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ETHERNET INNOVATES AT A HIGHER LEVEL TO REACH APPLICATIONS

A final breakfast for me at local bakery Bäcker Wiedemann and the last day of CEWC 2009 beckons. This morning's opening session from the UK's BBC gives us first-hand insights from a key application driver and the twin challenges of capacity and costs in video. With an eye on the 2012 London Olympics, and strong adoption of its *oplayer* platform amongst the viewing public, the BBC is building a unique position in the emerging OTT video market.

Off-topic, we learn that "*Stack and Binge*" is a recognised type of viewer behaviour and I'd never imagined that watching an entire series of TV programmes consecutively on DVD or off the PVR – as we sometimes do – might have a name and be the subject of behavioural studies.

Following the BBC, BT, Eurofiber and Level 3 provide their insights into Carrier Ethernet application in residential broadband, open networks and global services, together with analyst house Ovum.

And finally, another key topic for 2009/10: Carrier Ethernet for the consumer broadband marketplace. The principles of Ethernet ALA (Active Line Access), as conceived by Ofcom in the UK, are now being supported by both BBF and MEF. Many BBF members around the world are talking about ALA and there's more to come on this over the coming year, I'm sure.

So to return to my opening diary theme: "*what's new?*" We don't need reminding that this is a tough time – belts are tighter, unnecessary expense is cut, travel is trimmed and all costs are carefully scrutinised. But clearly, something positive is happening in Carrier Ethernet to keep several hundred industry professionals so busy – even happy, as I observe – this week in Berlin.

Without doubt, Carrier Ethernet is a growth mainstream services and networking market. A number of analysts forecast around \$40bn worldwide business services revenue in 2013/2014, and this seems to be justifiable. The combination of clear need, rapid standardisation, investment by multiple vendors in unison, formal MEF certification and extensive interoperability testing has provided carriers with a fresh multi-purpose platform – ready for production services in record time. Strong multi-vendor competition should ensure that costs remain under control.

So what to do with this new platform? Carriers are evaluating new architectures, providing new services, looking to "*monetize the network*" and using Carrier Ethernet as a transformational or evolutionary strategy. This is what we've heard here in Berlin, and this is where the innovation is. And still more to come... this is work in progress.

Along with Ethernet Globalisation, "*Application-aware Ethernet*" is my second strategic trend in the market this year. I am fascinated this week to find much vendor consensus to add more functions to Carrier Ethernet: security, application assurance, policy management, DPI – even content caching is proposed. Today, these functions are associated with traditional IP platforms, IP appliances, various bolt-on arrangements, etc. But if they can be integrated on simpler and lower-cost Carrier Ethernet platforms at the edge of the network, goes the reasoning, then why not? A complex area, with much to evaluate and much strategy to decide.

I'm signing off for this year: it's been a highly productive event and can't possibly cover everything in three short diaries... thanks for reading and hope to see you at CEWC 2010!



Don't forget CEW APAC - the MEF's official APAC Congress takes place in Kuala Lumpur this November 2-4. Full details are now available at www.carrierethernetworld.com/apac. This event is hosted by **Telekom Malaysia**

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