



# Winning in the Telco Data Center

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# Agenda

- Heavy Reading intro
- What's happening in telco?
- Why is open source relevant to telco?
- What do telcos think about open source?
- Key takeaways
- Q&A



# Who is Heavy Reading?

Heavy Reading offers deep insight and comprehensive strategic guidance of emerging telecom trends to network operators, technology suppliers, and investors.

Our remit is to provide the comprehensive competitive analysis needed today for the deployment of profitable networks based on next-generation hardware and software.

Founded in 2003, Heavy Reading has become the industry's principal research firm, producing more than 800 reports, 700 white papers, and 300 surveys over the past 12 years.

**800**

Reports

**700**

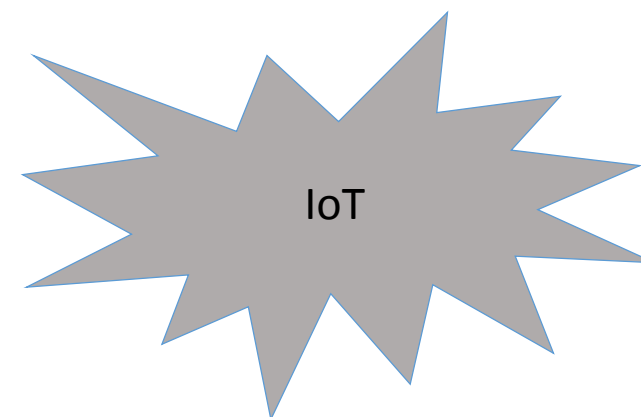
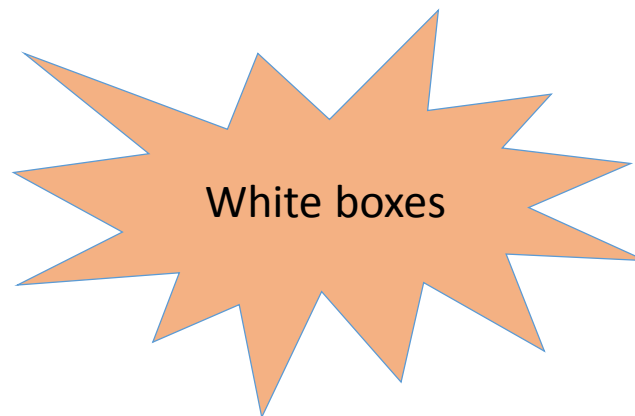
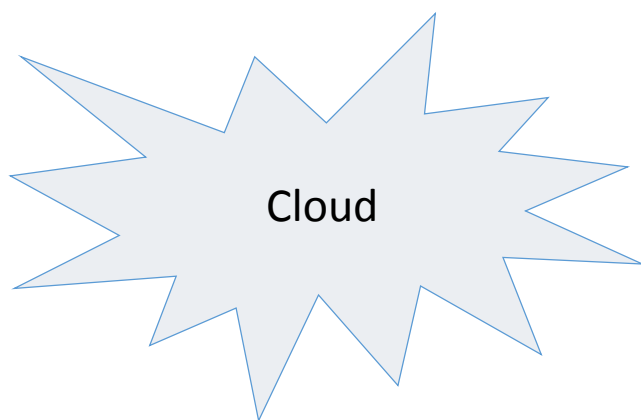
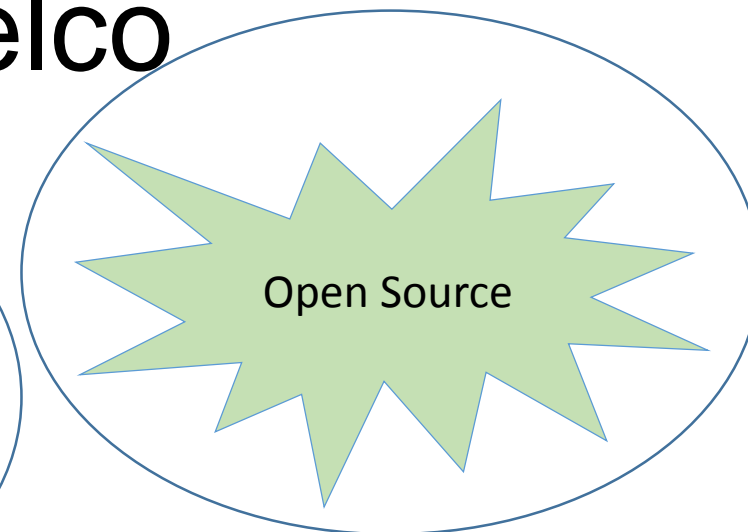
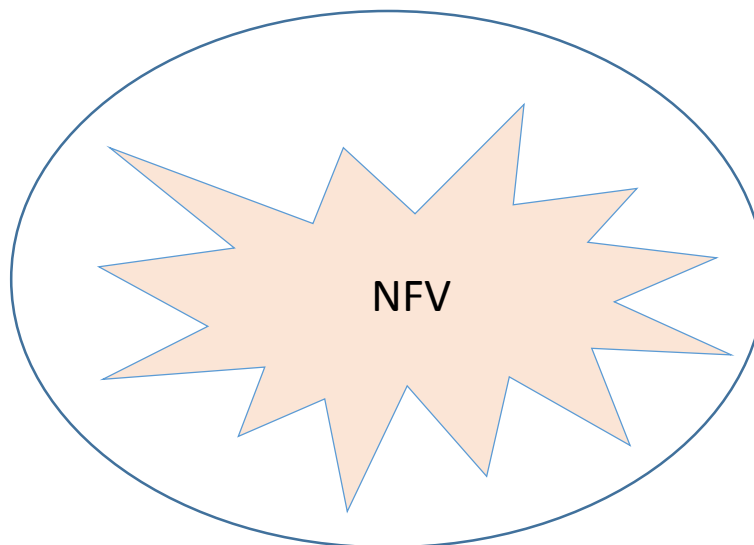
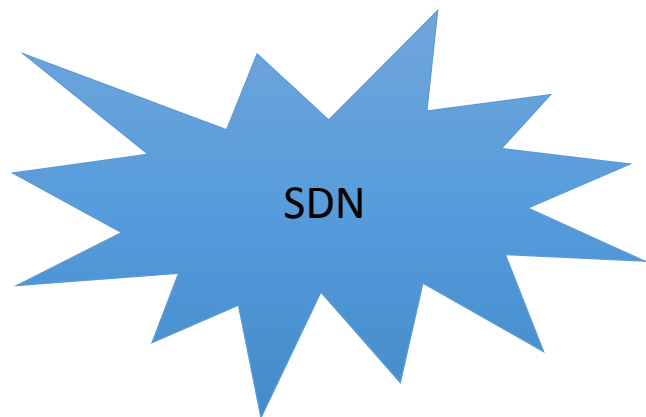
White Papers

**300**

Surveys



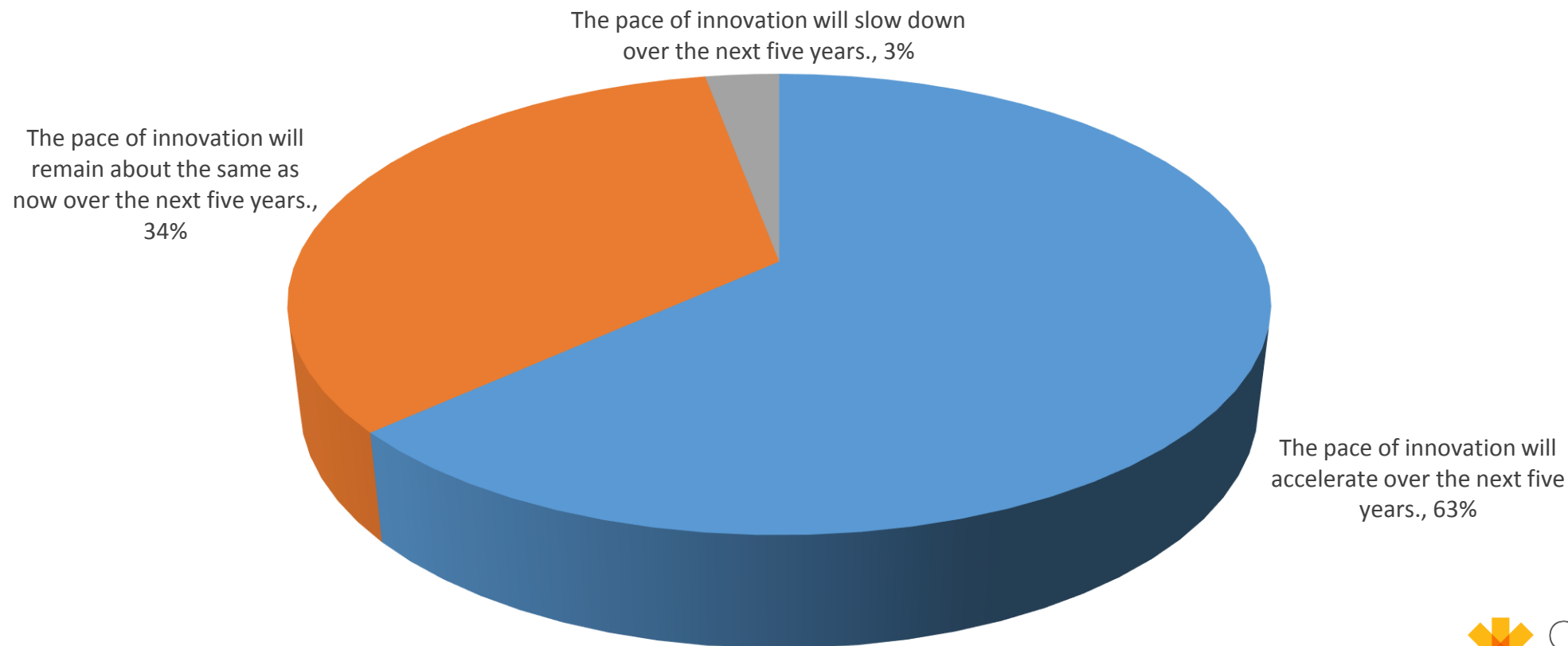
# Unprecedented change in telco



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# We asked telcos

What do you expect the telecom industry's pace of technology innovation to be over the next five years?



Source: Heavy Reading service provider survey, August/September 2014, n=73



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# We asked telcos

Which areas will have the biggest impact on the telecom industry over the next five years?

Virtualization	54%
Next-generation cloud services	52%
Internet of Things	49%
Security	42%
OTT service delivery	37%

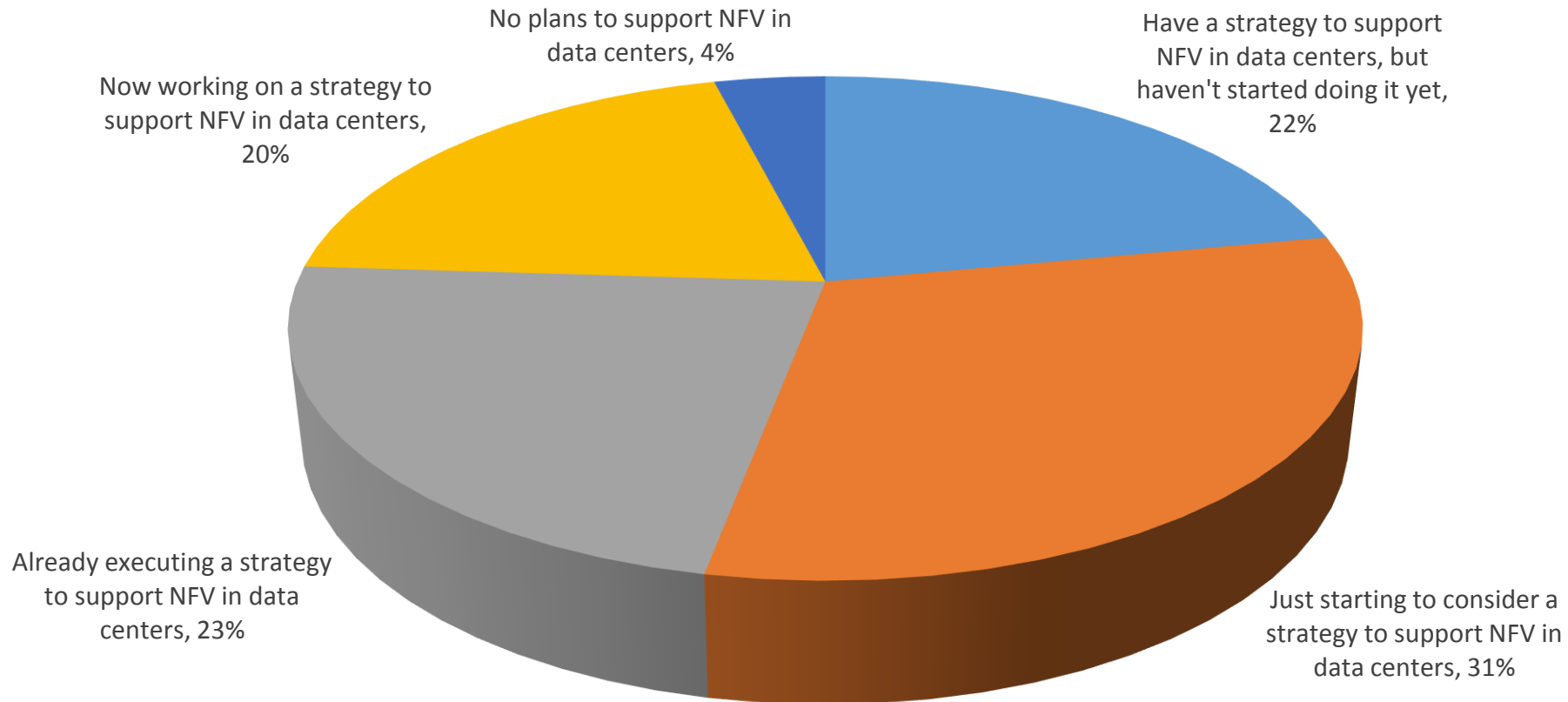
Source: Heavy Reading service provider survey, November 2014, n=144

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# We asked telcos

Which of the following statements BEST describes your company's plans to support NFV in your data center(s)?



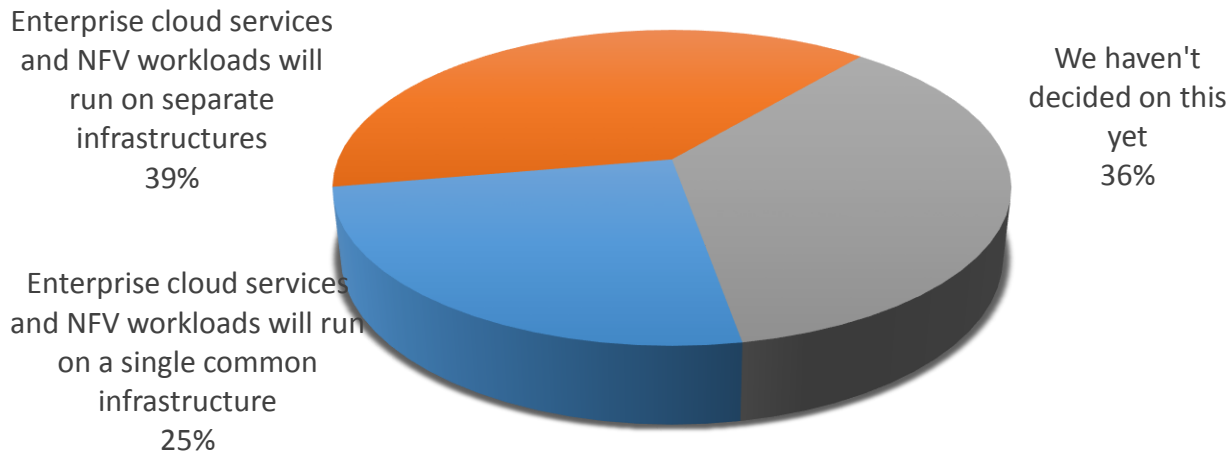
Source: Heavy Reading service provider survey, August/September 2014, n=73



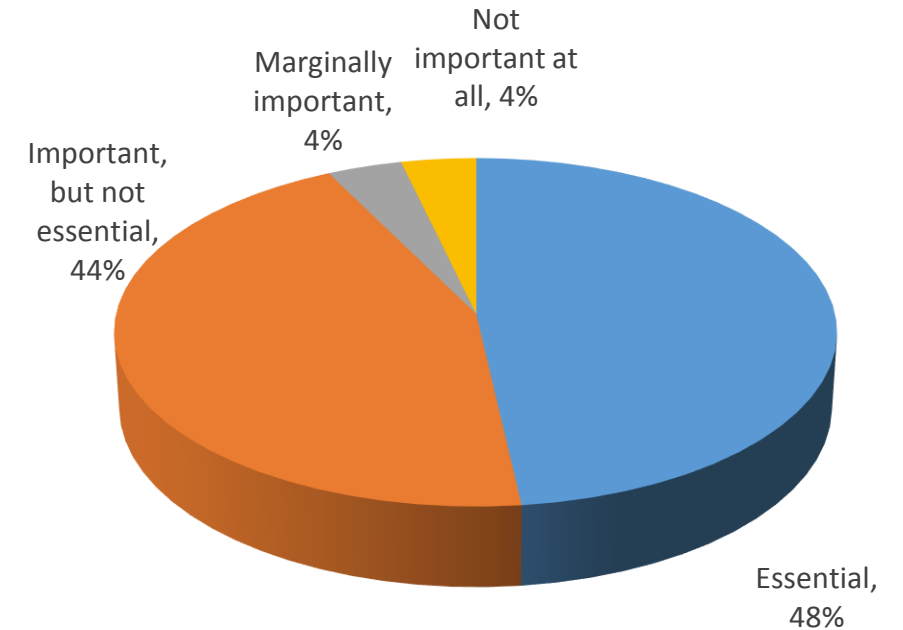
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# We asked telcos

Which of the following best reflects your company's plans regarding data center infrastructure for enterprise cloud services and NFV workloads



How important is it to be able to run IT and VNF workloads on the same cloud hardware platform?



Source: Heavy Reading service provider survey, August/September 2014, n=73

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# Criteria for NFV solutions and suppliers

	Solution	Supplier
#1	Elasticity	Has a clear vision & roadmap for NFV
#2	High performance	Systems integration capabilities
#3	Security	Network understanding & experience

# What open source projects are relevant for telcos?



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# Telcos have mixed emotions about open source



Rapid Innovation  
Higher Quality  
Interoperability  
Lower License Costs



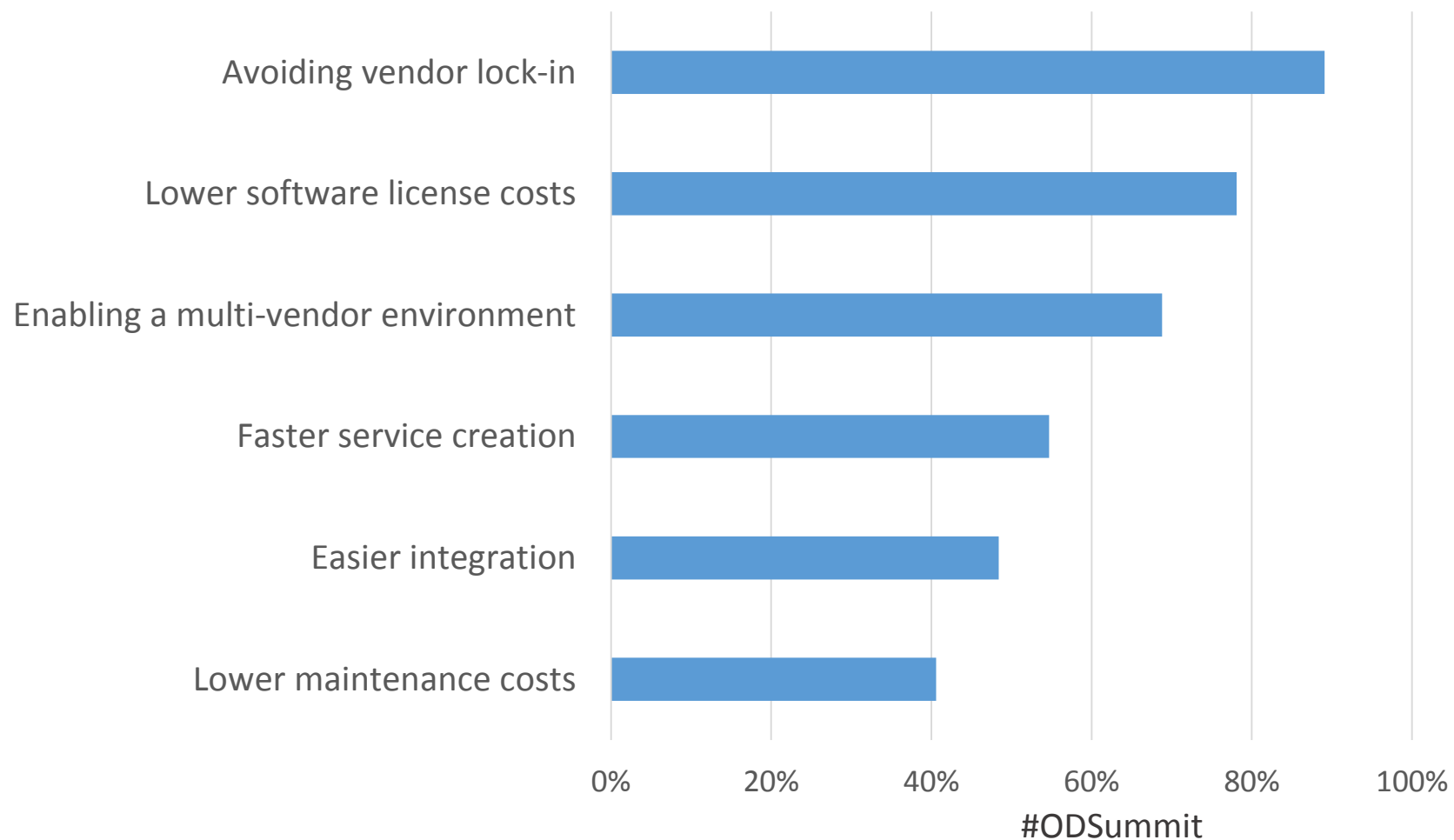
Integration  
Support  
Stability  
Security



New Skills  
New Models  
New Vendors  
New Processes

# We asked telcos

What are the main benefits to using open source solutions?

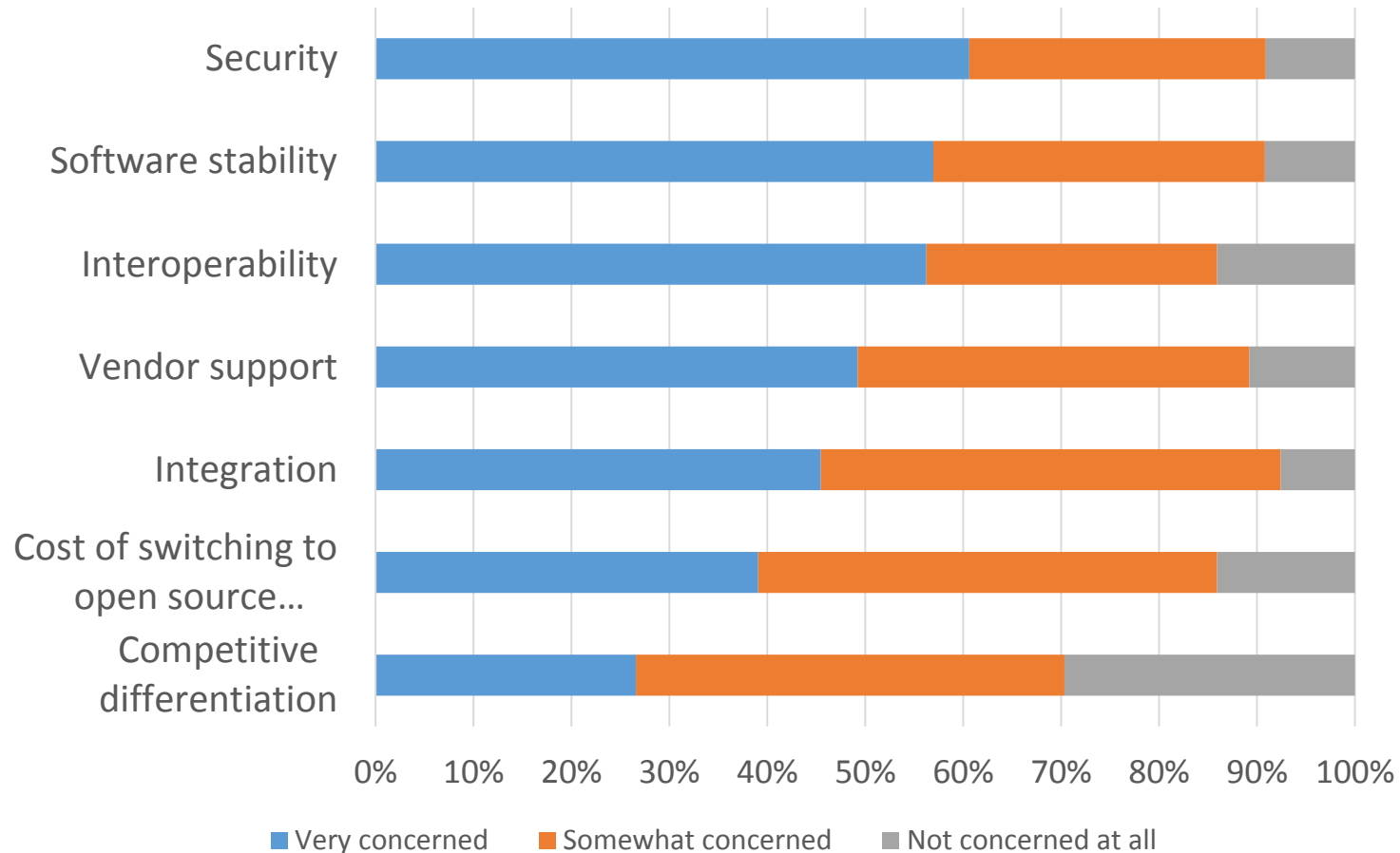


Source: Heavy Reading service provider survey, February 2015, n=65



# We asked telcos

What is your company's level of concern regarding each of the following as it relates to deployment of open source solutions?



Source: Heavy Reading service provider survey, February 2015, n=65

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# We asked telcos

What are the main obstacles to deploying open solutions?

- #1 Lack of skill set needed to operate**
- #2 Cost of running 2 networks during transition**
- #3 Inertia**
- #4 Unclear ROI**
- #5 Cost of purchasing new solutions**



# Criteria for open source solutions and suppliers

	Solution	Supplier
#1	Integration with existing data center infrastructure	Level of support
#2	Support for cloud management/ orchestration tools	Level of experience using open source
#3	Modularity	Integration partners

# Key Takeaways

- The telco market is transforming
- Change is a must
- Open source will play a role

***Tremendous opportunity for vendor community***





Thank You



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