Telco cloud: Why it hasn't delivered and what needs to change for 5G

STL PARTNERS

JUNIPER NETWORKS

Telco cloud was meant to change the way telcos operate and unlock key benefits

Ability to pick the best-of-breed solutions from multiple vendors without lock-in

Openness

Flexibility, visibility & control

Ubiquitous ability to monitor and optimise systems to respond to customer needs

Systems that work and scale as expected in an efficient and reliant way, as demands grow

Performance at scale

Agile service introduction

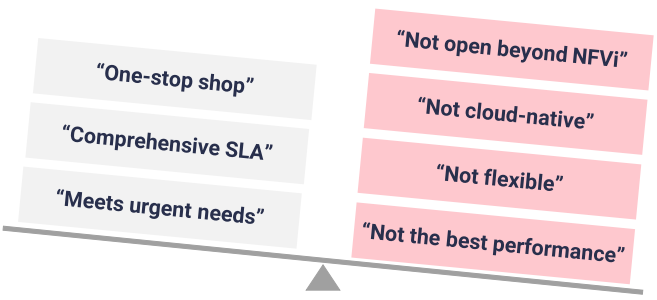
Innovate and develop faster, through automation, in a more customer-centric way

But telcos have struggled to do this due to flawed approaches to deployment

Function-first

"We need to virtualise XYZ"

Outcome: Vertically-integrated stack(s)

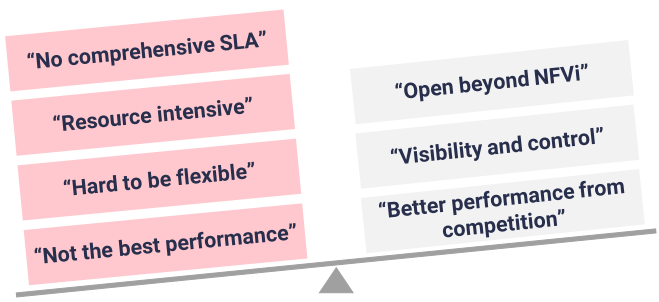


"Easier but we're now at a dead end…

Platform-first

"We want to build a cloud platform"

Outcome: Horizontally-integrated platforms



"Powerful but really difficult for us to do…

Multi-vendor telco cloud is the preferred goal but barriers need to be overcome

Need for internal transformation

- Leadership commitment to make change happen
- Acquiring the right skillsets and culture
- Defining and quantifying what success looks like

Need to foster collaboration & integration

- All elements, whether new or legacy, need to co-exist harmoniously
- Requires significant cross-industry collaboration

Need to balance standards & blueprints

- Standards bodies (e.g. ETSI) have driven efforts to develop standards and blueprints
- But still lagging behind realities and telco needs

Need for better management & orchestration capabilities

- Need MANO solutions to provide visibility and control over networks
- Required to remove need to deploy vertically-integrated stacks

Need for vendors to partner & pre-integrate

- Vendors need to help operators with their goals
- Joint propositions and pre-integrated solutions help those without resource for DIY platform-approach to achieve goal

The findings are based on primary research with over 20 operators globally, conducted by STL Partners, in partnership with Juniper Networks.

To find out more about these findings, please see our related thought leadership report here.

Source: STL Partners research programme, February 2020