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How Supply Chain Stops Competition

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Not a normal CMO. Rakuten Whisperer. Rakuten Symphony



November 15, 2022

Summary

This article discusses what we all know is true but we don't bring up in polite company.

The existing telecom supply chain is purposely slowing, destroying new suppliers.

This is bad for telecom operators who need to change the industry status quo.

It is good to understand how this is done.

Introduction

Change is not universally positive, it destroys those that reap benefit from the status quo. The system in existing supply chain leaders forces change to be attacked, since change endangers needed future sales. Process, governance and incentives are all aligned to ensure change cannot happen. Therefore the change needs to be stopped at best, controlled at worst.

Rather than the "Four horsemen of the Apocalypse" I bring you the "**Four Devils of Deception**", named Deny, Dissemble, Delay and Dominate.

Devil 1 - Deny

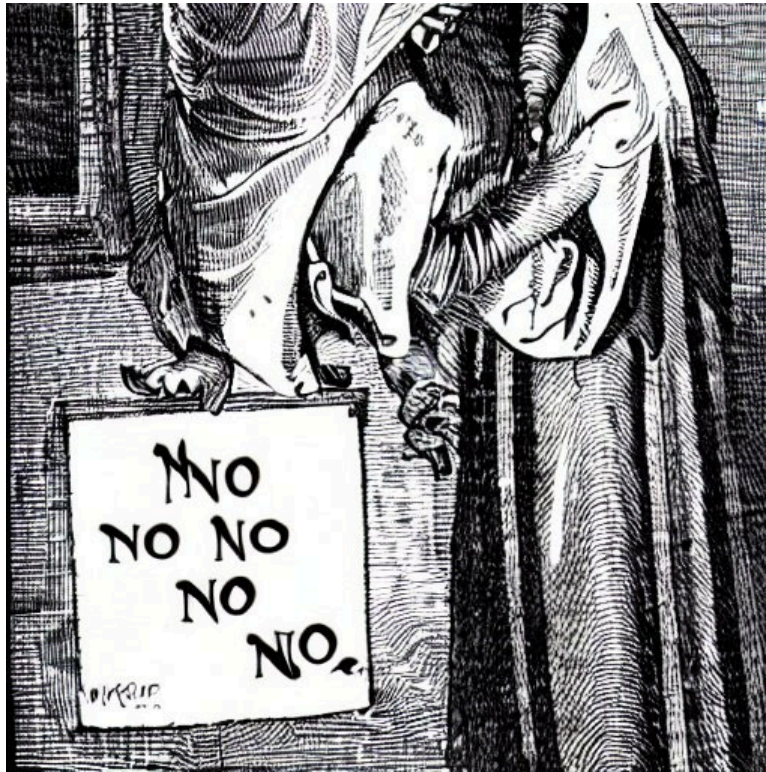


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The first devil is Deny, and it says new promises will not work, it is not possible!

For example, in 2012 **"IMS will never work on cloud"**. It did.

And in 2014 **"Radio will never run on cloud"**. It is doing.

The default argument by Deny says applications are special and thus require special solutions from special providers. "We are special".

The majority of change from outside the incumbent supply chain dies with Deny Devil. **The next devil, Dissemble, only starts if enough existing supply chain customers want the change.**

Devil 2 - Dissemble



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Definition of dissemble: "to pretend" or "to present a false appearance of".

The incumbents cannot disagree with their customers requirements.
They fully support the change stating "We hear you and we agree, we will participate to make sure it actually works. We will take care of you!"

Dissemble devil starts the incumbent's journey of **change timeline management**.

Dissemble devil can be recognized by the existence of public statements like

■ "We support initiative X"

followed by private statements

■ "Initiative X is not ready, X is not secure,

■ X is more expensive, ..."

Dissemble devil is evidence that the change cannot be halted and the costs have to be taken.

Devil 3 - Delay



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Devil Delay ensures **the change only happens according to the wanted timeline of the incumbent.**

The definition of the **wanted timeline** for the change is when

- The incumbent's portfolio can politically claim to support the change
- New competitors have gone out of business due to lack of revenue

All tactics are deployed to slow the change down. Negative briefings are held across all influencers. Third party reports are funded showing lack of change readiness, lack of security. It is made clear to decision makers that non-traditional decisions could end careers.

When customers are adamant they want change, incumbents lower prices and drive constraints until it is guaranteed new companies cannot make money even if delivery is possible.

Delay devil is **not good for the incumbents.**

- The additional choices cause delay to decisions, slowing time to money for everybody.
- The increased competition forces discounting and margin destruction.

Both outcomes are bad for the incumbents short term business.

Devil 4 - Dominate



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Dominate devil happens after new competitors are destroyed. Change is no change. Supply comes from from the same supplier, with the same delivery model, supply chain and economic cost structure. There is a new technology in there somewhere.

The net result of the change is status quo and the race to the bottom has cycled again.

The companies and people outside telecom continue to change at the speed of technology innovation, and increasingly work around telecom rather than with telecom. Who in their right minds wants to fight with Team Devils!

How could this be different?

Telecom needs to be reborn. This is not bolting jet engine parts to the side of the existing steam train. It is redesigning a system to be ready for the demands of 2030. Telecom inventions have not been adopted in other industries. Internet technologies have been adopted by many industries except telecom.

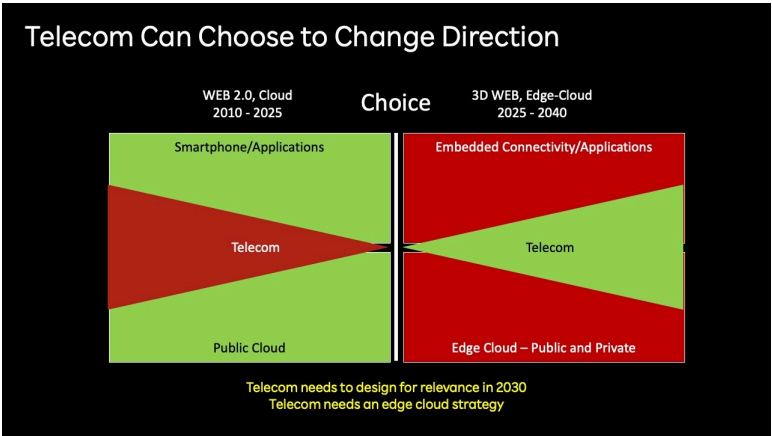
"Open Ready" interfaces need to made actually open, driven independently from the "Open Ready" provider. Collaboration between existing supply chain vendors and new players from outside the industry is essential to allow the system operator to design the system they want rather than the supply chain with asymmetric power provides.

Existing initiatives exist in industry collaborations and labs need to be forced into production and commercial scenarios, with business defined outcomes not technical proof points.

The incumbent supply chain has no ability to disrupt their existing business. The Four Devils of Deception are born from this reality. The only ecosystem players that can force such change are telecom operators themselves.

Final takeaway: 2030 is smaller for telecom unless we fix this in the next two years and deploy true change in the following five. Telecom needs to find a way to change

As always, words are my own, comments and dialogue in response appreciated.



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