about fancy new retail services as in previous years; rather, the industry has realized that its role is as an enabler for others to provide the retail service." (Which is a topic explored in more depth in the *Noble Bit Pipe* article this month, written by Trevor Hayes.)

The floor itself had some of its usual hiccups. Vendors on the lower floor are consistently frustrated, year in and year out, by the lack of traffic they receive. However, the Forum made a wise choice by placing its Forumville exhibit in the middle of the lower exhibition floor, and giving it a very open floorplan, encouraging flow-through. This led expo attendees into Forumville by making it somewhat more amenable to the casual browser. It also helped to increase the interplay between Forumville visitors and the vendor booths that surrounded the central exhibit. That didn't *solve* the "lower floor doldrums," as I've decided to call them. However, it was a step in the right direction. (Now, if they could do something to prevent the escalator between floors from failing mid-show, that would be ideal, but you can't always get what you want, I suppose.)



Overall CSP numbers seemed down, but vendors claim that the quality of meetings was high. It seems the economy has most clearly impacted the travel abilities of the lower rungs on the totem pole, making tradeshows the territory of the decision-makers. And the vendors that we talked to thought that was a good thing.

Still, the fact is that the vendor companies that seemed to be having the most successful shows were, to be sure, those who viewed Management World as a venue for pre-arranged meetings, and a place to nurture nascent relationships in a centralized way. OSS/BSS isn't the sort of technology that's easily hocked from booths. It's a different animal, with different requirements. Face-to-face meetings are valuable, but if they are the ultimate goal, it makes one question the value of the massive booths and the expo floor and the overall pomp that surrounds events like these. Still, the event showed no signs of flagging just yet, even in a very precarious time, economically. It seems that the Management World model, while occasionally imperfect, is still one of the best things going in the industry.

### **A Few Notes from the Show Floor**

With nearly continuous meetings, we were able to hear the latest and greatest from dozens of companies with interesting stuff on the horizon. However, in the interest of time, we can only afford to focus on a cross-section of these companies.

**SAP** was at the show announcing their acquisition of **Highdeal**. The evening before this deal was announced, the savvy analysts at LTC, International made the declaration that Highdeal would be acquired very soon (though they imagined it would be a different giant that gobbled up the pricing, rating, and billing firm.) The next morning, their betrothal to SAP was announced. We'll be interested to hear more as the deal progresses.



**Nakina Systems** packed a conference room for their presentation with Verizon as they showcased the success of their CEMS strategy with the North American giant. (You can read more on that here: <http://www.pipelinepub.com/pipelinednn/static/NewsArticle.aspx?ItemID=55>) It's another example of the strength that Nakina has in the element management space, drawing largely from the extensive hardware knowledge of its staff.

The brainchild of an executive team with a long OSS/BSS pedigree, **Ontology Systems** attempts to draw some very high-minded information science concepts into the OSS/BSS field... at least nominally. The company is still relatively young, but touts deals with BT and QnetiQ as proof that they are gaining traction in the space. We'll be interested to see, as the company grows, how dedicated they are to the wider ideals their executive team espouses.

**Clarity**, a company most familiar to us for their work in developing markets where they provide single-vendor solutions, has moved into a very (we think) topical space with their deal with Western Power to provide Unified OSS for the purposes of delivering effective utilities. The implications of using OSS solutions to aid in the creation of smart-grid technology is particularly interesting as the Obama administration promotes the propagation of smart-grids in the US.

**Telcordia** told us that their consulting division has been setting benchmarks for best-in-class CSPs around the working and identifying areas for improvement coming out of the consulting side. In what they call "Transformation Meets Reality" the migration of data is "a serious problem." Telcordia told us they are one the few vendors to migrate data slowly AND correctly. Furthermore, the firm

announced that Portuguese wireline operator OniTelecom has awarded them a contract to help them enhance the overall customer experience, reduce costs and accelerate time-to-market for new services for its corporate customers. Along with a host of other customer wins on the books and in the works, Telcordia continues to be one of the top names in the fulfillment space.

**HP** was introducing three software solutions to help communications service providers manage the customer experience to create greater loyalty, especially among high-value customers. As part of the HP Next-Generation Operations Support Systems (HP NGOSS) portfolio, the service assurance solutions enhance the quality of the customer experience by ensuring that all paid-for services are actually received. (The three solutions in question are HP Service Quality Management, HP TeMIP Service Console and HP Unified Correlation Analyzer.) HP drew particular attention to its interaction with Bulgarian CSP M-Tel, which has already demonstrated specific success with the solutions portfolio.



**Vertica:** Data warehouse Vertica was the belle of several balls at Management World, as both **Sigma Systems** and **Subex** announced partnerships with the firm. The move is an interesting one, because it draws attention to the sheer volume of data that must be handled within a particular system in order for proper and efficient management to take place. Subex announced a similar deal at the show with **Dataupia**.

**Openet** announced an OEM deal with **Cisco**, and announced that the joint venture has signed its first contract with a leading Tier 1, U.S. wireline and wireless service provider. The provider will deploy the Cisco-branded Openet FusionWorks product along with Cisco's Mobility Solutions. The companies state that "the combined deployment of Openet's policy solution and Cisco's deep packet inspection products will enable the operator to automate control over its wireless and wireline networks and maximize revenues from applications and services." This represents a move forward for the undeniably solid Openet solutions set.

**cVidya**, a player in the revenue assurance space, was among the most bullish of the companies we spoke to. As they focus on plugging revenue leakage, their value prop is more resonant than ever in a soft economy, and they touted deals with MTN (as well as many other CSPs they wouldn't name on-record) as proof.

**Tribold:** EPM leader Tribold became the first company with a software app (TRIBOLD 3) to be awarded a TM Forum certification mark for the Forum's SID. This is an interesting development for the Forum, which has sometimes shied away from being viewed as a standards organization. Perhaps we'll be seeing more of these certifications in the near future.

**Progress Software** announced that 3 Italia, the leading 3G provider in Italy, has chosen the Progress Apama Complex Event Processing (CEP) platform to provide real-time visibility and operational responsiveness into its service and billing process. The solution allows 3 Italia to proactively monitor business events in its convergent billing and network systems in real-time, enabling them to have a holistic, customer-centric view of how their services are operating. According to Progress, problems, therefore, are anticipated and corrected before services and customer satisfaction are impacted, minimizing revenue loss.



**CA** was at the event showcasing multiple solutions designed to help CSPs achieve greater efficiency and lower costs. Calling its approach the "Lean Operator vision," CA demonstrated its solutions for cloud computing, customer self-service, IMS, IPTV, managed services and more.

**Sigma Systems** announced that it is committed to helping Communications Service Providers evolve into Next-Generation Operators (NGOs), so they can succeed in today's rapidly changing communications marketplace. According to Sigma Systems, the communications industry is rapidly changing, forcing traditional voice telecommunications service providers to reinvent themselves to remain competitive. Evolution means transformation, and it's something CSPs really need to evaluate in order to move forward.

**Amdocs** was at the show, operating from what we can only deem its "Mobile Command Center" (a two story trailered meeting site parked outside of the Acropolis Convention Center). There, they presented findings from a recent study, stating that almost all (91 percent) of service providers surveyed view modernization as a key component of OSS outsourcing engagements. Additionally, benefits such as increased service profitability and improved time to market ranked nearly as high as operational cost savings, demonstrating the expanded business value of OSS outsourcing. More than two thirds (67 percent) would prefer to outsource business support systems (BSS) with OSS. In addition, Amdocs announced that it was releasing what it was calling "the industry's first single catalog offering to support both business and operational systems (BSS/OSS)."



**Tekelec** was at the event talking about the latest in their IAS (Integrated Applications Solution) offerings. They conveyed that by keeping a close watch over a wide variety of KPIs and using common applications for QoS, Tekelec can help maintain solid quality across a large number of network types.

**NetCracker** was highly visible at the event, and was touting its OSS solutions as “award-winning” even before winning another award, handed out by the TM Forum. Sanjay Mewada, NetCracker’s VP of Strategy, was also on hand for panels on fixed/mobile and mobile commerce.

**Redknee** continues to exercise their flexible model within the OSS/BSS space, and it’s getting them quite a bit of traction. Bohdan Zabawskyj, Redknee’s CTO, conveyed that the company exercises the strategy of operating as a turnkey billing solution in Greenfield environments or in developing markets, and as a strategic component in situations in which deeply entrenched components already exist. With companies like O2 Germany, T-Mobile, DigiCel, Bell Mobility, and Mobikom Austria, there seems to be a good deal of resonance for their model.

**Tektronix** told us they will keep **AranTech** as a separate brand in the short term as they evaluate their integration strategy going forward. However, the two are “operating seamlessly now in parallel tracks,” demonstrating how AranTech’s Customer Experience Management solution works in tandem with Tektronix’s Network Intelligence Strategy.

**Comverse** was alive and well at Management World promoting Comverse ONE as “the first true converged BSS solution in the market.” VP & GM for Comverse’s Billing & Active Customer Management, Gabriel Matsliach, explained that converged charging alone is not enough. By combining billing with active customer management Comverse has seen their customers experience 40% increase in ARPU. Mobile advertising was also a focus for Comverse in Nice, with what they described as a unique offering that allows CSPs to analyze and control touch points with consumers and incorporate billing info and then offer usage-based promotions and reward programs to strengthen customer loyalty and build brand. And, if that’s not enough, the solution also lays claim to enabling revenue acceleration, shortening time to market, and providing immediate results for CSPs.

**Oracle** announced an upgrade to their unified inventory management product, and already have customers using this product. Boasting 15 customer wins in 15 months and touting full support for Next-gen **and** legacy systems, because according to Leonard Sheahan of Oracle “old doesn’t mean it doesn’t work.” Oracle also told us they adopted the SID for their information model and have done some adaptation/amendments where necessary.

**Comptel** was proud to promote their participation in the Service Model catalyst project with an end-to-end demo of Comptel solutions at Forumville this year to show the transition from legacy to Next-gen. After acquiring Axiom last spring, Comptel proudly offers “a large portfolio of products with solutions that work together in harmony in real time” known as Comptel Dynamic OSS.

When questioned about their decision not to exhibit this year, **ConceptWave** told us “We don’t sell by booth – our solutions are targeted.” ConceptWave has gained recognition in order orchestration citing that their BSKyB implementation was finalized in just 14 weeks. They also have a CEM message promoting “customer experience that is consistent-ly good” while noting that the “CEM space doesn’t really exist.” Expect to hear more from ConceptWave in Pipeline this fall.

As first-time exhibitor in Nice, **Cerillion** was at the show talking about their convergent billing solution, launched in Jan-Feb '09 and followed up with a recent case study demonstrating their utilization of the TAM framework.

**Whitestein** was at the show, as it was at Management World-Americas in Orlando last fall. The BPM company has a lot of interesting things to say about the interplay between BPM and the more traditional types of OSS/BSS we've seen at Management World in the past. We look forward to hearing more.

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