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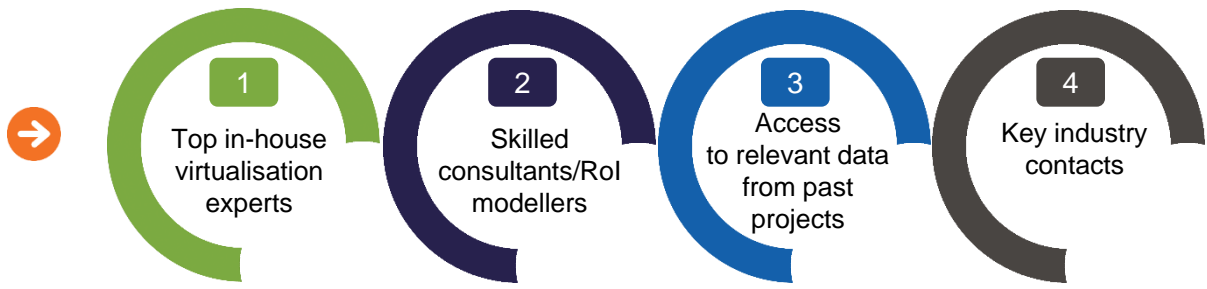
BUSINESS CASES IN VIRTUALISATION: INTRODUCING ANALYSYS MASON'S EXPERTISE

STELA BOKUN, MANAGER AND HEAD OF CUSTOM RESEARCH

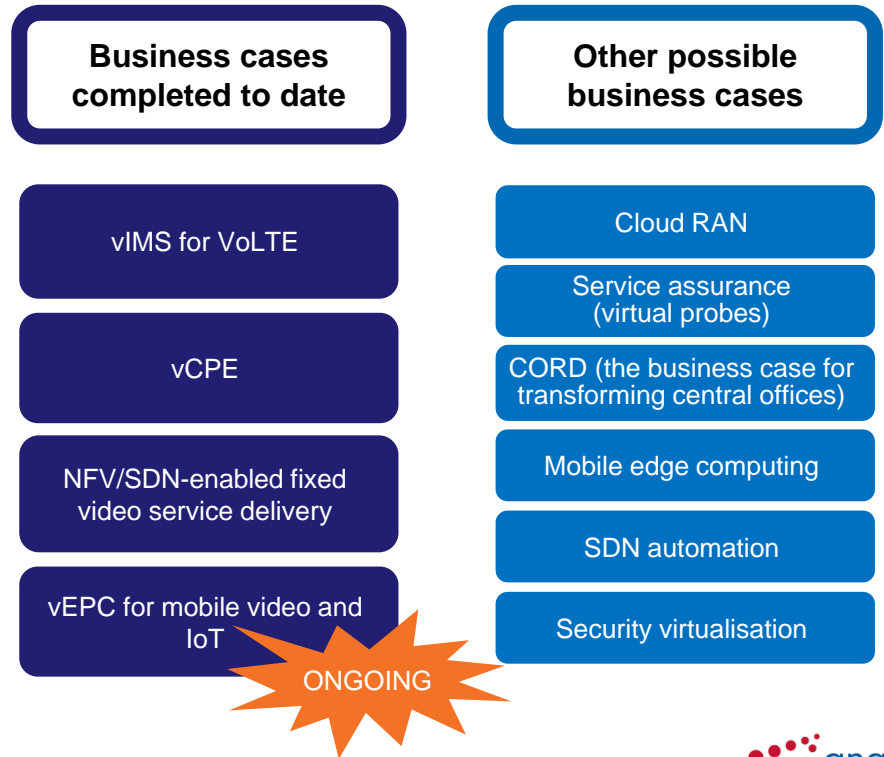


Analysys Mason is well-positioned to deliver high-quality virtualisation business cases in an efficient manner

Why is Analysys Mason able to build *high-quality* virtualisation business cases very *efficiently*?



OUR APPROACH



In addition to conducting interviews with industry stakeholders, we use the information from past NFV/SDN projects to inform our business cases

WE HAVE CARRIED OUT OVER 20 NFV/SDN-RELATED PROJECTS OVER THE PAST 2 YEARS

1
STRATEGIC ADVISORY

Nokia Telco Cloud Index that assesses the maturity of operator's telco cloud strategy (NFV/SDN)*

IT architecture review, virtualisation blueprint and TCO assessment for a large group operator

Impact of NFV/SDN on network design and planning

2
THOUGHT LEADERSHIP WHITE PAPER**



THE IMPACT OF TELCO CLOUD TRANSFORMATION AND HYBRID NETWORK MANagements ON CSPS' OPERATIONS



vCPE SERVICES BUSINESS CASE: POTENTIALLY BILLIONS OF US DOLLARS PAYBACK FOR FIXED CSPs



NEXT-GENERATION OSS IS CRITICAL TO DELIVERING SERVICE AGILITY IN NEW VIRTUALISED NETWORKS

3
CUSTOMISED FORECASTS

vCPE: global spending on related professional services

Software-controlled networking: global spending on NFV/SDN per product segment

Software-controlled networking: spending on NFV/SDN in Sub-Saharan Africa

*: YouTube link: <https://www.youtube.com/watch?v=9iU3gY843MU>

**.: Link to our published white papers <http://www.analysismason.com/White-Papers/>

vCPE case study: Analysys Mason has developed the industry's first detailed, publicly presented vCPE services business case

PROBLEM

- Amdocs sought to make compelling business cases for network virtualisation and needed a thought leadership whitepaper on specific NFV business cases, focusing on virtual customer premises equipment (vCPE), to coincide with its product launch and function as a sales tool.

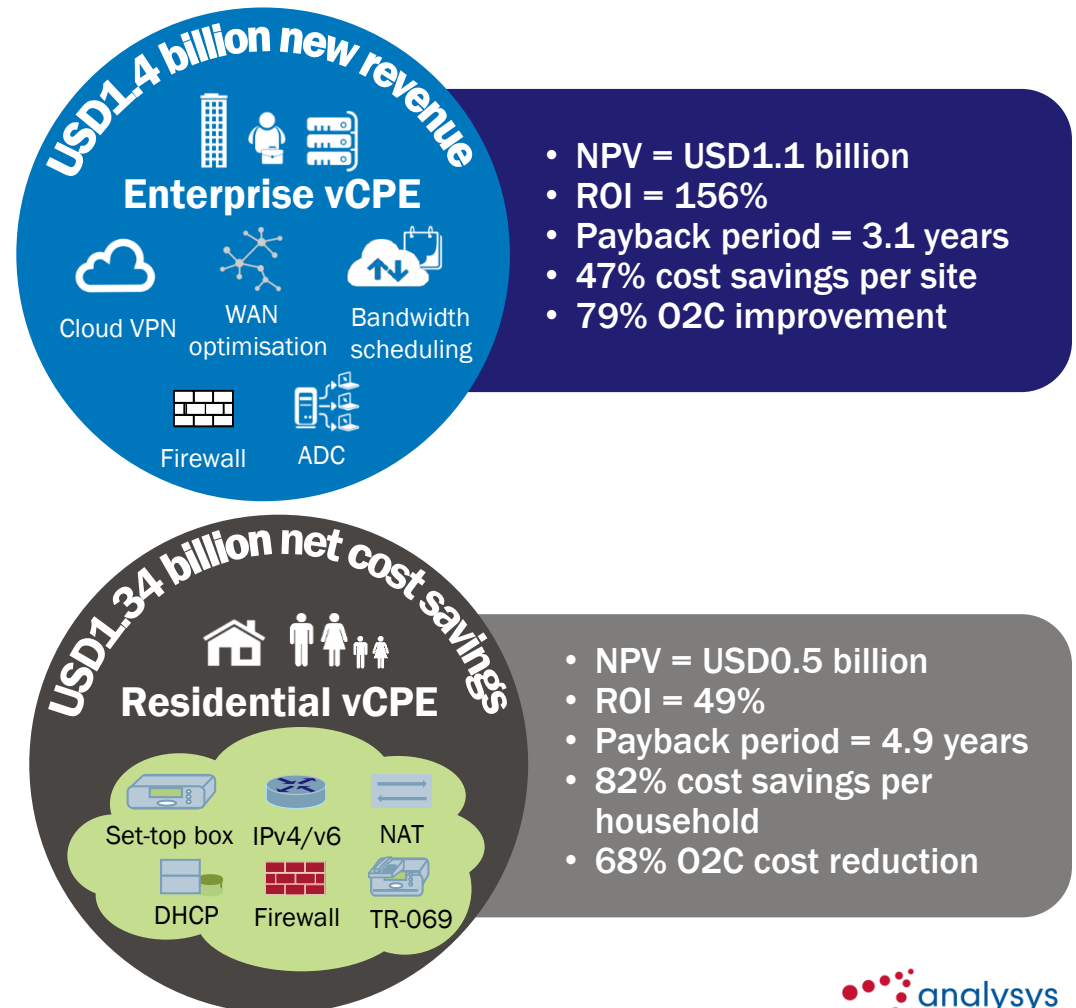
SOLUTION

- We developed separate business case and ROI models for both the enterprise and residential CPE service segments. Each model uses a composite communications service provider (CSP) profile underpinned by Analysys Mason's benchmarks, interviews with CSPs.
- We assessed the impact of vCPE on CSPs' main operational processes, namely CPE supply management (SM), order to cash (O2C) and trouble to resolve (T2R), over a 5-year period of customer migration to vCPE.

RESULT

- Main findings of the ROI models showed that vCPE can deliver notable revenue benefits for enterprise services and provides sizable cost savings for residential.
- Widespread attention from the industry and media, enhancing the reputation of Analysys Mason
- New business from Amdocs and CSPs.

SUMMARY OF ROI ANALYSES



vCPE is in the network virtualisation front seat thanks to the impact of this business case on the industry

FEEDBACK FROM INDUSTRY

We were doing a vCPE business case and need to reconsider now.

Tier 1 global vendor

We are impressed by the whitepaper you published last year. We are building our own business case and we'd like to get your help.

Incumbent EMEA network operator

We believe in this enterprise case. But can you help us understand what is the minimum needed for me to commercialise vCPE services?

Global Tier 1 vendors and operators

LINKS TO MEDIA COVERAGE OF OUR BUSINESS CASE

- www.telecomtv.com/articles/sdn-and-openflow-world-congress/vcpe-analyse-that-13016/
- <http://inform.tmforum.org/strategic-programs-2/agile-business-it/2016/05/vcpe-business-case-could-net-providers-more-than-1-billion/>
- www.youtube.com/watch?v=5Y6GdNL2hgU
- www.lightreading.com/cable/cable-business-services/why-nfv-makes-sense-for-cable-business-services/a/d-id/719261
- www.screenplaysmag.com/2015/11/17/service-agility-platform-drives-payback-on-cpe-virtualization/
- www.vanillaplus.com/2016/05/11/17994-virtualisation-business-cases-reveal-the-real-nfv-deal-for-csps/
- www.sdxcentral.com/articles/news/enterprise-vcpe-boasts-156-return-on-investment/2015/10/
- www.telecomasia.net/content/vcpe-business-case-potentially-billions-dollars-payback-fixed-csps

Subscription research from Analysys Mason

Clients across the breadth of TMT rely on our research and analysis to inform business-critical decisions.

Consumer services programme

- Mobile Services
- Mobile Devices
- Fixed Broadband Services
- Convergence Strategies
- Video Strategies

Network investment programmes

- Network Investment Strategies
- Network Traffic
- Spectrum

Telecoms software and networks programmes

- Software Forecast and Strategy
- Telecoms Software Market Shares

Network-focused

- Next-Generation Wireless Networks
- Service Delivery Platforms
- Service Fulfilment
- Service Assurance
- Network Orchestration
- Software-Controlled Networking

Customer-focused

- Digital Experience
- Customer Care
- Revenue Management
- Analytics



Digital economy programmes

- Digital Economy Strategies
- Future Comms

Enterprise and IoT programmes

- Large Enterprise Voice and Data Connectivity
- Large Enterprise Emerging Service Opportunities
- SME Strategies
- IoT and M2M Services
- IoT Platforms and Technology

Regional markets programmes

- Global Telecoms Forecasts
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports

DataHub

- Data covering +80 countries and +400 operators
- +1400 forecast and +250 historical metrics
- Regional results and worldwide totals
- Operator historical data
- Compare markets and operators
- Export to excel and save searches

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