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## **Cutting Through the OSS Hype: Notes from TeleManagement World**

July, 2002

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At this year's TeleManagement Forum in Nice, France, a number of trends became evident.

Competition has become much tougher, particularly in the inventory management market, where new vendors continue to crowd in. Vendor messages continue to change and become more product focused, but many of the touted benefits still sound the same. Especially in areas related to IP services and service assurance, stories continue to be told that bring very little value to service providers. Integration remains a costly challenge that the TeleManagement Forum, among other groups, continues to investigate, beginning work on the foundation for a shared information or data model with hopes of bringing integration costs and efforts down to a minimum.

### Product Focus

During just the past three years, marketing has made a significant shift from componentized suites to configurable tools, and now everyone is talking about tailored products. According to Ed Pinnes, executive director, Integrated OSS Systems Engineering and integration on themselves. This only goes to reinforce the message that Steve Laufman of Qwest voiced back in February at OSS World 2002, where he insisted that to compete for carrier business OSS vendors need to invest and listen more, and charge a lot less.

### Integration Still a Challenge

Integration remains one of the toughest and most daunting challenges, and vendors offer a million and one new answers for solving ongoing integration problems. In the past several years, carriers have almost always attacked integration from a technology perspective, with a goal of making systems talk to each other. The industry has invested millions in enterprise application integration (EAI) technology—only to have vendors turn around today and point out all of its flaws, after spending years selling its long-term benefits.

At the heart of this problem is a lack of commonality in data models. In simple terms, different systems think about different elements of a carrier's business in different roles and common interactions need common definitions. Says Martin Creaner, TMF's chief technical officer, the goal is to "reintegrate the network into the business process and make it a profit center instead of a cost center."

From a very practical point of view, a shared data model could be useful in

implementation and integration. OSS applications can only do their jobs when loaded with the right data, rules, policies and processes that dictate how they interact with or manage the carrier's business. Carriers spend millions for systems integrators to bring in armies of inexperienced consultants who do little more than map data from one system to another. They bill thousands of hours creating the data element and process documentation necessary to the people who actually implement and integrate systems. Often, this arduous process is poorly managed and can't keep up with the speed of the business. By the time the documentation is done, requirements change. Turning to common data and process models side of integration, says this executive, technologies like Java are already driving down the cost. Where the integration-to-application cost ratio was once 3:1 or worse, in most cases it is now much closer to 1:1. Telcordia's Pinnes, likewise, cites groups such as the OSS-J and vendor partnerships that actually deliver real products as helpful forces in driving down the cost and difficulty of integration. Open, common technologies in telecom, which perhaps started with CORBA and moved into technologies like XML and Java, have helped reduce technology costs and difficulties, but they have not been able to solve the larger business and data modeling problems that persist and increase cost and complexity.

### Inventory Is Hot

The inventory market seems like the center of the OSS universe these days. New vendors continue to arrive from all areas of the business and the globe. Some business actually appears to be happening, particularly with mobile operators. The list of inventory vendors includes Cram to clean up the shop. They're revisiting their networks, looking to optimize them and find the most effective ways to roll out new 3G resources in line with existing physical infrastructure. As a result, they seem to be interested in nailing down their inventory resources and improving their provisioning capabilities as they adopt ISP-type services and networks. From the air interface to the backbone, 3G operators have inventory needs, and they are out shopping for systems.

However, inventory is a crowded market, and everyone will be vying for the same contracts around the globe. China may be adding 5 million mobile subscribers per month, according to industry estimates, but that doesn't necessarily translate into a wealth of contracts. Companies like Arkipelago, which thrives off a strong channel relationship with Ericsson, could have the inside track as equipment vendors prime new deals around the globe. The sales process today is like "truffle hunting," says Mark Mortensen, chief marketing officer at any more compelling today than it was a year ago. Their arguments stress a reduction in the time it takes to plan and configure VPNs, but the VPN business today may not hold enough dollars for carriers to take notice. Large carriers aren't in a big rush to replace or cannibalize their ATM and frame relay investments with VPNs and other, more operations focused priorities, are taking precedent.

While the market is not clear on Astracon's future, questions have especially grown around Orchestream, which recently saw its CEO and North American president leave the company. It did, however, have a customer on hand from Telewest, a mid-tier carrier based in the United Kingdom, which vouched for its ability to automate activation of

MPLS VPNs on its backbone, something Telewest decided could not be handled manually.

### The Network Data Layer

More general than activation, the network data layer is a mess of systems. Element managers, domain managers, activation platforms, configuration management o me about what's happening on the network. I don't really care where it comes from, because I can make sense of it once it gets to me." Carriers are perplexed about how and where it is best to collect, filter and analyze network data as it relates to operations, and many are testing solutions that help consolidate and simplify network change management and inventory reconciliation.

### Service Assurance

#### Is Still Confused

Service assurance continues to be a big buzzword around the industry, but it's not clear that anyone is buying it. No need to reiterate here all of the reasons a carrier might be opposed to implementing service assurance solutions. At a basic level, carriers aren't convinced they need to offer user-specific SLAs and other guarantees and measurements that will expose them to new billing liabilities. OSS vendors insist they will have to offer complex service assurance, lest their competitors steal customers away. However, there's no huge push to move performance reporting and them is critical in today's sales environment.

Where service assurance is largely succeeding is in the back office. The issue is not so much about giving customers guarantees as it is about improving the ability to deliver services and driving costs out of the equation. Trendium, for example, has had success in measuring key performance indicators and providing visibility into the interactions among key service delivery systems. By delivering critical process metrics and analyses, carriers can prioritize their systems investments, plug revenue leaks, and reduce the time and cost to deliver service. It sounds like marketing, but it actually works. Looking at the business from a horizontal perspective reveals a range of costly inefficiencies that can be remedied. The problem has been a lack of awareness of the holes in the business.

#### It's All About the Horizontal

The shift toward horizontal business awareness represents perhaps the greatest trend evident in today's OSS market. Carriers nee driving cost out of the business while simultaneously improving one's ability to serve customers. If a vendor can't tell a compelling story that covers each of these angles while demonstrating a return on investment in some kind of real dollars, it's going to be a very long and lonely 2002.

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