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The executives who will run telecoms in 2020

Introduction by Joe Gallagher

The telecoms industry will become ever more critical to our world over the next decade. And the growing globalisation of communications will increasingly influence the profile of those leading the sector.

The leaders of today have overseen radical developments in the ways in which we communicate and this spirit of innovation will be key to the sector's future success. Businesses need to be identifying and recruiting the right people for the future and training them to have the right skills for the global businesses of the next decade — and beyond.

There is yet to be a truly global telecoms operator similar to those in other sectors such as food, with Nestlé and Kraft; the oil sector with Shell, BP or Exxon; banks such as Barclays or HSBC; or consumer goods companies such as Procter & Gamble and Unilever. There are very large players, many of which serve increasingly global enterprise customers — but from a consumer market perspective, the focus is often on one or just a few countries.

As consumer demand for communication and mobility continues to increase in the coming years, there will be a need for truly



Joe Gallagher is head of telecommunications at KPMG UK

global players in order to compete effectively and offer customers the services they expect.

This ambition will require global business people with a global outlook and increased experience outside the telecoms markets. They will need the commercial, political and cultural awareness that cross-border, cross-sector working can bring to equip them to run the companies of the next decade.

Senior executives — like all people — often develop and/or recruit others in their own image, but well-run companies recruit to fill in the talent that is missing at the top. They identify the gaps in skills and experience when they work to complete their leadership team.

We are already seeing telecoms companies starting to recruit much more from other industries, hiring executives with skills outside technology and other traditional areas.

As consumers and enterprises grow ever more demanding they will turn to the companies who can deliver instant service. Consumers — and leaders — of the future have grown up with the technology and know what is possible.

Over the past 10 years the telecoms industry — apart from a some blips around 2000-01 — has shown itself to be more resilient to the economic downturn than others. It is already an industry that pervades our lives.

The executives who will run telecoms in 2020 will be as much at the centre of the world's public and political life as those running the financial services sector today. The industry will expect much of the men and women who lead it in 2020 and beyond.

Succeeding in a changing world takes talent. I would like to congratulate the 40 individuals recognised here, who are helping to drive the future of this dynamic sector, many of whom could well be leading the behemoths of 2020. ■

The industry's 40 under 40

Who are the industry's young leaders of today and the leaders of tomorrow? Global Telecoms Business readers helped us make the selection

Our list of the 40 executives is compiled from submissions made by readers worldwide since the beginning of 2010.

We asked our readers who they thought are the industry's young leaders of today and the leaders of tomorrow.

We also contacted those who were in our similar list in 2009 — some of whom are now too old to qualify — to ask for their suggestions.

We accepted nominations only of people born on or after July 1 1970. We checked birthdates with nominees and we rejected a few who were born in the first half of 1970.

After making the first selection from the many nominees, we asked the shortlist if they would be prepared to take part in a short survey, which is published here, and a longer survey which will be published at our 40 under 40 conference and awards ceremony in September.

We'll be inviting all 40 to the conference, as well as many other speakers and guests. We'll be publishing details of the exciting programme shortly.

Srinivasa Addepalli

Tata Communications



As a domain expert in developing strategies and business plans in the Indian and global telecom sector, Addepalli,

Tata's senior vice president for corporate strategy, is responsible for formulating and executing all new strategic initiatives including growth plans, entry into new markets and mergers and acquisitions. He is also a director on the boards of Tata Communications' retail broadband and transformation services subsidiaries.

Victor Alston

Ixia



Since joining the company in 2004, Alston has been the key architect behind Ixia's wireless and wire-line technology

development. An accomplished high-tech executive focused on operational excellence, he has specifically initiated and managed development of high-density network testing platforms that are driving industry quality and performance standards for carrier networks and associated equipment.

Jamie Anderson

TiasNimbas Business School



Anderson is recognised as one of the world's leading researchers on the telecommunications industry in devel-

oped and developing markets. He is an award winning author, and his current research focuses on business strategy in the telecommunications sector, industry convergence and strategies to serve low-income consumers in developing markets. His research has been published in MIT Sloan Management Review, the Wall Street Journal and Financial Times, and he advises many of the world's leading telecommunications firms. He's also one of the editorial advisers to Global Telecoms Business.



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Sian Baldwin

BT



The UK is speeding up under the leadership of Baldwin. Fibre is introduced and broadband at 24 megabits a second is

available to 50% of UK homes and businesses. But she is not content: her goal is for a 75% footprint by early 2012 with fibre reaching four million end users by the end of that year.

Baldwin has great vision and is introducing a content distribution model so end users can enjoy exciting and innovative content services over broadband, while ISPs and content providers share just rewards. She has attended Harvard and London business schools.

Shaun Barriball

MobileIQ



Shaun is the driving force behind the success of start-up Mobile IQ which has carved a niche in the highly competitive mobile

website and mobile apps development market. US and UK content providers wanting to go mobile with Barriball include News International, the New York Post, the BBC, Channel 4, The Guardian, Maxim and Trinity Mirror.

Mukesh Bavisi

Exponential-e



Co-founder of Exponential-e, Bavisi has been instrumental in transforming corporate networking and business VPNs in

the UK. Ignoring the path trodden by other service providers, he has personally led a team of more than 40 staff to make layer 2 ethernet VPNs a reality for over 500 business customers, radically changing the industry forever. A true pioneer in his field, Bavisi is a hands-on leader and is respected by all those who know him.

Richard Cameron

BT



Cameron is CFO of BT Operate, the division of BT that operates the company's IT and network infrastructure. In the last two

years he has reduced operating costs by 25% through a transformation programme that improved labour efficiency, produced savings from vendor contracts and significantly reduced energy consumption.

He was previously finance director of BT Consumer where he reversed declining ARPU and profitability. He is also a non executive director of Tech Mahindra.

Marcelo Claure

Brightstar



Claure founded Brightstar, now a multi-billion dollar business, only 12 years ago. He has forged deep relationships with many

of the world's leading wireless device manufacturers, network operators and retailers.

Brightstar is a global leader in value-added distribution and supply chain solutions for the wireless industry, and as such has visibility to trends and best in class practices across the wireless value chain. It now has a local presence in about 50 countries.

Adam Davison

Expand Networks



Adam Davison has over 14 years experience in sales, management and business development in networking companies, and

has successfully maximised significant sales in EMEA for international start-ups. As corporate VP of sales and marketing for Expand Networks, Davison implements sales processes across the regions, initiating alliances to

enhance the company's global presence. Before Expand, Davison was sales manager for Ericsson Enterprise where he developed a new channel strategy for Western Europe that over-achieved targets each year.

Pieter de Villiers

Clickatell



De Villiers established Clickatell as a leading mobile messaging provider, enabling enterprises and consumers to benefit

via mobile. He led the company through a decade of growth and innovation by providing high value SMS technology to financial services providers, governments, social communities and developers in several markets. He understood the need for a global web-to-mobile gateway, which today serves 10,000 enterprises and reaches millions of people.

Helmut Duhs

Velcom



Duhs planned the integration of one of the largest Belarusian enterprises into a publicly listed Western company. Under

his leadership, Velcom has won back revenue market leadership, prevailing over the big player in the CIS area. Even in 2009 during major economic downturn — against the trend of a 15% reduction of GDP growth in Belarus — he managed to lead the company towards local double-digit increase of all indicators. Velcom is successfully positioned as a future-proof Western investment in Belarus.

Joel Fisher

Telcordia



An early pioneer in the VoIP industry paving the way for IP network migration, Fisher has over 15 years of experience in the telecommunications industry.

As vice president of marketing for Telcordia's interconnection solutions group, Fisher helps communication and content providers deliver new services and applications by leveraging subscriber and network information. He was president of the Voice and Video over IP Quality Alliance, addressing voice and video quality issues in next-generation networks.

Walter Goldenits

Telekom Austria



Goldenits successfully restructured the IT at Mobilkom Austria, then implemented the IT at Vip Mobile in Serbia and Vip Operator in Macedonia. He was responsible for the IT strategic orientation of the mobile communications group, reducing costs by 30% at Mobilkom Austria. As CTO of Si.mobil, he was responsible for the rollout of the UMTS network in Slovenia. Now he is in charge of the transition to an all-IP network at Telekom Austria's fixed network and was responsible for the launch of the first fibre city project in Austria in 2009.

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Gavin Krugel

GSMA



Krugel has been part of a number of the world's most successful mobile financial service implementations, including Wizzit, MTNBanking, mTranZact, Simplus, and the GSMA's Mobile Money Initiatives for almost a decade. He has helped develop, implement and drive several highly successful payment products. His knowledge, energy and enthusiasm for mobile money services are boundless and he is acknowledged as one of the leading experts and thought leaders in this space.

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Mikhail Gerchuk

MTS



As vice president and chief commercial officer of MTS, Gerchuk holds the responsibility for the development and implementation of the company's marketing, sales and customer service strategies, as well as realisation of overall revenue targets. He was promoted to his current role in December 2008 and has developed the commercial and marketing initiatives that enabled MTS to increase market share and maintain growth during the economic downturn in 2009.

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Nick Heller

Google



Heller, director of strategic alliances, is one of those people who will rise to the top — bright, articulate, innovative, visionary and clever. He sits on the telecom-web boundary and will have a great career in forging the new world that will emerge from the current players today. He is impatient and unconventional and will be a mover and shaker.

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Heather Kirksey

Alcatel-Lucent



Kirksey chairs the Broadband Forum's broadband home working group. She has played a critical role, leading teams of technical experts from all over the world, in defining several key specifications relating to the management of devices in the home that have helped enable the growth of broadband over the last five years. This work has included the world-adopted TR-069 CPE WAN management protocol and many other areas including internet gateways and femto access.

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Mounir Ladki

Mycom



With Ladki's leadership Mycom delivered major global innovations such as the first commercial 3G/3G+ service assurance and the

first convergent mobile/IP/fixed solution. An industry visionary in telecoms and IT, Ladki is shaping tomorrow's network and service management solutions and practices in partnership with industry leaders such as Qualcomm and HP, focusing on areas such as mobile broadband experience, internet service delivery, self organising networks and business process automation.

François Locoh-Donou

Ciena



Locoh-Donou became general manager for EMEA in 2004. Since then, he has grown the business by 30% year-on-year, expanding it into 13 territories across the region and developing strong relationships with key decision makers in EMEA. Today, Locoh-Donou is embarking on another major transformation — Ciena's integration with the Nortel MEN business in EMEA, which will double Ciena's EMEA presence.

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Bryan Littlefair

Vodafone



Littlefair is transforming Vodafone's approach to IT security across the global organisation. Security is vital to the new value-

added services the industry is relying on to generate revenue growth. Hosting customer data and downloadable applications requires robust and responsive security. Littlefair promotes a business focused and collaborative attitude to foster global cooperation. He builds on his career at MCI Worldcom and at BT where he was awarded two patents, to champion IT security as enabler.

Nikola Ljušev

Vip Operator



Ljušev joined Vip Operator as CEO and CTO at age of 34. He was and still is the youngest senior executive officer in Mobilkom Austria

group. Despite a difficult market environment and more than a decade entrance lag, Vip Operator managed to achieve over 16% market share in only two years under Ljušev's leadership. The growth strategy based on best value for money positioning and exclusive world class innovations, forced mobile incumbents to enter defensive strategies and invigorated competition.

Alastair Lukies

Monitise



Lukies is CEO and co-founder of Monitise, the world's first multi network, multi bank, mobile banking and payments

service. Live in the UK and US, with recently formed ventures in Asia, India and Africa, Monitise has been identified by the World Economic Forum as a technology pioneer because it enables societal change on a global scale. Lukies leads a team of exceptionally talented people who have made Monitise extraordinarily successful as a company and thought leader.

Erwan Ménard

HP



Ménard is driving HP's core strategy to help service providers succeed in a market that is undergoing historic change.

As the world's leading IT company, HP also has a vast telecom-specific portfolio. With this unique combination, HP provides solutions and services that can enable the unlimited choice that subscribers now want and expect. Ménard's global business is helping service

providers transform their infrastructure, innovate with personalised services, and monetise the value of their network assets.

Giorgio Miano

Syniverse



Miano came to Syniverse from mobile operator Wind Telecomunicazioni. He put his knowledge to work for Syniverse

in Europe, where he won significant customers and established a Rome office. Because of his success, he was chosen to lead Syniverse's Latin America operations in Buenos Aires, where he opened several offices, built an expert staff and grew revenue by 34% in just two years. Miano lends his expertise globally to the company's roaming solutions.

Alastair Mills

SpiriTel



Mills was appointed CEO in 2005 and, aged 32, was one of the youngest CEOs of a UK-listed company. He developed SpiriTel's highly successful "acquire, integrate, grow" strategy, and has led the company through 10 acquisitions in just over three

years. Customer numbers have grown from six to 3,000, staff numbers from 15 to 130, and SpiriTel is now recognised as a leader in the provision of converged communications services to the corporate market.

Hunter Newby

Allied Fiber



Newby is a telecom visionary. He envisioned a truly interconnected world when he developed the first interconnection

facility, Telx. Now he is building America's next-generation network. His vision is Allied Fiber,

created to address America's need to eliminate obstacles for broadband access, wireless backhaul and lower latency through new, next generation long haul dark fibre construction with sound principles and an open access philosophy.

Ruth Pickering

BT



Superfast Pickering shaped BT's fibre strategy. With rollout now a reality, 10 million customers are set to benefit by 2012.

In her current role Pickering defines and directs the future of BT Wholesale's £4.6 billion business, creating new growth opportunities for it and its 700 customers. She is driving BT Wholesale into content and interoperability and expanding its horizons into Europe and cloud services. Pickering was formerly with Cable & Wireless and attended the London Business School.

Tom Regent

AT&T



Despite the challenging economy in 2009, Regent has driven double-digit growth for AT&T's enterprise business. Regent's relentless focus on speed and innovation has resulted in a customer focused business in EMEA, spanning more than 30 countries and a workforce 5,000-strong. He has driven a 50% increase in sales productivity in just two years,

a result of organic growth, expansion to new markets, and successful introduction of new innovative services such as cloud computing and telepresence.

Mike Schabel

Alcatel-Lucent



Before the strategy, before the organisation, before the technology, Schabel sits with customers, asks questions and lis-

tens. He ignites the customer spirit into a team to innovate and solve a customer's complex challenge. A true entrepreneur, he evolves his ideas, trusts his team and believes that great things can happen when the right team is focused on the customer.

Gareth Senior

Comptel



Senior founded Axiom Systems, where he served as CEO and CTO, in October 2000. After eight successful years of

building the company into a recognized player in the broadband fulfilment market, Comptel acquired the company in April 2008. Senior has continued his executive role at Comptel, and has been pivotal in innovating and leading the development of the company's end-to-end OSS products for communications service providers — and helping to shape telecoms industry standards.

Mikhail Shamolin

MTS



Shamolin, president and CEO of MTS, leads the largest mobile operator in Russia and the CIS and the second largest

mobile operator in Europe. He was appointed to his current role in May 2008 and has since initiated a strategic transformation of the company. Through a number of initiatives that include an acquisition of Comstar-UTS, Shamolin is leading MTS towards becoming a fully integrated telecom provider that offers a variety of communications, entertainment and content services.

Khumo Shuenyane

MTN



Shuenyane has already developed a formidable reputation. MTN is very acquisitive, and its rare to find someone under 40

with such responsibility in a large organisation. Last year Shuenyane presided over, to name but a few: the proposed merger with Bharti, which would — had the regulators not blocked it at the 11th hour — have created the third largest telco worldwide, and been the largest cross-border deal in 2009; the completed merger between MTN and Verizon South Africa; and the disposal of MTN's international carrier services business to Belgacom.



Succeeding in a changing world takes talent.

Congratulations to the winners of the 40 under 40.

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Eylon Sorek

Orckit-Corrigent



Sorek combines in-depth knowledge and experience in telecommunication marketing and technologies.

In the past 10 years he has demonstrated excellent professional and personal skills at organisations such as Cisco and Nokia Siemens Networks. As marketing director at Orckit-Corrigent, Sorek was able to introduce a new product line to the outbound environment and is expected to leverage his success in the telco industry.

Alexander Sperl

Vip Mobile



Under Sperl's leadership Vip Mobile started within only six months after its licence award. In only 30 months the opera-

tor reached 1.2 million customers and gained more than 12% market share. Despite being the youngest operator in Serbia Vip has launched the latest and most innovative services. Sperl won an award from the Serbian government in 2007 for the best greenfield investment in the country and was elected as one of the 10 most powerful foreigners in Serbia in 2009.

Rod Ullens

Voxbone



Voxbone CEO and co-founder Rod Ullens leads a rapid-growing innovator that is advancing IP communications and

global connectivity. Ullens has spearheaded creation of iNum numbers and has driven their evolution — with 18 million iNums assigned; high-definition voice, presence, IM, and SMS support added; and non-VoIP carrier involvement building. Voxbone's iNum and DID num-

bers let operators and enterprises quickly deploy new services and expand globally with local presence while reducing costs.

Eran Vakrat

Spin3



Vakrat has developed Spin3's full-service mobile gambling offering. The complex solution includes online acquisition and

retention tools, payment processing and back-office systems. In 2008, he developed Spin3's web application platform for the iPhone, iPod Touch and Android devices — the first commercially available casino games platform for smartphones with advanced browsers. Vakrat heads research and competitive intelligence and has increased product revenue threefold in the last two years.

Walter Vicente

CSL



Vicente was instrumental in CSL's business transformation, culminating in the development of the company's award-

winning NextG network. He is a key architect of CSL's mobile broadband business model which ensures that the company is able to optimally combine growth and profitability objectives. At 36 years of age, and after two years as CSL's CFO, Vicente is well positioned to help drive CSL's growth in Hong Kong while maintaining its leadership of the market.

Athena Wang

Huawei



Wang started her career at Huawei as a product engineer in 1998 and by 2007 became deputy managing director

of Huawei UK as a result of her excellent judg-

ment, diligence and dedication to the company and its customers — rare qualities in such a young professional. Wang is a successful networker, actively supporting other female professionals through her enthusiastic participation in Women in Telecoms and Technology. Her collegiality and warmth makes her an extremely effective ambassador for Huawei in the UK.

Dan Warren

GSMA



As director of technology at the GSM Association, Warren is highly effective at influencing business strategy and

service concepts, as well as retaining authority in setting technical direction. He has worked in the GSMA on key issues such as roaming and interconnect as well as voice over LTE, issues that will shape the way that operators' businesses and networks operate for years to come. Warren has a clear vision of how the communications industry needs to evolve to remain profitable as underlying technology changes."

John Wilkinson

XConnect



A VoIP innovator with 15 years international telecoms experience, Wilkinson has led commercial operations for XConnect

since June 2008 and has been instrumental in propelling IP interconnection, ENUM and NGN services. He was pivotal in achieving the industry-first registry tie-up with GSMA's PathFinder, launching the first Korean ENUM federation and securing XConnect's series B funding. Previously with Interoute, Wilkinson led development of Europe's largest NGN and Europe's first unified communications suite based on Microsoft's Office Communications Server.

Two-thirds have already set up companies and they're going to expect fast speeds

We surveyed our 40 selected executives under 40 and their answers were surprising. Most have already set up companies, but most don't plan to study for an MBA. And they expect four gigabits on their fixed connections by 2020 but a more modest 100 megs on mobile. This is what they say the industry will look like in the next decade

Now you know who they are. But what do they think about the industry over the next five or 10 years?

We asked our 40 chosen executives to take part in a confidential survey — to help us get a better picture of them and of their views of the industry's future challenges. We agreed to preserve their anonymity. All 40 answered some or all of the questions, and we're grateful for their help.

Their expectations of bandwidth in 2020 — a broad prediction of several gigabits to the home by 2020 — will get the investment bankers reaching for their spreadsheets.

More than half of the select group are already C-level executives in their current company, or have been in a previous company, and about a third expect to achieve that level in the next five years — meaning that around 90% of our group have been, are, or expect to be C-level executives by 2015.

Entrepreneurship is high: a remarkable two-thirds of our respondents from the 40 under 40 have already helped to set up a company, and another 20% expect to do so before the decade is out.

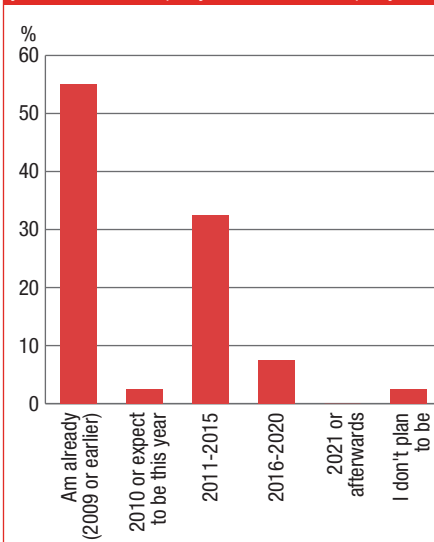
How were they educated? We asked about their educational qualifications. Science and technology clearly lead: nearly half had degrees in science or technology subjects. The rest were in arts, business, finance or languages. Around 8% did not have a first degree.

For about a quarter of the 40, their highest degree was a master's; and three of the total had a doctorate.

About one third of the total respondents have an MBA — a master's in business administration — already. Some expect to get an MBA over the next 10 years, a few this year, but most of our select

C-level aspirations

When do you expect to be a C-level executive (CEO, CFO, CTO, COO or similar) in your current company or another company?



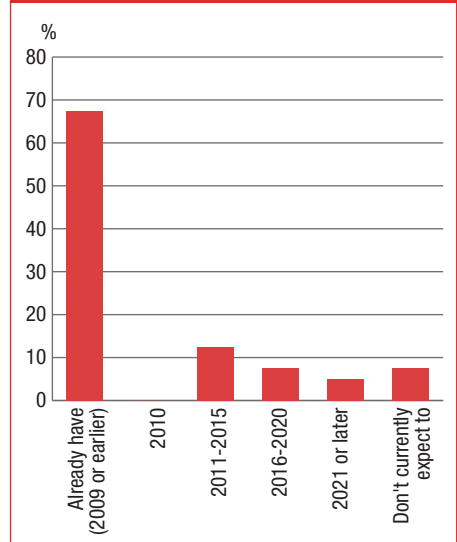
Source for all charts: Global Telecoms Business online survey March 12-18 2010 of all members of 40 under 40 for 2010. All 40 responded

executives do not plan to study for an MBA at all.

We asked those with an MBA where they had studied, but the sample was too small to indicate any preference: Insead, Stanford, the Indian Institute of Management, Cambridge and the London Business School all claimed one graduate each. Another, without an MBA so far, commented: "Stanford, if I were to do one."

Setting up companies

Have you already helped start up a company? If not, when would you expect to help start up a company?



Speeds of the future

We asked them about their broadband speeds, fixed and mobile, as they know more than most about what is possible now and in the near future. And their predictions for the future are based on a realistic knowledge of the industry — but their predictions will also set challenges for the vendors and operators of 2015 and 2020.



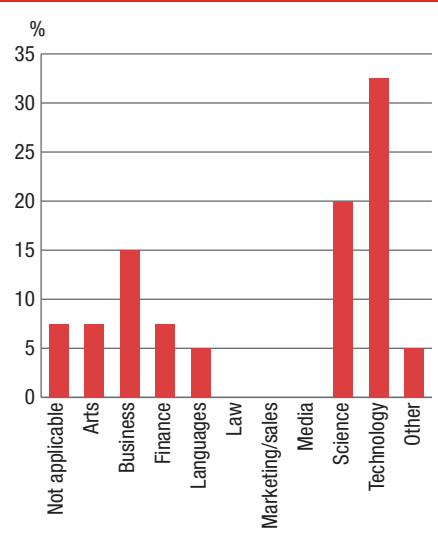
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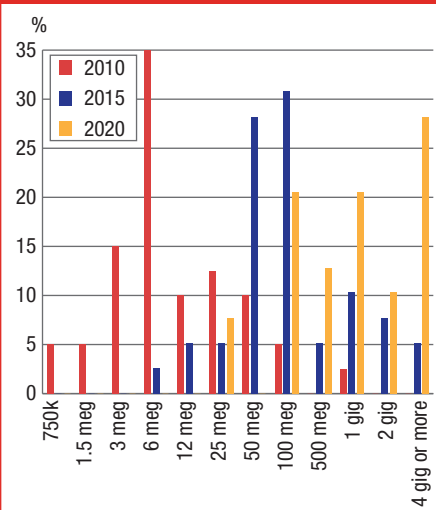
Educational qualifications: first degree

If you have a university first degree (normally a bachelor's), in what broad category did it fall?



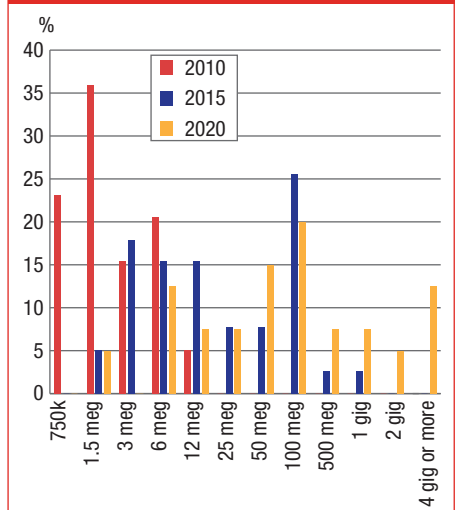
Fixed speeds now, in 2015 and 2020

What fixed broadband speed in bits per second do you have at home now, and what speeds do you expect to have in 2015 and 2020?



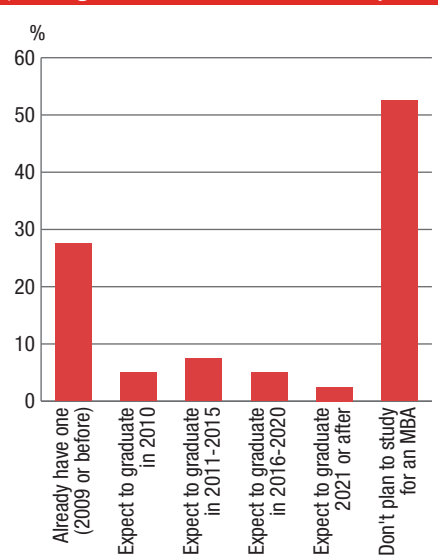
Mobile speeds now, in 2015 and 2020

What is the highest speed in bits per second now on your best-performing mobile device and what do you expect the speeds to be in 2015 and 2020?



Educational qualifications: MBA

Do you have an MBA now? If not, when do you plan to graduate with an MBA? Or don't you?



for the telecoms industry between now and 2015, and between 2016 and 2020. Those answers reflected their expectations of bandwidth demand between now and 2020.

Connecting everyone

"The biggest challenge over the next decade will be to profitably connect every man, woman, and child to the net while delivering a high quality and reliable service," said one.

Another said: "The biggest challenge the telecoms industry will face over the next five years will be for mobile operators to find successful ways to partner with application providers. Without a workable model, mobile operators risk becoming 'dump air pipes'."

Later on, the biggest challenge will be "how to manage network capacity", said the same member of our elite 40. "As more advanced mobile content is consumed, combined with higher subscriber penetration rates, networks will be pushed to their limits."

The biggest challenge for the industry is how to adapt in a world increasingly dominated by internet based companies and services, noted one of the 40. "Their whole business models need to be reviewed, and carriers will need to redefine their core business: it's either infrastructure or value added services. Doing both successfully will be very difficult."

That will also affect operators selling to enterprises, said another. "A move from CPE-based solutions in business telecoms to managed services will put many smaller resellers out of business."

Cloud services

Another agreed that "the convergence of telecoms, IT and entertainment" will lead

to "the almost total move to cloud-based services, with consumers expecting everything, everywhere".

The industry will need "new forms of partnership to be made to allow fixed and mobile networks to work in complement, and will require traffic to be transported as short a distance as possible".

This "requires a combination of investment in technology, new partnering structures, new traffic handling capability and a shift in attitude in how operators view traffic generated by their customers, but if it doesn't happen things will quickly start to grind to a halt".

Another said: "The biggest challenge for telcos between now and 2015 will be see the competition coming, because it won't look like a telco — it will look more like Google. And because telcos don't really know how to classify Google outside of their CTO function, there is a good chance some of us will fail to prepare adequately."

Another said: "Increasingly, collaborative rich media are a 'must deliver'. As we move forward it won't be an option to guarantee the performance and capacity demands. For fixed links, FTTH may well be the answer but what happens with mobile? Delivering the capacity users demand — and that is set to be a lot of capacity — is the challenge." Bandwidth will continue to lag demand, particularly in the mobile space, said another.

One of our 40 said, bluntly: "In the long term, it's very difficult to predict what the comms world will look like. As usual we will overestimate what can be achieved in one year and underestimate what can be achieved in five to 10 years."

But that doesn't stop us trying. For if the 40 leaders of the future don't know, how are the rest of us to tell? ■

Nearly 40% of our 40 get six megabits a second into their homes now, and a few get 100 megs. But most expect to get 50-100 megs in five years' time, and a remarkable four gigabits or more in 10 years' time.

That's on fixed networks. Their mobile predictions are more modest. The highest score for mobile broadband speeds at the moment was 1.5 megabits, but in 2015 and 2020 they expect 100 megabits, though a few expect much, much more in 2020: see chart.

And we asked all of them to say, in a few words, what they saw as the biggest challenge