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# Editor's foreword



Stuart Gilroy

Everyone agrees that the road to Digital Britain is redefining how the ICT channel thinks and acts, but there is no broad consensus on how the industry can mould and accelerate the UK's all-digital journey for the long-term advantage. Enter Comms Vision 2019...

To form a solid relationship between full fibre, 5G, the evolving network architecture and emerging digital services economies – and assess their impact on the future success of ICT providers – we need a bigger vision to identify real next generation market opportunities. Therefore Comms Vision sought to clarify the output of pure fibre and 5G beyond pointing to infrastructure, faster speeds and greater capacity. Why? Because it's time to fully decipher the technologies, services and market opportunities that will be delivered over a modern network – and ultimately come to underpin channel businesses in Digital Britain.

Comms Vision also explored the role of industry collaboration in building a coherent strategy for the all-digital future, and how cooptation could accelerate the drive to Digital Britain and reshape how the wholesale channel operates. We asked what more can be done to speed up progress and channel growth in this key mobilisation phase of Digital Britain. Moreover, we assessed how the channel's ICT resellers can make sense of these seismic industry changes and look ahead with a holistic strategic vision.

5G, like full fibre, merits meticulous attention. Given the frequency with

which 5G launches are likely to occur in the coming months and years, Comms Vision is a timely platform for ICT providers to receive an update on 5G right now. It is expected that 5G will create a wireless connectivity network that opens the gates for an unprecedented wave of innovation as a platform for the future, providing a boost to technologies such as AI, Machine Learning, the IoT and smart cities. But questions need to be answered: What will be the true

## We asked what more can be done to speed up progress and channel growth

impact of 5G on the channel? Do the underlying economics work? What does 5G mean for businesses? Should resellers plot a 5G roadmap now?

### Strategic issues

Comms Vision addressed these key strategic issues, shining a light on how next generation connectivity will reshape our approach to all markets, exploring how 5G advances the ultimate goal of seamless converged connectivity, connecting customers to a network that intelligently links 4G, 5G, Wi-Fi and full fibre. For the ICT

channel, 5G, like any new technology, can only be defined by the business case and proposition that makes it real and substantive, and Comms Vision provided clarity on this.

For the channel to prevail in Digital Britain, common sense dictates a joint consideration of 5G and full fibre, the evolving network, OTT services, new digital economies and the rise of managed services. How they set the stage for the development of a digital channel fit to deliver connected Britain is now a priority matter.

Against this backdrop of industry change you must ask yourself a cardinal question: Where do you want your business to be in Digital Britain, and how will you get there? Comms Vision met these pressing issues head on, and offered insights into the key leadership questions to ask yourself: Where to focus on the future? And how to gain confidence in new markets, face threats and develop the resilience to keep pace?

As you will see in the following pages, Comms Vision provided delegates with an understanding of these pressing matters, and enabled them to take the strategic action required to prepare their organisations to thrive on the road to Digital Britain.





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# Setting strategic direction in Digital Britain

Comms Vision's opening SuperSession drove towards the core of what will form a successful long-term strategy in Digital Britain, and helped delegates to prepare their business for the growth opportunities that lie ahead, especially as enterprises begin to focus on the new technologies, applications and OTT services that will be underpinned by pervasive fibre and 5G infrastructures.



**S**ooner rather than later, the pressure of Digital Britain's accelerating development will force traditional channel partners to choose between embarking on a journey of transformation or risk becoming irrelevant. According to Alex Tempest, Managing Director of BT Wholesale, there are plenty of reasons for the first option to be taken. "Digital Britain equates to opportunity," she stated. "It crystallises the fact that customers are moving at pace as they seek new opportunities in their own environment in terms of how they reach customers in a broader, slicker, more agile and disruptive way. The channel can take them on that journey and elevate the customer experience as agile and disruptive players in the market."

Perhaps more than any determining influence on UK plc, technology has become a code for organisations to unlock growth faster than they previously imagined. "The key driver is that customers are seeing the art of the possible, recognising their ability to

rapidly accelerate their business – and in this the channel can play a crucial role," added Tempest. "The comms industry has long known this art of the possible, but we haven't seen it coming quickly enough. Rapid uptake will be a destabilising factor so the industry must drive the adoption of convergence."

In all this we must define what Digital Britain truly means and identify the factors at play in the market, from the dug out fibre trenches to the rise of cooptation in the channel. "We see, especially among the altnets, a tapestry of capability emerging across the UK footprint," stated Gary Steen, Managing Director of Technology, Change & Security for TalkTalk. "Therefore, the customer has far more choice, but with that choice comes the complexity of putting it all together. We're moving away from a single party approach towards an ecosystem based on collaboration."

At no other time has the industry been minded to work together in mutual collaboration, but it's an emerging

model that may come to define the current era as it ticks the Digital Britain box. "We sit in an incredibly complex market and having cooptation – and knowing that you can pull together the customer solutions whatever they may be – is important," observed Tempest. "As Digital Britain is about packing together new and disruptive technologies, it is critically important to work with trusted partners, with a clear level of engagement."

## Meeting challenges

We can all see benefits in Digital Britain. We can also see the challenges facing the ICT channel. In the past, challenges have served the channel well, and it's no different today. "The market's getting more complex," noted Justin Fielder, CTO at Zen Internet. "Therefore the channel must truly understand what matters in the digital economy rather than where they perceive they can build value systems. This is the

## We need to operate in a highly collaborative environment with greater cooptation and collaboration between competitors

challenge and the opportunity, because if you understand that reliability, speed and capability is what's driving the consumption of products, then you can deliver that to your customers."

The oft-repeated claim that simplification of the comms industry is an unquestionable boon was brought into question by Daryl Pile, Managing Director at Gamma. "As things get simpler, broadening the portfolio sounds like the right thing

to do, but the traditional model of having two or three vendors per discipline will put you under stress," he said. "Is it fair to ask your sales, operations and provisioning teams to be experts in various disciplines? That's not going to scale. So you have to think about one partner per discipline or multiple disciplines. You can't be an expert in everything as you try to maintain the value that you create."

The rise of Digital Britain is a blessing to all except stick in the mud traditional comms resellers, not least because the industry is transitioning towards professional services, which poses a challenge to them, believes Fielder. "They need to go on the same transformation journey as the infrastructure providers," he stated. "It follows that in Digital Britain channel partners need to think about how they can use digital tech to transform their own business. The

ability to pick and choose and build an ecosystem based on standards and integration factors enables partners to get inputs from providers with similar ecosystems that, for example, provide knowledge on what is happening in the customers' network."

## Leveraging innovation

At present, organisations are wanting to solve a number of challenges and in response the channel can take to the marketplace value creating solutions that are innovative and encompass IoT among other emerging technologies, says Elsa Chen, Chief Customer Officer at CityFibre. "We must leverage machine learning across the whole customer journey to provide the best experience and free up investment in innovation and creativity," she said. "We need to be experts and leverage our partnerships with competitors to deliver complete solutions. We need to operate in a highly >> p8





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<< 7 collaborative environment with greater cooptation and collaboration between competitors."

That works on one level, but, observed Pile, in Digital Britain there are over 100 hosted UCaaS providers able to meet more customer segments than ever before and competition is at boiling point. "The barriers to entry are lower and digitalisation is driving greater choice," he stated. "The channel has important choices to make. There will always be somebody cheaper on a specific product, but it's about how you bundle and integrate solutions that work. Gamma surveyed 400 IT decision makers and 73 per cent said they value the integration of products more highly than the products themselves. The value that the channel creates, and sells, will come out of how they integrate, the advice they give, the connectivity and the applications – and making sure it all works for the customer."

For end users price is important, but just as key is speed and reliability which taken together are bigger than price, noted Fielder. "The dash to the bottom for price has played its game," he said. "Connectivity is not a commodity that supports the ecosystems built around it – it's driving people, their purchasing habits and businesses.

"The move to transform a traditional IT based business into one where people can work one day at home is a big journey for a lot of people, and it's the channel's magic to sit down and understand what that journey is, get the right inputs and suppliers to provide the right solutions and then build a business based on that approach. It seems straightforward so long as you are prepared to look forward rather than backwards."

Now, channel partners have a golden opportunity to take command of

delivering Digital Britain, and act in their own and the country's interest. Never has there been a more transformational time in the history of the UK's comms industry. "Digital Britain enables organisations and people to work as they choose, consume products and services as they wish, engage more effectively with people and deliver a service that allows them to go out and drive their business," noted Tempest. "It's ultimately about flexibility.

"In the next ten years, 60 per cent of school children won't know the job they want to do because it hasn't been created yet. This notion encapsulates Digital Britain – its about agility, transformation, being able to decide where you want to take and manage your business in a way that suits you. What sits behind this is an ecosystem of providers at every level which can help to deliver that seamless experience, and improve on it time and time again." ■

# Time to bring it on

In matters of planning and go to market it is not the time for stop-go unless you want to slam up against a brick wall. It's the time to seek relentless momentum and dominance over rivals, and a strategic shot of organisational alignment will win the day, according to former Chief Executive of BBC Ventures Group and ex-Virgin Commercial Director Roger Flynn.

Flynn shared compelling insights into why the alignment of business strategy, customer proposition and cultural values will be key to the success of all Digital Britain change programmes. In fact, there is nothing boringly familiar about what lies ahead. "Never in my career have I seen so much opportunity," stated Flynn. "We have AI, VR and AR all enabled by 5G, and we are in an era of the 'art of the possible'. This change is as fundamental and far reaching as the advent of the Internet. Nothing is going to stop, it's going to accelerate. So how do you change your business model?"

The challenge for us all is in the way we respond, if we are not to be caught in the headlights. "In taking action, align your strategy, infrastructure and culture – then drive it hard," said Flynn. "Push and innovate. We call it relentless momentum, making it hard for rivals to keep up. They will have their own change propositions. To play the game you have to move fast and be relentless."

Flynn's 'let-rip' approach could be traced back to his first 15 minutes working directly with Richard Branson, which changed his life. Having been set a surprising task and given little time to turn Branson's vision into strategic



reality, Flynn quickly understood what it takes to deliver a fresh idea to market fast, and one that challenges the status quo. So pertinent in our Digital Britain 2.0 phase. "If you have a new vision or direction, your strategy, infrastructure – the policies and processes – and culture must be in alignment," stated Flynn. "If there is a change of tact, it puts the key elements out of sync. All three must be developed together."

### Culture is key

Even when steeped in the promise of a business opportunity that could signal the start of a new phase of growth,

the one thing that undermines all change programmes is culture, the resistance from people not wanting the plan to work, pointed out Flynn. "This cultural aspect of the alignment model encompasses fear of change," said Flynn. "Engage staff with the change factors and get the fear out of the system. This is achievable only by being open minded, which can mean changing your approach. Communicate even when there's nothing substantive to say, other than a general update, because people in the midst of change require some form of engagement to fill the void. Change your approach to the implementation of strategy. You can't lead change if you are spending too much time and energy with your people. Ensure you have realignment, and get the company's shoulder to the wheel."

Stick in the mud ICT providers are no match for those in step with the march of digitalisation, who punch the air and shout, 'Bring Digital Britain on!'. "There are endless opportunities and you need energy to grab them; and to guard against being outpaced a modicum of nervousness about the potential threat of market rivals is healthy," added Flynn. "If you are a little nervous and excited when there is everything to go for, that's a good place to be. You will do well." ■

# Harnessing the next phase of convergence

Look into every corner of the comms industry and we see a new dawn. No wonder customers are crying out for guidance as legacy technology continues to be swept aside. With this in mind, said BT Enterprise Unit CEO Gerry McQuade in his Comms Vision TED Talk, we must explore the future of technology integration and how the convergence of applications, services and networks will evolve during a complex period of digitalisation.

**F**or now, the industry is rooted in change, disruption and uncertainty, so radical action is required by all involved, urged McQuade. "What we are going through as an industry and as businesses is significant," he stated. "The disruption and digitisation happening in every organisation is driving change for our customers, a shift they don't understand – and 5G will alter everything. It's not going to be about 5G on its own. It's part of an ecosystem and will transform everything about how businesses operate."

For the next two to three years we can expect a hybrid position, observed McQuade, then we will see the full power of 5G. "However, don't be fooled into thinking 5G is not important today," he added. "We are already live, and we are seeing significant change. 5G is a completely different model, designed for billions of devices, which changes the nature of how a network is run."

A number of elements must be considered to make 5G come to life, explained McQuade. Chief among these is user scenarios. "Just over a year ago we put a live network in Canary Wharf and invited almost 100 businesses to talk about 5G," he said. "What stunned us was that almost all had ideas about what 5G could do for them. Their use cases prompted us to think differently about how we should work with businesses. We changed the model of our innovation and R&D around 5G, knowing what it means to customers wanting to create self-designed use cases."

BT's advances in rolling out 5G include a live broadcast with the BBC, and two versions of live ultrasound from an ambulance. BT has 20 cities already covered by 5G, and by the end of the year another 20 will be 5G'd. "We need to think about where 5G goes next," commented McQuade. "It's easy to think about the technology as extra speed on a mobile, but most



**We will be under threat from a number of external players, and we must change the paradigm of how we operate**

of the customers we spoke to talked about how they could use 5G in a saturated way for wireless offices.

## Seamless integration

"That said, it's never going to be just about 5G. We will need a lot more computing power at the edge of the network. It's going to be about WiFi 6 and Ethernet, with software wrapping it all together driven by a capability to look across the networks, including in the customer environment – the whole spectrum from small to large organisations. In this model where multiple devices and multiple networks need to be dealt with in real time, managed services becomes an important factor."

Two, three or four years out there will be many other new capabilities. "To manage, secure and make these available easily to customers means that we need to do things differently," added McQuade. "At every level we as businesses need to think about how we present ourselves, and rethink the nature of what we are presenting to customers. It's less about products as individual silos, and more about how you converge products and add value to customers. It's not just about how we go to market, it's about how you do business, the organisational model and how we run our networks."

How customers consume connectivity in the coming years will also change.

"Over the next two to three years we are looking at a completely different way to manage, control and secure the network," commented McQuade. "We are rethinking SD WAN, Ethernet and broadband services to supercharge them in the core network environment. We are building towards our mobile, fixed and WiFi networks becoming completely seamless, reconsidering where we target our customer usage so we can move them between whatever node we want within those network environments. It's seamless, it's consistent, secure and agile. That creates change for our customers."

"When talking to business customers I see fear. They really do not understand

the journey that they are going on. So professional services is growing at 400 per cent per annum because people are struggling with this move towards more fragmentation and more digitalisation."

That digital skills are lacking in the SME market is not news, but the deficit will be felt far more acutely in the time to come. Already, the CBI estimates an £86 billion productivity gap between what could be delivered against actual figures, due to a dearth of digital skills to utilise existing tech capabilities that enable organisations to trade better. "We need to take businesses on that journey, support them and make those converged products become a reality," stated McQuade. "We have a number of dynamics at play in the fixed and mobile market, and various dynamics around AI, robotics and machine learning – all are driving a different operating model that will happen within customers, the channel and the networks – and we all need to respond to it."

The key change factors identified by McQuade are 5G, SD WAN and managed services. "Ultimately, we need to think five years ahead, think about the environment we will be working in, the services we will be providing, and how much change we need to make collectively to be successful. We will be under threat from a number of external players, and while it is unlikely we will have our lunch stolen, we must change the paradigm of how we operate."

"Furthermore, the SME market is mostly driven by ease of doing business. They want to be led, taken by the hand on the journey of the sales process and the service environment. They are not overly interested in what we do nor the technology. They want support, which is the role of the channel." ■



# Define your mobile and UCaaS strategy now

Digital transformation is fostering an epoch of mobility catalysed by 5G, according to Gamma CEO Andrew Taylor in his Comms Vision TED Talk. Meanwhile, UCaaS will drive new business models, differentiation and competitive advantage as we transition to an all-digital environment.

**T**hat Gamma has secured a channel friendly MVNO deal with Three which includes 5G services is good news. The partnership is significant, and suggests that 5G must be a chief consideration among the channel's strategists. So much so that Taylor is on his way to defining a new 5G channel proposition that frees itself from the traditional baggage of doing business with a mobile operator, he claims. "We thought long and hard about what we've been doing in mobile during the past six years, and decided on a commercially flexible MVNO as a Service proposition," explained Taylor. "With 5G, data will explode. We don't know what it's going to look like but the traditional business model based

on price and usage is not appropriate based on our view of the future."

Taylor reacted to what could be the catalyst of unprecedented industry change, namely 5G, in terms the channel understands, with a familiar string of commercial must-haves that put the partner first. "We wanted a commercial relationship with an MNO based on risk and reward," added Taylor. "We also wanted network equivalence to make sure that when the MNO launches new services we get them at the same time to service the channel, such as voice over WiFi and 5G which will be important in the coming years. We also wanted a partnership that would be focused on the channel with no

conflict. This is not about the next 12 months, it's about the coming years, so we sought a first class citizenship relationship and stayed with Three.

"It means true operational control through the Gamma portal, and flexibility as partners will decide the tariffs and what the price bundling looks like for customers. And as a MVNO we provide partners with full ownership of the customer. This way we will enable them to disrupt the market."

## Opportunities

What Taylor's commitment to Three means to the channel is crystal clear. Also plain to see are the implications and opportunities contained in market analysis undertaken by Gamma. Whatever the topics of industry conversation that will be sparked by the research findings, it is likely that it will involve a running stream of market opportunities. "The UK market for voice, data and mobile has flatlined during the past two to three years, and it's going to flatline for the foreseeable future," observed Taylor. "There is disruption and substitution in the market, which is moving from traditional voice to IP voice, with a respective decline of around 10 per cent and growth of 10 per cent over the next five years. That's where the opportunity and the money is."

The UK is in a strong position, with the channel driving much growth in SIP and cloud adoption. Right now, the SIP market is 65 per cent penetrated, with between one million and 1.4 million SIP trunks still to go. On cloud telephony the penetration levels are much lower at circa 25 per cent, amounting to 4 to 4.5 million seats in the UK. "We are at the early growth stage around cloud," stated Taylor.

He expects approximately 4.5 million seats to go live over the coming years spread evenly across the micro, SME and enterprise sectors, with around 1.4 to 1.7 million seats in each of the segments. In the micro segment (one to ten users), the penetration is 18 per cent, quite low with 1.2 million seats

## With 5G, data will explode, and the traditional business model based on price and usage is not appropriate

in the cloud and a potential market for 5.2 million. Business customers with between 10 and 50 employees have experienced almost 50 per cent penetration. They are the subject of much competition. Low barriers to entry equate to new entrants, even though this is a relatively small market, its total size being around two million seats, with one million still to go. "If partners are feeling competition in this space that's the reason why," said Taylor. "The channel has done a brilliant job over recent years in driving cloud into that marketplace."

Turning to medium size customers, with 50 to 250 seats, penetration sits



at around 18 per cent, with 2.3 million seats in total and 400,000 already moved, so 1.9 million to go. The enterprise level has achieved 20 per cent penetration, and offers 5.6 million seats to go after. "The key question to ask is: How are you going to make sure you get the biggest opportunity within each of those areas?" stated Taylor. "The channel needs to consider what it can do with products and services to stretch them and provide new capabilities as more competition comes into the UK market."

What will be at the heart of the new entrepreneurialism that will sweep through the UK's comms sector? Enter UCaaS, a service that Taylor believes will enable the channel to differentiate and compete against the OTT and software players, comprising VoIP, basic bundling, hosted PBX replacement, collaboration, conferencing and omnichannel contact centre in the cloud, which Taylor rates as a 'massive opportunity' for the channel. "Taking all of this and integrating it within an office environment while providing the network enablement is something the channel can do and competitors can't," emphasised Taylor. "Software players won't be able to do this and offer quality of service."

Gamma's magic ingredient in the mobile and UCaaS mix will prove influential in the market, but we must not ignore what will be a great strategic challenge, observed Gamma's Managing Director for Channel Daryl Pile in his Comms Vision TED Talk. "Since launch in March Gamma has witnessed nine per cent of hosted roll outs attach a UCaaS component, but take away in-house solutions and demos and we arrive at five per cent, which in a £2 billion to £3 billion market is surprisingly low," commented Pile. "We need to drive towards 30 per cent and get better collectively at selling UCaaS."

## Smashing the market

Pile hopes the channel will bring a rush of new business in the UCaaS space, displaying the same verve that helped it land swathes of the SIP market. "Think SIP: The channel smashed the market – we need to do that with UCaaS," he added. "But the circumstances are not the same. With the likes of Microsoft Teams gaining traction – worlds are colliding."

Perhaps market competition is nowhere fiercer than in the UCaaS space. Here, the channel must contend with upstarts and industry giants, but great comms entrepreneurs are true to their moment in time, and 5G could be their secret weapon. "We have UCaaS on the desktop and handset, and it's been an app on the mobile for some time, but UCaaS needs to become far more media rich and 5G will enable that," noted Pile. "So we are working closely with Three. 5G is going to displace some fixed lines, and resellers need to think about how close they are to one of the four operators. Partners need to ask whether they will get what they want from their mobile data provider over the next five years."

**We thought long and hard about what we've been doing in mobile during the past six years**



# What we learned from York's fibre roll out

More than most countries in Europe, the UK has maintained its archaic comms infrastructure. However, no more is our copper legacy resistant to change, and the channel ignores the roll out of modernising full fibre at its peril, warned Guy Miller, Director of Fibre For Everyone at TalkTalk.

**T**he drive towards Digital Britain is disrupting every corner of the comms sector and the pace of change is remarkable for its rapid speed and transformation. What is also remarkable is fibre's capacity to be the 'next big thing', emphasised Miller, albeit a slow burn compared to other fast rising technologies. Until now.

The transition to Digital Britain is not just about the likes of cloud, AI and new infrastructure deployment, it's about understanding the practicalities that drive digital transformation within UK businesses. To win, channel partners must embrace disruption, grasp opportunities, gain confidence and elevate industry performance, believes Miller. And to that end, he shared insights into TalkTalk's own full fibre work in York. "We've put our money where our mouth is and we are doing it for ourselves, initially working with CityFibre and Sky before creating altnet FibreNation," said Miller.

FibreNation was launched by TalkTalk in November 2018 as a wholesale FTTP operator led by CEO Neil McArthur. It has tested and trialled full fibre in York which is now hailed by TalkTalk

as one of Britain's first true Gigabit cities. TalkTalk knew the move was the right course of action. Less certain was whether there would be an appetite for full fibre from consumers. Thus, the roll out was very much a learning curve. What TalkTalk learned from the experience can be broken down into four areas. First, education. "This was needed to clear up misconceptions, but educating the market proved a challenge," stated Miller. "So we gave customers 500 megabytes for the price of a copper line to prove to them the superiority of the product."

## Getting noticed

The second lesson learned was that causing disruption was both a blessing and a curse. Disruption to road traffic during trenching was an annoyance to locals caught in jams, as you'd expect, but the blessing was that TalkTalk got noticed. In these parts, the company experienced four to five times the input volumes compared to areas where ducts and poles were used. "Being first in the area and making yourself known is critical," said Miller.

Just as important is raising awareness via word of mouth and tactical engagement with the locals, far better

than relying on PR and leaflets. Therein lies TalkTalk's third big lesson. "It's key to avoid being perceived as just another telco so we worked with the local community, offering supportive sponsorships for example," explained Miller. "Consumers then more readily tried out the service, and loved it, with uptake spurred by word of mouth communication, driving up to 50 per cent penetration in early build areas."

Fourthly, TalkTalk decided to go all in with fibre and not sell copper products at all. "Consequently, our NPS in York is in the 40s and we are experiencing less than four per cent churn," noted Miller.

Having mastered the art of promoting full fibre adoption in York, TalkTalk is translating its experience to create an all encompassing professional practice

**Disruption brings change and uncertainty, but the channel must be ready for this transformation to stay relevant and ahead of the curve**

## It is critical for the Government and regulator to support investment – how else can we move to a digital economy?

for the channel. "We will work with other access providers," said Miller. "We are not going to create a world of pain for the channel. We'll work with providers to bring the same set of standards, APIs, billing etc, and be transparent, meaning that partners can choose their preferred access provider."

Miller further crystallised these imperatives and the reasons why

channel partners must rethink connectivity now, as no existing business model is immune to change and the impact of Digital Britain on how we work is without question. "Disruption brings change and uncertainty, but the channel must be ready for this transformation to stay relevant and ahead of the curve," he commented. "Yes, a partner may lose 10 per cent to 20 per cent of their Ethernet base, but they can smash their FTTC base with FTTP. This is a disruptive and exciting time in the connectivity space and it's not yet clear who is going to win the build wars."

## Disrupters win

But what is certain is that it is time for channel partners to form their full fibre strategy now, emphasised Miller. "Disrupters usually

win, and those who work with disrupters also win," he added.

That's not all: People are starting to more acutely realise the looming demise of WLR3 and copper, and as these services reach the cliff edge a whole raft of new products is required, observed Miller.

"Everything must fundamentally change in seven years," added Miller. "This is a challenge for the comms channel which is accustomed to acquiring fully packaged and polished products from suppliers. That's not yet the case with full fibre, but this is the biggest land grab the comms industry has ever seen and whoever sells first to the customer will be in there for years. Act now – this is a land grab opportunity – first in will win."

Miller also noted that TalkTalk is planning to launch an OTT IP voice service that is technology and CP agnostic, along with Ethernet products, and introduce a set of technological, operational and commercial criteria – standards that will make life easier for partners – along with all important APIs.

He also said that it is critical for the Government and regulator to understand that infrastructure build is one thing, driving adoption is another. There has to be a market opportunity for the channel. "It is critical for the Government and regulator to support investment – how else can we move to a digital economy?" he asked. "We have seen years of little intervention from Ofcom and Government. We have spent much time dwelling on the lack of performance from Openreach – and after years of lamenting it would be illogical for the channel not to take the opportunity in front of us." ■



# Chen urges industry to 'get its act together'

Calls to deliver digital transformation have long run through the industry like a Mexican Wave, yet when it comes to full fibre barely a ripple has been felt on the ground. Enter CityFibre, a disrupter which is making waves, and when the enormity of what is at stake for the channel is fully realised it will show itself eager to champion the unfettered role out of full fibre, according to CityFibre Chief Customer Officer Elsa Chen.

In her Comms Vision TED Talk Chen emphasised that digital transformation is ultimately about choices, and the time for the UK to pull its infrastructure socks up is now. Infrastructure is critical to the UK but we are currently languishing far behind other countries in rolling out full fibre. It says something when the world's fifth largest economy ranks 30th out of 35 nations in

terms of comms infrastructure, noted Chen. "Competition is key," she added. "We are in this position because of a lack of competition. Now, it's about making the right choice to build an infrastructure that underpins the digital economy."

#### Economy boost

It is a fact that the positive economic impact of a fully fibered Britain will

run to many billions realised in short time. And Chen put the onus squarely on delegates and their counterparts across the UK as potential agents of change with the inherent power to bring about these propitious conditions for future business growth. "Don't underestimate your power of influence," she said. "The channel can anchor a continuation of the monopoly or seek an alternative. It's time for the industry to get its act together."

In exercising its own power of choice to spark a transformation CityFibre has committed to not less than 20 per cent full fibre coverage. "We must understand that the decisions we take now have an impact on what the digital infrastructure will look like in

**We must understand that the decisions we take now have an impact on what the digital infrastructure will look like in ten years time. Choices must be made today**



ten years time," commented Chen. "The choices must be made today."

In a business update Comms Vision delegates learned that CityFibre's integration of Entanet, acquired in July 2017, is gathering pace with the wholesale arm's livery soon to be retired as the Group continues to centralise and retain its disruptive entrepreneurial spirit, which is a key ingredient in achieving its ultimate purpose to disrupt the status quo. To accelerate its vision CityFibre kicked off an industry consultation in October aiming to more clearly define the role of alternative full fibre infrastructure builders in aiding the switchover of customers from legacy copper networks to fibre.

As part of the consultation CPs can identify the provisions required to support all legacy services on the new networks, what the process should be for the mass migration of customers, and what steps are needed to ensure straightforward switching for consumers. The initiative was triggered by a key phase in CityFibre's Gigabit City roll out in Stirling, which will be ready for a copper to fibre switch over next summer. In his Comms Vision interview, Andy Wilson, CityFibre's Head of Wholesale, said:

**There is more momentum at local and central level. This will start to accelerate over the coming year**

"We all have a responsibility. The more organisations driving this the better."

#### Breaking barriers

As it turns up the volume on its demand for greater competition CityFibre continues to work with Ofcom and Government as well as peers to sidestep barriers to growth, including areas such as wayleaves and the scope for full fibre providers to engage in overbuild, a scenario which could mean that full fibre would appear across just 30 per cent of the UK. "There is more momentum at local and central level," said Wilson. "This will start to accelerate over the coming year."

That is not all. It is increasingly obvious that business growth moves fast once full fibre has been embraced, according to Paul Anslow, Managing Director of Triangle Networks, a CityFibre

regional partner. It had become clear to Anslow that CityFibre's whole city approach – based on a build once build well rulebook – comprising one network ecosystem provided an opportunity not to be missed.

"We needed to do something different," he said. "With full fibre, we had a new product and as CityFibre's profile gained traction we grew alongside the greater awareness. We are focused wholly on full fibre services now, and have not installed ISDN30 for two years nor a phone system for four years. Although still a small business we do have a role to play, and have found our niche in the ecosystem. We plan to be in 10 locations with CityFibre across the country and provide services to more smaller companies."

CityFibre's opening gambit in the market hinged on working with a set of local partners, such as Triangle, wanting to grasp the potency of full fibre, on an exclusive basis. In a bid to advance further towards the UK's digital golden age the company has now adopted a full channel approach, with no exclusivity and with a carrier interconnect route to market. "We are seeking highly motivated regional partners," added Wilson.

# Embracing magic moments of opportunity

Against the backdrop of unprecedented industry change you must ask yourself a cardinal question: Where do you want your business to be in Digital Britain, and how will you get there?

In his session, Zen Internet CEO Paul Stobart – who was instrumental in scaling Sage's revenues from £120 million to £1.3 billion – addressed the key leadership questions delegates must ask of themselves in an era of perpetual change – and top of the agenda is a people first strategy and culture. Stobart has a long held and deep interest in the nuances of leadership following a moment of self realisation that occurred during a leadership programme some years ago. "I realised I was rubbish at leadership," he stated. "I thought I was good, but in truth I was doing it all wrong."

He'd discovered that true leaders deftly switch between two modes of leadership – Manager mode and Leader mode, both of which, when leveraged appropriately, can have a profound impact on individuals and companies. Manager mode is about control. It's a good policy in a crisis but if relentless can be demotivating and negatively impact how a business performs. The other aspect is Leader mode, where responsibilities are passed to others who are thus empowered. "That starts from me choosing to inspire people to do things for themselves," noted Stobart.

True leaders also listen with intent and presence as any level of feedback may spark a great idea. "Listen

to colleagues, be attuned to the feel of the business, the market and customers," added Stobart, who also put forward arguments in favour of staff appreciation. "A simple thank you for doing a good job and being who you are can be a magic moment of opportunity that inspires people – but all too often these moments are lost," he said.

"And ask questions. The best questions are incisive and designed to overturn limiting assumptions that exist in the heads of staff. It is important to encourage people to change deep set beliefs that may limit their performance. Ask what they would do differently if they were to achieve more than they think is possible. Their initial answers may be banal, but persist with questions, delve deeper, and the gem of an idea may be unearthed."

## Untapped potential

Thus, staff are accepted by Stobart as having untapped potential, that through acts of leadership that inspire also get people to more readily think for themselves. "Great leaders balance Leader and Manager modes, and switch between them instinctively," said Stobart. "Leadership matters, so does appreciation."

Stobart intends to educate Zen people on the power and intricacies of

leadership and instil an understanding of leadership at a granular level. "We talk about technology and Digital Britain, but it's people who are going to deliver it," added Stobart. "So for me, it's people first. If they are

engaged and inspired the customer feels a different type of experience. It's about doing the basics well."

Zen founder and Chairman Richard Tang takes a ferocious pride in happy

staff, said Stobart. For Zen, the ultimate achievement is measured not in finance nor customer numbers, but the delivery of happiness to people, customers and suppliers. "We do this through leadership development, and we are

rolling out a programme to 550 Zen staff, to engage as many people as deeply as possible in the business – through workshops, close engagement and asking loads of questions to get people fired up and enthused."



**I thought I was good, but in truth I was doing it all wrong**



# AI drives new model

AI will liberate and drive organisations forward in Digital Britain, but first we must define its role and take the right action, argued technology evangelist and author Theo Priestley in his Comms Vision TED Talk.

**A**s an anti-futurist Priestley re-examined how the future will look through a hypercritical lens, through which he sees automation, AI and algorithms challenge humans to target more complex tasks. As we know AI is already being used to speed up the analysis of data. Examples cited by Priestley include lawyers using the technology to quickly seek legal precedents hidden within huge numbers of past cases. He also noted that some hedge funds are run by algorithms, and pointed to instances where AI and algorithms are writing for themselves.

"AI drives a different business model, automating marketplaces and work environments where the front, middle and back office will become a thing of the past," he stated. "But the biggest challenge is finding the resources to analyse stored data. The search for resources to make sense of data is a defining trend."

All agree that we are in a fast moving market but in taking a different tack Priestley dispelled myths around the readiness and capability of organisations to easily leverage AI, Machine Learning and the fruits of stored data, noting that training people to effectively work with algorithms and machines could take up to two years to get them and their outputs fit for purpose. "Given that the value of data tumbles quickly over even short



**To build Digital Britain we need a connected infrastructure that allows data to flow without barriers**

time periods, it is imperative to move quickly in the Big Data world," he said.

#### Data-driven

"Organisations with the power to use their data rather than store it in silos will become data-driven, which is essential to digital transformation journeys that rely on the free flow of

information, leading to a networked, collaborative and fluid business. Huge growth in remote working and the requirement for flexibility is key to achieving better outcomes. To build Digital Britain we need a connected infrastructure that allows data to flow without barriers. AI, data, connectivity and culture are all points to consider." ■



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# Evolving networks and services economies

The spread of digitalisation has plunged conventional business models into strategic revamp mode, and for the channel, the network revolution has become a moment of truth, according to BT Wholesale's Head of Professional Services Steve Blackshaw, who showed further proof that long-term business planning needs to be considered and actioned right now.

In his Comms Vision TED Talk Blackshaw focused on the future of global and UK networks, and how the all-IP network will enable resellers to create new services in the digital economy. He detailed the factors driving the move to all-IP and new service economies, and explored the business opportunities these create for ICT resellers in Digital Britain.

The good news is that there are macro trends to suggest network development is settling down to a predictable equilibrium. For the ICT channel, 5G, like any new technology, can only be defined by the business case and proposition that makes it real and substantive, and Blackshaw provided clarity on this. 5G is coming to life, and there are clear signs that Ultra-Reliable Low Latency Communications (URLLC) will catalyse the IoT.

Like 5G, new digital economies that will arise from Big Data merit meticulous attention. Also, Blackshaw showed how global telco consolidation – those OTT players with no interest in delivering local service provision – will create a boom in demand for managed

services at a regional level. Networks are exploding, so it should come as no surprise that traditional methods of building them, based on a traffic laden core and associated metro networks, will need to be reconsidered, along with a rethink of the future business opportunities for ICT providers. Chief among the action points is latency.

"We are digitising everything in the workplace and at home," stated Blackshaw. "We are starting to contextualise data and workflows, and enable automation at a time when the rates of technological change and adoption are accelerating. Most of the data that has ever run over the Internet has happened in the past five years. We are in an era of ultra HD streaming, and developments are accelerating incredibly. In all this, latency matters."

## Latency matters

For example, take the cloud assisted car. This is the concept of a car talking to the vehicle behind using on board compute. In the future the compute is likely to be removed from the car and put into the cloud, among the benefits is that less can go wrong in the car.



Crucially, when using a 4G network connected to a metro network the data transfer could take 90 milliseconds, which is not good enough when travelling at 80mph. On the other hand, deploying a 5G network would reduce the latency to around nine milliseconds, thus rendering the scenario far more realistic as a use case. "Low latency must be built into the architecture and the compute moved towards the edge

of the network," added Blackshaw. "We've started to do that, moving content distribution and caching, for example, closer to the edge."

For the channel, all innovation will eventually be judged by the use cases that deliver margin. Therefore a key industry challenge is to discern true dawns from false ones – a dilemma that has long hung over the business case

for the IoT. But a bright outlook is now in view. IoT solutions at their most basic level are constructed using inanimate monitoring devices. For example, BT is working with a utility company in the water sector that has 3,400 dumb devices, which is expensive to run, and power must be delivered to them.

"However, the advent of low latency 5G with low power and high battery capabilities, that last up to ten years, means we can go much wider in terms of the coverage of devices," added Blackshaw. "You don't have to physically maintain them, therefore the cost model comes down and these solutions become far more feasible."

## Emerging digital markets

It is forecast that there will be 20 billion IP devices connected to the Internet and rising, because use cases such as the one cited by Blackshaw are far more feasible – hence the explosion of device numbers and associated data. Nor is that all: The data must be moved in a secure way across the network, quickly and with a full complement of latency requirements. That data must be stored and analysed, which will give rise to new service industries and new digital economies.

"Ultimately, there is money to be made in these new services," explained Blackshaw. "Customers will need your skills, not only in fulfilling the technology but the integration, support and the maintenance at the top of the stack. The managed services will include the integration of software – so embrace that change."

It is truly a time of network revolution, and direct action is being taken by the telco giants to secure as much of the future market for their OTT services as possible. The channel

at large now faces a new dynamic, but the genesis for future success lies in ICT providers' hands today if they act on Blackshaw's exposure that managed services is a realisable opportunity that must be readily welcomed by all regional partners.

Such pragmatism must be shown as big telcos around the world continue to converge. Why? Because their platforms and services are all about scale. "The larger your reach the more ubiquitous the service on a global scale, so telco companies are starting to acquire each other to gain as much geographic coverage as possible," commented Blackshaw. "But their services have to be localised and unique to individual customers. This is where the channel steps in because global players are not interested in localising services unless they can automate them. They want to provide a ubiquitous service globally, and have regional partners to make the change. Our job is to give the highest performance for the lowest cost per bit. That way we make the most margin. But we also want to personalise services - therein lies the value add."

The future flourishing of local ICT providers may be near limitless, if they explore value add beyond the scope of current imagination, all underpinned by the next generation network, believes Blackshaw. "This dynamic means that we are heading towards a network architecture that has a central regional cloud, with a metro core and CPU compute at the edge of the network to promote latency requirements. Whole new digital economies will emerge off the top of that, including security, automated intelligence, operations support systems development and digital asset exchange – and the channel can charge for this – if you embrace it."



# Precision planning

Comms Vision was joined by Colonel Tim Collins OBE, who brings military precision to teamwork, leadership and motivation, on which he is a pre-eminent authority.



In his session, Collins put a spotlight on the parallels that exist between business leadership and military problem solving, and showed delegates how to hone and improve their strategic planning. His words are as inspiring as they are thought provoking, so much so that a copy of his speech to British troops of the 1st Royal Irish Battle Group in Iraq on the eve of battle in 2003 hangs in the White House Oval Office.

For this historic rallying call he is known worldwide, and the strength of his address to Comms Vision delegates helped them to lead, plan and achieve their own transformational business objectives in Digital Britain. Collins showed that there is huge value in marshalling straightforward but effective leadership techniques, ones that match strategy to desired outcomes, and when taken together will deliver on expectations.

"Firstly, figure out what you do and what you are for," stated Collins.

"It never hurts to think about this, and provides greater focus to your strategic thinking on what you want to achieve. Are you just firing the guns or trying to hit something? Then, get your organisation right. Do you need a new department to cater for new and different operations? What

**Delivering success is about being the person who tells the team what they want to achieve, surrounds themselves with the best people, and is not afraid to let them get on with it**

needs to be done to fit the company to evolving market conditions? And get the right people in the business. Some talent will exist in the

organisation, but you may need to buy some skills in. Find people with the right attitude because capabilities can be taught and developed."

What also emerged is that leaders must engender the right spirit in their people. "They should feel ownership and loyalty, and care about the organisation," added Collins. "Motivate people and make them feel valued. They want order and certainty, and it is important that they see fairness and are appreciated."

The issues are also about messaging. "Communicate instructions clearly," advised Collins. "Things go wrong when leaders do not say clearly what they want to achieve nor spell out peoples' role in reaching objectives. Then step back and let them get on with their tasks. Delivering success is about being the person who tells the team what they want to achieve, surrounds themselves with the best people, and is not afraid to let them get on with it."



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