



Message from the President



*Message from Beth English
President SCTC*

I'm sure most of you are aware of the great programs and initiatives we have under way to benefit our members. For example, the monthly Quipz newsletter, regional meetings, annual conference, speakers bureau, updated web site and search capability, presence at trade shows, and the ever popular listserv.

The board has been working on other initiatives that, while less "visible," are equally important to the growth and longevity of the organization. For example, for the past 18 months, Molly and Meagan have documented processes, policies and procedures around everything required to run the organization...from when to post articles to our SCTC blog to how to reconcile our member database with our accounting system. Having established procedures provides continuity when staff or board members transition, and further allows us to operate more efficiently while focusing our resources on strategic initiatives. In addition, for the first time in recent history, we have a 360 degree view of our member roster. We anticipate a greatly improved renewal process this year as a result.

In another strategic move, the Long Term Conference committee has already secured the venue for the 2019 annual conference at The Eaglewood, an all-inclusive resort in Chicago. We are currently in negotiations for a West Coast conference in 2020, achieving our goal of securing conference venues three years in advance. Securing venues early gives us more choice and allows us to lock in better rates. Stay tuned for announcements about 2019 and 2020 conferences.

Beth K English

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Nominating Committee

Dear Esteemed SCTC Colleagues:

It is my privilege to lead the 2018 Nominating Committee for the SCTC Board of Directors (BOD). As a Past President, Board member, committee chairman, and a member since 1990, I can confidently state that the Society has been the most important relationship in my professional career. The SCTC is an organization that embodies the statement, "You get out of it what you put into it."

Our industry is changing dramatically. For the SCTC to remain relevant and valuable to members, clients, and the industry, it relies on its members' experience, time, and ideas for guidance and direction. The Board

is the vanguard of this guidance and direction for the SCTC. It comprises individuals that believe in the organization and works as a team for all our common benefit.

This letter is a "call for interest" to SCTC members for six director positions that will be open for election during our annual conference in Annapolis, MD, September 24-27. The Board is looking for fresh ideas and alternative approaches to cope with the challenges (and opportunities) that face the SCTC, internally and externally. Engaged members are essential to attend all Board meetings as well as lead or support Board initiatives. The anticipated time commitment is three to five hours monthly, a very

reasonable investment into the organization.

The election process is open, so that one may stand (nominated and seconded) for election at the annual conference, even if the Nominating Committee has not submitted your name previously.

If you are interested in learning more about the Board and being part of the SCTC's continued growth and relevance, please contact me or Meagan at SCTC headquarters at your earliest convenience to discuss further.

*Very sincerely,
Byron W. Battles*

Annapolis, MD

SCTC SOCIETY OF COMMUNICATIONS TECHNOLOGY CONSULTANTS INTERNATIONAL

2018 ANNUAL CONFERENCE
SEPTEMBER 24-27, 2018
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register at: www.sctcconsultants.org

REGISTER for the SCTC Annapolis Conference

We are getting ready for a great Annual Conference in Annapolis, MD on September 24-27, 2018.

The Keynote Speaker for this Conference is Louis J. Giannotti, Chief Information Officer, Deputy for Information Technology for the Naval Academy. We have a new addition to the conference this year – AI Bootcamp! As a pre-conference workshop, we will hold the ½ day workshop on Monday, September 24th. Russ Rands of Prolego will be hosting this Bootcamp. It is an artificial intelligence workshop for executives focused on practical applications and business strategy. Demystify the buzzwords and understand what is materially important to your business versus what is just industry noise. The training is catered to non-technical business leaders but does not shy away from getting into technical details in an approachable, impactful way.

Register at: visit www.sctcconsultants.org

SCTC Newsletter Q&A with Brent Kelly

New Board Member

Name: Brent Kelly

Firm location: KelCor, Inc.,
North Logan, Utah – “Near Salt Lake City”

Can you share a little about your practice?:

I am the President and Principal Analyst at KelCor, Inc. where I provide strategy and counsel to CxOs, investment analysts, VCs, technology policy executives, sell side firms and technology buyers. I’ve had a rich and diverse work history, making measurable real-world contributions in multiple industries including telecommunications, manufacturing, electronics, oil field services, chemicals, and mining. My strengths have been in numerical methods and applied artificial intelligence along with significant experience developing IoT solutions and complex software systems. Since becoming an analyst, I have written hundreds of articles and reports in the unified communications and collaboration industry and have regularly delivered webinars and thought leadership addresses at public and private events. My educational background includes a Ph.D. in Engineering from Texas A&M University and a B.S. in Engineering from Brigham Young University. I have served two terms as a city councilman in my northern Utah community and I am co-owner with my wife of Alvey’s Candies, Inc., a gourmet chocolates manufacturing company that sells wholesale in eight western states plus we run a retail outlet in the mall located in Logan, Utah.

How long, what you do, who you work for?

KelCor has been in the consulting business since 1998. We got into the communications space by doing some work for an early video over IP startup, named Sorenson Vision. Sorenson was trying to commercialize some low bandwidth video compression technology that came out of the Space Dynamics Lab at Utah State University. While working for Sorenson in a marketing capacity, I invited Boston-based Wainhouse Research to review the company’s video product roadmap. That led to an invitation from Wainhouse to join them, which I did in 2001. As a result of the experience at Sorenson, I encountered every problem known to mankind about how to make video work over an IP network. I stayed with Wainhouse until 2012. As an analyst, I have done a lot of forecasting, TCO

comparison, competitive product and service analysis, and have created white papers, and case studies. I have done custom projects for all of the major video, telephony, and UC companies in the unified communications industry. I was one of the early believers that Cisco and Microsoft were going to disrupt the communications market, doing my first in depth analysis of Cisco’s portfolio in 2004 and Microsoft’s emerging portfolio and strategy in 2005. Since 2005, I have been a regular presenter at the industry trade show now called Enterprise Connect. At that show, I have done three-hour technical deep-dive sessions on Cisco, Microsoft, IBM, UC, and video communications. More recently, I’ve worked with SCTC member Phil Edholm for the past five years to annually update and present a very popular session comparing Cisco versus Microsoft products, strategy, and services.

Most of my work at the present time is doing competitive analysis for some of the major sell side companies as well as custom project work for end users who seek an independent assessment and recommendation for their own technology roadmaps and the vendors they should use.

The SCTC added the membership category for Analysis. Can you talk about how your practice is different and the same as a consultant?

In many respects, analysts and consultants do the same things – we sell information and expertise. The biggest difference is who we engage with. Most independent analysts, like myself, get most of their funding from the vendors through subscriptions, speaking engagements, webinars, white paper creation, and custom research projects. Most of the SCTC consultants work for end users, although I do know several who also do significant “analyst” work for the vendors. So, there can be significant cross over – analysts can do consulting work for end users and consultants can do analyst work for vendors.

My primary reason for joining the SCTC was to learn from the consultants. I say this because as an analyst, we are in regular contact with the vendors who wish to influence us as we write, create reports, or speak at third-party events. In that context, we only get the vendor marketing spin about how great a particular product or service is or will be. What I hoped to gain from the SCTC

consultants was a version of the truth about vendor products and services from those who actually oversee their implementation and know the good and the bad – who see it in operation and know from firsthand interaction what works and what doesn’t. I get some of this from the listserve and from private conversations with a few of the SCTC members, but I don’t get nearly as much as I wish I could get. I think the SCTC is a gold mine of information that is a huge untapped resource for the communications industry at large.

When not working as an analyst or consultant, what are your interests?

I’ve chosen to live in Northern Utah because it allows me to take advantage of all the outdoors activities found here: hiking, backpacking, mountain biking, road cycling, fly fishing, skiing, snow shoeing, water skiing, etc. I do as many of these activities as I can. My wife and I regularly attend the theatre and invest a lot of time with our grandchildren (8 and counting!). I also tend to read a lot. My kids say I’m “grouchy” when I don’t have a good book to read, and I read all types of books. We are active in our local church, and I’ve been affiliated with the Boy Scouts of America for many years serving as Scout Master several times as well as in a number of troop committee functions.

While serving as a city council member, I had the opportunity to work on numerous committees and projects, the most significant of which was restoring irrigation water when a major canal breached. For those of you who don’t live in the West, Utah is the second most arid state in the USA, and irrigation canals are the lifeblood of city water supplies and agriculture. This was a big project that involved a Federal government appropriation along with working with the EPA, the US Forest Service, a power company, different agencies in the state of Utah, our local county, three adjacent cities, multiple canal companies, and several engineering firms.

When not outdoors, working for KelCor, or doing volunteer work, there are plenty of things to do for my wife’s chocolates company. She does the day-to-day manufacturing, but I’m responsible for keeping the point of sale computers running, keeping the network up, introducing new technology, fixing any unusual accounting issues, doing the quarterly taxes, and any legal, regulatory, or compliance work required.

The SCTC Canadian and Great Lakes Regional Forum was held June 5, 2018 at Braeben Golf Course, Mississauga, Ontario. Approximately 42 people were in attendance, including consultants, VACs and some new people being introduced to SCTC. We were fortunate to have SCTC members come from the US to join us, which was a trek. Many of our speakers were VAC members and also traveled from afar to join us for this event.

The topics covered included:

- CONSOLIDATION IN THE COMMUNICATIONS INDUSTRY – THE GOOD, THE BAD, AND THE UGLY Panel
- DIGITAL TRANSFORMATION: INSIGHT INTO GETTING IT RIGHT
- LEVERAGING THE POWER OF AI AND MACHINE LEARNING TO DRIVE YOUR BUSINESS OUTCOMES
- THE FUTURE OF WORK WITH ARTIFICIAL INTELLIGENCE
- IMPACTS OF DATA PROTECTION REGULATIONS (GDPR / PIPEDA)
- REGULATORY & LEGAL UPDATE - CHANGES IN THE INDUSTRY
- BIOMETRICS AND UC – A LOOK AHEAD
- FRAUD AVOIDANCE AND MITIGATION
- APPLYING MODERN LAN PRINCIPLES TO HELP CUSTOMERS EFFICIENTLY MOVE TO THE INTERNET OF THINGS
- REFRESHING INSIGHT ABOUT REFRESHING YOUR UC STRATEGY
- FACT OR FICTION – OMNICHANNEL CUSTOMER EXPERIENCE
- SD-WAN Panel

We learned a lot and from some of the notes I wrote here are just some of the many notes I took:

- If our vendors don't have the time to develop something, they will acquire what they need. In the last 11 years there have been over 500,000 acquisitions and the trend doesn't seem like it will slow down. As consultants we need to just try and keep up with whom acquired whom and their roadmap for the various products lines which sometimes compete.
- With AI – Context is king: whether it is recognizing the caller is from a mobile phone or facial recognition to great people in your reception area or knowing the habits of your customers to distinguish those from a fraudster or machine in the IVR or on your website – all of these can help businesses.
- NEC has its facial recognition application with cameras in hospitals, casinos and even in some football (soccer) arena entrances for crowd control. Facial recognition has so many possibilities – ensuring the very young or the very old in homes or schools don't leave the premises to not allowing known hooligans in the arena.
- 50% of the US population does not have a land line anymore. Avaya has developed an application offered in the Cloud that will determine if the call is from a mobile phone and then you could treat it differently – maybe offering a mobile app option or other treatment.
- The next big thing – Quantum computing? Two are operating today in Waterloo, Ontario, our high tech area with a couple universities close by. These computers will be required to do a lot of the AI processing tasks of the future.
- 73% of the data an organization has, is not used. Companies need to figure out how to utilize this data to enhance the customer experience and the business. This also has to be

viewed in context of GDPR.

- GDPR (General Data Protection Regulation) is a set of guiding principles that became effective in Europe on May 25th of this year. Entities that process, store or retained personal information of EU citizens. The fines for non-compliance with GDPR are steep. The concept of PII (personal identifiable information) has greatly expanded under GDPR – it now includes any information or data when combined or compiled that can identify a person. An organization cannot have that information without complicit consent. There are some exceptions for legal or contract purposes consent has given; however, information on an individual that is not needed should not be retained. A person has the right to ask an enterprise to identify all the PII they have and where it is all stored. The individual also has the right to request all of that PII be deleted – from everywhere. One of the biggest challenges for organizations will be identifying all the PII and in all the places that information is kept. It pertains to any EU person's data at this point, but most likely will move eventually into North America.
- Genesys continues to enhance its AI, however, strongly believes in blended AI – AI and the human; AI will augment the interaction between an agent and the customer; it can match customer attributes with those to similar agents or whatever parameters are established.
- Cisco Webex meetings of the future will be voice driven and activated, the camera will be able to identify who is in the room, so you won't have to announce yourself and it will have the ability to automatically mute your microphone should the dog start to bark; what is even better with NLP (Natural Language Programming) speech to text it will take the meeting notes while you are having the meeting. Now that is great!!
- From Verint we heard about how authentication in the IVR can greatly reduce fraud. End users will be able to look at the ANI from the Fraudster list which includes most fraudulent numbers and even voice clips of fraudsters, it checks the velocity of navigation to see if it is a human or machine, while also reviewing how the person is navigating in the system.
- NVT Phybridge explained how with IoT it is not just about the bandwidth anymore. In fact, power has an impact on the network and impact to the business need to be considered along with security.
- OnX reviewed the importance of TCO in relationship to security and its importance.
- Altivon reminded us to provide channel guidance to our consulting customers, when designing and implementing Omni Channel. Know that different customers have different needs at different times. Furthermore it is important to know the cost of each channel and guide people towards certain channels.

There was a lot more covered, however, the main point is – we had great speakers, information, questions, dialogue, and nice refreshments with wine tasting at the end sponsored by our VAC CLPs Mitel Dave Clardy, Genesys Marsha Bailey, OnX Lance Hart, Verint Dean D'Adamo, NVT Phybridge John Croce and Altivon Frank Tersigni.

5G - “Wireless isn’t just for mobility anymore”

One of the topics that was discussed in the recent SCTC Mid-Atlantic Northeast Regional Conference (MNRC) in Alexandria, VA, was 5G (with the above title), the fifth generation of wireless communication network that is being rolled out in stages from now through 2020. While preparing to moderate the panel discussion, I learned that 5G is not just a faster 4G. It’s a lot more than that.

THE EVOLUTION & ITS DRIVERS

The wireless communication network that most people in the world now depend on for everyday tasks has already come a long way from its start in the 70s and 80s when its first generation, now referred to as 1G, was voice-only analog (with low voice quality at that) was circuit switched and used the PSTN as its core network.

Since then, 2G introduced data transmission of up to 64Kbps with its digital cellular technology (still using a separate dedicated voice channel), circuit and packet switching and SMS in the following decade and a half. 3G, introduced in mid-2000s, increased the data transfer rate considerably to up to 2Mbps using CDMA technology and packet switching in its core network. It offered integrated high quality audio, video and data.

Introduction and wide adoption of smart phones was made possible with 3G, while this wide usage, in turn, made increasing demands to the nascent high speed, high quality, wireless network services. One such demand was smooth undetected transition when a mobile phone streaming an audio-video session moved between the public wireless network area (outside) to one’s accessible WiFi range. This and the increasing demand on the speed and volume of data communication, supporting streaming video, etc., led to the advent of 4G LTE—which we have been using since the beginning of the current decade.

Needless to say, the insatiable appetite of billions of users of smart phones (and laptops, and notebooks, etc.) around the world need even more capacity and higher speed than the current stage of this long term evolution 4G system can satisfy. Meanwhile the world we live in has changed considerably with the advent of Internet of Things (IoT), telemedicine, and self-driving cars, as well as progress in more versatile and manageable networking technologies like software defined networking (SDN) enabling the support for such high demands and the application-specific required low latency and reliability.

MAIN PILLARS/CHARACTERISTICS OF 5G

To begin with, 5G, like its predecessors during their advent, is not yet fully defined. So, you can say that it’s still a work in progress. (See rollout below.) The outlines and major goals/requirements for this generation of wireless networking system, however, are all set and (at least unofficially) agreed to by 3GPP, the consortium of industry representative companies tasked with defining wireless network goals, requirements and specifications since (at least) the development of 3G. Perhaps the most important aspect of 5G is its service-based architecture making it flexible, scalable, and programmable. Such an architectural underpinning enables 5G carriers to offer application-appropriate “cloud native” “network slicing” to other service providers (somewhat like MVNOs, but with much expanded flexibility and for a much wider variety of services and applications) supporting specific service/usage requirements such as those mentioned earlier. To achieve such flexibility, required performance, scalability and agility, 5G network systems are/will be software driven, relying on now fully developed and tested dynamic network management technologies of SDN, Network Function Virtualization (NFV), etc. The 5G wireless network is set to provide an efficient, flexible,

and advanced implementation of the OSI seven layer model (instead of being, basically, a data-link layer service, like its predecessors) with Application Programming Interfaces (API) for third party service providers. I think this will, in part, make all providers of cloud services re-evaluate how they want to offer their services in the era of 5G. By allocating the specific types of network resources needed for each third party service provider (e.g., low latency resources for an autonomous vehicle service provider) with network slicing, 5G enables implementation of variety of communication networking requirements without the burden, cost, or feasibility challenge of one network supporting all requirements for all types of applications. 5G is going to support user experience continuity in challenging situations such as high mobility (e.g., in trains), areas that are either very dense (like large sports stadiums full of smart phone in hand live streaming spectators) or sparsely populated (that may be suffering from little or no reception now), and journeys covered by heterogeneous technologies (WiFi, etc.). It will be a key enabler for IoT by providing a platform to connect a massive number of sensors, actuators, etc. with stringent energy and transmission constraints. The fifth generation wireless networks will support mission-critical real time services requiring very high reliability, global coverage and/or very low latency like public safety, self-driving vehicles, telemedicine. This means provision of Giga bit transmission speeds, more accuracy of terminal location, increased reliability and availability, improved terminal battery capacity life and protection of (users) privacy.

The spectrums used to support the foregoing objectives/requirements include using frequencies below 1GHz, mid-bands of 1GHz to 6 GHz, the existing LTE frequency range, plus new millimeter wave bands above 24 GHz which can support data transmission rates of up to 20 gigabits per second. The 5G new radio specification to support these is now complete, enabling non-standalone rollouts underway this year (which, basically, provides 4G LTE functionality at the much higher speeds of data-link layer of 5G). To support the Gbps transmission rates possible with millimeter waves, and much higher capacity required to handle dense environments (like sports stadiums full of spectators streaming live videos), massive MIMO (multi input multi output) transmission and antennas will be used.

ROLLOUT

3GPP has a two overlapping phase plan of action for 5G rollout. Phase one (Release 15) requirements and architecture for the Radio Access Network (RAN) were finalized in 2017, and its protocols are planned to be finalized this year (2018). Phase Two (3GPP Release 16) for the core network and terminals requirements are to be finalized this year, and its architecture and protocols are planned for completion in 2019 and 2020, respectively. Meanwhile all major US carriers have announced plans for rollout of 5G infrastructure and initial (non-standalone) service for users spanning 2018 and 2019.

SOME RECENT DEVELOPMENTS

May 2018 issue of Business North Carolina reports a sharp growth in demand for wireless telecom towers in preparation for the 5G rollout. On May 23, 2018 Wireless Week reported Qualcomm’s announcement of a 5G New Radio (NR) system for small cells and remote radio heads, “the industry’s first, the company said.” This solution (presumably a chip set and possible accompanying firmware/software), which was unveiled at the Small Cells World Summit in London, “would support spectrum in both sub-6 GHz and millimeter wave bands.”

VAC President Letter

We're almost halfway through 2018, the VAC has already had an amazing participation in the SCTC regional events. We have traveled around North America to what have been perfectly executed meetings. At each of these events this quarter – in Dallas, Alexandria and Toronto - the VAC had opportunities to contribute presentations, participate in valuable panels and have networking opportunities. Thanks to the regional team committees for dedicating the time – it paid off for everyone who attended. These events add value to the organization to share information but also to grow the organization. We continue to see more exposure to new consultants and VAC. The VAC looks forward to more of them in the future.

Our VAC membership has continued to grow and we continue to urge all of the VAC members to participate in the events, including the upcoming Annual Conference in Annapolis. The VAC will again be hosting a fun networking event and look forward to the entire conference agenda.

The event calendar is back! Kurt Martin with NEC has agreed to help maintain the industry events. This tool has always proved to be a key when we schedule our activities without conflicts. Please send any events you have scheduled to Kurt at Kurt.Martin@necam.com/214-316-6937. He will update the calendar that will be distributed and posted on the SCTC website. Thank you Kurt!

And to all VAC members – we need your brains. If at any time you have ideas or would like to contribute to the VAC Board – please let us know. We welcome your participation!

Marsha Bailey/VAC President

Marsha.Bailey@genesys.com/317-201-0605

Will Two New Government Consultations Change The Face Of Telecommunications And Broadcasting Regulation In Canada?

*By Christian S. Tacit, Founder, Tacit Law**

In the last few weeks, the Government of Canada has launched two consultations that could have profound impacts on how telecommunications and broadcasting are regulated in Canada.

The Competition Bureau has launched a market study to determine if retail wireline broadband markets are sufficiently competitive. The Bureau's concern leading to the study stems from two significant factors: (1) only two networks, those of the traditional telephone and cable companies, are capable of providing broadband Internet services; and (2) Despite CRTC regulation and the presence of more than 550 ISPs in the Canadian market, as of 2016, 87% of retail internet subscriptions in Canada were purchased from a traditional telephone or cable company, even though prices offered by other ISPs can be as much as 30% lower.

This is the second market study that the Bureau has conducted, the first being on technology-led innovation in the Canadian financial services sector.

Based on the Bureau's analysis of the factors that make a market competitive in that case, when it comes to broadband it may also focus significantly on economic factors such as the high concentration of suppliers, high barriers to entry, high costs of switching for customers, and the price-elasticity of retail Internet services.

The Bureau's findings may lead to recommendations for regulatory and even legislative reform, although it is much too soon to tell what will come out of this process.

A broadcasting and telecommunications legislative review was recently kicked off by the Innovation, Science and Economic Development Canada and Heritage Canada. The review will be conducted by a seven-member panel headed by Janet Yale who has previously held senior executive roles at TELUS, Canadian Cable Television Association and the CRTC. The panel reflects a diversity of expertise and perspectives. The review will examine a broad range of issues, including how telecommunications and content creation should be approached in the digital age, net neutrality, cultural diversity and how to strengthen the future of Canadian media and Canadian content creation.

One of the central (and very polarizing) issues that will no doubt be addressed is whether ISPs should have to make financial contributions to support Canadian content. This follows a recommendation to that effect made by the CRTC in its recently published Future of Programming Distribution Report.

Perhaps the most interesting aspect of these two processes will be whether they end up generating some conflicting recommendations. What the government and the CRTC do with the recommendations from the two reports will definitely be worth watching. Stay tuned....

Legal Update from Martha Buyer

What the AT&T/Time Warner Means

There are many interesting things to consider when evaluating last week's decision by the U.S. District Court for the D.C. Circuit which allows the AT&T Time Warner merger to proceed, but one of them is that it is hoped by AT&T that this transaction will be closed by June 20th. That's next week!!

The facts of the matter are readily available. It's an \$ 85.4 billion deal for a combination of cash and stock. Check your favorite newspaper for facts and figures. The legal issues—involve Anti-Trust law, which, although seeming to be as interesting as watching paint dry, can provide some [very dry] clues into the government's thinking about consolidation in this industry where sophisticated technologies have absolutely changed the playing field for enterprise and individual providers and consumers alike.

First, a critical definition and some historical perspective. A vertical merger is one that combines two related but non-competing entities. This occurs when a manufacturer and supplier in the same production chain combine. A horizontal merger occurs when two competitors at the same level of the supply chain combine. Because the AT&T Time Warner merger combines a content provider and content deliverer, this is a vertical merger. More on this later.

Vertical mergers occur less frequently, and usually with less fanfare, than horizontal ones. In those cases when the Department of Justice has been concerned about a combination, it has permitted the merger only with "behavioral remedies," including concessions on the parts of the involved entities to either sell of portions of their business(es) or agree to conditions limiting corporate actions going forward. In this case,

rather than opting for even the possibility of such remedies, the Department of Justice simply sought to prevent the merger altogether. It gambled and lost.

Because vertical mergers are less common, there's very little in the way of legal precedent and guidance for judges who are confronted with the complex issues like those affecting this one. In fact, the last time for judges and legal scholars to rely upon when considering potential violations of Anti-Trust law. The crux of the antitrust concerns is whether or not this merger is likely to hurt consumers and negatively affect competition.

Very simply put, the DoJ's concerns are that by allowing AT&T, as the service provider, to have access to Time Warner's content (particularly both Turner Broadcasting content including traditional programming and sports and news content (read: CNN)), it will use preferred access to its own content to restrict access to other non-Time Warner content in the form of blacking out certain channels and other video programming that have been available through AT&T products. It's worth noting that the content produced by Turner Broadcasting (including particularly CNN, which the president finds as a constant thorn in his and the administration's side) which, it has been argued will enable AT&T, as the owner of Turner content, would increase AT&T's leverage to secure favorable concessions during negotiations with pay-TV providers hurting consumers. Anti-merger forces have suggested all along that providers could block content as a way of securing concessions once the parties come to the table to discuss licensing options between and among providers.

On the AT&T Time Warner side, the argument is that first that consumers

will walk with their wallets—that is, if the combined company does not offer programming choices that consumers find attractive, those consumers will search out other providers who offer them what they want. In an ideal market, this is true. But in many parts of the country, there is no competition for broadband service—let alone content, so this argument is without merit for many AT&T customers.

However, in defense of the merger, because of the incredible blurring of lines with the growth of services and products offered by companies like Amazon and Google, the definition of competition in this space has changed dramatically. Further, in Judge Leon's 170 page decision, he opined that the Justice Department had not proven that given current market conditions, that this merger met the standard required in order to prevent the combination on the grounds that it is anti-consumer and anti-competitive.

While the judge encouraged the parties not appeal his lengthy, but tight decision, it's certainly possible that the decision could be appealed, raising the issue to the Supreme Court. But for the time being, the decision does reflect what may be a seeming shift in policy of how the DoJ will address vertical mergers generally by eliminating the "behavioral remedy" option. This case provided essentially an "all or nothing" approach which is always risky business. Time will tell how and to what extent this decision will affect consumers.

Judge Leon's opinion can be found at <http://www.dcd.uscourts.gov/sites/dcd/files/17-2511opinion.pdf>

UC Evolves to Collaborative Communications

Blair Pleasant

COMMFusion LLC and BCStrategies

As an industry analyst, I follow trends in the market and try to identify what's coming next. As the unified communications (UC) market continues to evolve, I believe the next stage of evolution is what I call "Collaborative Communications." This involves several key trends that are currently taking place:

- **Various UC, collaboration, and contact center applications are being integrated to provide a gestalt-type effect where the total value is greater than the sum of the individual parts.**
- **Communications capabilities are being embedded in the software applications we use on a regular basis to do our jobs,**
- **The PBX/IP-PBX/VoIP system is quickly losing its central role in the way businesses communicate.**

As a variety of applications are being embedded with calling capabilities, communications technologies are becoming a part of software apps we use for work (and even for fun). Whether it's a team collaboration application with integrated calling and conferencing capabilities, or a CRM application with contact center capabilities, communication functionality is no longer solely in the domain of the IP-PBX/VoIP system.

Let's look back at what's been happening. Around the same time unified communications and collaboration hit the scene, we also saw the rise of business-grade social software from companies like Jive, Microsoft (Yammer), and IBM (Connections), which were mostly standalone applications. More recently we saw the increasing prominence of team collaboration (aka workstream collaboration) tools such as Slack, Cisco Spark (now Cisco Webex Teams), Unify Circuit, and many others. While all of these on their own are useful, the real power comes when these applications or capabilities are integrated together. When they become part of a larger application suite with seamless integration and a unified user interface, they provide value that is exponentially increased.

For several years I've seen applications like enterprise social software struggle for one main reason – they're isolated or siloed applications. The vendors get this, and have been working to integrate their point solutions together, as well as with other vendors' offerings, while adding calling and other capabilities to their standalone offerings.

Expect to start seeing more integrated collaborative communication offerings in the coming months. Several companies have already made good progress. Companies like Cisco, Microsoft, and Starleaf have had a head start, with others following suit. For example, RingCentral

has done a notable job of integrating its Glip team collaboration software, now called RingCentral Teams, with its cloud UC service. 8x8 has been pushing a single platform for UC and customer interaction, while Vonage is focusing on integrating its cloud UC offering with its CPaaS capabilities to communication-enable applications and workflow.

The point is, point solutions can only go so far. With an integrated UC/team collaboration/social, or collaborative communications solution tied in with a company's business processes, users will have increased functionality and a seamless user experience. As consultants, you have an important role to play in helping your customers move away from siloed applications to more efficient and optimized collaborative communication solutions.



Financial Report

The SCTC remains in a stable financial position. As of May 31, expenses are coming in slightly lower than budgeted and membership dues revenue is slightly higher than planned. If you are interested in more details, please see the financial reports posted on the website and reach out to me directly with questions.

As we head into the summer, in addition to planning and coordinating the fall conference in Annapolis, MD, the Board will continue to expand our marketing and recruiting efforts. The number one strategic initiative of this year's board is to increase the value of the organization by expanding the number of consultant, analyst and associate members of the SCTC. While we have made headway on several of our key initiatives related to expanding our the organization, we have funds budgeted to support developing and maintaining a social media presence and could use a few volunteers to help get this initiatives moving. If you have a few hours you could contribute to the organization and have an interest in social media, we could use your help.



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