



TELCO CLOUD INSIGHTS SERVICE: DRIVING KEY INSIGHTS FROM OUR DATASETS

Webinar: Questions and Answers

Telco Cloud Insights Service: Driving key insights from our datasets

This document outlines the questions and answers received from the STL Partners webinar **Telco Cloud Insights Service: Driving key insights from our datasets** hosted on Thursday 8th June 2023.

You can watch the recording of the session and access the slides using the [link here](#). If you have any questions not addressed in the webinar or this Q&A document, or want to hear more from our speakers, please contact:

- **Emma Buckland**, Principal Analyst, STL Partners, emma.buckland@stlpartners.com
- **David Martin**, Senior Analyst, STL Partners, david.martin@stlpartners.com

If you are not subscribed to our **Telco cloud insights'** datasets, you can find material on to these resources here:

- [Intro to the Telco Cloud Deployment Tracker](#)
- [Intro to the Open RAN ROI tool](#).

If you are a subscriber, please access them in your normal way or through our new **Tools' portal**.

1. **[In relation to your number of deployments in the telco cloud deployment tracker], how does the number for 2021 keep changing? It was 96, then 115, then 124, then 132. At what point do you declare your 2021 number final?**

This is a fair point in relation to what happens with historical year stats. We don't have formal cut-off points by which we stop making changes to historical number of deployments. At each quarterly update, we look for new deployments, actual or announced since the end of the previous quarter, and in doing so we may come across information that we have previously missed. Or we correct information that we may have previously mis-interpreted in relation to the launch date, for example.

In addition, and because this is a product with a quarterly update schedule and a regular focus on a specific theme (for instance SD-WAN in April 2023, 5G cores in July 2022), at each update we do a blanket search on all types of deployments (by scanning through specialised press releases) and for the topic-related research, we proactively scan specific deployments. So, the SD-WAN update in April 2023 allowed us to retrospectively adjust our number of SD-WAN deployments for historical years. By having a different theme every quarter (a type of deployment, a region, etc) we make sure that all aspects of the tracker are looked at in depth, not at every quarter, but on a periodical basis (ie once every year).

2. **We are finding the Telcos are struggling to find enterprise use-cases in NA and slow to roll. This is also impacting their knowledge acquisition in telco-cloud space. What do you have to say about it? Is this only in NA or other parts of the world as well? In your expert opinion what needs to happen for this market to grow faster?**

On 5G SA deployments which I think what this question was relating to, our data from the tracker indicates, as explained during the webinar, that launches have dragged on for longer than expected, not just in North America but in other parts of the world too. Slide 10 shows how European operators are expected to launch 5G SA in 2023, even though very few had by 31 March 2023 (those who had include Orange Spain, Vodafone Germany, Telenor (DNA) and Telia in Finland (DNA)) and most of these expected launches were announced well over 18 months ago. We have detailed what we understand to be the reason for operators to have delayed 5G SA roll-out and why some deployments (AT&T, Verizon) are within limited coverage only. Those reasons include a perceived lack of use cases on the enterprise side (as mentioned in the question), as well as:

- Lack of use cases on the consumer side, combined with limited device availability or device take-up and concern of cannibalisation of existing (broadband) revenue by SA-enabled connectivity services
- No demand for commercial use cases enabled by 5G SA including for edge computing or private networks for which earlier generations and other technologies (Wi-Fi) are deemed sufficient for now. This may change when more use cases involving autonomy come to the fore.
- Uncertainty about the role of the hyperscalers in the rollout of cloud-native services, including SA
- Organisational changes needed within telcos to fully exploit the capabilities of 5G SA.

We have developed those points and the reasons why operators should nonetheless stick with their 5G SA commitments in a recent report ([5G SA core: Why and how telcos should keep going](#)).

3. **How does an SI benefit from the tool? Any directions for System Integrators for enterprise use cases**

This question relates to the open RAN ROI tool which calculates the financial benefits of a given operator migrating part of their footprint to an open RAN architecture in preference to retaining a traditional RAN approach. SIs, and other vendors supplying a part of an open RAN solution, can tailor the tool to represent how the cost of open RAN based on their offering would compare to the equivalent cost in a traditional approach and calculate the financial benefit (positive or negative) on a 10-year period. The model also allows for specific integration costs to be taken into account and the user can define the timing and scale of those costs as an input to the model.

The model looks at open RAN in the context of the macro network. For any specific advice on open RAN in the context of enterprise deployment and private networks, please see our free resources on our Private networks hub [here](#) and contact our in-house experts if you want to discuss any issues further!

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