



**Incoming Elite CEO
doubles down on
top priorities p10**

**ITS chief thrives as a
catalyst for positive
change p31**



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This month's
movers and shakers



Focus invests in scaling up Zest4

IN A DEAL that's been hailed as a 'defining moment for both businesses' Zest4 has become the channel arm of Focus Group following an investment that moves indirect revenues to 25% of the group's total.

SPECIAL REPORT

Zest4 has embarked on an accelerated expansion campaign following an investment that sees the Cheshire-based wholesaler scale up the channel operation of Focus Group.

"The potential for channel growth is significant and until this point was a market in which we had not achieved scale," said Focus Group CEO Barney Taylor. "We have a strong channel presence but this strategic

investment completely changes our outlook."

Taylor confirmed that Zest4 will continue to operate independently of Focus Group to ensure integrity, using its own technology platforms. "All systems and data will remain distinct," he added.

Zest4 currently works with over 500 partners across the UC and IoT space, 97 of them added in the last 12 months. Zest4 MD Mandy Fazelynna continues to lead the service provider's

operation alongside the current directors and existing management team.

"Our immediate message to partners is that nothing is going to change," she stated. "It is business as usual with new products planned for 2023."

Zest4 founder Freddie Fazelynna and CFO Kevan Wakerley remain as board advisors.

Pictured above (l-r): Focus Director Ralph Gilbert, Mandy Fazelynna and Barney Taylor.
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EDITOR'S COMMENT

**Stuart Gilroy**

Openreach extends Mildenhall and Salisbury PSTN switch off deadline to October 9th: When a press release lands in your inbox quite late on a Friday afternoon it warrants closer attention than perhaps the sender intended. Cut to Friday 27th January

and 'ping' I received an email from Openreach as the weekend drew closer. Subject line – 'Openreach trials service methods to support analogue network retirement in Salisbury and Mildenhall'. And the sub-headline – 'Trial measures will prompt customers to contact their service provider'. As is often the case, the real headline news appeared towards the lower end of the release: In a nutshell, Openreach has cancelled its benchmark PSTN shutdown planned for April 19th in Mildenhall and Salisbury and rebooked for October 9th 2023 due to the number of customers still using analogue services.

Openreach intends to prompt end users (including businesses!) still using legacy services (without an agreed exemption) in Salisbury and Mildenhall to convert to digital alternatives by limiting their broadband download speeds to around 2Mbps from April 24th and blocking outbound telephone calls (not the emergency services) from June 5th. Openreach hopes that these 'gentle measures' will 'nudge' customers to contact their CP. And confirmed that the actions will be introduced in batches.

Clearly, leaving the proactivity up to customers is a risk. And is restricting a service that customers pay for the most sophisticated method of delivering Digital Britain? Furthermore, are these 'responsible adjustments' right? And what does the move say about the task ahead as the 2025 PSTN closure deadline approaches? To what extent is this a wake up call and failure of industry messaging? And where does responsibility ultimately lie?

(Note: Our Channel Forecast session on page 22 was conducted prior to this deadline extension announcement).

Stuart Gilroy, Editor

Mitel eyes top UC spot via Unify deal

MITEL has set its sights on becoming the top global UC vendor following its acquisition of Unify.

"This deal shows that we're committed to unified communications and collaboration," stated Graham Bevington, Chief Sales Officer, Mitel. "We want to be the number one operator in the UC space. This is the first step in that process, but it's far from the end of the journey."

The transaction creates one of the biggest UC players in Europe and the Americas with more than 75 million users in over 100 countries and a channel community of 5,500-plus global partners.

According to Bevington the channel won't feel the effects of the deal until H2 this year.

"Until then the two businesses will operate separately and we forecast business as usual," he said. "Decisions about product branding and naming would be determined during the integration period."

The deal sees Mitel acquire Unify's voice platforms, collaboration and contact centre products, device and endpoint portfolio (and related IP).

Unify also brings a managed services business that builds on

**Graham Bevington**

Mitel's standing in the mid-market, enabling it to address larger mid-to-enterprise firms.

The transaction also provides Mitel with a broader range of on-premises, hybrid, private cloud and enterprise managed services, and delivers new capabilities in key verticals.

"Our partners are pushing us to get more involved in vertical markets," added Bevington. "The Unify portfolio and its heritage with Siemens Enterprise Communications helps to pull that together."

Bevington says the acquisition enables the dialogue around Mitel and its partner community to be changed. And Mitel is turning up the volume on its customer life cycle management.

ment messaging, particularly in the unified communications space and within the partner community. "To our partners and distributors, this confirms our commitment to the space," commented Bevington.

Robert Nunn, MD of Unify distributor Viegli, added: "While the mechanics of how it all fits together are unknown, I have had it confirmed that the Unify OpenScape Business portfolio promise of support and development until at least 2030 is absolutely unchanged."

"I don't see anything much changing other than a lot more marketing being done during the next 12 months by Unify."

Stephen McIntyre, Marketing Director, Nimans, added: "The two companies combined will offer a full suite of unified communications products and services aimed at a broader market in terms of industry verticals and business sizes."

"For Nimans, this acquisition presents an opportunity to expand our customer base as we will potentially offer customers a wider variety of UC solutions and models."

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NEWS ROUNDUP

TALKTALK'S altnet aggregation strategy has entered acceleration mode following the implementation of Strategic Imperatives' Fibre Café platform. Fibre Café addresses the integration and automation challenges for service providers when onboarding new altnets, while enabling altnets to more quickly launch wholesale propositions. Strategic Imperatives has provided provisioning solutions to TalkTalk for over ten years and this latest development provides a unified view of the patchwork quilt of networks and interfaces. Strategic Imperatives MD Wail Sabbagh said: "The Fibre Café is creating a more equal marketplace, enhancing customer choice and creating a dynamic fibre wholesale market."

SIX Degrees has pulled in Chris Blofield as COO. He moves from Clario where he was Global VP, Client Success. Blofield was previously Rackspace's interim COO and VP – Customer Success and Operations for EMEA. Six Degrees CEO Simon Crawley-Trice said: "With the economic forecast predicting a challenging few years ahead, it was essential that we took every opportunity to best support customers."

CTS seeks top place in EMEA

GOOGLE Cloud partner CTS aims to become an EMEA leader in Google Cloud services following investment from Marlin Equity Partners. Current investor NorthEdge Capital retains a minority share in the business.

"CTS is well positioned to capitalise on the significant momentum behind Google Cloud, one of the fastest growing public cloud platforms," said CTS MD Chris Bunch.

"We see ever growing demand for our professional and managed services capabilities across the sectors and regions we serve in Europe."

Marlin MD Mike Wilkinson commented: "The business's focus and expertise in services and software for the Google Cloud Platform and Workspace make it well positioned in a strategic growth market."

Jon Pickering, Chief Investment Officer at North-Edge, added: "Since our initial investment in 2018 CTS has grown net revenues, developed a number of new proprietary products, scaled internationally and invested in its people."

Founded in 2008, CTS employs more than 270 people with offices in Manchester, London, Edinburgh and Utrecht.

Onecom nets tech biz IMS



Martin Flick

LDC-backed Onecom's geographic presence and technical capabilities have been significantly boosted following the acquisition last month of midlands-based Microsoft partner IMS Technology.

The deal is Onecom's first in 2023 and ninth since 2019, and adds 600 customers.

"The economic uncertainty and accelerating convergence of communications and IT technologies will increase the dependency for UK businesses to rely upon the expertise of specialist suppliers such as Onecom," said Onecom Group CEO Martin Flick.

"IT services and communications tools should no longer be sourced independently if cost and operational effectiveness is to be achieved."

Flick noted that the acquisition is reflective of Onecom's ongoing intent to broaden its portfolio of IT services and extend its geographical reach.

NEWS ROUNDUP

CHESS ICT has snapped up Callagenix in a deal that adds over 350 customers. Callagenix is an Ofcom registered SS7 carrier with its own range of UK local and non-geographic number blocks, plus agreements with international carriers to provide local and free phone numbers from over 100 countries.

MICROSOFT Dynamics 365 Partner Preact has been acquired by ANS Group. ANS is a Microsoft cloud specialist with partnership credentials including the Azure Expert MSP, Data & AI and Low Code Advanced Specialisations, along with membership of the Business Applications Inner Circle.

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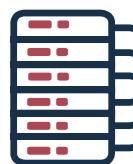
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Disneur eyes new pastures



Vincent Disneur

WITH a sense of 'job done' and drawn by opportunities brought about by the 2025 PSTN switch off Union Street MD Vincent Disneur is poised to leave the business, which was acquired by DWS in September 2020.

"When we sold the company there was an opportunity for me to oversee the transition," he stated. "Merging Union Street with two other billing companies, Aurora and ebillz, was something I had to be a part of. With Union Street's future secure now is the time to pass on the baton."

Disneur will leave in April following a transition period. "The Big Switch Off has given rise to huge opportunities in the channel which I'm keen to explore," he added.

Over the past three years Union Street has doubled its personnel and revenue, with turnover increasing from circa £6.8m to £16m.

DWS CEO Terry O'Brien said: "I am grateful for Vincent's contributions and dedication. DWS will continue to invest significantly into Union Street as part of our platform strategy."

Gamma launches Connect for MS Teams to UK channel

THE channel launch of Connect for Microsoft Teams by Gamma marks a significant step in its ambition to become 'the leading provider of Microsoft Teams Phone across Europe', according to Chris Wade, Chief Marketing and Product Officer.

Gamma says it is one of just two UK providers that can offer the service on a channel model, enabling partners to scale their direct routing service to provide a pure cloud-managed solution.

"Through Operator Connect, partners can create automations to streamline provisioning, billing and reporting," stated Wade.



Chris Wade

NEWS ROUNDUP

FORMER President of Kyndryl UK&I (a spin out of IBM) Tosca Colangeli has joined Microsoft as Solutions Leader for the UK. Prior to Kyndryl, Colangeli worked in the tech sector for almost 27 years in global, European and country leadership roles. Microsoft UK CEO Clare Barclay stated: "Tosca brings a depth of leadership and solutions capability, as well as a passion for helping customers digitise and transform."

UK TECH firms Automation Logic and Qubix have been acquired by Irish business Version 1, creating an entity with over 3,000 employees and more than 650 customers. The transactions take Version 1's deal tally to 16 with more promised this year, and follow PE firm Partners Group's acquisition of a majority stake in the company last year.

MULTI-sensor cameras deployed by North across Hammersmith and Fulham will create what is claimed to be the largest CCTV network in the UK with 1,869 cameras in operation. They will be rolled out across the borough as part of a £5m project.

Virtual1



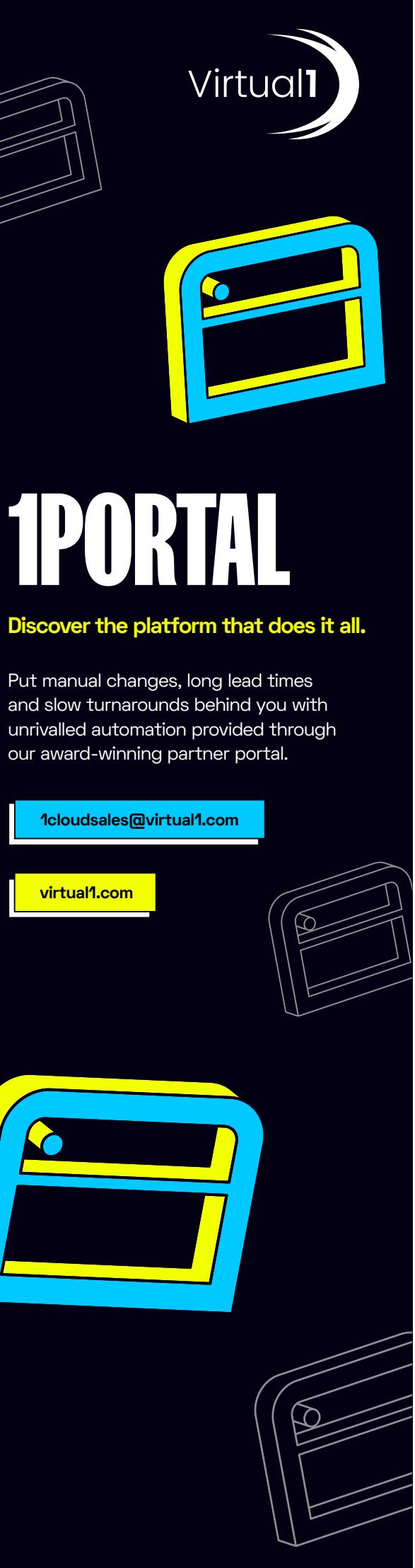
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NEWS ROUNDUP

ARROW Business Communications has acquired Aberdeen-based IT service provider and integrator Bruhan. The deal bolsters Arrow's presence in the region as well as its influence in the oil and gas sector. Arrow CEO Richard Burke said: "Bruhan provides us with enhanced enterprise IT capabilities and expertise to support larger clients." Bruhan MD Bruce Buchan added: "Bruhan's clients now have access to a wider technology team with multi-year experience and our employees are part of a larger family."

OPENREACH'S board leader for Scotland Katie Milligan has assumed a wider remit following the step-down in March of Kim Mears OBE, MD for Infrastructure Delivery. Mears will continue in an executive advisory capacity and remain Chair of the Welsh Board, as well as take on non-executive roles outside of Openreach. To date Milligan's remit has been Chair of Openreach Scotland, Managing Director Customer, Commercial and Propositions. Her role has now been extended to include Chief Commercial Officer. She will continue to steer the delivery in Northern Ireland and expand her role to include Infrastructure Development.

Finance firm grows base



Simon Fabb

TECH sector finance provider Lease Group has onboarded its thousandth channel partner following a two year expansion phase that saw its partner base double in numbers.

Lease Group covers the telecoms, IT, AV and energy sectors and the growth of its mainly online solution has been attributed to higher demand for finance since the pandemic, expansion into new sectors and its business model.

The company first traded as Lease Telecom but rebranded to Lease Group in late 2019 to reflect a move into other sectors and suppliers.

"This milestone highlights the growth in demand for flexible payment options," said Director Simon Fabb. "We've fostered new partnerships in other sectors where high upfront

costs have traditionally been a barrier for suppliers looking to get deals over the line.

"Renewable technologies, such as EV charging points and solar panels, have been a key driver with over 100 renewable energy suppliers joining Lease Group's partner base in 2022."

Fabb also noted that as-a-service offerings in the IT and AV channels have also accelerated channel growth.

"Deploying as-a-service in a way that financially benefits both the supplier and end user, without compromising on the buying experience, is critical in today's want-it-now culture," added Fabb.

"The key to running a successful finance programme is to develop a solution that approves finance at a far quicker speed than a traditional bank loan."

Adoption of hybrid cloud up

HYBRID cloud adoption is up 11% on 2021 as inflationary pressures continue to force IT decision makers to find more predictable and stable costs, according to Node4 research.

"This is not just a money saving move," stated MD Paul Bryce. "IT decision makers are starting to believe that hybrid cloud is a viable long-term option and are investing in different cloud and non-cloud hosting platforms."

Bryce also noted that hybrid cloud adoption in the mid-market prompted 75% of companies to leverage managed services to offset labour shortages.

The cyber landscape is also a growing concern as 29% of respondents reported that the increase in cyber attacks had the biggest impact on their organisation over the last 12 months. The research found that 25% of IT investments are currently driven by cybersecurity needs.

"The research also suggests that over the last 12 months mid-market companies have reprioritised a range of other IT investment plans to deal with challenges posed by the rising cost of doing business and adjusting to long-term hybrid working," said Bryce.

Billing biz bulks RPI increases



Samantha Dennahy

AN RPI Increase Service launched by Union Street Technologies enables partners to make large scale price increases to products and services across their customer base.

"Resellers in the ICT channel have seen the cost of their services go up dramatically, forcing them to increase prices and pass on costs to their customers," said Product Owner Samantha Dennahy.

"Through consultations with partners it became apparent that many of them – especially those with larger bases – were experiencing challenges with increasing their prices in response to rising inflation.

"It can be a labour intensive exercise with high potential for human error. We developed our outsourced RPI Increase Service to help them overcome these challenges."

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NEWS ROUNDUP

FORMER Accenture MD Hannah Birch (pictured below) has joined Node4 as Managing Director Digital. She started her career at BP and also held leadership positions at Fujitsu Services



UK and Computacenter. Her new remit includes strengthening Node4's Microsoft relationship and driving value through the integration of acquisitions Risual, TNP and Tisski. Node4 founder and CEO Andrew Gilbert said: "With our recent acquisitions and the broadening of our partnership with Microsoft, Hannah is the right person to lead the integration of our Digital Team."

FLOTEK'S influence in the telecoms space received a boost following the Welsh MSP's acquisition of Swansea-based comms firm Saecom. The deal also gives Saecom customers access to Flotek's IT and cyber support services.

Cloud drives breach fears

HIGH confidence among financial services firms over their security strategies is challenged by an increase in successful cyber attacks, providing security resellers with an opportunity to address new threats arising from, in particular, greater adoption of cloud services.

However, research by Bridewell indicates that finance organisations are outperforming their peers across the UK's critical national infrastructure (CNI) in cyber security confidence and maturity, taking on average 13 days to discover a cyber attack, faster than any other CNI sector.

In contrast, the transport and aviation industry takes almost two months (51 days).

But with cyber attacks rapidly expanding in volume and sophistication, 69% of finance organisations have experienced an increase in threats during the last 12 months.

Furthermore, the sector has seen the second largest rise among all UK CNI (81%) cyber attacks following the Russia-Ukraine war.

Emma Leith, Director of Consulting at Bridewell, stated: "The finance sector has made fantastic progress in evolving its cyber security posture, and



Emma Leith

its maturity and resilience in the face of mounting security challenges sets the standard for organisations across CNI.

"However, as the continued rise in attacks against the sector shows, there is always scope for improvement."

Almost half (46%) of cyber decision makers in finance identified cloud services as the biggest potential attack route. Similarly, compromise of remote employees (39%) and insecure VPNs (37%) were flagged as significant threats.

"Organisations must take further proactive steps to strengthen their security postures," added Leith. "They can achieve this by preparing and rehearsing cyber scenarios, and ensuring that a cyber threat intelligence-led approach to security is firmly embedded in everything they do."

Urgency over UCaaS threat

LARGE scale cloud PBX providers sweeping up subscription-based long-term customer contracts pose a growing threat to UCaaS resellers, according to Wildix co-founder and CEO Steve Osler, who predicts that 2023 will be a make-or-break year for many channel resellers too slow to adopt subscription payment models.

"Customers signing up for a new cloud PBX in 2023 will not change it until the PBX goes for good," stated Osler.

"Everyone is grabbing what they can and trying to convert customers to recurrent cloud solutions. As a result, 2023 is the year in which you have to convert your remaining customers from Capex to Opex."

To underline the urgency Wildix's UC&C Summit 2023, staged in January and attended



Steve Osler

by over 1,300 UC&C experts from across the world, underscored the importance of using subscription models to protect against the threat posed by hyperscalers while exploring the drivers in a post-PBX world.

Wildix co-founder and CTO Dimitri Osler added: "What's next after the PBX market is dead? Customer communication platforms. These platforms create opportunities and maximise the chances of closing deals by increasing customer interactions. From a business owner's perspective, there's always a need to invest in a solution that can achieve that."



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TelcoSwitch gets new CEO

TELCO SWITCH CEO Russell Lux has stepped down making way for Yay.com founder and CEO Matt Mansell who takes over the Chief Executive role.

Yay.com, which is a SaaS UC business, secured private equity investment from TelcoSwitch backer Queen's Park Equity (QPE) last November in a deal that enabled the UCaaS platform to leverage TelcoSwitch's base of channel partners.

Lux founded TelcoSwitch in 2015 and secured QPE investment last year.



Matt Mansell

Mansell's prior experience includes pioneering work at Adobe with its Dreamweaver product, then serving as founder and CEO of a fast grow-

ing European domain registrar acquired by Host Europe (Go Daddy) in 2012.

He then spent almost three years representing the European Go Daddy board before founding Yay.com which was acquired by QPE as part of its long-term strategy for IP investment and development in TelcoSwitch.

"TelcoSwitch has been disruptive in the UK channel market," said Mansell. "I'm taking over the CEO seat as we combine the strength of our partners with our platform."

NEWS ROUNDUP

ELITE Group CRO Adam Turton has taken the CEO position following the step-down of Rob Sims who served as Chief Executive Officer for over five years. Sims remains with the company as a board advisor. Founder and Chairman Matt Newing said: "Adam's appointment is the culmination of all his hard work and dedication to the company." See page 10 for the full story.

BOURNEMOUTH-based 4Com has acquired the business telecoms customer base of Bluebell Cloud Solutions. The transaction is 4Com's third in nine months. 4Com CEO Gary Scott said: "As this was our first acquisition where we've bought a customer base rather than an entire company it was a new experience for us, one which we've learned a lot from." Bluebell Director Ben Newbury added: "We needed an injection of capital to expand the business, that's where 4Com came in and purchased a large part of our customer base."

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Elite CEO doubles down on

Following the step-down of Elite Group CEO Rob Sims last month incoming Chief Exec Adam Turton continues to take the right critical actions across the full range of leadership priorities to create a resolute and confident long-term outlook.

The appointment is a personal triumph for Turton, and the next natural step in a 20 year career in comms spent exclusively at Elite Group (and associated group companies) where he started as a cold caller. "My appointment sends a powerful message to the business and reflects positively on Elite Group as an employer that nurtures talent and rewards loyalty, commitment and hard work," he stated. "There really are no limits for driven people looking to develop their professional careers in this sector."

According to Turton, given the size of the market and the speed with which it continues to grow and evolve, the long-term opportunity for Elite Group is 'huge'. "I have ambitious growth plans for the business," he added. "I am prioritising a strategic review of the market with a view to developing our product strategy and go-to-market for the next three to five years. I am also prioritising the execution of our strategy for the 2025 PSTN shutdown."

Turton says the evolution of technology has made it increasingly difficult to achieve competitive advantage and bring value to a widely diverse customer base (partly inherited through M&A) ranging from micro to enterprise. But he is confident that the interventions and strategies he has planned will keep Elite on track and prove successful. "We have been guilty of trying to provide everything to everybody and that has been a difficult cycle to break," he explained. "I am looking to refocus the business on the areas where we can differentiate and bring most value to customers."

This entails striking a balance between insightful market reviews and the technology roadmap to establish product market fit and develop a stronger more focused cloud services portfolio, pointed out Turton. "At the same time we are looking to develop our professional services capability, incorporating systems integration services and an enhanced managed service," he added. "We are most interested in the



Adam Turton

I am looking to refocus the business on the areas where we can differentiate and bring most value to customers

trajectory of the cloud services market including SaaS, UCaaS, infrastructure and platform services. And are becoming increasingly interested in next level process automation and virtualisation, the Metaverse, Applied AI and Machine Learning, and where these developing technologies play in our portfolio and target markets."

Long-term view

These priorities highlight the extent to which the pace of change is affecting all organisations. And to overcome the challenge posed by new competing priorities Turton has fixed his attention on what

matters most. "Defining a single focus that will drive us towards our long-term vision is key," he said. "When we split our attention on several tasks it gets increasingly difficult to reach an outstanding result. Vision without action is a daydream, but action without vision is a nightmare. As a priority, setting a clear long-term vision of the business we want to be, with a defined destination we are aiming for, is critical."

Also essential to long-term growth is a significant focus on near-term objectives. "We're halfway through our financial year, so in the next quarter my plan is to balance

my time between setting the long-term strategic direction for the company and supporting short-term tactical improvements that can positively impact our trading performance," he stated. "A big part of my role is ensuring that our people are all aligned and share our vision."

He believes that today's leadership priorities are about articulating why a business exists and creating purpose driven companies that inspire and engage people. "Employee engagement and culture has to be top of the agenda for business leaders," added Turton. "Technology is what we do, it's not

on strategising

what makes us inherently different. The real value is delivered by the talented people in our organisations. It is our collective ability to adapt to change that

The real value is delivered by the people in our organisations. It is our collective ability to adapt that determines how successful we are in the future

determines how successful we are in the future."

Elite's capacity to adapt is beyond question. The company began its commercial life in 2000 and has completed more than 15 acquisitions. It serves circa 3,000 customers of all sizes in the public and private sector and across a wide range of products and services. And its headcount is approaching 180.

Positive outlook

Turton reported that adjusted trading for this financial year will be relatively flat and in line with budget. Underlying recurring revenues

are growing at nine per cent, positively impacting the outturn going into the next financial year. "The focus is on new incremental fixed recurring revenues and managed services contracts," stated Turton. "Over 95 per cent of recurring revenue sales closed each month are for strategic growth products and services incorporating cloud applications, connectivity and professional services."

In a nutshell, Elite's value proposition is focused on helping businesses navigate the complex world of technology, making it easy to understand and simple to use, delivering digital transformation solutions that bring real value and help businesses communicate and collaborate in a more, secure, productive and profitable way. And according to Turton, this approach is key to unlocking full value from what he describes as 'probably one of the single biggest compelling events to happen in our sector'.

"The 2025 PSTN shutdown," he stated. "Whenever there is change there is opportunity. Elite has been on the telco-to-technology journey for a

while now, we have a clear plan and a strong portfolio of new technology services that will bring more value and benefits to customers. I'm confident that we are well positioned to mitigate any risk and maximise the 2025 PSTN shutdown opportunity. But there are implications for channel partners exposed to significant PSTN revenues and margin."

Taking action

In terms of today's other leadership priorities, Turton is taking positive action on further developing a diverse and inclusive workplace, and also investing in the organisation as a catalyst for positive change around ESG. "We're on a journey to formalise our approach to sustainability and are committed to being transparent with our stakeholders on our progress," said Turton. "We have already committed to shorter-term emission reduction targets, aiming to reduce emissions by 42 per cent by 2030 and 63 per cent by 2035. We have an ambitious strategy which allows us to reach Net Zero by 2040.

"We are a socially and environmentally conscious business and recognise that we have a responsibility to do more than simply provide shareholder returns. We are taking this responsibility seriously and engaging with our partners whose values regarding the environment, charitable efforts and investing in the local community align with our own. But in all of this, prioritising employee engagement and culture is critical for success. Business is a team sport and culture eats strategy for breakfast." ■

From cold caller to CEO...

ADAM TURTON worked for a number of years in professional sport as a coach, mentor and sports psychologist before entering the business world. He stumbled into comms nearly 20 years ago when offered a job by Elite Group founder Matt Newing, previously known to him as they attended the same school. "In 2004 Matt offered me a cold calling job on the minimum wage paid hourly," said Turton. "I took a leap of faith and accepted." Turton rose through the ranks and became Sales Director, Managing Director for Communications, CRO, deputy CEO and from this month leads the business as CEO.

Clients navigate crisis with Complete advice

W alton-on-Thames based Complete PDA offers a one-stop IT and data service to both new and existing business customers.

Founded in 2005, the company has also been offering energy to its customer base for 10 years. It began working alongside Fidelity Energy in 2018 and the partnership has had a highly positive impact on the business, according to Managing Director Mark Scott.

"It wasn't until we partnered with Fidelity Energy that we saw the difference it made. The Fidelity brand has never been forced on us. All marketing materials can easily be white labelled and whenever we need additional help and support with any marketing flyers or mailers the team are always on hand to provide this. The newsletter updates are great to have too, as we can show the client when prices have increased or decreased due to the market movements.

"We have regular contact with our Business Development Manager, Clare Stratford and the team are always proactive in keeping us up to date with our portfolio. We enjoy regular interactions with Fidelity Energy's top people like John Haw and Sean Dixon through updates, webinars and events. We therefore know no one is hiding anything. Once we have got the contract signed by our customer, they do all the stuff behind the scenes from talking with suppliers and managing the switch."

From the low energy prices during the pandemic to the unprecedented highs seen in the ongoing energy crisis, Fidelity has helped Complete PDA progressively and proactively support its customer base, as Mark explained.

"90% of all our business is retention. We have had some customers for almost 20 years, so suggesting another product to them is quite easy, especially with energy where they can benefit from the service and no longer need to manage a complex utility. As mentioned The biggest benefit of working with Fidelity Energy is that we can forward procure. So, during the pandemic when the market dipped, we were able to proactively look after our base.

"During the Covid crisis, trying to persuade customers to procure when the prices were so low was tough as many businesses were working remotely and not using their office space. But the support from the Fidelity Energy



Complete PDA Managing Director, Mark Scott.

team, across all aspects of the sale, helped immensely. Locking previous short term contract customers into four- or five-year deals was a revelation. Many have come back to me now to thank me for saving their business!"

The highs of the energy crisis have been just as difficult, but Complete PDA have still been able to alleviate the issue for customers by showing industry knowledge and qualified information with support from Fidelity Energy, which constantly monitors market movements.

"Their team let us know when it is best to forward procure the energy at a time that benefits the customer, rather than in the short period of time when they are in their renewal period," said Mark.

"For example, last year, we quoted a client before their renewal as we believed it was the best time for them. The market was predicting a double hike in prices by the time they were due to renew. We had built the trust in the relationship over many years and with Fidelity Energy providing the reasoning to support the predictions, the customer was happy to accept. By the time they switched they had managed to avoid the double price rise and saved their business from paying an eyewatering rate.

"This is something we were unable to do in the past and has been crucial to us in supporting our customers during the energy crisis."

Summarising the benefits of the partnership with Fidelity Energy, Mark said: "They are always there to support us as their partner, working alongside us rather than just as a reseller. That is what makes a big difference when you go into a partnership with anyone."

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Strang's top priorities

Commsworld Chief Operating Officer Bruce Strang discusses the driving forces and competing priorities shaping the Edinburgh headquartered network provider's strategic outlook and growth planning.

The primary drivers propelling Commsworld's growth trajectory include a continuing push into the public sector which has helped to generate a 20 per cent increase in turnover from £19.2 million in 2020 to £22.7 million. This year the business is targeting 15 per cent top line growth; and the delivery of significant digital transformation projects in the public sector will likely necessitate a headcount increase of between five and ten per cent. Gathering momentum will also be fuelled by healthy B2B sales in the commercial sector with the 2025 PSTN switch off stimulating new opportunities, and presenting fresh challenges.

Another priority is to innovate and focus on quality of service, noted Strang. "These priorities feed into our main objective of continuing to grow our customer base in the commercial and public sectors," he commented. "Our biggest long-term opportunity is to play to our strengths through the expansion of our UK-wide optical core network which has transformed the

security and resilience of digital infrastructure for organisations the length and breadth of the country, offering speeds of up to 200 gigabits per second. Two years on from its completion, the network has helped boost our customer numbers, contracts and figures."

Strang's top priority is to ensure Commsworld is ahead of schedule with the large digital transformation projects it's currently delivering, including Renfrewshire Council and North Lanarkshire Council. "In North Lanarkshire we have completed the first 120,000 metres of ultra-fast full fibre network across the region," he added.

"This amounts to the first third of the entire 340 km of fibre infrastructure in place and means we are on track to complete the infrastructure network by next summer, which will give homes across North Lanarkshire access to gigabit-capable broadband years earlier than planned."

Commsworld is seeing more local authorities, not just in the towns and cities but also across rural counties



Bruce Strang

The ability to balance competing priorities is an important aspect of today's business environment. For example, Commsworld balances the need to build new infrastructure without causing disruption to people going about their daily lives.

At the same time, as Chief Operating Officer a personal priority for Strang is to continue to support Commsworld's people so they are able to maximise their focus on the firm's objectives. This includes improving the post Covid-19 pandemic office working experience, which Strang says should be a key objective for today's business leaders. "It's all about recruiting, developing and motivating the best people, which means creating the right work environment and culture," he said. "This is a key element of future success."

The biggest short-term challenge facing Commsworld is also one of its biggest opportunities – the PSTN switch off in 2025. "The challenge is to make businesses that have not planned ahead for the PSTN shutdown to recognise that they need to start preparing now," noted Strang. "We impress on them that the clock is ticking and that they will need to prepare eventually. On the whole, we have achieved success with this approach and customers have taken 2025 on board."

"But the challenge of tomorrow will be that many companies will find themselves joining a long and growing queue of organisations desperately seeking to resolve their requirements too close to the switch-off deadline." ■

It's all about recruiting, developing and motivating the best people, which means creating the right work environment and culture

and regions, understand the value of procuring large digital transformation programmes that accelerate the investment in fibre.

Tech enlightenment

"They are realising the role that technology and connectivity can play in promoting educational attainment, reducing the digital divide, the smart delivery of services and using technology to meet their Net Zero targets," commented

Strang. "North Lanarkshire and Northumberland councils have used the procurement process to deliver improvements in connectivity for not only residents who never had access to broadband networks before but also to provide schools with uniform access to speeds of up to 1Gb per second. This will be a game changer for the next generation in terms of equality of access to the best digital resources."



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Next moves in billing

Billing providers face an opportunity to lead with purpose, catalyse innovation and scale up the channel's capacity to provide critical services across diverse and evolving markets, according to Inform Billing Managing Director Shaun Bodsworth.

Not so long ago, the big challenge to the profitability of billing providers and resellers was to break their loyalty to legacy systems and desk-based applications. Cloud solutions were in the ascendancy – after all, it's what customers want, expect and need – and the shift to cloud also provided a catalyst for innovation. "Anyone not using a fully cloud-based billing platform should be asking serious questions of their provider," commented Bodsworth. "It may not be a painless move, but the risks to a business of being stuck on old technology, such as those around disaster recovery and business continuity, should not be underestimated."

This stark assessment underscores the extent to which Derby-based Inform Billing has pursued a course of business reinvention, which is an ongoing process. For example, the company's focus throughout 2022 and into 2023 continues to be on functionality that supports and improves integrations between different systems

and automations, to simplify and speed up processes and solutions that help resellers and end customers to become more self-sufficient. "Self-service functionality, particularly relating to mobile services, has also evolved from a nice-to-have to an essential requirement," added Bodsworth.

"Mobile continues to be a growth area, attracting new entrants and existing dealers seeking to gain more flexibility in their offering and greater autonomy by equipping themselves with true wholesale mobile offerings. Having the right billing capability to offer creative tariff packages and flexible options for pricing and bundling is also critical to a reseller's success in the mobile space."

Big strides forward

Inform Billing's refinement of existing carrier integrations – such as improvements to monitoring unbilled usage, updating mobile bars and completing SIM swaps for leading suppliers – has also taken big strides in line with increasing demand and a



Shaun Bodsworth

greater focus on research and development. "Over recent years we have invested in excess of £5 million in the research and development of our products," stated Bodsworth. "Executing our development roadmap is critical to success and we have full control of this through our in-house development team."

Inform Billing is not immune from the pressures that impact all channel businesses, and recruiting people with the right skills has proved to be one of its biggest, but not insurmountable, obstacles to achieving its goals. "The combination of the upward pressure on costs from rising salaries and inflation and the downwards pressure on pricing, along with the distinct shortage of skilled and unskilled workers, is likely to remain one of the biggest challenges

facing businesses across the channel in the year ahead," added Bodsworth.

Looming challenge

He pointed to another looming challenge that could explicitly impact the channel, despite the nature of the issue being less clear. "Although the final details are still concerningly awaited, another key development on the horizon in 2023 is the introduction of One Touch Switch which will present a significant challenge to the channel," stated Bodsworth. "From network providers to aggregators, to resellers and billing providers, how the channel responds will play a key part in competing with the big connectivity partners, particularly in the residential market."

It is encouraging to see an upward turn in new entrants to the market catalysed by

the migration from traditional voice to IP-based services and the roll out of full fibre. "These developments provide opportunities for resellers, both new and established," added Bodsworth. "It will be exciting to see what follow-on solutions develop through OTT services, in a similar way to how mobile applications have evolved over time on the back of improved network infrastructure and more powerful devices. These OTT services represent a tremendous opportunity for subscription-based content and on-demand services that will require a different approach to billing."

"For the channel to adapt and adopt evolving and improving OTT and connectivity services it will become more important to select suppliers on merit, particularly as the landscape could evolve quickly. With this in mind, keeping billing and the more general selection of software applications independent from other service providers will give greater freedom to adapt and provide choice to end customers."

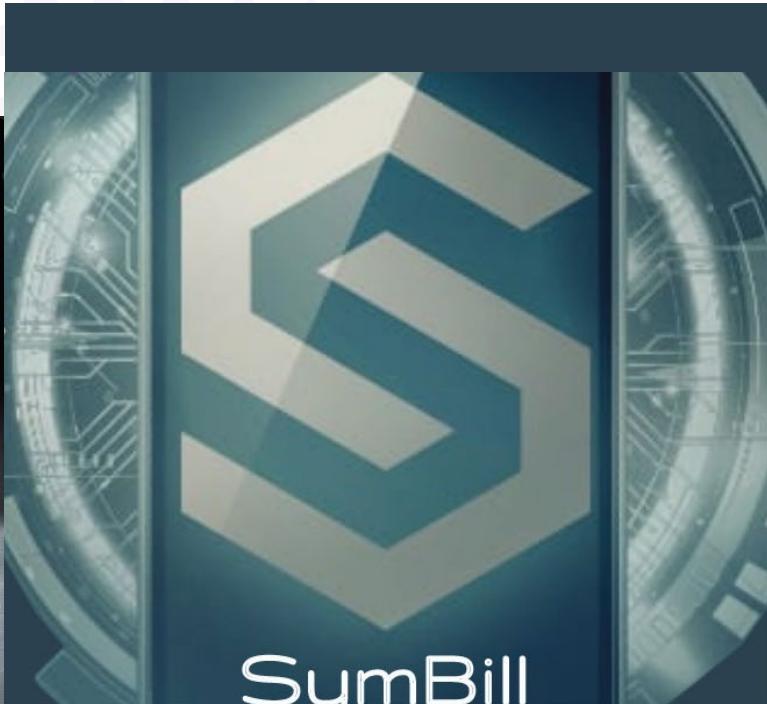
Inform Billing's customers span traditional telecoms, IT, mobile, connectivity and IoT as well as utilities, waste management, banking and hospitality. "These customers all use our software in different ways for billing," noted Bodsworth. "An adaptable approach to automation, integration and AI technology will continue to play a large part in the future. We are developing partnerships in diverse markets relevant to the subscription economy, opening up future opportunities for both Inform Billing and the channel."





*It's not the strongest of the species
that survives... but the most **adaptable***

Charles Darwin



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Defining the attributes o...

The channel's billing providers continue to rise to the challenge of meeting current and emerging opportunities while keeping pace with the demands of the market. Here, we explore how three top billers are strategically responding to the requirements of resellers, leaving no door unopened where there is room for improvement.

The expanding comms landscape is increasing the scope of billing providers to evolve and provide specialist services, as well as become drivers of innovation. And it follows that billing must remain a core competency for resellers, emphasised Keith Pearhouse, Managing Director, Symbiant Technologies. He noted that with growing pressure on margins due to rising wholesale costs and customers wanting to pay less because of inflation and increasing overhead costs, there has never been a more important time to ensure that a full range of demands are met.

"These requirements include all costs being billed to customers in accordance with the agreed tariff," he stated. "As well as cancelling wholesale costs where services have been cancelled by the end user; carrying out structured revenue assurance routines; levying cancellation charges where permitted; clawing back commission payments on cancelled services; and increasing customer prices in line with changes in CPI or RPI or other contracted metrics that can play an important role in maintaining margins. With the complexity of services on offer to end users these

key disciplines require alerts and automation."

Effective debt management routines are also key, noted Pearhouse. "Why work hard to have your efforts undermined by a small proportion of customers not paying their bills?" He stated. "Have resellers got adequate controls in place for debt prevention and debt collection routines? Prevention can be achieved by integrating credit checking into customer acquisition; providing alerts for early warning signs such as customers cancelling their direct debit outside of the collection cycle; and reporting the debt performance of each sales partner."

Symbiant Technologies also helps resellers to review their operational activities through the integration of industry feeds into its billing system and offering a web-based CRM platform with in-built wizards to simplify the processing of customer requests; while giving customers access to their data to self-serve common enquiries and to order new services.

According to Pearhouse, between now and 2025 could see a number of mergers and acquisitions which plays into the hands of billing providers. "This

implications for information security and compliance with industry regulation which a potential buyer will analyse thoroughly as part of their due diligence," he added.

Improving the user experience, boosting efficiency, driving tasks and doing bulk updates (especially for price rises) are key aspects of a billing manager's role. And to make life easier for them Union Street Technologies launched an RPI Increase service in January, which implements bulk price rises across a reseller's customer base. "It provides a simple way to increase profitability with minimal effort, reducing the risk of errors and mistakes which comes from manually completing bulk price changes," stated Aylott.

He also noted that the company is looking at how its billing software can ease the pressure on resellers as they prepare for the switch off. "It's clear that the process of moving end customers onto new services needs to be automated as much as possible, not just for provisioning new services, but also for cleanly ceasing outgoing services," added Aylott. "Solving this challenge is something we've invested time and effort into, developing automated and integrated



Keith Pearhouse

Having well controlled KPIs and reports to help identify and manage trends plays an important part in the due diligence process.

will be driven by business owners approaching retirement, others wanting to explore different markets and those not relishing the challenges of the PSTN switch-off," stated Pearhouse. "The common factor in all cases will be the desire of business owners to maximise shareholder value. In this context, having well controlled KPIs and reports to help identify and manage trends will play

an important part in the due diligence process."

Realising value

Chris Aylott, Head of Product, Union Street Technologies, also noted that business owners seeking to optimise the value of their company come under intense scrutiny during the sale process, and billing plays a big role in making a business more presentable by demonstrating its true value. "It also has

f billing success

solutions that streamline the provisioning process.

"As 2025 approaches and work begins in earnest to convert customers away from PSTN/ISDN services, there's a risk that the ordering and provisioning process will create a bottle neck for resellers. Technology that can help ease their workload, such as process and workflow management tools, will become invaluable as will billing software with versatile provisioning capabilities that help resellers source the right package for themselves and the customer."

Self-service developments

Union Street Technologies launched an end customer portal last year to help resellers meet growing demand for self-service options. Additional self-service features are planned for this year which may include facilities to raise support queries, make payments, manage call barring, assets, upgrades, data top ups and more.

"Ultimately, if there's something the end customer



Chris Aylott

It's clear that the process of moving end customers onto new services needs to be automated as much as possible, not just for provisioning new services, but also for cleanly ceasing outgoing services.

can manage themselves we want them to be able to do so," added Aylott. "These features will make end users feel more empowered, provide a better customer experience and help resellers to reduce the administrative burden of servicing their base."

According to Nigel Fox, Chairman and CCO, TelXL,

while billing is just one facet of an 'exceptional' customer experience it impacts other areas, especially now that automation is leveraged across many aspects of billing. "The ever increasing use of process automation in accounts payable frees up significant customer resources," he commented. "And for the last decade billers have been honing secondary uses of bills, crafting them to do far more than simply set out charges, delivering communication efficiencies such as reminding customers about the end date of their contract or promoting a special offer."

"However, these automated billing processes are removing an opportunity to create a human experience. A balance between the two needs to be found. Functionality is fine, but the increase in automated processes is wasting the efforts of resellers to form closer customer relationships. Instead, resellers need to think more holistically."



Nigel Fox

Functionality is fine, but the increase in automated processes is wasting the efforts of resellers to form closer customer relationships.

Continued from page 1

The rationale behind the deal was to accelerate new growth opportunities, extend the portfolio of products and services for the channel and create a scalable channel business that will operate independently to Focus Group's direct operation.

According to Focus Group co-founder and Director Ralph Gilbert, both businesses will maintain high growth ambitions in their own right. "Our investment in Zest4 is a defining moment for both businesses," he stated. "One of the most compelling reasons for this investment is the ability to introduce more products and services into the channel."

Taylor noted that Zest4's product mix of telephony, connectivity and IoT solutions position it well to support partners through the imminent technological change as the UK becomes fully digital with the ISDN switch off and the convergence of ICT solutions. "Product growth is now diverse across the group as traditional revenue streams are strengthened by high growth in data, mobile, IT services, Microsoft and enterprise," he commented.

Taylor also noted that Focus has set out four clear business objectives around Organic Growth, Operational Excellence, One Focus Group, People-Purpose-Culture. "Becoming One Focus Group and integrating our direct business across the UK is

a critical part of this plan, while maintaining the strong culture that has been at the heart of Focus," he stated. "Zest4 shares this purpose and is the right organisation to accelerate our ambition in the channel as a fast growing stand-alone business under a strong leadership team."

Key step

Taylor indicated that Focus Group had considered for some time that a strategic investment in the channel was an important step into a fast growing UK market. "We saw a number of our partners and competitors investing in the channel, and Zest4 coming to market was an opportunity to execute our strategy," he added. "This investment also opens up the possibility of channel-focused M&A activity in the future."

Fazelynna commented: "We have invested heavily in Zest4 over the years and known Focus Group co-founders Chris Goodman and Ralph Gilbert for a long time. From the outset this investment was always going to be the most compelling next step for the business."

Knight Corporate Finance advised the shareholders of Zest4 on its investment.

Focus Group was established in 2003 and has circa 870 employees servicing over 27,000 business customers. Zest4 was founded in 2013 as a mobile wholesale provider, later launching an IoT division, cloud and connectivity services.



Zest4 and Focus Group join forces

Cloud tech David takes on the hyperscalers

Creative ITC Group Managing Director Keith Ali aims to build a £400 million revenue business within five years and has rallied VARS and MSPs to take on the hyperscalers and unlock significant private cloud value through strategic partnerships.

In Ali's view, it's vital for technology VARs and MSPs to seize an opportunity to capitalise on the trend of businesses repatriating from public to private cloud infrastructures, especially at a time when the global cloud market is expected to be worth nearly \$600 billion this year. But he warned that concentrating on the hyperscalers leaves a 'huge share' of the cloud industry at risk of being sidelined. "Despite growing concerns around TCO, data governance and support availability, hyperscalers Amazon, Microsoft and Google still dominate the cloud market, accounting for approximately two thirds of global cloud revenues (excluding China)," stated Ali. "And they're growing at a faster rate than smaller providers. The emphasis from vendors on public cloud is only compounding the situation."

According to Ali, many MSPs aren't in a position to do anything other than offer public cloud solutions. Therefore Creative ITC has

launched a channel partner programme that includes private cloud solutions with a range of fully managed private, hybrid and multi-cloud options, enabling MSPs tap into new revenue streams.

The timing of the launch is key. Ali observed that cloud repatriation is starting to 'snowball' as companies evolve their technology strategies. He also noted that Creative ITC, which was founded in 2006 by CEO Eamon Murchan, more than holds its own against the hyperscalers and is now a well established global cloud services provider itself, delivering private cloud solutions and managed services across five continents. "We took on the big boys and SNC-Lavalin chose David over multiple industry Goliaths," added Ali. "We're punching well above our weight on a global stage."

New client wins are always acknowledged as company milestones, not least the first million pound deal a decade



Keith Ali

We took on the big boys and SNC-Lavalin chose David over multiple industry Goliaths. We're punching well above our weight on a global stage

ago. "These momentous occasions still act as a catalyst to springboard the company forward," said Ali. "Success breeds success and Creative ITC continues to go from strength to strength."

The company has tripled in size over the past five years, and last year revenue grew 30 per cent while

EBITDA doubled. In 2022 it opened three data centres, onboarded 12 new clients, welcomed 34 team members, introduced four additional services and rolled out its channel partner programme.

Partnerships

"We recognised the market opportunity to establish a channel division, opening

up new income streams while supporting other IT companies on their own growth journeys," explained Ali. "Growing customer demand for IT systems that are easier and cheaper to manage is fuelling the growth of MSPs. The programme makes it easier and quicker for partners to deliver new services. They can



n the Goliaths

access managed solutions, additional technical support, our cloud expertise and global service capabilities."

Another clear development has been Creative ITC's speciality in the Architecture, Engineering and Construction

In the next three to five years Creative ITC will be a £400 million business

(AEC) sector. "Our enterprise scale DaaS roll out for BAM broke new ground in the AEC industry," claimed Ali. "And our contract win with SNC-Lavalin last year was the company's largest deal to date. But more importantly, it's evidence that our business strategy is paying off."

Last year the company was hailed as the number one AEC Cloud Services Provider in the UK, became the first UK VMware partner to achieve all seven MSCs, was crowned NetApp Platinum Partner of the Year and won three industry accolades as well as four UK best workplace awards.

Ali also noted that Creative ITC is well positioned to take advantage of the transition towards Everything-as-a-Service, providing solutions that meet future needs while dovetailing with existing IT investments. As-a-Service offerings complement Creative's VDIPOD platform and can be utilised as customisable solutions in their own right.

"Hot on the heels of infrastructure virtualisation,

application virtualisation is burgeoning," he added. "Yet compute and storage – and therefore virtualisation – are coming closer to the edge. This increases the need for greater workload mobility, automated operations, improved performance and resource availability. These are some of the main drivers behind our focus on solution development."

To help clients future proof their IT and overcome challenges when modernising IT systems, Creative ITC has also developed a Modern Application Platform (MAP) based on Kubernetes designed to de-risk legacy system updates while stretching budgets through container orchestration and performance improvements. "It's a single-stop solution for updating older software to the latest languages and frameworks, while simplifying scary and costly cloud transitions," said Ali.

But for Creative ITC, the best is yet to come according to Ali, who joined as Managing Director in 2013 after a stint as head of technical strategy at Cisco, spending eight years overseas running IT departments throughout APAC and the US before leaving to join Creative ITC. "We've enjoyed phenomenal growth and the stage is set for that to continue," he said.

"This year we step up another gear. We're in investment discussions to fuel development through both organic and inorganic routes, and in the next three to five years Creative ITC will be a £400 million business. Watch this space."

Just a minute with Keith Ali...

Role model: An old boss of mine who showed me how to be a leader, have no preconceptions, ignore reputations and give everyone the same opportunities and respect.

Your main strength and what could you work on?

My vision and firm belief that anything is possible is a strength. But I still need to work on my patience.

If you weren't in ICT what would you be doing? I love DIY, so a builder or carpenter.

Tell us something about yourself we don't know:

My guilty pleasure is watching reality TV, particularly talent shows.

Three ideal dinner guests:

Richard Branson, I admire his approach to business and his vision; Sylvester Stallone, I grew up watching his films and was struck by his self-belief; and Piers Morgan, love him or loathe him, he always stimulates interesting debate.

Best advice you have been given: Self-doubt is not only common, it's universal. Don't let it limit or stop you. Listen to it, overcome it and move forward.

Industry bugbear: Global network connectivity remains a huge challenge for the industry. SD-WAN has gone some way to overcoming the issue but really, it's a way of treating the symptoms rather than tackling the root cause. The problem still exists.

Lesson learnt: When you're setting out it's tempting to recruit more junior people to maximise staff budgets, but this often proves to be a false economy. Experienced team members bring more skills from day one and can fuel company growth much faster.

Top tip for resellers: Find a partner who really understands what you're about and can help you on our journey.

The telecoms industry is forever changing and that is why we have our agony uncle and channel expert James Drake here to answer all your channel queries and industry issues. James is the Managing Director of Eclipse Wholesale, a channel-first connectivity and comms distributor that offers market-leading services throughout the UK. With over 30 years in the business who else is best placed to answer all your burning questions?

Take a look below for this month's most sought-after queries...

Q1. When is the Copper Switch Off and how will it impact my customers?

Dave, Nottingham

A1. Stop/Sell is later this year and switch off is in 2025. It will already be impacting your customers with Copper-based products seeing consistent price increases. I recommend you speak to suppliers about washing your estate and scheduling migrations to Full Fibre products.

Q2. How do I prevent Mobile bill shock? John, Fife

A2. Bill shock is caused when a user unexpectedly receives an invoice for usage, usually, when roaming. The most efficient means of preventing this is to set usage alerts, bars and monitor customer usage via real-time usage portals.

Q3. Is the Comms industry still relevant? Everyone seems to be leaving the

A5. Simple SOGEA, FTTP, Mobile, Unified Communications.

sector. Adrian, London

A3. Ha-ha! The Comms marketplace is moving through a transition period, but who could resist the opportunity to assist customers to utilise Full Fibre connectivity?

Q4. The UK is currently experiencing record inflation. Will we see prices going up? Gwyn, Wrexham

A4. Absolutely. Several factors are all pushing wholesale comms and connectivity pricing upwards, so be prepared for price increases across the whole marketplace and from all vendors.

Q5. I'm new to the Telecoms industry, what products should I be selling? Rory, Peterborough

Got a question or would like to find out more about Eclipse Wholesale?

Get in touch here: <https://www.eclipsewholesale.co.uk/news-insights/channel-corner-with-james-drake/>

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High optimism prevails

It is unclear how the UK's economy will affect channel businesses, but according to Jola CEO Andrew Dickinson there is little to inhibit the firm's ability to achieve its goals over the next 12 months. To understand what lies behind Dickinsons' optimism we asked the questions all channel CEOs will be pondering.

Dickinsons' optimism about channel growth continues to build, despite a dip in the economy – and he has good reason to be upbeat: As part of Wireless Logic (which acquired Jola last July), Jola is supported by what Dickinson describes as 'one of the largest and most innovative IoT/M2M companies in the world'. Furthermore, Jola increased revenues by 40 per cent and doubled EBITDA last year, an uptick that put the business on track for its best performance to date, according to Dickinson. "2022-23 will be our best year ever with revenues and EBITDA up significantly on 2021-22, due to a swelling of our partner base to over 1,300," he stated.

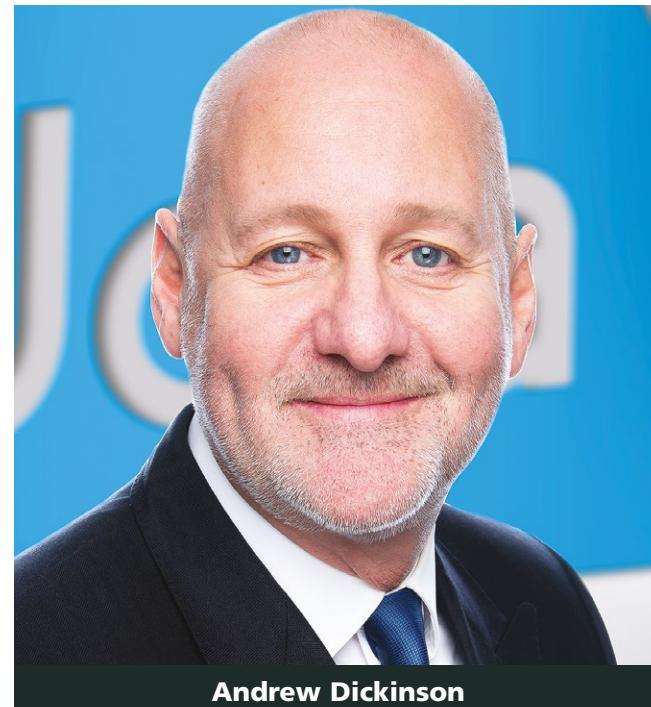
The company also continues to benefit from large inflows of sales from bigger MSPs and resellers winning significant orders. Even more potential resides within the tranche of resellers yet to

get into mobile data. "Only around 30 per cent of resellers have a mobile data proposition and to compete effectively in the next few years they all must have one," added Dickinson.

Growth potential

He says that mobile data is the fastest growing telecoms sector and partners who win mobile data deals accrue important recurring revenues that increase the value of their business. "M&A activity shows that resellers embracing mobile data are on average 3x more valuable than others, with EBITDA multiples as high as 25x," explained Dickinson. "Furthermore, resellers without a mobile data proposition will not be in a position to help customers through the 2025 switch off."

Another source of growth, noted Dickinson, is innovation, which is especially driven by small



Andrew Dickinson

means you tend to meddle in peoples' jobs, so much so that the best people could become demotivated and leave when they see standards dropping."

Agility is key

Another pressure that is causing concern for CEOs is managing everyday challenges, which Dickinson overcomes through Jola's collaborative and agile approach, enabling it to react quickly without breaking processes. But the biggest challenge for resellers in recent years, says Dickinson, has been to wean sales people off capex sales and onto 'rule of 78' recurring margin commission schemes. "This makes it much easier to compare the relative value of new products and has made channel sales people more flexible," he commented.

"The channel has always thrived on technological change and flexibility is key to maximise the potential of compelling events like the 2025 PSTN switch off. There is an unprecedented opportunity for resellers to grow the value of their businesses. High monthly recurring revenue makes the channel more resilient to downswings and we have never been in a better position to win more and bigger orders from under the noses of the big telcos. The channel is in great shape."

Jola is also in fine fettle, and every employee benefits from achieving its EBITDA target. "One of our best decisions was giving all Jola people share options," said Dickinson. "And one of my best moments was telling everyone how much they were worth when we sold last year."

Resellers without a mobile data proposition will not be able to help customers through the 2025 switch off

and agile organisations such as Jola. Some of the decisions Dickinson is prioritising right now sit around innovation, which he says is key, especially for a business occupying Jola's place in the value chain. A big innovation trend to have emerged from Jola is automation, which is central to its modus operandi and the success of Dickinsons' leadership approach.

Strategic decisions

"My job is to set a strategic direction for Jola with trickle down KPIs, and then ensure that we focus on, understand and correct any negative gaps," he stated. "In this context, our focus on process automation has allowed us to grow rapidly without

adding to staff overheads. But due to an acceleration in new partner acquisitions we have two entry level account management positions to fill – that will be it for this year."

One of the big pressures of business growth is to maintain or improve quality during phases of expansion. But this is not a pressing concern for Dickinson who articulates a solid strategy. In contrast, he has observed other organisations fail to grasp the basics. "I see many companies abandon the basics of recruit, train and retain as soon as they start to enjoy success," said Dickinson. "Lazy recruitment in a growing company means you are always recruiting and re-recruiting. It also

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Progress on key parameters

UK organisations are relying on their CP providers to help them navigate and emerge stronger from the large-scale and complex PSTN shutdown in 2025. But it's testing times for the industry and although we face a universal task how CPs approach it varies significantly and they fall into three camps – the doubters, laggards and doers. And to say that the transformation ahead requires an industry-wide responsible approach would be to underestimate the gravity of key messages urged by industry leaders during last month's Channel Forecast insight session.

The journey to all-IP will soon reach a critical juncture as all eyes fall on Salisbury and Mildenhall when Openreach will close the copper network in April 2023. "April 19th will inform us how feasible the 2025 date really is," stated Steve Blackshaw, IP Migration Director, BT. "The trial will demonstrate how the market reacts, the media's perception, and it will show how CPs have prepared their service organisations for the consequences of not migrating WLR in just two exchanges. It's a huge test for the industry and Ofcom. If we are serious about this change we need to embrace it. We need to learn from the pilot – that's the whole point of a trial. And we need to industrialise readiness for 2025. If we respond well in April this year then December 2025 is feasible."

April 23rd is certain to be a critical bellwether. However, equally important is the WLR stop-sell which could also be a make or break moment. Adrian Sunderland, CTO, Jola, added: "2023 is the acid test. We have Salisbury and Mildenhall in April,

and the WLR withdrawal in September 2023. This is the year. There will probably be some tactical solutions that need to evolve as we approach 2025, but if we can't solve the problems that occur in April and the September date shifts, then the 2025 deadline is doomed. This is the year that all of us have to respond."

Legacy issues

However, despite the lessons that will be learned from the PSTN closure trials in just a few weeks time some CPs will likely remain challenged and shackled by their loyalty to legacy technology. For them the change ahead requires a new, more positive and responsible perspective. "I've heard people say 2025 is not going to happen," observed Mark Howarth, Head of Trading and Partner Experience, Zen. "But the messaging from industry and from Openreach is clear, and the price increases show where BT wants to go. It's an industry problem and challenge and we need to work together. It's the responsibility of CPs and the industry to take 2025 seriously and stop thinking it's not going to happen."



Steve Blackshaw

If we are serious about this change we need to embrace it. We need to learn from the pilot – that's the whole point of a trial

No organisation currently relying on PSTN will be able to respond positively to the 2025 switch off without a CP partner that is responsive to change. This means customer centricity needs to move to the forefront of many reseller businesses, noted Adam Cathcart, Managing Director, Onecom Partners, who

emphasised that effective client engagement and personalised relationships are more crucial than ever. "But for a number of resellers across the channel their contact strategy with the customer is non-existent," stated Cathcart. "It is important that resellers have that trusted advisor

relationship and are regularly in contact with customers so they are aware of the journey ahead and how they can best utilise the investment they have already made."

The opportunity for CPs is to become drivers of positive transformation in customer organisations, rather than be seen as an occasional and one dimensional service function. But this requirement may present a big challenge for smaller CPs. "There is a palpable divide among resellers based on what their customers look like," noted Sunderland. "If customers are in the larger end of SME, the enterprise or public sector, these partners could be part way through a large project to migrate from PSTN/ISDN instigated by the customer. But the other half of resellers focused on SMEs aren't acting quickly enough. The customer isn't asking for it, and these resellers aren't actively promoting the transition. It's a huge opportunity missed by some of the smaller resellers."

Many CPs have traditionally been characterised by standardised approaches to customers and may find

Factors vital to 2025 success

themselves between a rock and a hard place when making decisions. "What we see from partner feedback is that, yes they want to go on the journey and transition their customers, and yes there is an urgency around that, but they also have to balance this with the requirements and growth of their business, in the context of shareholder expectation or simply to survive," added Cathcart. "The focus for resellers is on striking the right balance between making the transition and winning new business."

The comms sector has historically thrived on change, but as the discussion above suggests, the implications of the PSTN switch off may not be fully understood by certain resellers lacking a depth of understanding at a management level. The fact is that no area of the channel will be untouched by this development, and no CPs are exempt from the impact, which carries a risk. "Our observation is that resellers who act early are benefitting the most for sure," added Blackshaw. "The early adopter phase is absolutely over and those that adopted the IP portfolio 18 months ago have now adapted to the APIs and are reaping the rewards. The real risk is that legacy focused providers will be left behind."

Awareness in the market is also a challenge, but efforts are being made to bring 2025 front of mind. "There are three different layers of BT Group we work with to get the message out about all-IP – but there is more work to do in the market," added Blackshaw. "Outside of BT, a number of CPs including BT are working with



Adrian Sunderland

If we can't solve the problems that occur in April and the September date shifts, then the 2025 deadline is doomed

Tech UK to engage industries, local authorities, DCMS and Government to raise awareness. That's fine, but we need to do more so BT Group is managing a series of marketing and public relations campaigns in 2023-24 including the channel."

Consultation

It is a fact that the PSTN switch off is challenging many resellers' capacity for marketing, directly impacting their ability to gain customer traction unless they learn to take a more consultative approach. "This is not like the analogue TV switch off where we saw billboards in town centres, this is being done by the industry and trusted consultancy is what we are focusing on," stated Howarth. "It's about taking partners on the journey with clear processes and clear templates. Data will drive good decision making over the next two years

around availability and make it easy for resellers to understand and tell the story to their end customers."

Sunderland also noted that traditionally it's difficult for resellers to press ahead with push marketing. "Unless there is large scale national education from Openreach that reaches everyone then there is not going to be pull demand – so there has to be trusted consultancy," he said. "There has never been a better reason to phone up a customer, have a conversation and propose a solution."

It could be argued that consultancy has become the number one driver of competitive advantage on the road to all-IP. And there is no time to waste in picking up the phone because Howarth calculates that a reseller with 1,000 PSTN circuits will have to transition one a

day between now and the switch off. He then raised some key questions: "Given the economic climate, is this a priority for customers? And for some CPs, is it a priority? Are they kicking the can down the road? There are other priorities for them other than embracing 2025 and acting quickly. The industry needs to make this a higher priority for customers needing to understand the problems they will face in 2024 and 2025."

Polarisation

It is clear that disparities between proactive and less active resellers will become more pronounced, and to prevent a continuation of this trajectory Onecom Partners tracks and shares knowledge across its bases, benchmarking companies by tracking them against their counterparts. "If resellers drop below the mean they focus more on increasing their momentum," explained Cathcart. "We maintain that interaction with partners, make sure they understand what 2025 means to them and recommend the products and services we feel would suit the customers they are going after."

As we have seen, the comms industry will likely define its assessment of 2025 viability primarily through the lens of Salisbury and Mildenhall in April. But for now, the signs are positive despite obvious challenges. "2022 was a huge year for our all-IP portfolio in terms of data access, SoGea, FTTP, and also in closing out some of the older networks," said Blackshaw. "That contributes to our all-IP journey. The decline in the legacy PSTN and FTTC market has been

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Key points...

- There should be no blurring of the lines between Openreach's stated intent and CP assumptions that the 2025 deadline is a pipe dream. The die is cast.
- April 23rd 2023 represents a critical bellwether as Salisbury and Mildenhall become the key focus of attention when local PSTN exchanges are shut down.
- Consultancy is the lifeblood of 2025 success and one of the most important issues for lagging resellers to resolve.
- Determining what customer PSTN lines are used for is the critical first step in applying an all-IP roadmap and establishing a consultative footing.
- For resellers to remain competitive they need to provide a smarter and more bespoke service that takes into account the diverse needs of customers.
- The longer an all-IP implementation timeline is delayed the more challenging it becomes to address. Therefore 2025 strategies should be a key focus area for resellers now.
- CPs should seek to optimise their 2025 strategy based on five parameters: Accepting that the deadline is set in stone, auditing customer PSTN usage, conducting broader product and service consultancy, working more closely with vendor partners and taking responsibility.
- The opportunity for CPs is to become drivers of positive transformation rather than be seen as an occasional and one dimensional service function.
- It is not enough to think of 2025 in isolation from current business strategy. In order to succeed, CPs need to quickly align across all aspects of the migration.



Margin

**Mark Howarth**

This is not like the analogue TV switch off where we saw billboards in town centres. This is being done by the industry and trusted consultancy is what we are focusing on

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dramatic, and 2023-24 will be even bigger years because there won't be a single customer in our portfolio that cannot move to an all-IP substitution by the end of Q2."

Howarth pointed out that 93 per cent of new orders for Zen's direct business are a mix of SoGEA and FTTP. "Within our partner business this rose from 66 per cent to 84 per cent in December," he said. "And there has been

a 72.4 per cent increase in our IP voice fulfilments from December 2021 to December 2022. The biggest metric is around identifying the gap in that installed base in 2024 to forecast how much heavy lifting there is to do."

**Adam Cathcart**

The focus for resellers is on striking the right balance between making the transition and winning new business

Jola's portfolio is all-IP by nature, and compared to 2021 it worked on many more projects last year that were absolutely about deploying IP to replace PSTN and the data signalling marketplace with ISDN. "That took us by surprise and we acquired a wholesale SIP provider to help us meet some of that demand," said Sunderland.

It must be accepted that targeting the PSTN switch off without resolving the complexities of Salisbury and Mildenhall (if any emerge) significantly raises the stakes in respect of 2025 success. But however you look at the

switch off, the bigger all-IP picture tells a compelling story. "Ultimately, we are learning that migrating to all-IP enables businesses to more easily move their applications to hybrid cloud," commented Blackshaw.

"That enables flexibility in network routing and IT architecture, and when we talk to IT directors they insist on using IP as a protocol. As we turn off our legacy networks, not just PSTN, those IT directors are desperate to get away from legacy protocols because it disables them. There is a much wider conversation to be had with customers." ■

More important points to consider...

Mark Howarth, Head of Trading and Partner Experience, Zen

We know from our own research that one in three SMEs are aware of the switch off and the impact it will have on them. The key word is enablement, so resellers can make logical decisions for their business at the right time for them. Clearly the clock is ticking, but it's about formulating a plan, and keeping the dialogue open between ourselves and resellers is key.

Adam Cathcart, Managing Director, Onecom Partners

Our background is in being a traditional fixed line business so we've seen that transition over a number of years, and in 2022 continued to see growth in IP. But 2023 is going to be a big year for us in terms of the drive for 2025. One of the key things is to make sure we are communicating updates from Openreach and the Federation of Communication Services to the channel, to enable partners to manage their customers' expectations.

Adrian Sunderland, CTO, Jola

Case studies are beneficial for resellers that haven't won that first IP voice deal yet. A good example is a reseller who is our biggest customer for ISDN replacement despite never selling an ISDN in their 30 year history as an MSP. We helped them on that journey based on a case study. For those not yet on this journey, speak to your suppliers. Don't try to learn everything from scratch. The reality is that suppliers would have solved problems and helped similar resellers. This is where wholesale suppliers can help to kick start this process.

Steve Blackshaw, IP Migration Director, BT

Start now: It's a huge opportunity but also a massive threat to those who don't take 2025 seriously. I would suggest as a first step discussing an audit. If the customer has more than 20 PSTN lines, what are they using them for? BT Wholesale offers audit services if partners don't have that capability.

Billing charges forward

PRD Technologies exemplifies a sector that has stepped up the pace to generate new opportunities for resellers and address a range of strategic and evolving requirements. Here, Managing Director Simon Adams shares insights into the actions he is taking to help move the channel billing market to the next level.



Simon Adams

One of the biggest priorities for ICT resellers seeking a competitive advantage is to have an automated billing platform in place that enables them to integrate with multiple distributors and offer a diverse portfolio of flexible services and bundles, according to Adams. And investments made into PRD Technologies' Intelligent Billing platform last year were also reflective of increasing demand from the channel for more sophisticated enterprise level solutions. "Larger providers and resellers are no longer content using standard billing platforms with moderate levels of functionality, combined with manual processes," stated Adams.

Intelligent Billing is now used by some of the largest IT distributors and cloud service providers including Westcoast Cloud, OPTM and XMA. Another element of

PRD's 2022 strategy was to work with fibre providers and altnets. "The larger altnets demand bespoke functionalities, often high invoice output capabilities with tight timelines and integration with third party systems such as Automate, ConnectWise, GoCardless, Marketplace and Microsoft Power BI for intuitive data insights," added Adams. "PRD's platform now supports these requirements and we are working on tenders with specific and scalable requirements right now. This is an exciting industry sector for us and we are looking to grow within this space during 2023."

In 2022 PRD delivered a near fully automated platform for WightFibre. The platform is so automated, said Adams, that users rarely need to use the billing portal because Intelligent Billing integrates all the subsystems ensuring they interact with minimal human interaction. "One

Larger providers and resellers are no longer content using standard billing platforms with moderate levels of functionality, combined with manual processes

of our clients claimed that the enterprise level solution saves 300 hours per month in manual work compared with their previous billing platform," added Adams.

Total automation

API development is also a key part of PRD's 2023 roadmap. "We plan to continue developing API libraries to fully automate our platforms at all levels, wherever possible," stated Adams. "For example, due to increasing economic uncertainties resellers are more cost sensitive and require automations and integrations, even at entry platform

levels, often to compensate for resource reductions."

Also on PRD's to-do list this year is widening key partnership programmes, including ConnectWise, GoCardless and others. "We recognise the importance of these systems across all sectors and the need for PRD Technologies to partner with them," commented Adams. "We will also be recruiting key strategic new roles to support our growth plans."

A big challenge facing the sector is increased sales cycles, especially at enterprise level, while the

tender process is becoming more detailed. "Compliance standards and regulations are now at the forefront of any client proposals, hence our ISO 27001 and ISO 9001 accreditations," added Adams. "ISO 27001 standards especially are now minimum prerequisites on tenders we receive. This helps dispel trust and data breach concerns with client data."

From a helicopter perspective, Adams sees three main drivers of change in the ICT channel billing landscape over the coming year and beyond – increasing API integrations, automations and partnerships with providers such as ConnectWise, Microsoft and in Fintech. "We are being invited to partner more and more with key strategic developers' programmes, especially in Fintech," said Adams.

Other important billing related trends Adams is tracking include less demand for core level billing platforms. "Accounting systems are increasingly used for fixed priced and bundled services as alternatives to traditional billing systems," he observed.

Billing complexities remain one of the biggest challenges facing resellers, especially where they partner with a number of distributors and sell a diverse range of products and services, pointed out Adams. "Billing can become extremely complex, time consuming and resource heavy," he said. "This is why PRD Technologies will continue to partner with key distributors in 2023, developing automated and integrated functionality to simplify the onward billing process." ■

Stobart's green mission

Zen CEO Paul Stobart is tackling the Scope 3 carbon emission challenge head-on and has taken decisive and proactive action on rallying the industry to urgently get to grips with the supply chain decarbonisation agenda. Here, he shares insights into the sustainability imperatives and hurdles that will impact us all, and encouragingly he writes with an optimistic note.



Paul Stobart

Continuing extreme weather around the world in recent months, the atmospheric rivers in California, devastating floods in Australia, or worsening droughts throughout the Horn of Africa, reminds us of the untold damage that decades of carbon emissions have been, and are doing, to our climate. As business people we are alive to this threat and recognise that we share in the responsibility to reduce emissions to the minimum as fast as possible.

Recognising the urgency, Zen has completed measurements of Scopes 1 and 2 emissions (effectively those that are directly or indirectly under the control of the business), and Scope 3 emissions (those emissions generated by upstream suppliers providing us with products and services and by downstream customers

who use those products and services). We have submitted our plan to get to Net Zero to the Science Based Targets initiative (SBTi) and had it approved, and are now executing on our strategy to reduce carbon emissions for all three Scopes by 50 per cent by 2030 and by 90 per cent by 2040.

Setting the standard

The SBTi's Corporate Net Zero Standard is the world's first framework for corporate Net Zero target setting in line with climate science. It includes the guidance, criteria and recommendations companies need to set science-based net zero targets consistent with limiting global temperature rise to 1.5°C.

Success will depend on suppliers and customers in the supply chain in which we operate helping us achieve these goals. We are all in

this together. To that end I have been lobbying the larger players in our industry to join a steering group on climate change to provide guidance, information, and encouragement to the thousands of businesses who want to do the right thing by the environment, but either don't know

1 and 2 emissions, the challenge is dealing with Scope 3. Measuring Scope 3 emissions is difficult because, due to the lack of available data, it relies on us 'guesstimating' emissions across the supply chains we serve. Setting out to reduce these Scope 3 emissions presents further challenges,

in global supply chains are placing additional emphasis on sustainability. If they don't see their suppliers developing strategies with a view to reducing emissions, then these corporates have made it clear that they will switch supplier. Indeed, I have seen this happen in the UK in several industries outside of telecommunications in the last six months. It's amazing how quickly businesses develop sustainability strategies when there is a threat of losing a big customer!

This is not a challenge we can pass to the next generation, by then it will be too late. The challenge is ours and it is now

what to do or how to go about do it. Happily, this idea has been well received and I am hopeful we will see meaningful progress in 2023 because the criticality of positive action grows by the day.

All businesses can take steps to reduce Scope

as all we have been able to do historically is influence others to do the right thing and reduce their emissions, thereby helping the whole supply chain reduce emissions in aggregate.

But I do sense that things are changing. First, it's clear that more and more corporates

Second, businesses are taking the whole issue of Net Zero far more seriously than was the case a few years ago. I sit on various boards and Net Zero is now a regular agenda item. The conversation is no longer about how to measure emissions or how to put in place appropriate milestones. The discussion now is all
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Put second use first

Manufacturers must shift gear to realise sustainability potential, according to ETB Technologies Managing Director Nick Stapleton.

According to Stapleton, there is a significant opportunity to develop the supply chain with a sustainable mindset by considering the second user market right from the point of manufacture. "Currently, some manufacturers restrict access to licences, support contracts, upgrades or spare parts, which makes the product less appealing for the refurbished market," he stated. "Making these more readily available to all would get more equipment into the 're-use, refurbish, recycle' loop, which we believe would create a more buoyant market across all ages of equipment."

Stapleton believes that greater availability in the second user sector will attract more potential customers who may never have bought new. He reported a 44 per cent increase in new customer spending from 2021-22 as more organisations realise the product quality and availability within the sector.

"This continues the demand for new products being constantly added to the top of the funnel, and allows a greater choice for a wide range of business sectors," he added. "This would have a positive effect

on sustainability and Net Zero goals for the channel and wider industry."

Working together to improve the industry through quality and availability can only be beneficial for everyone, emphasised Stapleton. "We're already seeing some good examples of collaboration, such as the recent creation of a BSI standard for refurbished items, which is a great step forward to continue to build trust," he added. "There is also talk about the creation of an industry body to help with lobbying and standards."

However, the sector could do better, noted Stapleton, pointing out that the Open Compute Project – the collaborative community focused on redesigning hardware technology to efficiently support the growing demands on compute infrastructure – appears to have limited contribution from the big manufacturers. "It would also be beneficial to see more collaboration between companies to encourage the Government to take the lead in promoting refurbished or re-used equipment, which can have financial benefits as well as green ones," commented Stapleton. "Until the Government supports



Nick Stapleton

Until the Government supports the product cycle as a whole manufacturers will continue to have control over the second user market

the product cycle as a whole manufacturers will continue to have ultimate control over the second user market."

Green incentives

Government incentives and subsidies are key to ensuring more businesses consider refurbished hardware, noted Stapleton, citing one example where the Government could include refurbished machinery in the super-deduction allowance which lets British firms claim back up to 25p for every £1 they invest in 'qualifying' machinery and equipment, and update this before it ends in April this year.

"Research into sustainability and best practice, such as energy consumption in data centres, should also take into account the use

of refurbished tech when calculating any environmental benefit," added Stapleton. "There is an opportunity for the sector to work more closely with distributors, as well as the more academic side of IT, to raise awareness of the benefits."

ESG becoming a governance related topic has correlated with environmental awareness becoming a board level issue, which is a positive development, observed Stapleton. "Talking about these issues at a board level will ensure that they filter through all aspects of business," he said. "And having the opportunity to collaborate more with partners and others in the same sector means that there will be a stronger voice for the green agenda."

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around execution... what are we doing right now to reduce emissions, and to achieve our milestone ambitions?

Third, I believe that the Scope 3 challenge will get resolved over the next few years as more companies come together to work through how to measure, share and manage carbon data. Organisations like CDP already provide hubs and portals where businesses can work out their Scope 3 emissions and assess how best to reduce them.

Leadership matters

Fourth, peer pressure in this space is real. CEOs do not want to be seen to be out of touch when it comes to the environmental agenda. They want to be seen as proactive. If an organisation has a half-hearted strategy on how to tackle climate change, then it will be vulnerable to customer defection and will struggle to recruit key talent.

Finally, markets are becoming more informed about climate change and prepared to challenge businesses when claims are exaggerated, or just plain wrong. Many businesses today claim to be green when all they have are some carbon offsetting activities to reduce Scope 1 and 2 (but not Scope 3) emissions to a net neutral position.

Some businesses say they are at Net Zero already, a claim that needs to be challenged. The only way that this can be the case is if those businesses have reduced their carbon emissions by 90 per cent and put in place carbon removal practices (such as tree planting, kelp farming, soil management or direct from air carbon capture) to remove the remainder. That's a hard bar to reach. The Net Zero imperative is not a challenge we can pass to the next generation, by then it will be too late. The challenge is ours and it is now.

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A balanced agenda

In response to the market forces that will shape the future of billing, Tekton Managing Director Harry McKeever has struck a balance between taking actions to drive innovation while moving the needle on today's opportunities and challenges.

To understand the future of billing in the ICT channel it is key to acknowledge the driving forces at play. According to McKeever, the billing landscape will undergo significant changes over the coming year and beyond, and will be characterised by greater flexibility, personalisation and digitalisation. But these next moves will be accompanied by familiar challenges which McKeever says can be disburdened with the right billing approach. "The channel's infamous competitiveness and tight margins remain the biggest issue," stated McKeever. "Resellers are continually faced with the challenge of differentiating themselves against largely like-for-like counterparts. However, billing offers a clear route for creating significant competitive advantage, and as a billing provider we must continue to innovate."

The factors that are redefining the channel's billing ecosystem include greater demand for automation and digitisation, so much so that McKeever

urged ICT providers to invest in tools and technology to automate billing and customer management. "Incorporating automation and AI into billing systems to improve accuracy, reduce human error and increase efficiencies is key," stated McKeever. "Offering a dynamic self-service facility for improved visibility, control and overall end user experience is also fundamental. Customers value having access to real-time information, personalised alerting and transparent billing practices."

Furthermore, big data and analytics enables channel providers to gain insights into customers' usage patterns and preferences, enabling them to personalise billing and pricing strategies. "Predictive analytics and machine learning algorithms identify patterns in customer data," stated McKeever.

"Astute resellers will use their billing platform to gain commercial intelligence, rather than to simply issue invoices. They will have the ability to track and analyse customer usage data to improve



Harry McKeever

billing accuracy, influence commercial strategies and target up-selling opportunities. Visualisation and comprehension, rather than raw data, is essential."

Margin analysis

Meeting the growing demand for real-time information and automatic CDR imports improves cash flow and reduces the need for customers to pay large lump sum bills at the end of a billing cycle. "Business intelligence reporting and margin analysis suites also help resellers to identify loss-making services, unallocated services and high margin charges," added McKeever.

Another consideration when developing future-proof billing systems is the growing use of digital payments. McKeever pointed out that

ICT channel providers will need to adopt advanced modes of payment such as e-wallets, virtual credit cards and other digital payment methods to meet customer demand. He also noted that the Internet of Things and connected devices will lead to more complex billing models. "With the growing number of connected devices, billing solutions need to handle the increased complexity and volume of data generated by these devices," added McKeever. "This includes usage-based billing and real-time charging."

"We expect the IoT to be a hot topic in 2023 with more resellers capitalising on it. This means expanding our SIM management integrations to include additional vendors and a wider array of functions."

Tekton's integration with mobile providers has long been a feature of its platform, allowing customers to self-serve functions from SIM swaps to call barring. And with the emergence of 5G, billing solutions need to support the greater speed and capacity of these networks. "This includes real-time usage-based billing to keep up with the increased data usage in 5G," added McKeever.

Also at the forefront of his mind is the growth of omnichannel billing, because connecting all customer touchpoints, such as website, customer service centres and mobile apps, enhances the customer experience. Another aspect of improving CX is the integration of billing systems with other service providers to provide customer choice. "Establishing API integrations into third party best-of-breed software systems, such as accounting software, saves time and combines data from multiple sources to produce tailored intuitive reports that support strategic planning," noted McKeever.

Throw into the mix Ofcom's billing-related regulatory changes and the need to stay compliant comes into sharp focus. This includes the watchdog's latest update which gives customers more control over bundles and alerts. Taking all this into account, it's clear that resellers need to be adaptable and innovative to succeed in the future. "By offering a variety of billing options, going online, bundling services, personalising their billing, automating their processes and implementing SaaS billing, resellers will be able to stay competitive," concluded McKeever.

A catalyst for change

In this strategy update ITS CEO Daren Baythorpe displays a clear intention to turn full fibre industry transformation into a catalyst for positive change among channel partners.

Backed by Aviva Investors, rapid growth has become a defining factor for ITS in recent years. The company – which is primarily a network builder of wholesale access full fibre networks – has substantially increased its network reach, is profitable and has more than trebled revenues year-on-year. "We balance high growth with profitability," stated Baythorpe. "Creating a sustainable business gives partners the confidence to grow with us."

Baythorpe fully expects its impressive growth trajectory to continue while deepening and broadening relationships with the partner base, and commercialising the network infrastructure through the addition of new products and services. Portal and API development are also priorities, along with ensuring the right people are on board. "Over the last 12 months we have more than doubled our headcount," added Baythorpe. "We focused our recruitment around technical capabilities, the product portfolio, bid support, customer service and field delivery."

Having secured the capabilities he needs and

put in place positive changes across the business Baythorpe is confident that ITS is in a stronger position to support the growth of its Faster Britain brand launched in 2020. "There are three main components to this programme – getting fibre in the right places across the UK, warming the market to full fibre XGS PON-based services to replace ageing Openreach-based leased line EAD infrastructure, and giving partners the tools to win in the market," explained Baythorpe. "We also provide a range of off-net solutions anywhere in the UK via our infrastructure partners."

Last year ITS opened a new headquarters and NOC along with an office in London. These investments help to bring teams together, including partners. "The collaborative spaces have already paid dividends and are a reflection of how hybrid working is so beneficial to productivity," added Baythorpe.

M&A is another important aspect of ITS's strategy, underlined by last year's acquisition of NextGenAccess which brought additional dark fibre expertise into the business, as well as increasing ITS's own fibre footprint



Daren Baythorpe

The telecoms industry is undergoing a once in a lifetime change as the UK transitions from copper-based FTTC broadband to full fibre

which is reflective of a major transformation in the sector.

Industry transformation

"The telecoms industry is undergoing a once in a lifetime change as the UK transitions from copper-based FTTC broadband to full fibre," stated Baythorpe. "Our own roll out is helping to drive this by delivering access to business communities across the UK. Many of our partners are beating the drum for fibre using our Faster Britain brand and the collateral we have put at their disposal."

Baythorpe has witnessed growing demand for higher bandwidth 10Gbps services and greater acceptability that FTTP broadband can deliver

reliable business class services that replace copper and low end 10 and 100Mbps leased lines. "However, the overall demand for leased lines is growing as businesses adopt the Internet and cloud-based solutions and sunset old expensive technology such as MPLS," he said.

Baythorpe's broader plan is to enter locations with high business density and low current fibre access. Basically, areas with pent-up demand, and the strategy is accelerating. "This year we will roll out more full fibre than any other single year to date having substantially scaled up our delivery capabilities," he commented. "This is the result of us entering new towns and

cities while building out and densifying our current network footprint."

These successes are a manifestation of Baythorpe's belief in delivering clear leadership and focus, enabling greater partner-led sophistication and adaptability to be built into the business. "We will remain agile to what the market needs and continue to listen to partners," he stated. "Feedback is a gift that we can always learn from. This is a key reason why we have invested in building a significant sales team that offers close and engaged partner liaison."

In dealing with today's major challenges such as high inflation and the economic impacts of war in Ukraine, Baythorpe has taken strategic measures to mitigate the consequences on ITS and its partners.

"Across the board we are all experiencing increased costs," he commented. "The telecoms industry is impacted by the fact that kit is priced in dollars and no one is immune to fluctuations in the exchange rate. There are also supply issues."

"To mitigate this risk we have worked hard to build long-term agreements with our suppliers which has been helped by our financial stability and the line of sight we have on our business. We will always think carefully about any price changes and have not applied any increases to our on-net connections. The key priorities must be to ensure we are delivering on our promises, the consistent quality of delivery, service and communication. This is our ongoing focus."

Successful strategies that pro

After the pandemic, channel organisations enhanced their wellbeing strategies to alleviate the strain on their staffs' physical and mental health.

Many of the proactive players would go on to cite these measures as key for their staff retention and recruitment over the last few years.

However, these measures must evolve once again as the ongoing cost-of-living crisis has made financial uncertainty a top concern for employees. The sector is never slow to adapt and this feature will provide a window into the people-focused measures being successfully adopted to promote wellbeing.

With aid ranging from one off payments, to ongoing financial advice, an empowered workforce expects their employer to take an active role to support them through a tough period.



PARYSA HOSSEINI-SECH
ONECOM

Our biggest focus on employee wellbeing is mental health support which evolves based on peoples' needs. Many external issues post-pandemic continue to impact our people, the latest being the cost of living crisis and the uncertainty that comes with the current economic climate. We have a strong team of Mental Health First Aiders who share sources of support, including an internal podcast series. Onecom staff have access to an Employee Assistance Programme, resources available through our benefits schemes and free support from our financial advisors. We continually look at ways to support the health of our employees, creating a positive impact on overall wellbeing. Our culture allows staff to talk more openly about their wellbeing, something that has developed over the past few years and shows how important it is to break down the stigma around mental health.



LAURA BARROW
GIGANET

The cost of living crisis has emerged as one of the main challenges to employee wellbeing. Alongside a one-off payment made to all our staff, excluding executives, we have facilitated professional financial planning workshops and one-to-ones to help our people navigate this period. We also hold wellbeing days which include bespoke health and nutrition workshops and individual health checks. One of our Survey Managers, Darren Barber, has been vocal about the value of these checks after he was alerted through the scheme that he may have type 2 diabetes. Listening to our employees is an essential element of our wellbeing strategy, allowing us to implement policies that meet the needs of our teams and individuals, such as enhanced maternity and paternity leave alongside improved sick pay. We aim to promote an inclusive culture across our workforce and will continue to focus on wellbeing as a priority through 2023



CHRIS MORRISEY
LILY COMMS

The post-pandemic return to the office forced a shift in employers' mindsets as many workers began to demand a better work life balance. This new narrative, coupled with the cost of living crisis, has made employers really consider the value of their people and their needs. We have recently introduced Mental Health First Aiders to our business who are trained to recognise and support the needs of our people. We have introduced an Employee Assistance Programme for staff which offers them advice on subjects such as debt management, legal advice and mental health. A free gym membership is now a given for our staff and incentive schemes are open to the whole company, although we are still a work in progress and continue to look for further ways to improve our wellbeing benefits.



BOB SAHOTA
HIGHGATE IT

The cost of living crisis has caused an economy-wide nervousness. We recently invited a third-party finance expert in to conduct a financial wellbeing seminar for all employees, which everyone seemed to get a lot from. We officially became a four-day week organisation last year. This has given everyone some time back to spend however they choose, massively improving work/life balance. We have not had to use a third-party recruitment specialist for any of our hires and staff retention has also been extremely high and our wellbeing philosophies play a large part in this. We created a safe space for each employee to provide feedback to the business. Prioritising employee wellbeing and mental health must be on the radar for all organisations in 2023. We must remember that employees are human beings that will be dealing with challenges we may not be aware of and deserves compassion.



ANN SOUTHGATE
CELLHIRE

The pressures that employees face inside the fast-paced telecoms sector and outside the workplace have been heightened by the pandemic. We adopted hybrid working to encourage a healthier work/life balance and are mindful of the need to support mental health where required. We train and empower our managers to hold regular open conversations with individual employees about any challenges they face at work. Many employees have been with Cellhire long term, as their careers develop, and we have never had an issue with recruitment. Absentee levels are low. We are a supporter of the Mindful Employer plus Charter and a Gold Accredited Investors in People organisation. Our health insurance provider includes a portal allowing employees to manage their health online. We have established a positive and supportive organisational culture responding to the needs of each employee.



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Promote and improve wellbeing



SOHIN RAIHTATHA
REDSQUID

Mental well-being plays a big part in hiring and retaining the team and therefore remains at the forefront of our people strategy. We offer private health insurance, where the individuals get rewarded for leading an active lifestyle with Apple watches, cinema tickets and travel discounts which have proven to be successful. We are building a creative community and hosting yearly Redsquid Family Days where we can meet family members to get that deeper connection that fosters trust and cohesion. We match that with activities spread out over the year including providing massages, personal trainers and an office football tournament. We try to create an environment that is health-promoting throughout and then focus on the individual with development programmes that allow staff to grow and learn new skills that will help them succeed in their roles.



BERNIE MCPHILLIPS
PANGEA

There's been a toll on our collective mental and physical wellbeing in our attempt to adjust to a post-pandemic world. The cost of living crisis, NHS' growing waiting lists, and strikes across various public sectors, have made it an unprecedented few years. We supported our team professionally and personally by working with a business that specialises in physical and emotional wellbeing. Group access to shared learning and unlimited, unscripted 1-2-1s for confidential private matters has helped us tackle the uncertainty and instability of the world around us. We keep things relevant to company objectives by incorporating Pangea themes and topics into group sessions. Plus, we've run physically and mentally challenging off-site retreats to exercise the body and mind while connecting with nature. The support we give is available to everyone within Pangea.



TABITHA LOGAN
FOCUS GROUP

Dealing with the cost of living crisis and maintaining good mental health are the biggest challenges faced by many people in a post-Covid world. We provide free financial advice, travel loans and a hybrid working policy to help cut transport costs. Our teams were also provided with a cost of living payment to help alleviate some of their rising costs over the winter months. To support the mental health of our people, we offer an Employees Assistance Programme (EAP), access to mental health first aiders, mindfulness and yoga sessions. Our employee-led community group meet regularly to discuss health and wellbeing, creating a positive impact because it is looked after 'by the people, for the people'. We get honest feedback from employees across the business and ideas generated in peer-to-peer conversations. An annual wellbeing survey also gathers feedback which shapes our wellbeing strategy.



RACHEL WETHERILL
TALKTALK

We understand the importance of continually supporting colleague wellbeing and recognise that, particularly in our current climate, this support should extend from mental wellbeing to physical and financial too. For 2023 we have a plan of activities that support our 'steps to wellbeing' mission, giving an added focus to financial wellbeing. These include Lunch and Learn sessions where colleagues can share money saving hacks and guest speakers will address topics like managing stress and home finances; a Veganuary cooking workshop in our staff restaurant; regular coffee mornings; and our year-round £1 breakfast, giving people the opportunity to connect. A refresh of our Wellbeing intranet pages promotes our ongoing support which includes access to our 24/7 Employee Assistance Programme, employee discounts, affordable loans and Employee Networks.



SARAH HOWARD-
ILLSTON
ZEN

We want to make sure that our wellbeing strategy supports mental and physical health, financial wellbeing, as well as our rich and varied individual backgrounds and needs. We continuously review the strategy we have in place to support this. We engage with our networks of employees closely in the events and programmes that we implement and take feedback on board. This is a key part of our 'People First' approach - to build a culture where employees feel supported, valued and comfortable bringing their full selves to work. Our new starters frequently mention our People First culture and wellbeing strategy as a factor in them joining us, with exit interviews also often revealing it's a key factor in employee retention. Zen was identified as one of the Best Workplaces for Wellbeing in 2022.



CHRISTINA PENDLETON
INTERCITY

Our wellbeing strategy is built around our colleagues' health, both physical and mental. This means providing good work, focusing on our colleagues' personal growth, building positive relationships, and ensuring our managers are trained and equipped to support individuals within their teams. To support our colleagues financially we've put together a support package including pay rises (weighted to ensure our lower paid earners are secure), interest-free loans, a company-wide £250 cost of living support bonus, energy management and financial wellbeing workshops. Training and development are key drivers of engagement amongst our workforce, and we provide opportunities to refine their skills and advance within their careers. We also regularly participate in team building challenges to boost morale. We achieved a three-star Best Companies result in 2022.

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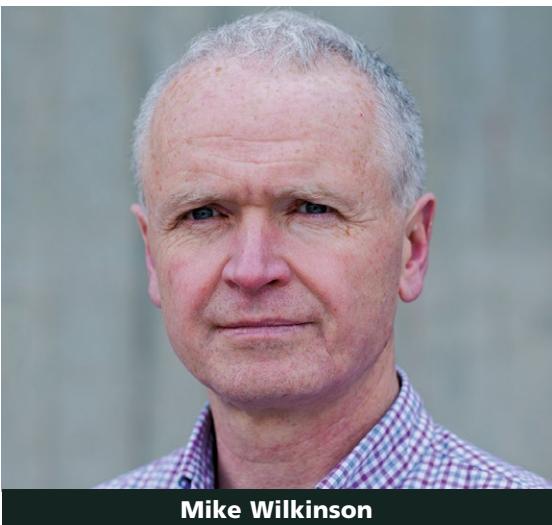
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Key move for Akixi



Mike Wilkinson

AKIXI'S incoming Chief Product & Marketing Officer Mike Wilkinson is poised to fast-track operator deployments and go-to-market strategies, expand platform integration and extend the firm's range of engagement solutions.

He brings over 30 years industry experience and moved from Microsoft where he was Principal Programme Manager. Wilkinson's prior experience also includes marketing and product focused positions at BroadSoft.

"One of the greatest challenges in the UCaaS industry is to closely marry technology to problems faced by businesses,"

he commented. "Akixi has developed a window into the real-time performance of a UCaaS service and how that is impacting SMBs or distributed organisations."

Akixi CEO Craig Decker added: "Mike brings a wealth of knowledge and experience, helping Akixi to deliver on our product strategy and growth plans."

Also on the move...

NODE4 has pulled in former Nasstar Managing Director Iain Shearman as Chief Commercial Officer. His remit includes identifying additional routes to market and maximising growth opportunities created by Node4's acquisition strategy. Shearman brings over 20 years experience

in communications and cloud services organisations in the UK and internationally, working with customers in channel, public sector and enterprise markets. "Joining Node4 is a great opportunity for me to pursue my long-standing interest in how organisations can apply technology to support their ambition and competitiveness," stated Shearman. Node4 Managing Director Paul Bryce added: "Iain is widely respected across the industry as a technology and business leader, delivering strong results for organisations across the channel, public and private sectors."



Iain Shearman

UC SERVICE provider Evolve IP UK has sharpened its focus on sales growth with the appointment of Jamie Hughes (pictured below) as Sales Director. He was previously EMEA Partner Manager for the company. "I have seen the team go from strength to strength these past six years," stated Hughes. "2023 is sure to be a great year for growth."



Jamie Hughes

THE priority Vertiv places on operational excellence was evidenced by the appointment of Giordano Albertazzi as CEO, who has 20-plus years of operational and business experience at Vertiv under his belt. "Giordano was instrumental in driving significant operational and financial improvements while leading EMEA and in the turnaround of the Americas," said Executive Chairman Dave Cote.

FORMER Lumen UK Wholesale Sales Director Jon Selway has joined Aryaka as Vice President of Channel Sales in EMEA. Part of his remit is to advance Aryaka's partner strategy

(underpinned by managed SD-WAN and Unified SASE solutions) across the UK and Ireland, leveraging his 15 years channel experience and reporting to Chief Commercial Officer Dennis Monner. "Jon brings a long track record of success working

with strategic partners across the UK and Ireland," said Monner. Selway added: "Aryaka aims to change the way businesses approach and achieve secure networking."

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