

FTTP campaign convoy e

Increasingly, full fibre will be key to the profitability of the comms channel, but most resellers are yet to connect with the reality that awaits them, when nothing less than FTTP will be fit for purpose. The 2025 network transition is not something resellers can relax into – it needs action now. So Comms Dealer’s panel of Fibre Unlocked experts sent a strong message to the channel, adding great emphasis to the task and opportunity at hand.

It is fair to say that the comms sector has capacity to speak up opportunities and tech ‘revolutions’ that somehow take a near eternity to materialise. Today there are copious references to full fibre and Digital Britain, but the difference is there is no time to waste and the catchphrase for ubiquitous FTTP has become ‘preparation is key and act now’. “In the context of 2025, just look at the number of services and applications that are copper based,” stated Paul Beacham, Senior Manager, Data Networking Portfolios, BT Wholesale. “They all need to be transitioned.

“And the corporate shift away from office-based operating models is spreading. Organisations that were office centric pre-Covid-19 will be supporting agile working beyond the pandemic. This is about the

services and applications that drive the requirement for the high bandwidth, high performance and stability aspects of fibre. Those are the dynamics that are coming into play and you can see that being prevalent across a number of sectors.”

Full fibre represents a brave new dawn for the comms channel, and FTTP’s greatest proponents, its providers, are not an exaggerating nexus of spin doctors with a radical message (revolutionary though it is). They publicise voluminous facts that should ring loud and clear today, while the copper network cliff edge also puts a bright spotlight on the full fibre imperative and potential challenges.

“2025 is absolutely realistic,” stated Andrew Wilson, Head of Wholesale, CityFibre. “We’ll play our part, but it does require a unified effort from the industry to



Paul Beacham

The 2025 impact and the stickiness of full fibre are reasons why the channel needs to get on board now

make sure we are doing the right things and building in the right places. One of the challenges in digging roads is wayleaves and the legalities of getting across highways and pavements. The DCMS needs to provide more support on resolving these issues. It is important that we all work together.”

Key foundation

As the copper network and associated services become things of the past in 2025, full fibre will be the channel’s raison d’être, underpinning

unprecedented business opportunity rather than an unwanted predicament dogged by insurmountable mountains to climb. “2025 was a huge challenge even before Covid-19,” commented Paul Smith, Head of Partners, TalkTalk Business. “We are lagging so far behind many other economies on FTTP, like Spain and South Korea. Even the 2033 timeline was highly ambitious. We need to apply continued pressure on the Government and infrastructure providers to deliver fibre to more and more cities. It means being courageous in accessing land and supporting street work commissions. We need the help of local authorities to support builders and move us forward as quickly as possible.”

It is true to say that legacy hang-ups exist in the building of the UK’s greatest ever



Andrew Wilson



Paul Smith

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Richard Thompson

network, and few resellers are currently flying the flag for connectivity reform. According to Richard Thompson, Managing Director, Wholesale, TalkTalk Business, this is no time for ICT providers to lock up their minds and throw away the key. On the contrary, it is time to formalise existing and future commitments to customers with a longer-term view that considers the UK's full fibre build which all agree is entering a period of acceleration. "I encourage resellers to start building processes around the deployment of full fibre," he said. "If you're used to just having broadband, fibre is different. If you're selling Ethernet, it's similar. Make sure fibre is embedded in your strategy and roadmaps."

Thompson's outlook on the full fibre network build is predicated on the need for more central control and visibility. So TalkTalk Business is drawing up, and then monitoring, a national full fibre coverage and procurement tool for partners. This is indicative of the firm's strong belief in acquiring control through data, which according to Thompson also requires resellers to studiously

analyse the ins and outs of their customer profiles in order to target appropriate solutions. "Resellers need an understanding of the intricacies of their existing base, the technology they use at an individual location level, and what the transition

This is no time for ICT providers to lock up their minds and throw away the key

path for those customers will be," he explained.

"These actions should be based on empirical data about bandwidth utilisation. This way resellers can create and be in control of a clear pathway rather than the market controlling how

quickly they need to move. Future proofing customer bases is super important. This will increase enterprise values as resellers are moving away from legacy onto next generation solutions. It's important to make that transition."

At all stages of the full fibre debate and revolution, the channel's commercial and long-term sustainability interests should be omnipotent and synonymous with fibre as underpinning future growth. Come 2025, all else will be yesterday, including legacy assets within a reseller's existing base. The answer must be to mobilise the channel and the most effective way to get more resellers into full fibre mode is education

and a change of outlook. "Resellers are hedging their bets on fibre," noted Jon Perkins, Strategy Director, Zen. "Fibre's challenging because it's an additional investment for the end user, a more expensive product. But when you apply a lifetime view there are abundant



Jon Perkins



Paul North

reasons to invest – inherently lower fault rates, reduced churn, and it's a case of future proofing. You enable users to do so much more, and if you position yourself early you'll reduce churn and keep more customers in the long term. That investment will pay back."

Knowing what you want for your business in the future requires a sensible and measured response now that fully considers the end game, emphasised Paul North, Head of Regional Sales, CityFibre. "It's an exciting time for the industry, and FTTP could be the last connection you sell," he stated. "If you don't get involved now a competitor will certainly eat your lunch."

"You can shape the build, shape the products and sell in a different way. We encourage our partners to bring opportunities and say this is where we'd like to go next. It's an exciting time for the channel and the biggest change in broadband since 21CN. There's never been a better time to focus on regional and local areas for business."

It is clear that the copper network has had its day, and is badly in need of a

fibre-based shake-up. What matters is rationalising and presenting strong arguments for resellers to change over the next five years. This is all the more urgent given the scale of the task and the high price of inaction. And North's sign posting of a local focus could be a reseller's trump card.

"It has been mentioned many times, but the trust that exists between resellers and their end users, the billing relationship and service integration delivered, means that resellers have that all important contact and relationship," commented Perkins. "Our focus is all about making it as easy as possible for resellers to perform that bridge role – take the product that we carry across the network and deliver it to the end user."

"It becomes much more focused when you follow the Openreach plan. Its ultrafast pivot as WLR is removed from sale will force us to think far more geographically. That is the kind of conversation we are having with partners, about how we can target specific areas and customers on their base by providing context."

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The UK's full fibre network will be more than the sum of its parts. It will be the manifestation of an all-IP era. But as we have seen, the idea that replacing the copper network is top of most resellers' agenda is optimistic. There is a danger that, despite the clear light of day, many resellers will be outpaced by their competition, as well as the FTTP roll out, despite having a head start.

"There is a huge role for resellers to play," reiterated Smith. "FTTP by its nature is

UK," he added. "There are some alternative network providers doing brilliant work, such as B4RN in Cumbria, a community led project with approximately 4,000 users now, where local farmers are digging up their own land, without wayleave issues, putting in their ducting infrastructure. And a project called Fastershire in Shropshire and Gloucestershire is bringing full fibre to some of the most rural areas in these counties."

Come the great new dawn of widespread FTTP availability, for Perkins the

The most effective way to get more resellers into full fibre mode is education and a change of outlook

localised and that's where the channel is at its best. To be successful in this next phase resellers should keep business simple and focus on doing a few things brilliantly. FTTP is fundamentally different from the copper alternatives, and there is an education piece to ensure we are consistent in our messaging."

To resellers for whom the facts so far are not persuasive enough, perhaps the actions of local full fibre protagonists offer an incentive. "There are circa 30 regionalised independent fibre builders at this point, and they have an opportunity to zig while the world zags and minimise any geographical divide that could pop out of the back of pure investment cases," commented Smith. "They have that local focus and can do things differently. Competition is rife on that front which is great."

Week in, week out, North sees more and more alternative network providers getting involved. "Up and down the country there are a variety of full fibre providers focused on pockets of the

crux of the matter is about adoption and the levers that the Government can pull together. "There needs to be some innovation from Openreach and some of the bigger suppliers around the commercials that will enable adoption," he said. "Then it is all about utility for customers and proving the case for fibre and why end users need to make that transition. The Government can lead by example. With innovation around commercials and delivering utility I'm confident that we can all deliver against expectations and keep up with the rest of Europe and other parts of the world."

The overwhelming message to the channel is to seize this chance to forge Digital Britain and that resellers are by their very nature best positioned to blaze a transformation trail. "This is a disruptive play, a migration, moving from one technology to another, so having an existing customer base gives resellers a head start," enthused Wilson. "But that does not protect you. Early adopters on the front foot are going to win out." ■

Understanding the 5G perspective: Gavin Jones, Channel Sales Director, BT Wholesale

DURING the Insight Session Jones, who led BT Wholesale's mobile team for six years, said 5G is accelerating fast, citing advances made by EE which is active in 112 towns and cities across the UK, Vodafone is close with O2 and Three also in the mix. He said the average speed of the EE network is 125 megabits and noted peaks between .8 Mbps to 1 Gb in certain areas. What needs to develop is latency which sits at around 25 milliseconds.

"It is key to remember that 5G is a moniker," he said. "There are three 5G categories: Enhanced mobile broadband; massive machine type comms and IoT; and ultra low latency (what works in five milliseconds). All operators have much network transformation to do over the next three to four years to enhance these."

Jones noted use cases for FWA which is easy to install and delivers fast speeds,



Gavin Jones

especially in urban areas. "The use cases we should look at instead of full fibre are in rural areas," he added. "You've still got to build towers and masts and some of the long distance spectrum isn't being auctioned off until next year. Looking towards 2025 you may envisage a utopia of choices – satellite dish, 5G etc – but they are

always going to complement and sit alongside full fibre."

Jones also noted some 5G limitations around high order spectrum that doesn't travel very fast, making it hard to use in cities. "5G will complement fibre," he said. "Fibre is here in perpetuity and we'll see a blend of mixed estates." ■

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2025 is a massive challenge, so other technologies have a role to play. It comes back to the combination of services that can be provided.

Paul Beacham, Senior Manager, Data Networking Portfolios, BT Wholesale

Home working is a reality and a huge opportunity for the channel. People need reliable and secure congestion free connectivity. Fibre delivers a much more robust experience and is the right solution to take the economy forward.

Richard Thompson, Managing Director, Wholesale, TalkTalk Business

If we overbuild in certain areas then we are not going to get that reach across all areas of the UK. We're working closely with DCMS to make sure we are all clear on where we are going and how we are doing it.

Andrew Wilson, Head of Wholesale, CityFibre

We shouldn't underplay 4G. LTE in particular gets to 60-70 megabits per second which is in excess of what FTTC customers get today. So just looking at 5G over simplifies things. You can bring in 4G, and it's in our roadmap to look at how we bring the two products together as part of a back-up solution.

Jon Perkins, Strategy Director, Zen

Corporate flexibility is the new mantra and work-ready homes are going to be a big focus for the future. Employers are starting to realise that unless they provide people with flexibility they won't attract talent. Use of cloud in the all-IP world will make fibre super important for productivity.

Gavin Jones, Channel Sales Director, BT Wholesale

How we make the coverage and the roll out visible to resellers is key. Local knowledge is a real advantage with FTTP as there is that regional sell.

Paul Beacham, Senior Manager, Data Networking Portfolios, BT Wholesale