

Fortune favours the brave in fibre but proceed with caution



DAVID ALLDRITT
HIGHNET

"There is plenty of opportunity to be found from PSTN switch-off and from the transition to full-fibre. However, there is no blueprint or 'one-size fits all' for resellers looking to adjust their portfolio or even to pivot their entire business model. Infrastructure build and/or network operation are big jumps for the average VAR, and although there are examples of it being done successfully, it does require new skills and significant investment. However, resellers have great opportunities to support their existing customers and to win new business in the role of a trusted guide on the digital transformation journey. We've seen coronavirus accelerate the demand for mobility and flexible working, driving businesses to cloud adoption. PSTN switch-off and full fibre are likewise catalysts for further digitalisation. Resellers who can position themselves with the expertise and access to products and services which support digitalisation will be the winners over the next 3-5 years."



JOHN IGOE
CITYFIBRE

"The full fibre rollout represents a huge opportunity for partners of all shapes to capitalise on the abundance of businesses who will be looking for improved connectivity to serve their ever-growing bandwidth demands and there are certainly considerable advantages to owning your own network. However, for all the benefits that come with the surge of new full fibre providers, creating far more choice and competition, unless you are of the requisite size and have sufficient volume of orders to share around, it can become difficult to establish strong supplier relationships with each of them, enabling you to benefit from their best levels of operational support and commercials. Therefore aggregators have never been so relevant - being able to take that pain away, using their extensive networks to recommend the right supplier for each individual situation as each carrier has their own benefits and deficiencies that must be managed."



TREVOR LOVELOCK
BT WHOLESALE

"With several big players already increasing investment in the space, and the potential for significant over-build in certain geographies, anyone contemplating building their own infrastructure should carefully consider the strategy against alternative opportunities for business growth. We've seen many new regional operators spring up in recent years, with considerable capital investment in the sector. So, with the right plan and backing, it is feasible for partners to consider - but it could be a high-risk strategy for them. There is still substantial value in reselling and orchestrating an increasingly diverse set of services for customers whose needs continue to evolve and increase as digital transformation across all industries increases in pace. Partners are well placed to leverage the investment others are making in technologies such as full fibre, for instance, so they can monetise the all-IP opportunities - partly generated by the WLR switch-off - without the need to invest in development themselves."

It is not too late for resellers to get involved with full fibre and with industry expertise, knowledgeable contacts and experience managing complex projects, a path exists for resellers to transition into carrier providers.

The Directors of 5G Communications had this in mind when they spun off a fibre unit, PCL Fibre, to capitalise on the planned fibre rollout.

Nathan Francis General Manager at PCL Fibre said: "Many resellers often wait for larger incumbents to provide new connectivity solutions and ultimately enjoy their wholesale offering. Instead of taking this traditional approach, 5G decided that it possessed the skillsets to exploit the growth of fibre and become a major contributor to the growth of fibre deployment in the UK."

"Many infrastructure providers move into selling IT solutions, however, there is really no reason not to do the reverse; become a 'Carrier Provider' if you want to advance from a reseller (VAR)."

However, the road from reseller to carrier provider is lined with challenges and outlays. Building and maintenance costs as well as a need for very specific expertise can be a drain on resources that needs a lengthy return on investment.

This begs the question - is the destination worth the turbulent flight it may take to get there. Therefore, we asked our host of industry experts if the full fibre rollout presents an opportunity for resellers to transform into end-to-end providers of telecommunication services, or if resellers would be better off as a guiding partner between business and larger incumbents.



PHILIP LEE
ITS

"One of the key opportunities the fibre rollout presents for resellers is being able to move away from reliance on the incumbent provider. The rollout has created a whole new generation of altnets that are specialists in full fibre. Our business models are built around fibre, and we are building pure fibre using the latest methods and technologies. There is no doubt that the fibre rollout is creating more business opportunities for resellers, as it gives them more choice, control, and agility. Having witnessed this step change, we have been quick to go a step further than traditional indirect models to enable 'end to end' by launching our Vantage scheme - partners come to us with a business case for us to build fibre in an area where they have identified demand, giving them an even greater degree of control, effectively owning the customer end to end."



MIKE KORKIDAKIS
WAVENET

"A plethora of statistics are available regarding the full fibre rollout and its positive impact on the economy. The rollout brings with it an abundance of benefits, and with the combination of connectivity and cloud computing, resellers - especially the ones operating their own networks - can easily move into the end-to-end telecommunication space. Bringing with them their experience of large networking projects opens up the ability to introduce end-to-end communication services for resellers, with the additional benefits of network monitoring as part of their offering resulting in seamless end-to-end stability. The greater freedom the rollout gives will open a whole new opportunity for resellers to offer competitive, future-proof solutions. The quality of services, stability and reputation already offered by carrier providers will make this the next logical transition for resellers."



MATTHEW WORBOYS
GAMMA

"The full fibre rollout is an exciting opportunity for the whole UK communications market. For resellers thinking of transforming into providers, the scope of success in this space can only be evident with significant long-term investments. Resellers should ask themselves how they will transition the voice services lost in the PSTN switch off, and whether they have the necessary resources to move into the provider space. Besides the initial capital outlay and maintenance and development costs, this transformation also requires extensive skillset and human capital. As existing providers keep on moving towards offering fully managed services of telephony, connectivity, IT and security, resellers can indirectly sell it all, pick and choose, or be in full control of it all. They can choose what parts of the jigsaw would be most beneficial to their business. Ultimately, the indirect model is certainly the most risk-averse approach, yet one still full of opportunities."



ALEX MAWSON
DIGITAL WHOLESALE
SOLUTIONS

"The transition to full fibre means that every customer needs to make a buying decision in the years ahead and this presents a unique opportunity for resellers to win business and build long-standing relationships with their customers. Compared to traditional WLR-based broadband, full fibre is easier to order, manage and upgrade, making it an attractive option for resellers, enabling them to deliver a customer's end-to-end requirements while maintaining control of their supply chain. With the ongoing fibre roll out and the shift to a connectivity-first communications strategy, resellers should now be expanding their portfolio with high-performing, ultra-reliable full fibre broadband which can be used as the foundation for additional services such as IP voice, UC&C, Cloud solutions and networking services, such as SD-WAN."



RAY O'CONNOR
INDIGO

"The UK government's commitment to a copper phase out by 2030 and the launch of its Project Gigabit now means FTTH is a very attractive form of access technology and will enhance the role of resellers addressing UK markets. Given the higher than ever penetration of FTTH across the UK, and the predicted explosion of the market to four times that by 2025, there is a huge opportunity for the reseller sector. Resellers, big and small, can offer a far broader reach of services to their clients - local and nationwide. A great example is that of traditional satellite TV retailers. Given the data capacities 'full fibre' adds, resellers can add value to their customers by offering full fibre rather than lesser performing access technology such as DSL or satellite"



ROAN PRATT
ENREACH UK

"Customers are increasingly looking to have all their UC requirements with one single supplier. As such, there are many options for customers on connectivity with FTTP, SOGEA and leased lines and more options to collaborate with Teams and Cloud. The two are very much intertwined and with these increasing options available for their business they are looking to their supplier to understand their requirements and provide the best solution. The opportunity in the reseller space is to be able to provide the best solution for the customer that is delivered right first time and the ongoing support for the customer is best in class. The rollout will only see demand and competition increase."

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Navigating leadership priorities

Colt Technology Services CEO Keri Gilder shares insights into how she is balancing the execution of leadership and strategy, digital transformation, workforce wellbeing, sustainability and broader industry challenges – all of which impact decision making.

It is clear that the need for strong leadership has perhaps never been more critical – and how leaders differentiate is largely determined by their priorities. “At the moment, employee wellbeing is my priority as a CEO,” stated Gilder. “You need a healthy workforce, mentally and physically, to have a healthy business. We’ve enabled over 60 mental health first aiders over the past year and we’re focused on supporting employees living with disabilities, such as neuro disabilities or dyslexia. We also launched a disability accessibility network. It’s vital that inclusivity and psychological safety exist for everyone to thrive in the culture you build.”

Cultivating partnerships in our industry is also vital. Without the technological ecosystem, true transformation won’t be possible. “Enterprise requirements are continuing to become more complex, and we need to join forces to deliver value that’s greater than the sum of our parts,” she added. “Carriers, data centre operators, cloud service providers, network operators and software developers need to co-build, co-develop and co-create.”

Gilder says that hybrid working means she has a higher responsibility to



Keri Gilder

Authentic leadership means putting the employee at the centre of the business. This is as important as looking after your customers – the two are inextricably linked

create an inclusive culture. “Not being in the office can perpetuate historical difficulties in dealing with silos,” she added. “A big challenge now is making sure there’s no divide between those that go back to working in the office at any given time, and those who are working somewhere else. As a leader I need to build trust and community with and among my employees. Authentic leadership means putting the employee at the centre of the business. This is as important as looking after your customers – the two are inextricably linked.”

Open culture
According to Gilder, building an open culture where everyone is able to bring their true selves to work is at the centre of leadership.

“At the same time you need to get right the balance between people, processes and technology,” she added. “The three are needed to future-proof your organisation and there’s a real danger if you neglect any side of the triangle. You need to provide the right tools to employees so they’re able to do their job, and the right processes to make it as easy for them to succeed.”

On a more interpersonal level, one of the biggest risks in leadership is not listening to those around you, believes Gilder. “Listen to your employees, customers and partners and always have an open mind to learn,” she urged. “Only then can you understand your business and in what direction you need to steer it.”

Wherever an organisation’s future pathway may lie, it is certain that connectivity will be essential to remove silos in a hybrid model and facilitate an open culture. “We conducted a study on our own headquarters to understand more about the future connectivity demands of hybrid working,” said Gilder. “We analysed bandwidth usage during pre-Covid months and then during the pandemic when some of our staff were back in the office. We found that with the office at just 60 per cent of our normal employee

attendance pre-pandemic, our bandwidth requirements were 50 per cent higher.

“Despite some people returning to the office, the majority of meetings in a hybrid age still have some kind of virtual element that connects to those who are not in the office. The crucial point here is that collaboration tools and apps connecting businesses today are only as good as the network delivering them.”

Cloud boom
The speed at which hybrid cloud has become the cloud model of choice for enterprises is striking, observed Gilder, and she highlighted some interesting implications as the basic multi-cloud model moves

In terms of the technology under Colt’s own roof, Gilder pointed to automation, Machine Learning and Artificial Intelligence as bringing value to many areas of the organisation. “When it comes to Colt’s network we’re looking at ML and AI to build networks that can reroute to avoid traffic-heavy areas and self-heal, as well as bundling our connectivity with emerging technologies to position us as an enabler of digital services,” she explained. “AI and ML can also improve the customer experience by predicting trends and specifics for customers so we’re one step ahead for them.”

The future also has sustainability at its core, noted Gilder. “For Colt

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into a new and more complex phase. “We see that enterprises don’t want 100 per cent of their workloads in one cloud,” she added. “They are going for a mix of public cloud services to run alongside their private cloud.

and for the telco industry, we need to work towards becoming net-zero,” she stated. “Clearly, it’s important for the future of the planet, however it’s also central to us being able to help our customers on their journey. We’ll also be collaborating more. When we look at the ecosystem and all the different elements that come into play to drive digital transformation, it is obvious that we’ll need to be more aligned on APIs and be driving more innovative and seamless solutions for enterprise organisations.” ■

More CEO insights on page ??



ROB DOWNES
9 GROUP



ANTHONY KARIBIAN
bOnline



JAMES SHRAGA
FIDELITY GROUP



OLIVER HELM
FULL FIBRE

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“The opportunity of the fibre roll-out is becoming more apparent in the buying process for customers. As the market becomes more aware of the choices available, customers are open to discussion around their full comms strategy and are looking for a trusted advisor to support them with their needs. Acquisitions can add new expertise which could equip resellers to make the transition to carrier provider, however this isn’t a viable option for most. A sensible strategy is to play to your existing strengths and to place the customer at the centre of what you do. If you have untapped expertise within your organisation, lean into that more to take advantage of emerging opportunities. Proactively engage with your customers to understand their environment, their strategy and their needs. Educate them on emerging solutions and provide advice and support which fits with their requirements as well as your skills.”

“The biggest impact of full fibre rollout and the BT switch off will be on small businesses which represent the lion’s share of late adopters still using legacy telecom products. These businesses are more likely to expect end-to-end services with connectivity, VoIP and related services all from a single provider with a single bill. This presents a great opportunity for resellers to bundle connectivity and VoIP and other digital products. However, one must not underestimate the challenges that will be faced by legacy telecoms providers trying to get VoIP right. It will be far easier for VoIP or IT solution providers to add full fibre to their portfolio than the other way around.”

“Technology will lead the recovery of businesses, as it has enabled companies to remotely trade effectively and efficiently during the pandemic. On that basis, all companies should strive to have the best connectivity they can afford for their teams to work proficiently. Despite 2025 seeming a long way off, it’s always better to get a head start on preparations to ensure as smooth a transition as possible. This will open the opportunity for resellers to convert and future-proof businesses and help partners and customers become informed buyers. With just over two million UK businesses using an ISDN connection and roughly a quarter unaware that the switch-off is happening (source: TalkTalk), resellers can help reduce overheads in this financially challenging period and transform businesses into digital enterprises as a ‘one stop shop’ for IT and telecom services.”

“With copper switch-off a closer reality, the opportunity for resellers to grow a sticky customer base on fibre is significant – and with more wholesale providers in the marketplace there are great opportunities to do this where the incumbents have traditionally maintained a strong foothold. Access to these services at a layer-2 level is easier now too, providing opportunities to add enhanced, higher margin, services. But building networks and selling over them are two very different, specialised, activities. Transforming to integrated is not easy to scale. Network builders specialise in scaling complex 24/7 engineering activities, with long ROIs, and provide access to services for resellers to leverage. Selling and supporting great quality connectivity is also a highly skilled activity, generally with a shorter ROI and underlying business model. Resellers and network builders are better placed to work together, focusing on their specialties to scale quickly.”