

telesperience

Datasheet: From OSS transformation to business transformation

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Telesperience data sheet: From OSS transformation to business transformation

0 Summary

OSS transformation has been a much talked about phenomenon in telecoms for the last five years. In this research programme Telesperience sought to gain an accurate understanding of what OSS transformation means in practice to communications service providers (CSPs) worldwide, what their primary goals are, how they're going about transforming their OSS and the progress they've made.

In this datasheet we present key findings from the research conducted amongst 33 fixed, mobile and multi-service CSPs worldwide, including in-depth interviews with senior staff from both business and IT departments. CSPs can use the detailed findings presented in this paper to compare their own experience, strategies and progress to that of their peers. In the accompanying issues paper¹ we put this research into context, and describe key insights gained from talking to senior executives worldwide about their views on OSS transformation. Taken together, this research provides a unique snapshot of OSS issues from both the IT department's and the business's perspective.

What's clear when reviewing both the research findings presented here, as well as the detailed discussions Telesperience has had with senior staff in CSPs, is that there is no single definition of what an OSS transformation is or how to go about it. The very nature of OSS transformation, however, is rapidly evolving from one driven purely by operational issues to one where business and customer issues are at the forefront. This is part of a key trend towards business-IT alignment within CSPs, and reflects changes in the way CSPs are doing business and intend to do business in future.

Key messages and trends

- The definition of OSS transformation is highly idiosyncratic, and the term is becoming less resonant with the mainstream of CSPs which are not changing their OSS as part of a grand technical plan, but rather to meet customer and commercial goals. That is not to say that operational goals or outcomes are any less important, just that they are increasingly being aligned to, and derived from, business and customer goals
- The most common drivers to improve the OSS globally are the need to increase OSS efficiency and the requirement for OPEX reduction (see *Figure 3*). The IT experts who took part in this section of the study are obviously primarily concerned with meeting operational objectives; but readers should note that there is considerable variation between different country markets and types of service provider. For some CSPs customer and/or commercial goals are becoming increasingly prime, with operational goals being derived from these.

¹ A free copy of the accompanying issues paper, along with a range of other resources on this topic, can be found at the content download site at www.osstransformation.com

Likewise, operational staff are becoming far more aware of customer and commercial goals. We are therefore seeing a shift from IT-centric OSS transformation to business-driven OSS evolution. For some CSPs operational efficiency is a desirable IT objective; for others it is an intrinsic part of their business strategy since it is imperative for them to profitably address certain low-ARPU opportunities such as the “next billion” subscribers or M2M services

- 2011 is the year of OSS transformation – only one-fifth of CSPs had begun the process of overhauling their OSS by the end of 2008. However, 2009 saw another fifth begin this process, and they were joined by another quarter in 2010 as the transformation pace quickened. This year alone, another one-quarter of the market will begin transforming their OSS. In total, 70% of CSPs began this process between 2009 and 2011 – all of which are still working to improve their OSS infrastructure (see *Figure 4*)
- 85% of OSS experts say they are experiencing benefits, or soon expect to, as a result of optimising their OSS. Some experts say that benefits can be hard to quantify² (see *Figure 10*)
- The way CSPs are evolving their OSS is highly dependent on local market conditions and their business model. However, it most commonly involves consolidation (73%) and simplification (70%) (see *Figure 2*)
- The most common starting points for OSS change is network planning and management, followed by inventory (see *Figure 6*)
- There was an initial tranche of CSPs who overhauled their OSS. These innovators report being up to 75% through the change process. In contrast, mainstream CSPs have only just started the change process, and typically report being less than 25% through it. Some CSPs report that they now view OSS transformation as a continual and never-ending process – that is, an evolution (see Regional snapshot of OSS transformation below and *Figure 5*)
- 70% of CSPs have bought new software as part of their OSS transformation strategy; 55% have had software built for them by a third party; 48% have outsourced the management of at least part of their OSS stack. (see *Figure 7*)
- 82% pay for the necessary software and other costs from a dedicated budget, but most expect to have to fund at least part of the changes through savings. (see *Figure 8*) Many CSPs report the increasing influence of the business on IT budget dedicated to evolving the OSS, with some even receiving part of another department’s budget in order to carry out necessary work. This is part of a trend toward business-IT alignment aimed at delivering greater business value from OSS investment.

² Benefits cited by CSPs and how these are measured vary considerably. Certainly, ROI is being measured by a wide range of metrics which themselves are determined by the goals and culture of the individual CSP. Many use direct IT measures such as OPEX or CAPEX savings; other CSPs are focused on commercial issues and therefore measure, for example, their ability to rollout more products, more quickly and at lower cost, resulting in new revenue streams or more market share; others measure customer-related metrics such as how a better OSS leads to lower complaint levels or higher retention rates; and some use hybrid performance measures, such as fewer faults or faster fault resolution (operational benefits), decreased payout against SLAs (commercial benefits) and few customer complaints due to more effective fault resolution (customer benefits).

Regional snapshot of OSS transformation

Region	Mainstream adopts	Progress 2011	Business goals	Drivers	Sourcing strategy
North America	2009-2010	○○○○ ○◎◎◎ ◎➡	Operational Customer Financial	1. Improve OSS efficiency 2. Support new product rollout 3. Speed up key business processes	71% bought on-premises s/w; 71% got third-party to build s/w; 57% outsourced; 57% used SaaS
Europe	2010-2011	○○○○ ○○◎◎ ◎➡	Operational Financial Customer	1. OPEX reduction 2. OSS efficiency 3. Speed up key business processes	80% bought on-premises s/w; 80% got third-party to build s/w; 60% outsourced; 20% used SaaS
CALA	2011	○○○○ ○○○	Customer Competitive Operational	1= Speed up key business processes 1= Support new product rollout	67% bought on-premises s/w; 67% outsourced; none reported using SaaS
MEA	2010-11	○○○○ ○◎◎◎ ◎◎	Operational Financial Customer	1. OPEX reduction 2. Speed up key business processes 3. Improve OSS efficiency	25% bought on-premises s/w; 75% outsourced; none reported using SaaS
Asia	2008-2010	○○○○ ○◎◎◎ ◎➡	Operational Financial Competitive	1. OPEX reduction 2. Customer experience improvement 3= Improve OSS efficiency 3= Network technology change	88% bought on-premises s/w; 13% outsourced; 25% used SaaS

Key: ○ mainstream, typically have completed less than 25% ◎ innovators, have completed up to 75%
➡ evolutionaries, now regard as ongoing process

Source: Telesperience 2011



















1 Defining OSS transformation

1.1 How do experts define OSS transformation?

Very early on in this research programme it became apparent that although we frequently hear industry commentators talk about “OSS transformation”, in fact this means very different things to individual CSPs, and to different departments within those CSPs.

Some CSPs have a purely operational view of OSS transformation; but many others now blend this with a more customer- or commercially-focused view of what the term means. The IT and OSS experts in this research programme used a wide variety of working definitions, and we provide some examples of these in *Figure 1*.

Figure 1 Examples of how CSPs define OSS transformation

Example	Type
“Lifting the OSS infrastructure to a new level of performance & reducing cost of operation at same time.”	 
“Providing a consolidated, integrated, flexible IT system capable of delivering the performance required in the coming decade.”	
“Transformation toward an ‘operational platform’ that enables creating, fulfilling, and supporting the valued services customers deserve, with the profitable revenues shareholders demand.”	  
“Centralize the management of the customer lifecycle, such that application and data service provisioning, fulfilment, billing and CRM are available from a single point of entry.”	 
“Change OSS to make the systems quicker to develop on, easier to operate and simpler to support.”	
“A change in the OSS to support a major change in the way an operator does business, usually in order to accommodate significant change in market conditions.”	
“OSS transformation to address network and BSS convergence.”	
“Moving towards COTS-based OSS products rather than legacy ad-hoc/in-house products, in order to make OSS scalable, highly available (HA) and disaster-proof. A consolidated unified approach for operations and support.”	
“Providing a scalable framework for the future.”	
“To provide a strategic IT platform to deliver management of the network and systems in order to support faster time to market, more information and less duplication of effort and data sources.”	 
“For us it is about business transformation - the OSS naturally has to change to support that.”	
“We have an operational definition but also a business definition. The business definition comes first.”	 

Key: Operational  Commercial  Customer 

Source: Telesperience 2011

The definitions we received revealed an interesting shift in mindset from a purely operational focus to a focus that was far more holistic and encompassed both commercial and customer objectives. What was particularly noteworthy was that both of these latter sets of goals would be supported by operational improvements, but rather than being implied they have now become explicit. This reveals a very welcome evolution in thinking within CSPs, and shows that in some CSPs IT is ceasing to be a silo and is becoming more aligned to business goals.

1.2 Is “OSS transformation” the right term?

In fact, the very term “OSS transformation” has become one whose validity is now questioned by some experts. For example, some of the experts we spoke to pointed out that it isn’t a term they use or believe is helpful to explain what they are doing. “The term is too broad,” commented one expert “it’s hard to know where to start”. Which, in essence, sums up many of the challenges CSPs have faced when transforming their OSS. Another respondent was quite blunt when we asked about his definition: “We reject the term – it is meaningless to us,” he said. Readers should be clear in understanding that both of these experts recognised that the OSS needed to change; their rejection of the terminology was more about what they thought needed to happen. Further clues about why they rejected the term came from three other experts in our programme.

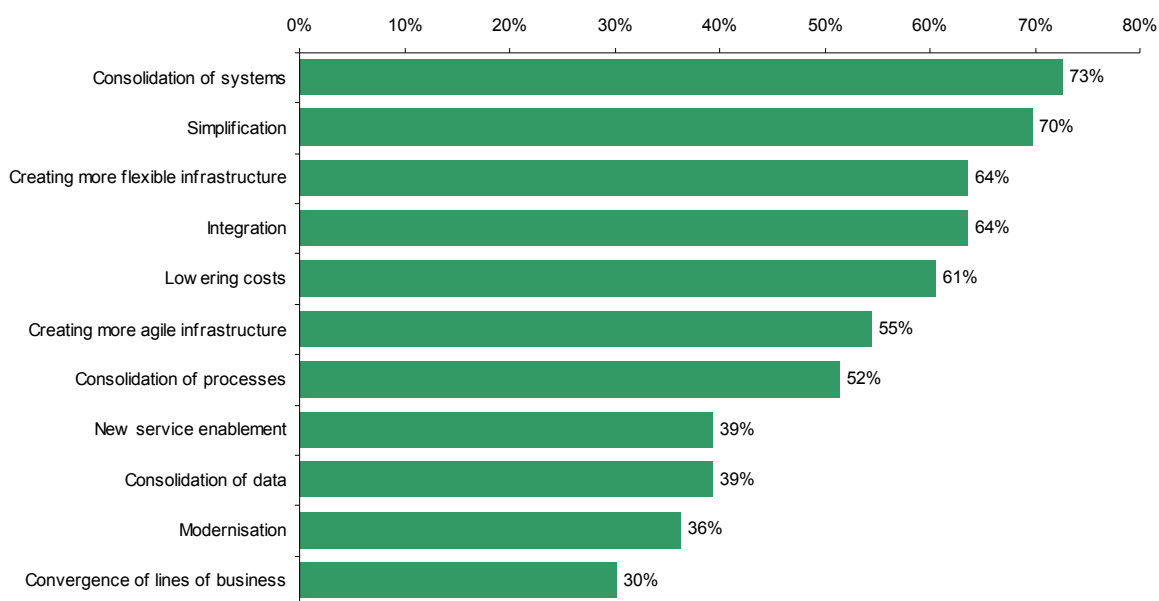
The first expert commented: “We have many definitions internally - it means many things to many people. This is why it is not so useful. Instead you need to understand the goals - the rest is the process.” He is making an important point: OSS transformation is a means to an ends, not the end in itself. Another expert emphasised this: “You also have to transform the BSS - the two now need to work together more closely. It’s a systems and business transformation, not just OSS.” His rejection of the term is due to the fact that broad as it is, “OSS transformation” does not sufficiently encompass or emphasise the right things. His vision is more business centric and wider than just systems, data and architecture. A third expert said: “[OSS transformation] sounds like a programme, with an end point. But we don’t think we can ‘transform’ our OSS, rather it’s about continual change to meet our business needs.” This expert is telling us that for him, it’s about evolution not revolution when it comes to the OSS, and that this is an ongoing process of improvement and realignment rather than a one-off programme where the OSS can be signed off as having been “transformed”.

1.3 What are the characteristics of an OSS transformation?

In order for us to establish a common definition of what OSS transformation involves, however, we asked the experts in our research programme what they thought the characteristics or operational goals of the OSS transformation process were.

As we can see from *Figure 2*, most experts see OSS transformation as involving consolidation (73%) and simplification (70%) of their current OSS infrastructure. Interestingly, the next most common characteristics of OSS transformation are to support a more flexible infrastructure (64%) – that is one that can accommodate change – and to integrate the OSS (64%) to remove silos and deliver automated processes. These characteristics are more commonly considered important than supporting new service enablement (39%), data consolidation (39%) or modernising the IT solution (36%). The most uncommon characteristic of OSS transformation is support for converged lines of business, which shows that for some CSPs integrating OSS by line of business is initially more important than integrating across lines of business.

Figure 2 **What does OSS transformation involve?**



Source: Telesperience 2011

This global picture hides some fascinating regional differences in terms of attitudes, however. These also give insight into the relative priorities of each region when reviewing their OSS.

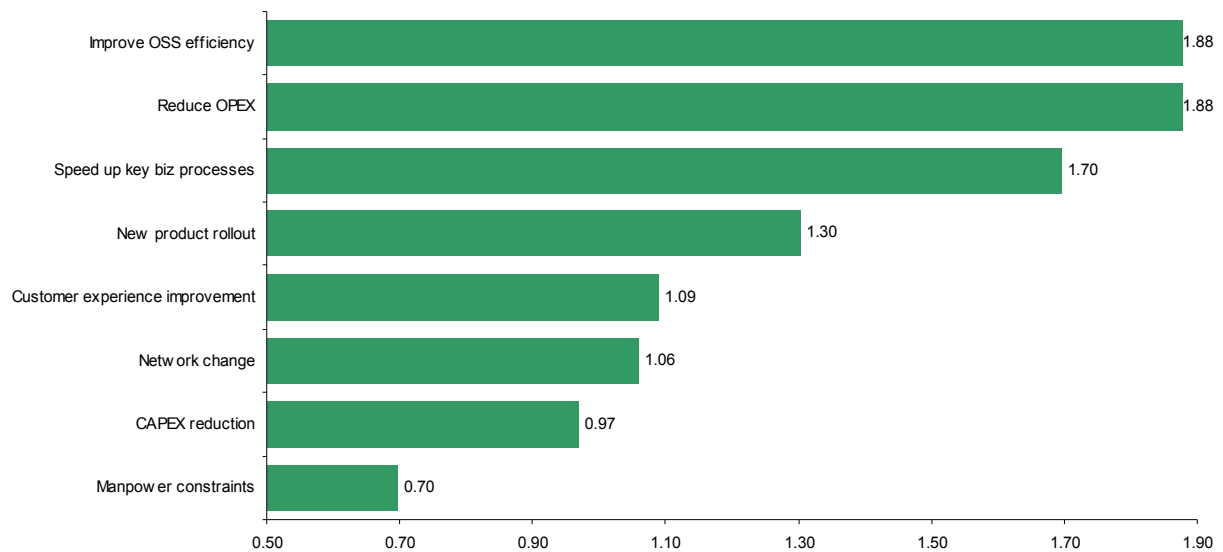
- **European CSPs** - are less likely to expect OSS transformation to deliver lower cost than the global average (50% versus 61%), modernisation (20% versus 36%) or support for converging lines of business (10% versus 30%). They are far more interested than the global average with using OSS transformation to create a more agile infrastructure (80% versus 55%), support new service enablement (70% versus 39%) and consolidate data (50% versus 39%).
- **North American CSPs** – are less likely to see OSS transformation as involving consolidation of systems than the global average (63% versus 73%), simplification (50% versus 70%), lowering costs (50% versus 61%), creating a more agile infrastructure (38% versus 55%) or new service enablement (13% versus 39%). They are more likely to see it as being about creating a more flexible infrastructure (75% versus 64%) and consolidating data (50% versus 39%).
- **CALA CSPs** – all the CALA respondents see convergence of lines of business as an important part of OSS transformation. They are less likely than the global average to see creating a flexible or agile infrastructure as being an important goal, or integration. None of the experts we interviewed from this area viewed lowering costs, consolidation of processes, new service enablement or modernisation as the most important parts of the transformation process.
- **MEA CSPs** – all the experts we spoke to in the Middle East and Africa region identified systems consolidation, simplification and lowering costs as important components of OSS transformation. They were more likely to see creating a more flexible infrastructure, integration, consolidation of processes, modernisation and convergence of lines of business as being important than the global average. They were, however, less likely to see new service enablement and consolidating data as important component parts.
- **Asian CSPs** – were far more likely to identify modernisation (63% versus 36%), new service enablement (50% versus 39%), lowering costs (88% versus 61%) and integration (75% versus 64%) as key parts of OSS transformation than the global average. They were less likely to see creating a more flexible infrastructure (50% versus 64%) or consolidation of data (25% versus 39%) as being important components.

2 Portrait of OSS transformation in 2011

2.1 The drivers of OSS transformation

According to our experts, the factors most commonly driving OSS transformation are the requirement to improve OSS efficiency and the need to reduce OPEX (see *Figure 3*). What these results show us is not what CSPs think they will gain from OSS transformation (for insight into this see *Figure 2*), but what is actually driving them to improve their OSS.

Figure 3 **What is driving OSS transformation?**



CSPs were asked to rate their top three drivers: where 3 is most important driver and 0 is unimportant.
Source: Telesperience 2011

It is interesting to note that OPEX reduction is seen as being of higher importance on average than CAPEX reduction – a recognition of the true lifetime and ongoing costs of OSS. Overall, both efficiency and process speed are rated more highly than new product rollout or support for new network technologies, which indicates that many CSPs are still focused on optimising current products, revenue streams and processes rather than future ones.

In addition to the drivers cited above, two other key drivers were noted by individual experts: harmonisation of OSS processes across their group, and compliance with government regulation. Compliance can sometimes be a driver for a CSP that has particularly aged or complex infrastructure, but is unlikely to be a sole driver of transformation. Telesperience should also like to note that harmonising processes is not the same as harmonising or standardising systems. We are aware that many of the largest CSPs are currently employing a global-local approach to OSS. Whereby some processes may be standardised, and certain systems determined centrally; but other systems decisions and business processes are decided upon locally. This is important because there are distinct regional needs, requirements, goals and priorities that need to be addressed. Thus locally tailored systems and processes may have great business value to the CSP.

The global results presented in *Figure 3* conceal certain regional differences and priorities.

- Manpower constraints are a much bigger issue in CALA (1.33), MEA (1.50) and Asia (1.00) than in North America (0.38) or Europe (0.20).
- The requirement for CAPEX reduction is highest in Asia (1.88) and lowest in North America (0.13).
- Network technology change as a driver is highest in Asia (2.13) and lowest in Europe (0.40).
- The region most concerned about using the OSS to drive customer experience improvements is Asia (2.25) and the region least concerned about this as a driver is Europe (0.30).
- The region most driven to improve their OSS to support new product rollout is CALA (2.67) and the region least driven by this is Europe (0.80).
- The need to speed up key business processes is an important driver for CALA (2.67) but less important in North America (1.25).
- OPEX reduction is particularly significant in MEA (2.75) but less significant as a driver for North America (0.75).
- The requirement to improve the efficiency of the OSS is particularly important in North America (2.13) and Asia (2.13), but less important in Europe (1.50).

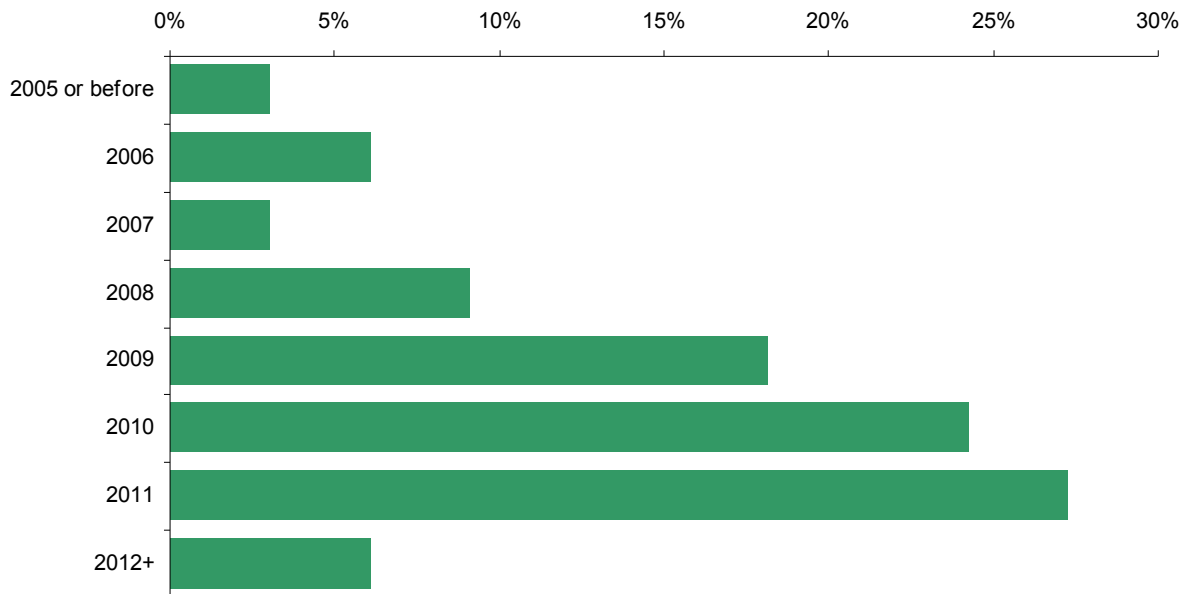
These results reveal the relative priorities of each region, *combined* with their maturity in terms of transforming their OSS and thus the current status of the OSS infrastructure in each region. It shows:

- **European** CSPs are still highly inward-looking and focused on cost control. The economic downturn has hit Europe severely and EU regulation is also affecting investment by accelerating the fall in revenues (eg by mandating lower roaming charges and MTRs) and because key decisions have not yet been made (eg with regards to Net Neutrality). The deadlock of rising data traffic and falling revenues from core services can be broken, however, by reducing the cost of supporting legacy OSS (via modernisation and simplification) and through innovation (enabled by a more agile OSS).
- **North American** CSPs are still concerned with OSS efficiency but are beginning to move towards new service rollout. Indications are that unlike most of Europe this region is taking positive steps forward despite the effects of the economic downturn and many CSPs here are now investing or preparing to invest in OSS processes in order to enable this.
- **CALA** is interested in speeding business processes and supporting the rollout of new products – although CSPs here are constrained by both CAPEX and manpower issues. CALA is generally an innovation-driven region, but this is often “frugal innovation” which delivers rapid and incremental results.
- **Asia** is the most advanced regional market overall, both in terms of what it is seeking to do and its thinking with regards the role of the OSS. Asian CSPs are grappling with the challenges from new network technologies (such as LTE) and by the requirement to improve the customer experience they offer as competition bites. Asia has some of the world’s most advanced telecoms markets and also some of the highest growth markets. However, even in the high-growth Asian markets there is a shift occurring to become more customer-centric and improve the customer experience. This is partly because customers are becoming more savvy and now expect more, but also because CSPs now wish to retain the highest ARPU customers.
- **The Middle East and Africa** region is still largely concerned with driving through efficiency and cost reduction in order to support growth. Some markets in this region are more advanced, more sophisticated and more customer-focused but overall subscriber acquisition continues to be the key driver. Inevitably, as in Asia, this market will reach a point whereby the focus flips from acquisition to retention. CSPs in this region have the opportunity to learn from other regions and prepare themselves for this shift in thinking.

2.2 OSS transformation progress

Observers like Telesperience may very well have been talking about the requirement to overhaul the OSS for a number of years, but after an initial phase when early adopters began the process of overhauling their OSS, there was a distinct gap during which many CSPs did relatively little and delayed overhauling their OSS for a number of years. As can be seen from *Figure 4*, the majority of CSPs report that they have only recently begun to tackle long-standing challenges in their OSS.

Figure 4 **When did CSPs begin transforming their OSS?**



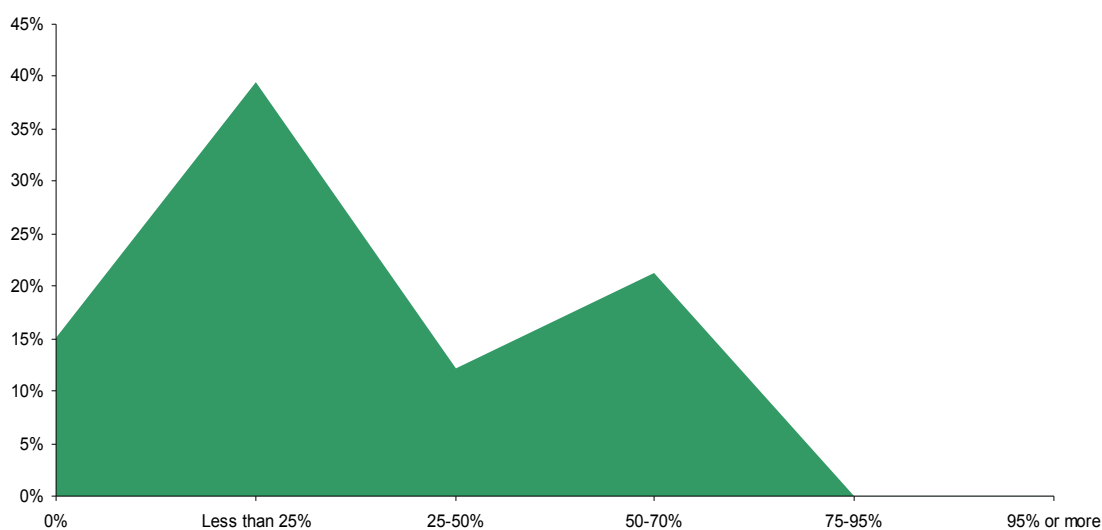
Source: Telesperience 2011

For the majority of CSPs, OSS transformation only got underway in earnest in 2009, with many stating that 2011 is their year to begin tackling these long-standing challenges. Moreover, the largest CSPs tend to have taken relatively longer to begin this process than mid-sized or smaller CSPs. Fifty-eight per cent of CSPs with over 20 million subscribers only started this process in 2010 or are beginning now in 2011.

This adoption curve demonstrates why Telesperience believes that we are in the middle of a major reassessment of our OSS stacks. We caution that established CSPs that have accumulated substantial legacy solutions and that haven't begun this process by 2012, risk rapidly falling behind the mainstream, as their rivals are now modernising, simplifying and consolidating their OSS to help them compete with other network operators, MVNOs and OTT players.

Given that most CSPs have only recently begun overhauling their OSS, it is unsurprising, that few report having completed their OSS transformation (*Figure 5*). In fact, some CSPs told us that they now view OSS transformation as a continual process or evolution rather than as a project. They no longer believe they can transform to an ideal and stable end state, but rather that their target state will continually shift to stay in line with their changing business requirement.

Figure 5 **How much progress have CSPs made in terms of transforming their OSS?**

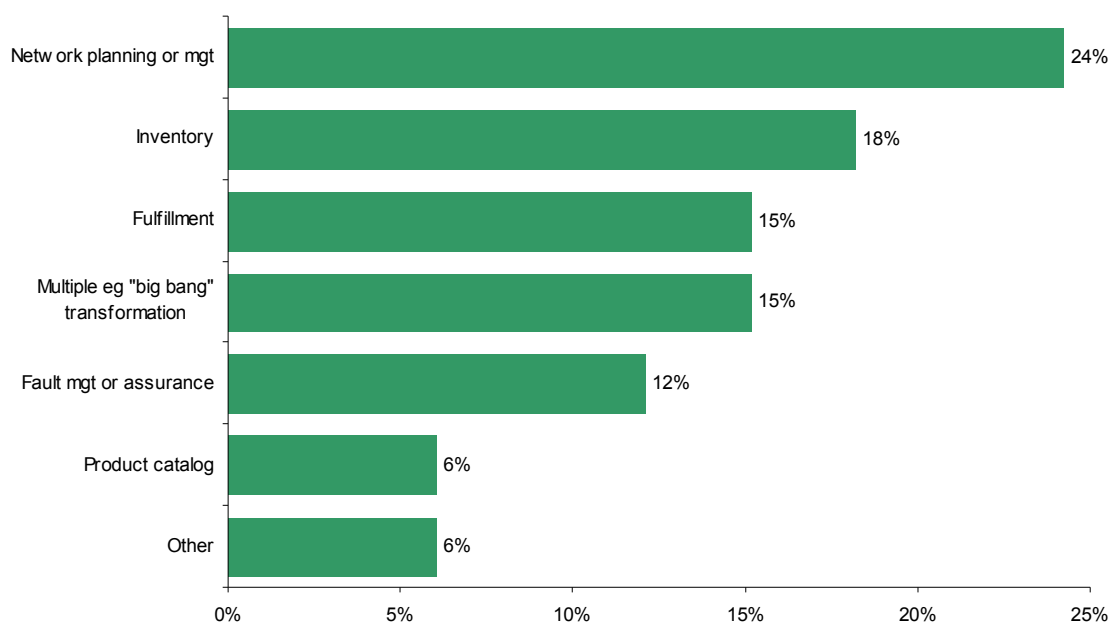


Source: Telesperience 2011

2.3 OSS transformation process

We asked CSPs where the starting point for their OSS transformation project was. The starting point varied, but the most common one was network planning or management, and the least common was product catalog. Telesperience does not believe there is a “right” starting point, as such, as this will depend on the legacy position, which part of the infrastructure is causing the most challenges in terms of supporting business goals, and what the business goals are. However, *Figure 6* shows that for around one-quarter of CSPs the biggest challenges they face are in network planning and management, and for around one-fifth their challenges are centred around inventory.

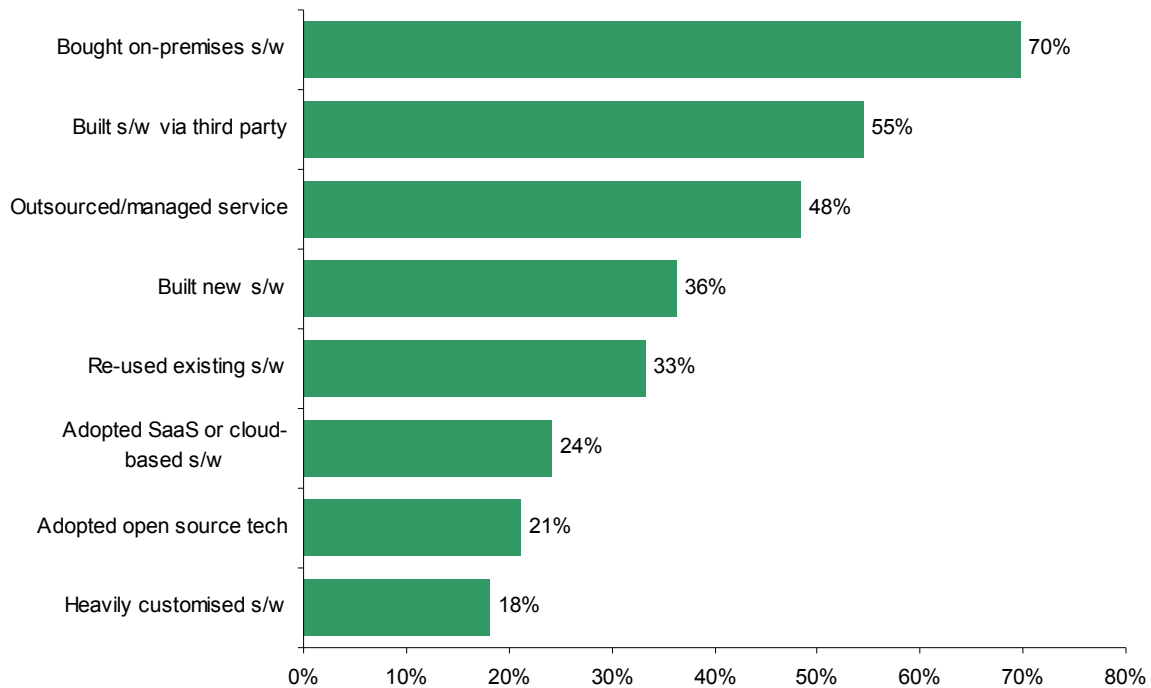
Figure 6 **Starting point for OSS transformation**



Source: Telesperience 2011

So how are CSPs sourcing the systems they are using to transform their OSS? OSS experts told us that they were using a wide variety of sourcing strategies. Seventy per cent had bought on-premises licensed software to help them modernise, simplify and transform their OSS. However, a significant number have built custom software themselves, or had it built for them by a third party (for example, by an SI). Around one-third of CSPs report they are re-using existing software; while just under half (48%) report they have begun to use some form of outsourcing strategy as part of this process (see Figure 7).

Figure 7 **Sourcing strategy for OSS transformation**

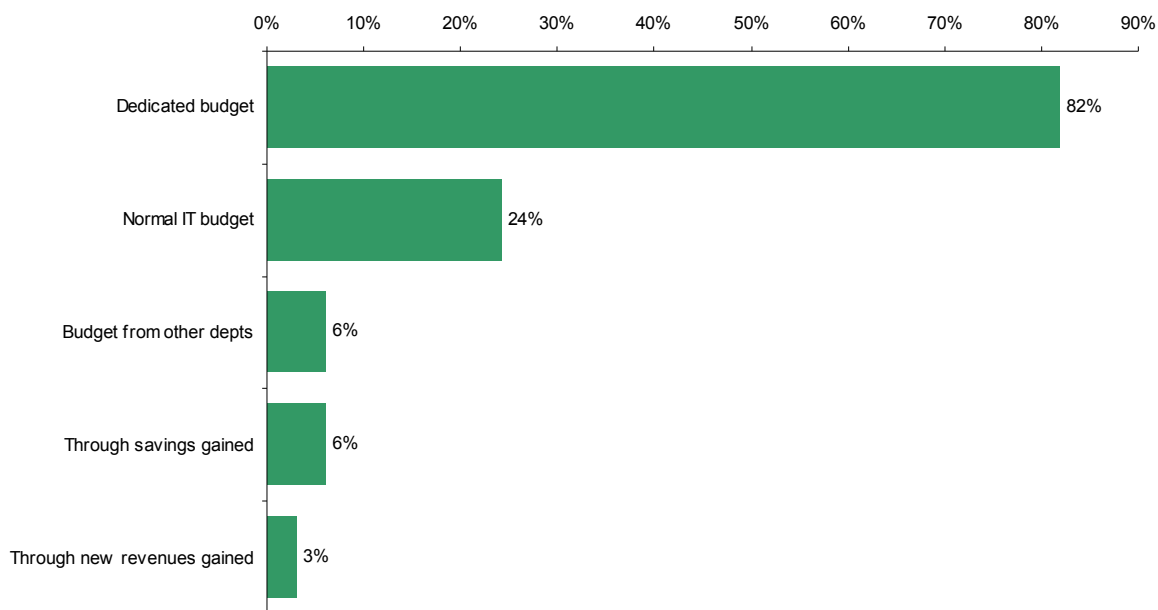


Source: Telesperience 2011

How do CSPs pay for new software investment and other costs associated with OSS transformation? The vast majority (82%) are given a dedicated budget to fund at least some of the extra software investment and other costs. Some, however, are expected to fund transformation either entirely or in part through savings of one kind or another. Although the initial phases may be fully funded, later phases may be expected to be partly funded through savings. Figure 8 shows how our OSS experts report funding their OSS transformations. It is important to remember when interpreting this chart that our experts were able to select more than one option from the different strategies listed (as some employ more than one strategy).

Experts also report that other departments are having an increasing influence upon IT budgets – either providing part of the budget required to make changes, or influencing the assignment of the budget.

Figure 8 Funding OSS transformation



Source: Telesperience 2011

3 Delivering ROI: goals and benefits

3.1 What are the business goals of OSS transformation?

In *Section 2* we discussed what OSS transformation is and whether the term still resonates with CSPs. We revealed that some CSPs have begun to question the use of the term, because they believe that OSS transformation is a process that supports the business, and as such the OSS will continually need to change in order to remain aligned to business goals.

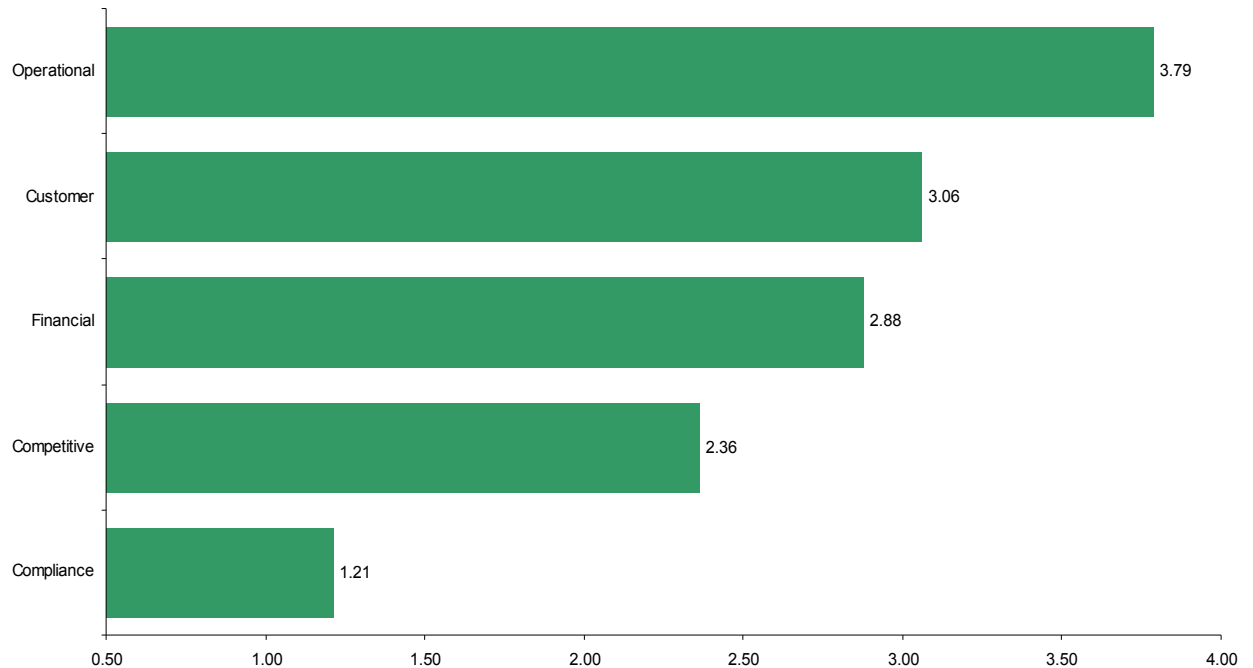
In order to discover which type of goals are important to CSPs within the context of their OSS transformation strategy, we asked OSS experts to rate five goals in order of importance. These were:

- **operational goals** – such as the requirement to increase the efficiency of operations, ensure scalability and so on
- **financial goals** – such as the need to reduce costs, improve profitability, create new revenue streams and increase customer spend
- **customer goals** – such as working to improve the customer experience, reduce customer complaints or increase customer loyalty
- **competitive goals** – such as helping differentiate the company against competitors, or place the company in a better competitive position
- **compliance goals** - to ensure compliance with new laws or regulations.

As can be seen in *Figure 9*, OSS experts rate operational goals as being their most important goals overall, but close behind these come customer goals. Readers should be aware that those questioned for this part of the research were from IT backgrounds, and thus are tasked with delivering against operational goals. Therefore there is perhaps sample bias towards operational goals. That said, it is extremely heartening that customer goals are identified as being so important today even by operational staff, and this backs up our view that OSS transformation is beginning to change into something that is focused as much on business and customer goals, as upon operational ones. In the conversations we've had with business and IT experts, many have explicitly mentioned that

operational goals need to be determined by business and customer goals, and that OSS should not be a silo, but an integral part of the vital business infrastructure of the CSP.

Figure 9 **Influence of key goals on OSS transformation strategies**



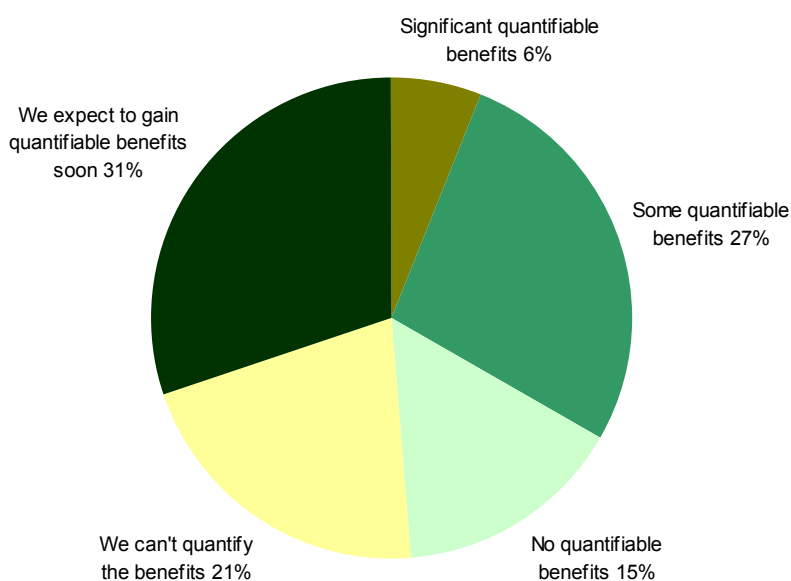
CSPs were asked to rate the relative importance of each of these five: where 5 is most important driver and 0 is unimportant.
Source: Telesperience 2011

3.2 Benefits of OSS transformation

Most OSS experts report that they have gained benefits from transforming their OSS – even though many are still at a relatively early stage of doing so. As shown in *Figure 10*:

- one-third (31%) report quantifiable benefits – six per cent describe these as “significant”
- one-fifth (21%) report benefits but aren’t able to quantify them yet
- one-third (31%) say they expect to gain quantifiable benefits soon
- only 15% report they have not yet seen any benefits, and this figure correlates with those at a really early stage or that are just poised to begin their OSS transformation
- 85% say they are gaining, or expect to soon gain, benefits from optimising their OSS. Some report, however, that it can be hard to quantify all the benefits. This reveals a lack of alignment between business and operational measures of performance, and this is the gap that many CSPs are now seeking to close.

Figure 10 **Benefits from OSS transformation**



Source: Telesperience 2011

Telesperience's view

Telesperience believes that a fundamental change is taking place in the OSS as staff move from having a purely operational focus and utility mindset to a more customer- and business-centric view. The term "OSS transformation" has become less germane and less resonant with CSPs, at the same time that ensuring the OSS is able to meet the needs of the business has increased in importance. Although this appears contradictory it is not. Today changes in the OSS are being made to meet business goals, rather than as part of some grand technical schema. Some OSS staff even question whether OSS change should in fact be viewed as a "transformation" – suggesting an end point and sudden major change – but rather as OSS evolution that is characterised by ongoing and continual adjustment to meet the changing needs of the business.

Telesperience does not believe there is a "right" way to transform your OSS: in the sense that CSPs have a choice of starting points, sourcing strategies and types of transformation. However, the good news is that for those CSPs that are able to optimise their OSS, and keep it aligned to the needs of the business, there are considerable operational, commercial and customer benefits to be gained.

Telesperience note that although it has taken some years for the mainstream majority to seriously attempt OSS transformation, this process is now underway. CSPs who delay much longer risk falling behind the pack and will struggle to remain relevant and able to compete with rivals. Powerful new business paradigms that CSPs can readily exploit are emerging, which will help them remain competitive. Unlocking the potential of these opportunities, however, starts in the OSS. The type of opportunities an individual CSP decides to exploit will determine the starting place and type of OSS change. CSPs with an OSS that cannot deliver what's required by their business, however, risk their entire future. And since the mainstream are now addressing their OSS challenges, a "wait and see" approach now carries high risk.

4 Information about the research programme

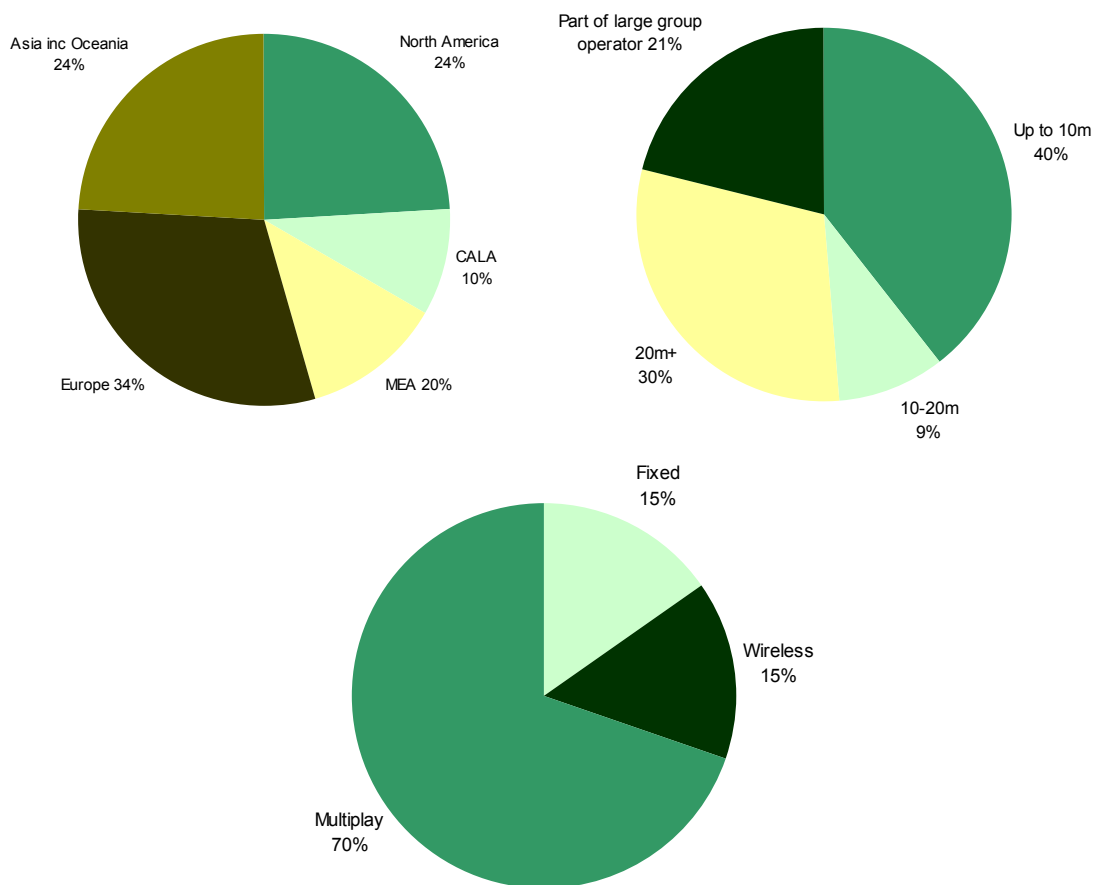
Scope of the research

This research programme uses a technique which is sometimes called “the expert panel” or “expert sample”. In other words we sought to locate a relatively small number of highly qualified experts who had the knowledge and experience to answer the questions we were researching, and who could represent the views of their peers. This research programme was focused solely on understanding the status and evolution of OSS transformation in CSPs worldwide and encompassed the views of fixed, mobile and multi-service operators. We spoke to both IT experts and senior business staff from 33 discrete CSPs. This provided a unique two-sided view of what was happening within CSPs, and how both business and IT goals were being met.

Demographics of the expert panel

In this programme we spoke to senior IT staff from 33 different CSPs worldwide. To provide more context and understanding, we also conducted in-depth interviews of both business and IT staff in 15 major CSPs worldwide. *Figure 11* provides a demographical breakdown of the CSPs we spoke to show regional spread, network technology and number of subscribers.

Figure 11 Demographics of respondents



Source: Telesperience 2011

5 Acknowledgements and further information

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About the author

Teresa Cottam is the Research Director and Founder of Telesperience. She has more than 17 years' industry experience and was previously an Associate Principal Analyst with UK-based telecoms consultancy Analysys Mason, covering the billing, CRM and service delivery sectors. Before that she was Research & Publications Director at Chorleywood Consulting, a specialist BSS/OSS consultancy which was acquired by Informa Telecoms & Media. Prior to this she was Managing Editor at industry analysts Ovum. Teresa has authored numerous influential reports and trends papers during her career, is a regular speaker at telecoms industry events, and is a judge at various industry awards including the GSMA awards 2011 (presented at MWC11). Teresa is passionate about helping CSPs optimise the value of their software, and strongly believes that software will play an increasingly important role in helping CSPs differentiate their offering, operate profitably, and attract & retain customers.

About Telesperience

Telesperience is a UK-based telecoms analyst firm focused on how software and data helps communications service providers improve their operational efficiency, commercial agility and the customer experience they deliver. We consider where the problems lie with legacy technology, and how companies can transition to provide a more positive telesperience for their customers and a more profitable business for themselves.

Telesperience's open source research programme relies on the goodwill of companies who fund research in order to make it free at the point of delivery. We endeavour to ensure that our research remains objective and independent: the steps we take to do this are outlined on our website, but the most significant is using experienced and respected analysts who have a track record within our industry. Report sponsors are always acknowledged, so readers are aware who is funding the research programme. For more information about Telesperience see www.telesperience.com, check out our blog at www.microsperience.com or visit our B2B wiki at www.wikisperience.com.

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