

## Letter from the Editor

By Tim Young

“While the law of competition may be sometimes hard for the individual, it is best for the race, because it ensures the survival of the fittest in every department.”

—Andrew Carnegie, “The Gospel of Wealth” (1889)

Perhaps that was a slightly easier statement for Carnegie to make than it might be for most. After all, he was decidedly on the winning end of competition. What’s more, Carnegie amassed his grand fortune on steel, which is a competitive industry, no doubt, but for which competition is arguably predictable. Steel companies would compete against steel companies, and all would endeavor to enhance their product in a few key ways (strength, flexibility, carbon content, and the like) while keeping their prices competitive.

Compare that to the modern communications landscape: Competition comes from all angles, with telcos, cablecos, over-the-top (OTT) players, and many others competing for market share and profit with a huge number of comparable, though not identical, business lines.

Yet service providers manage to innovate. New business lines emerge. Competitors become partners and former partners become competitors. It’s a complex world, but one that results in better outputs and reduced costs.



In this issue of Pipeline, we take a look at the modern competitive landscape. We see how the role and nature of content is changing, how video providers are moving beyond set-top boxes, and how cooperation is more and more becoming the name of the game. Also, we check out the state of MVNOs and examine the impact of changes in that space on competitors looking to go mobile. We also explore some of the interesting moves that software giant Microsoft is making in the CommIT space, from exciting new partner ecosystems to new approaches to benchmarking.

In addition, we’ll hear from Tail-F on the virtues of network abstraction, get commentary from CSG International on the role of telcos in the evolving value chain, and will profile ViryaNet in our monthly vendor spotlight. All that, plus the latest news and opinion in the communications technology space.

Also, I want to take a moment to mention that we’re extremely excited about our upcoming Pipeline Innovation Awards. We’re reviewing nominations and selecting finalists as we speak, and will be announcing the winners at our awards banquet May 21 in Dublin, Ireland. Check back for details as they continue to emerge, and good luck to each contestant!

Enjoy,

Tim Young, Editor-in-Chief

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An advertisement for Subex. The top left corner features the Subex logo with the tagline "empowering the telco". The background is a teal and green abstract design with hexagonal patterns and a globe. The main text reads "Monitor Performance of Newly Launched Products". At the bottom, there is a purple bar with the text "ROCware Solutions from Subex" and a yellow button that says "Learn More".