Pipeline

Knowledge Is Power

Chilly Nights, Close Encounters, and the Economic Elephant in the Room: Management World Orlando

by Tim Young

The Management World show enjoyed a change of venue, shifting from the Dallas Adam's Mark Hotel that had been its home for the past three iterations to the Rosen Shingle Creek Resort in Orlando. Though the weather was unseasonably cool for Central Florida, the new location offered several perks, including enhanced scenery (I heard at least one person remark that, even with evenings approaching freezing, at least the views from the hotel rooms featured golf courses and winding creeks, rather than empty parking lots), improved facilities (the venue was a bit cavernous in spots, and moving from meeting to meeting often involved covering serious ground, but the venue was crisp and clean, and space was ample), and better food (which was sometimes spirited away with little warning, but was generally tasty).

Some of the keynotes and conference programming received wan reviews, but there were certainly highlights. One keynote that received particular acclaim by several attendees to whom I spoke was *The Power of Technology to Transform the Future* address by Dr. Hossein Eslambolchi of Divvio, Inc. If you missed it, this and other keynote videos are available for viewing on the show website. The few conference sessions I was able to squeeze into my whirlwind Management World

experience were sparsely attended, but did contain frank and earnest discussion. That seems to be a good sign.

Show Focus
There was most definitely an elephant in the room at Management World. (Not literally. Though, with the show being in Orlando, that wouldn't have been beyond the realm of possibility...) That elephant, of course, was the state of the economy. Call it what you will: "A period of troubled economic times." "An economic rough patch." "A downturn," or even the dreaded "recession." No matter how you slice it, the impact that the economy is having on all business was being felt and addressed. It had a direct impact on show attendance and exhibition (mitigated in part by the fact that things like exhibition agreements had been in the can since the summer, when the outlook wasn't so bleak), but also permeated the wider discussion, both through keynotes and panels and through conversation.

The mood surrounding the economy was, for many vendors, actually cautious optimism. Several folks mentioned that communications are to a point where people no longer view them as luxuries. Consumers are unlikely to give up their cell phones. TV and web access are relatively cheap entertainment (vs. travel or going out to a movie), so those are probably not going to be one of the first expenses to go. Businesses have come to rely on voice and data connectivity. Priorities may be examined and bills may be scrutinized, but service will likely be retained for the time being. Therefore, unlike the travel and leisure industry, telecom won't be in the worst shape... at least not right away.

Players in the wider revenue assurance arena seemed to see tough economic times as an opportunity to demonstrate the necessity of reducing revenue leaks and maximizing revenue. The general feel of vendors seemed to be that since they create solutions that bring higher ARPU, lower churn, and more streamlined and efficient networks, generally, their jobs were more secure than some. That all remains to be seen.

The show had an expanded focus on cable issues, with a few events and a conference track aimed primarily at cable providers. While the focus is still

somewhat nascent in its development, the commitment to cable providers holds promise.

In addition, there was a relatively large defense industry contingent at the event. An estimated 50+ representatives from groups like Boeing and the US Dept of Defense were at the event to talk about standardization and other advances in communications. That was driven, in part, by the event's location, but is also indicative of the ever-changing nature of the TM Forum.

FORUMVILLE
This year, TM Forum localized all of its TMF activities into one central location, dubbed "FORUMVILLE." This area contained a demonstration theater, Catalyst projects, areas for discussion of standardization and other Forum-related education, and the Content Encounter, Phase 3. The Content Encounter, now just over a year old, served, in its third iteration, as a place for vendors to come together in a single location to examine the end-to-end delivery of next-gen content using existing technologies. It's an exceptionally practical demonstration, and thanks to a wide variety of participant companies (20+), remarkably cross-disciplinary. (You can read more about Content Encounter, Phase 3 in an article I wrote about it in the TM Forum Show Daily, which was produced in partnership with Pipeline. http://www.tmforum.org/News/CloseEncounterCloser/36672/article.html.)

The Show in General
This show seemed to be a bit of a step back from last year's event in some ways. We don't have final attendance tallies yet, but while the show was on track to match last year's event, there were last-minute cancellations that impacted this year's attendee count. The sessions and the show floor were sluggish compared to Management World in Nice a few months back. However, there were quite a few vendors who mentioned to us that they were still having a great deal of success at the show through prearranged meetings. Furthermore, at least one exhibitor told to us that they were fully aware that this would be a "vendor show," but felt that it was important to attend, anyway.

Now, let no one say that the TM Forum had an easy row to hoe this time around.

Economic concerns have led to more travel bans than you could shake a stick at (... assuming you're prone to stick-shaking), and it's generally a tough time to ask people to travel to a show. While vendors were generally locked into exhibiting several months ago, there was still plenty of time for attendees to back out, willingly or otherwise. Orlando was a better venue than Dallas, and I understand there are plans in the works for a show in the same spot next year. However, it would be a little too "Pollyanna" to say that the show wasn't a bit quiet. We'll see what happens in the space and in the Forum between now and Management World-Orlando 2009. In the spirit of the event, we'll take a position of cautious optimism...

Highlights from the Expo

At this event, we were fortunate enough to meet with over 50 of the most innovative vendors in the OSS/BSS space. While we didn't have time and room for mention of every single one of those meetings, here are the highlights:

ConceptWave: ConceptWave presented several case studies at the event. ConceptWave's Rick Kapani and Enoch Glover of Time Warner Cable presented a study entitled "Seizing Digital Voice Market Opportunity with Integrated Order Management" in a Cable Focus session. In the study, Glover underscored how automation was able to eliminate tedious "swivel chair" processes within TWC. In addition, Andre Gascon of Videotron and Dahl Morrison of ConceptWave presented a study entitled: "Leveraging an Enterprise Product Catalog Strategy to Consolidate and Simplify the Quoting/Ordering of Residential Quad-Play Services."

Openet: The folks from Openet conveyed to us that, overall, they were very pleased with the show and the activity and attention they had gotten at the event. They had releases on the use of their convergent mediation product by Videotron for its cable network, as well as slightly older releases on a partnership with IBM and the newest version of its Fusionworks framework. Openet continues to be forward-looking and optimistic, even in unsure times.

Convergys: We met with Yogen Patel, formerly of Ceon, who is now, as a result of Convergys's acquisition of the PLM solutions vendor, a part of a much larger

company. Patel reported that the former Ceon PLM team is functioning as a business unit within Convergys, and that the transition has been smooth. The acquisition was, and remains, an example of how the perceived importance of PLM is continuing to grow.

Subex: We were able to meet with Subex COO Sudeesh Yezhuvath, CTO Mark Nicholson, and President-Americas Greg LeNeveu to chat about the challenges and opportunities facing the CSP community in shaky financial times. Subex is all about revenue assurance, which generally receives more attention from the CSP set in the face of an economic downturn, as plugging revenue leaks becomes more mission-critical than ever. In its work with the Content Encounter and in its freestanding booth, Subex was attempting to spread the gospel of focusing on keeping the customer (as opposed to getting the customer), and reducing costs through enhanced visibility and razor analytics.

Intec: Intec released two major customer wins at the event. It was announced that Nextel Mexico was making use of the Intec Interconnect billing and settlements solution. In addition, it was announced that leading Russian mobile provider Vimpelcom has successfully integrated Interconnect version 7.1. The firm's position in the billing space is clearly continuing to grow.
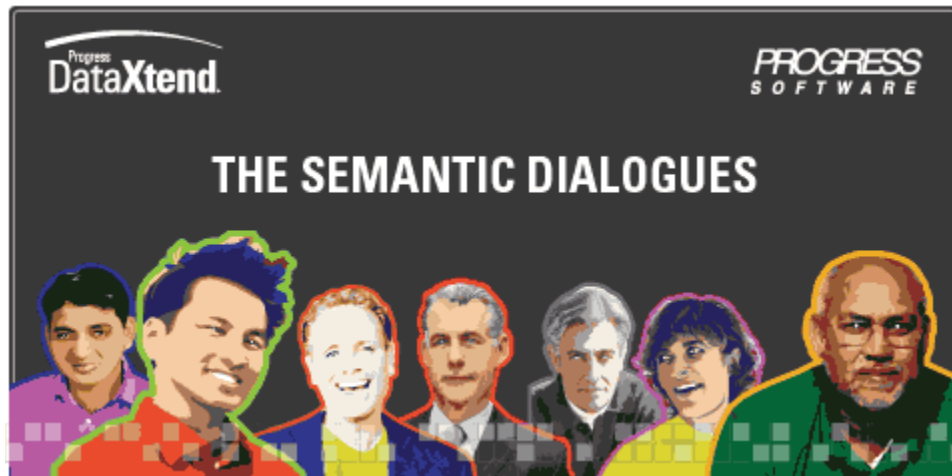
HP: HP continued to tout its wide array of OSS/BSS offerings in Orlando, with a special focus on its RealTime Charging solution. In addition, HP reps spoke about their relationship with Conceptwave, which helps to fill one of the few gaps in their fairly widespread array of OSS/BSS offerings.

Comptel: The Comptel team was at the event with a major customer win to celebrate. Sybase 365, the world's leading provider of inter-carrier messaging services, has chosen to deploy Comptel's AXIOSS suite. Sybase is responsible for some 80% of the world's SMS and MMS messages, according to Brad Niven of Comptel. In addition, the Comptel team brought word of a continued smooth transition after the acquisition of Axiom, and word of an expanded focus on the North American market.

cVidya: The folks from cVidya, led by Chief Scientist Gadi Solotorevsky, a TM Forum fixture, were at the event trumpeting the increased necessity of revenue assurance in trying economic times. "When business is good, providers sometimes consider a one or two percent revenue leakage to be the cost of doing business," said cVidya's Amir Gefen. That is not the case in the troubled times we face. In addition to their own meetings and presentations, cVidya was heavily involved in the Content Encounter, Phase 3.

Nakina Systems: Nakina was at the show demonstrating their innovative EMS and NMS solutions. Nakina's relatively recent strategy of marketing directly to NEVs, rather than going after the CSPs, has, it seems, been fairly successful thus far. The firm's strong relationship with Verizon Business continues to be an asset, as they are able to help NEVs comply with Verizon's EMS requirements. In addition, the recent acquisition of a third round of funding puts Nakina in a strong financial position.

Intelliden: Intelliden tells a compelling tale of rescuing stranded assets. Rahul Sachdev, of Intelliden, told us in a meeting that as many as 10-50% of most carriers' assets are stranded, generally due to mistakes in asset-freeing. Intelliden presented, at the event, solutions for remedying such a situation. In addition, Sachdev, alongside Brian Lakey of TELUS, presented a Next Generation OSS case study of TELUS' network automation, entitled: "Look Ma - No Hands!".

Soapstone: The former Avici Systems continues its successful transition from the core router market to the OSS space. The firm has received market validation for its Next-Gen Fulfillment assurance solutions, and will continue to seek to grow as Soapstone Networks.

Sigma Systems: Sigma was at Management World Orlando in a big way. As leaders in the cable OSS/BSS space, it wasn't entirely surprising to see Sigma heavily involved in several projects aimed at the cable attendees. As a part of the Content Encounter, Sigma presented alongside Arris, BlackArrow, and others in a segment dedicated to Personalized Advertising for Cable & IPTV. That same focus was in play in a panel discussion featuring Sigma CTO Brian Cappellani, alongside Stratecast's Susan McNeice, IBM's Steve Mannel, and Alan Hoff from SeaChange. Sigma was, at this event, and probably will continue to be one of the most relevant voices in the OSS/BSS space when it comes to the needs of cable providers.

Redknee: Redknee offers an array of monetization and personalization. The firm utilizes two approaches to the market: In greenfield environments, Redknee can act as a comprehensive solution. However, in more established markets, it can serve as one of many components in an OSS landscape. Redknee announced a deal with Digicel's Pacific Island Operations, which is part of an overall push into AsiaPac.

Tribold: Tribold was at the show promoting the release of their new Enterprise Product Management (the latest in PLM terminology) solution: Tribold 3.0. The new version was touted as "the only third generation EPM software solution available for the Communications Service Providers (CSPs)." In addition, Tribold hosted a panel (with which Pipeline had the good fortune of being directly involved) featuring TM Forum chairman Keith Willetts, Stratecast's Nancee Ruzicka, LTC, International's

Barbara Lancaster, and Tribold's John Rainger (CEO) and Ernest Margitta. The panel discussed the latest in EPM, and will be discussed, in full, in a future issue of Pipeline.

NetCracker: NetCracker, fresh off of its acquisition by NEC, was in full force in Orlando. The OSS/BSS player was the Platinum Sponsor of the event, with prime booth placement and a full team on-hand. NetCracker presented highlights from its interaction with a number of clients, with co-presenters from the U. S. Army, TW Telecom, and UPC / Cablecom, all describing their recent OSS transformational projects and the role that NetCracker solutions played in them. In addition, NetCracker drew attention to the way in which its preexisting solutions fit with NEC's Network, IT, SaaS, Device Management, IPTV, and SDP/IMS innovations, underscoring the value of the acquisition.

Satyam: Satyam was at the event, touting significant growth (from 14,000 to 51,000 employees) in just a few years within a number of different verticals. The company now stands at 2.3 billion in revenue. Satyam's Alpna Doshi had interesting things to say about the state of business transformation, even in a time of difficult economic constraints. Doshi's view was that, while a mindset shift is in full swing and priorities are being reevaluated, convergence is still key.

Amdocs: Amdocs was at the event promoting its recent deal with China Mobile's subsidiary Guangdong Mobile (GMCC), which has recently selected Amdocs Operational Support Systems. This is the first major sale into China for Amdocs, and represents an ever-expanding geographical base for the firm. Amdocs Director of Product Marketing Cassandra Millhouse mentioned that, moving forward, emerging markets are a part of the Amdocs game plan.

UltraBASE: UltraBASE (the rebranded OOCorp) was at the event promoting its "Elastic Business Cloud" platform. The spin-off of the services division of an IT Consulting Company, UltraBASE is relatively new to us. Unfortunately, the group encountered issues with the shipping of their booth materials, so their presence at the show had a less-than-auspicious start, but we're curious about what the future will hold for them.

Progress: The folks from Progress brought a significant contingent to Orlando to spread the word about their DataXtend Semantic Integrator. In addition, there was a good amount of focus by companies like Progress on the continued need for standards in the communications IT space. To demonstrate their allegiance to standards, Progress took part in two catalyst projects: Harmony 3 (Interoperability), and Enhanced eBonding (essentially trouble-ticketing). In addition, SOA scribe and Progress Chief Technical Architect John Wilmes was on hand to further promote SOA and standards in general.

TierOne: TierOne was at the event promoting its solutions, focused around MPLS provisioning. The key, according to TierOne reps, is discovery, which is true for optical or MPLS networks. Accurate data can help all providers make better use of existing equipment.

Martin Group: Martin Group announced its new Enhanced Services Platform (ESP), which is a collection of software applications enabling rapid development and delivery of revenue-generating products and services. It also offers an IMS platform to communications providers (and sounds like it can also see into the future...) Martin Group representatives also told us about a neat viral video experiment that they are conducting with good results, although if we tell you where to find it, that may ruin the end data. Suffice it to say it's an interesting project.

There were literally dozens of other companies with whom we met that are doing exciting things in the OSS/BSS space, including IBM, CA, InfoVista, TeamQuest, Harris Stratex, and others. In addition, there were a few companies that were relatively new to TM Forum at the event, and we look forward to working with them in the future. Those included Savvion, Whitestein Technologies, and Vertek.

If you have news you'd like to share with Pipeline, contact us at editor@pipelinepub.com.