

Competitive Update:	<b>MultiService Forum Announces Plans for Smaller, More Frequent Interoperability Tests and New Services Working Group</b>
Report Date:	March 19, 2009
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Market:	Carrier Infrastructure

## Standard View

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### Summary

#### Event Summary

March 17, 2009 -- The MultiService Forum (MSF) announced its new 2009 initiatives. Emphasis now shifts to the implementation of standards in the core network, notably 3GPP's Evolved Packet System and mobile broadband access technologies such as LTE. The Forum also launched a carrier-led Services Working Group to provide service descriptions and use cases for NGN operators. Most radical of all was a decision to supplement their biennial GMI with smaller events to address areas such as IPTV and LTE/EPS.

#### Analytical Summary

- **Current Perspective:** Positive on the MultiService Forum's updated 2009 agenda, because it addresses the next round of contributions that mobile operators and service providers need to accelerate the deployment of next-generation infrastructures and services. The new emphasis for the forum builds on its successful GMI 2006/GMI 2008 interoperability events to offer operators guidance in defining new next-generation services (Services Working Group [SWG]) and addressing access technologies such as LTE. With the pace of technologies such as the EPS, IPTV, and LTE, the Forum plans to conduct smaller, more frequent interoperability testing events to aid vendors and service providers with more timely verification and validation milestones. The newly established partnership with the Alliance for Telecommunications Solutions (ATIS) to validate its IPTV standards is also significant.
- **Vendor Importance:** High to the MSF, because it needs to provide meaningful and timely support for its vendor and service provider membership. Although its earlier interoperability events and standards contributions should not be overlooked, its membership must meet continuing challenges in rolling out the true next-generation architecture to meet demanding current, and future, market expectations. The MSF's two-year cycle met its objectives while the industry was in the planning and evaluation stages; now, it must provide more pragmatic support to facilitate the adoption of multiple technologies. The ability to provide the all-encompassing interoperability event (GMI 2010) is necessary, but smaller, incremental events focused on specific technologies will help propel new applications and solutions.
- **Market Impact:** Moderate on the mobile backhaul and core network markets, because continuous refinement and real world adjustments to the MSF's priorities are to be expected. Now that the standards have moved beyond the high level and into the implementation and trial phases, a more hands-on specific agenda is what the MSF needs to "ready" the industry for GMI 2010 and to prepare for real implementations. The timing of the new agenda comes as vendors are readying their initial next-generation solutions to meet early implementation of 3GPP's Evolved Packet System, as well as refinements to the initial round of new services that will be possible given a superior service delivery framework.

### Positives and Concerns

#### Competitive Positives

- The 2009 agenda refines the MSF's goals to address the progress needed for the next two years in front of GMI 2010. Now that much of the planning and overarching standards and architectures are fairly well in-place, it is time for the MSF and others to drill down into the details and provide guidance and greater specificity to the vendor and service provider communities. The new agenda provides the framework for the MSF to offer help in

establishing incremental milestones that come together for a highly successful GMI 2010 event.

- Although the benefit and impact from GMI 2006 and GMI 2008 cannot be overstated, the Forum's plan to conduct smaller, more focused, and more frequent interoperability testing events will help service providers and vendors alike. The smaller events can provide interim proof points for specific features and implementations well in advance of a complete ecosystem level testing event. Testing more frequently can set the stage to make adjustments in service definitions and in vendor product roadmaps that can ultimately reduce time to market for an end-to-end solution, since the piece parts can be verified independently.
- The formation of the carrier-led Services Working Group (SWG) to provide market-led high-level service descriptions and use cases will help maximize value for NGN operators. With difficult economic as well as technical challenges, service providers and operators need to insure that the new next-generation architectures can indeed support the new services being planned. The new SWG will also help vendors by providing specific services validation input that can be used to refine their priorities and guide their investments.
- The newly established partnership with the Alliance of Telecommunications Solutions (ATIS) to help validate its ATIS IIF IPTV standards shows that the forum is coordinating with other industry groups to pull together a broader ecosystem that can be exploited by vendors and operators to meet the deployment challenges of sophisticated services, which can then be verified as meeting industry standards.
- The urgency of the MSF initiatives was reinforced by Verizon's statements regarding its intent to begin testing EPS and LTE in Q4 2009 and begin offering commercial LTE-based services starting in 2010. The rapid rollout of next-generation services further emphasizes the need to provide very focused, technology-specific interoperability testing throughout 2009.

### **Competitive Concerns**

- There are no competitive concerns for the MSF as such, because the organization is an industry alliance, it is not seeking to compete with other bodies, and its work and advice is shared openly with fixed and mobile operators, carrier infrastructure manufacturers, and other groups such as the Metro Ethernet Forum, the IP/MPLS Forum, and a host of others.
- Although an obvious next step, the MSF did not provide any guidance related to the smaller, more focused interoperability testing events. A broad brush roadmap would have provided additional details to help establish incremental steps that the industry would be able to take between today and GMI 2010.
- The specific role of the Services Working Group (SWG) to guide the communication and entertainment sectors remains vague and would have benefited from additional clarification.
- Although the MSF announced a partnership with the ATIS and stated in the press release its intent to work with other industry groups, it did not outline how the coordination would impact GMI 2010 or how the other organizations might participate in this year's MSF activities.

## **Recommended Actions**

### **Recommended Vendor Actions**

- The MSF should provide periodic updates on its 2009 initiatives and publish an up-coming schedule for the first of its smaller interoperability test events.
- The SWG should provide a roadmap for the services it intends to define, beyond the obvious IPTV, HIS, and VoD candidates. With the power and flexibility of the next-generation architectures, the group should show how IMS and non-IMS services can be supported to drive new service revenues.
- The MSF should consider making multiple joint press releases that emphasize the participation of other industry organizations in its programs. Especially important would be acknowledgement of the use of implementation agreements and guidelines that are sourced from other organizations. This would show that the multiple organizations are working in close cooperation, rather than each inventing their own specifications.

### **Recommended Competitor Actions**

- Although most industry forums are not direct competitors, there is a level of competition for vendor and service provider mindshare and resources. As such, each forum should focus on its primary objectives while leveraging the work performed by its peers to minimize overlap and redundancy.
- The MEF should highlight its recently approved “Carrier Ethernet for Mobile Backhaul Implementation Agreement,” or MEF 22. The MEF is an independent alliance that promotes interoperability and deployment of Ethernet. MEF 22 describes how to apply specifications and industry standards for supporting radio access network (RAN) backhaul, including migration to 3G and 4G networks. The MEF should insure that its Ethernet service definitions and recently defined mobile backhaul specifications can be leveraged by the MSF.
- The IP/MPLS forum, which launched its MPLS in Mobile Backhaul Initiative (MMBI) in October 2008, defining how MPLS can be used to backhaul traffic for mobile operators, should encourage its use by the MSF. The MMBI provides a specific framework and set of requirements for the use of MPLS in the mobile wireless access and aggregation networks across various RAN interfaces and technologies such as GSM, UMTS, HSPA, LTE, and mobile WiMAX.

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