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In-depth analysis of WLAN, cellular and broadband wireless markets

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Key Issues

Virtualization is turning operators into fervent open source converts

- [Wireline and wireless carriers to cooperate on open source platform for NFV](#)
- [To prevent the new network being vendor-controlled, operators must open up too](#)
- [Metaswitch gains place in AT&T inner circle thanks to its new-look approach](#)

Carriers, fixed and mobile, are embracing network virtualization with almost alarming speed. Fully ratified formal standards will take another couple of years, but many operators are banking on the de facto specifications, from various industry groups, becoming sufficiently concrete offer the confidence factor of unified standards. Most important is ETSI's NFV (Network Functions Virtualization) initiative, and several carriers are already running extensive trials and evaluating the range of use cases, with a view to commercial implementation from next year.

However, while industry-driven specs move more rapidly, and more directly in response to carrier needs, than formal standards processes, they are also susceptible to the influence of major players with their own agendas. When it was first proposed in 2012, NFV was seen by many as a way for large network equipment suppliers to seize control of the wider moves towards virtualization and software defined networking (SDN). Virtualization up-ends the traditional profit models of the proprietary equipment makers, by running network functions as virtual machines on standardized hardware, and it provides a wide-open door for IT-oriented vendors like Oracle and Dell to enter the previously rarefied world of carrier platforms.

Operators, having been stung in the past by the need of their suppliers to control platforms, seem determined to keep the initiative this time. Most of the major virtualization trials, whether using NFV or inhouse approaches, have been widely multivendor, as seen at Telefonica and China Mobile. And the related, but wider, shift to SDN is also allowing leading proponents to extend their pool of partners, as AT&T has done by inviting companies like Metaswitch and tail-f into its inner circle (though Cisco quickly countered by acquiring tail-f). This shows that the greatest defence carriers have against a new generation of platforms monopolized by a few giants is to insist that everything remains open source.

In many ways, open source processes of various kinds are taking over the role of traditional standards bodies. They can be just as susceptible to the political and commercial interests of a few



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