

 digital wholesale solutions  
Power in Partnership

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Powering your potential

# Win big in the SMB ICT market

## **SMBs have spoken**

Gather insight from our survey of more than 200 small business leaders.

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## **Growth in mobile**

Discover opportunities in a growing mobile and hardware market.

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## **Market evolution**

Find out the key drivers of growth in the UK SMB comms market.

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## **Guide to the All-IP future**

Prepare for the 2025 PSTN Switch Off with future-proof All-IP products.

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# The Best Partner Platform for IT, Comms and Cloud

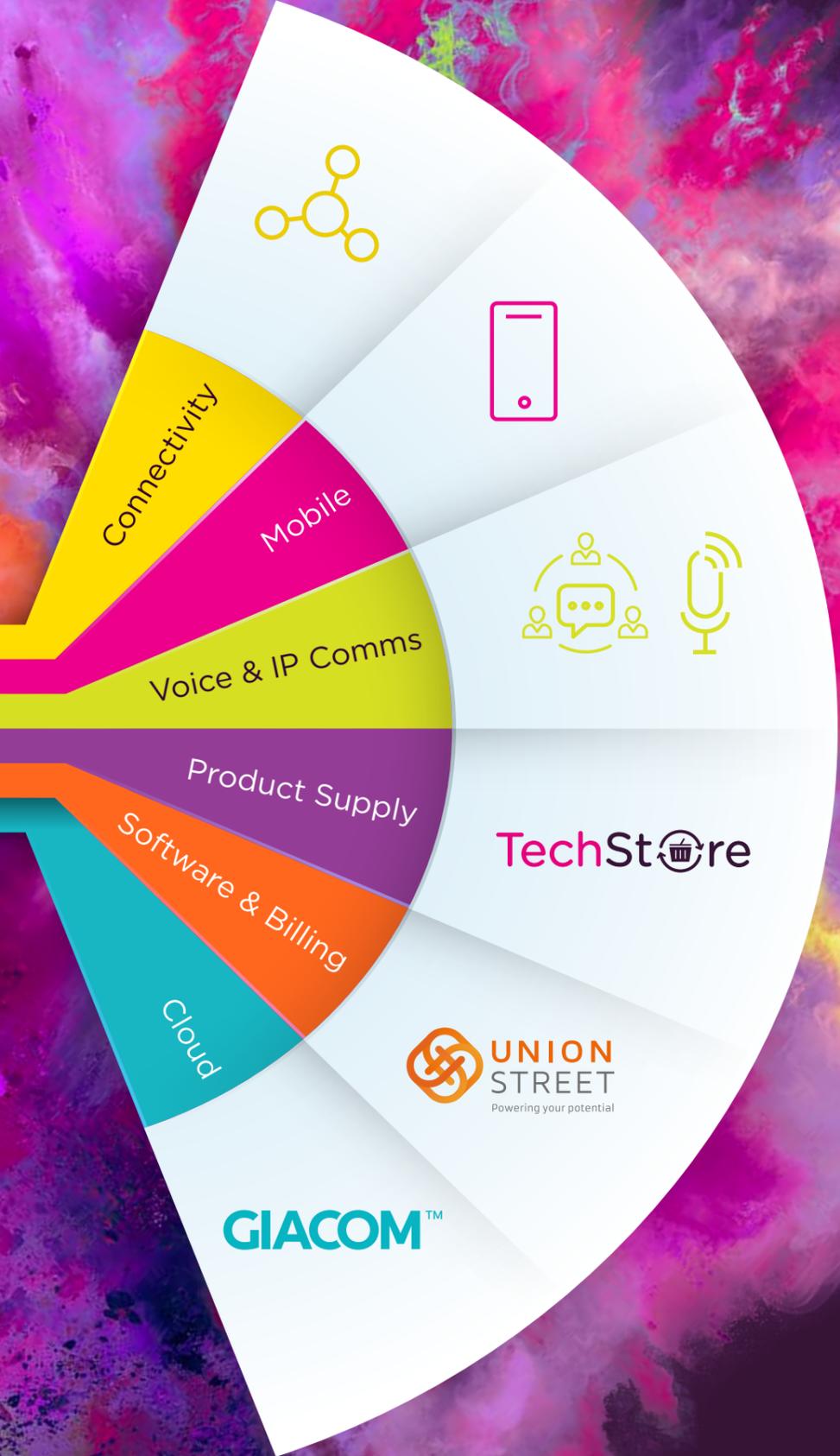
In 2020, Digital Wholesale Solutions, Giacom and Union Street became part of the same group of companies, bringing together three Channel leading solutions – telecoms, cloud software services and cloud billing.

We aim to be the leading technology platform in the Channel, making it simple for resellers to train, enable, sell, deliver and support small business customers in seizing the incredible opportunity in IT, comms and cloud.

Together, our combined Channel proposition, platform expertise, market know-how and 6,000 partners across Digital Wholesale Solutions, Giacom and Union Street are a powerful combination. No one is better positioned to help resellers do truly amazing things for the UK's small businesses.

We provide the **best** products, at the **best** price, through the **best** platform with the **best** people.

**100% Indirect, 100% Independent.**





## Small businesses have spoken. They want partners like you.

Terry O'Brien, CEO @ DWS

Businesses are getting back on their feet, with many now re-opening offices and benefiting from flexible and agile working. This positive trend is reflected in our survey of more than 200 small business leaders, in which nearly 70% are feeling overwhelmingly positive about the prospects of their businesses moving forwards, post-COVID.

Small businesses are telling us that they are now set to invest in technology like never before, wanting to power their businesses for the future and looking for Channel partners like you to help them lead the way.

During the first lockdown in 2020, businesses rushed to put temporary fixes in place to enable their teams to work from home. Now, as small businesses and large enterprises alike navigate the new hybrid workplace, they need to invest in remote working solutions for the long term.

In our research, they told us four clear and immediate priorities to fix remote working:

1. Making collaboration work for the long term - most small businesses have now deployed a UC&C tool such as Microsoft Teams. They need help to understand how they can get the most out of their licences as they work to build a solution that meets all their needs.

2. Fixing home broadband - more than 40% of businesses have reported problems with staff working at home, caused by poor networks. Over 60% say they are ready to invest to give their teams business-grade, secure connectivity at home, and with the fibre-rollout accelerating, the opportunity is now.

3. Putting in place a cloud or hosted telephone system - when offices closed, many small businesses rushed to set up call diverts from their business landline to their mobile to keep their business running. While this worked in the interim, they're now looking for long-term solutions in IP voice.

4. Joining together collaboration and communications - struggling with switching between systems to communicate with colleagues and customers, businesses now want to connect their systems and bring together internal and external communications.



**70%** of small business leaders are feeling overwhelmingly positive

Once businesses have fixed these pressing priorities, they want to figure out how to drive digital technology across their whole business, to improve the way they do everything for the long term. The Channel has an incredible opportunity to help small businesses with:

- > Getting everything else into the cloud - businesses now realise the liberation and flexibility you get when everything lives in the cloud, and everything is connected to everything else.
- > Mobile and Microsoft - boosting productivity by putting all those amazing apps into the palm of everyone's hand.
- > Automation - Systematically reviewing current processes to identify ways to automate workflow - from filling in forms, to ordering and ecommerce, to HR processes - they want simple, low-cost processes that reduce the need for development resource.
- > Fibre and 5G - businesses need a super-fast network to make this work at home, on the move and in hubs, and with 5G and Fibre-to-the-Premise (FTTP) rolling out fast, they're willing to invest to get the best.
- > Security - built into everything they use, so they don't need to worry about it.

You can be the business that makes this a reality for your customer. Working together as a Channel community, we have the resources, the reach, the know-how and the trust to help our customers make this change.

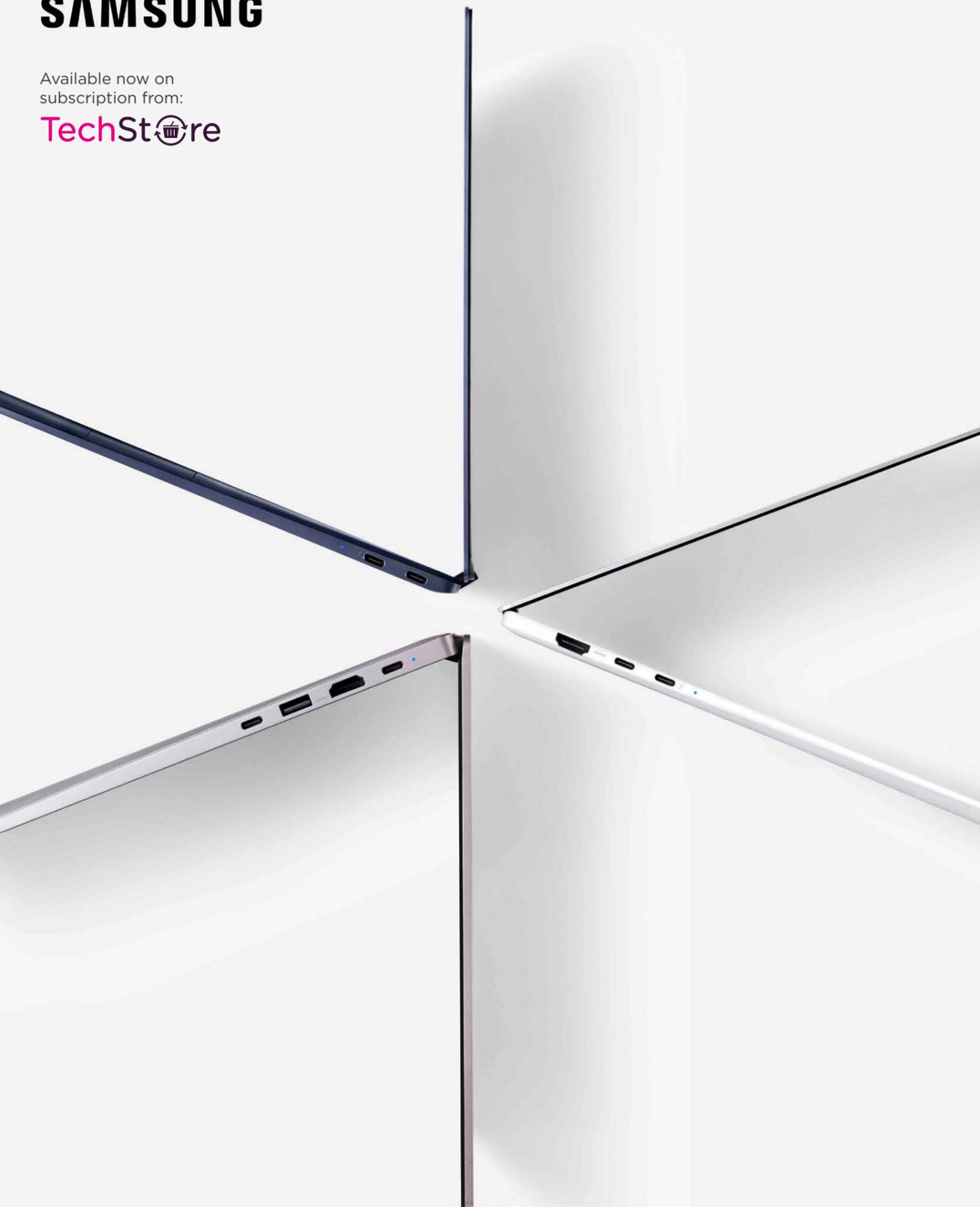
We are seeing this in the market forecasts. An already huge £10bn market, small business investment in cloud and comms is set to grow at 9% every year for the next five years\*, and with the fast-tracked shift to agile working, the PSTN switch off, FTTP and 5G compelling businesses to make buying decisions soon, no one is better positioned to help than the Channel.

\*Source: EY-Parthenon & PWC

**£10bn**  
Cloud &  
Comms  
Market

**13% YOY**  
Growth  
for the next  
**5 years**





## Growth in mobile and hardware

Ricky Shock, Head of Mobile Services Portfolio @ DWS

Ricky Shock, Head of Mobile Services Portfolio for Digital Wholesale Solutions explores the latest trends and growth in the mobile and hardware industry and the opportunities for resellers to unlock new services and revenue streams.

### Mobile connectivity for SMBs

Mobile connectivity gives businesses a continuous connection to their teams, customers and data. Companies can truly deploy a remote and agile workforce with cloud-based applications staying connected on mobile devices without requiring public/open Wi-Fi. Furthermore, team members can collaborate on the move, resulting in increased efficiency and improved communications within their organisation and with customers and suppliers.

Although Mobile Connectivity is not a new technology, as consumers and businesses, the way we use our devices has changed dramatically while the mobile industry continues to grow and push the boundaries with innovative new devices and tariff options.

### Opportunities for growth

Spending on Mobile Connectivity and Hardware by SMBs is set to grow at 6% CAGR over the next six years, rising to an incredible £3bn by 2026. A key contributor to this growth is the demand for hardware refresh, driven by 5G. In addition, the birth of over 500k SMBs over the past year could see an even greater need for mobile connectivity services as their businesses grow and mature.

The 5G rollout is a game-changer for business, with download speeds up

to 1Gbps, compared to an average of 32.5Mbps on 4G. By 2025, it's predicted that 5G will power 80% of all UK business mobile connections. The improved speed and latency will create near-seamless access to the cloud for collaboration apps, content and entertainment. 5G is also the main driving force behind a significant growth in Connected Devices and IoT Technologies.

We expect to see a 50% growth in Connected Devices globally in the next two years, such as PCs, laptops, tablets and printers. The practical applications are almost limitless, with every business benefiting from 'always connected' devices. In addition, IoT business connections are increasing and are expected to grow at 30% CAGR between 2020 and 2024.

The growing mobile and hardware trends are set to create a massive opportunity for resellers to unlock new services and revenue streams with end customers.

With DWS, resellers can maximise opportunities in the mobile market. Combining our award-winning Wholesale and Network Billed mobile propositions, subscription hardware on TechStore, and Union Street for industry-leading billing solutions gives resellers the perfect platform to succeed in the mobile and hardware market.





## Post-pandemic opportunities

Nathan Marke, Chief Operating Officer @ DWS

Nathan Marke, Chief Operating Officer for Digital Wholesale Solutions, presents a research-based and data-driven insight into the changing shape and growth opportunities of the ICT Channel and the SMB market.

### The UK SMB Comms market is large, resilient and growing

SMBs are perhaps the sector to have been hardest hit by the pandemic. Since the first lockdown, many businesses have had to adapt the way they operate, as places of work shut down and working from home became a reality for many. But the SMB market is resilient, and it's growing. A record number of businesses, more than 500,000 were established during the pandemic, a rise of 10% from the previous period. The SMB market has consistently delivered each year, and despite huge challenges and uncertainty, the determination behind their creators could turn any SMB into a large corporation, creating thousands of jobs.

**500k**  
new businesses  
**started**  
**up in**  
**2020**



### A large, high growth addressable comms market

SMBs are hungry for technology; this year alone, they've spent more than £10 billion, growing at 13% CAGR. The high increase in start-up businesses means we're at the start of a large, high growth addressable comms market. Over the next five years, we expect the SMB market to increase their telecoms spend, particularly in Connectivity, Mobile, VoIP, Unified Communications and Security. The potential for resellers to diversify their businesses, expand their product offering and give SMBs what they need is massive.

### Drivers of UK SMB comms growth

We're now witnessing a perfect storm of four mega market trends that, working together, create mass switching and upgrading opportunities for resellers, assisting SMBs in future-proofing their businesses. From the vast market opportunity presented by the 2025 PSTN Switch Off, to the prediction that 20% of the UK will become full fibre by 2024, to the 5G rollout allowing small businesses to truly power remote and agile working, these advances in technology create enormous opportunities for both the Channel and SMBs.

### The Channel is in the prime position to capture this growth

With 40-50% of SMBs still buying their telecom services directly from the big comms providers, resellers are perfectly positioned to seize the market opportunity. Customers want a one-stop shop from a local, knowledgeable and trusted supplier, and the Channel is well placed to help SMBs achieve this. We are seeing partners expand their portfolios to meet the demands of SMBs and grow their customer base. The Hybrid Work Revolution is here to stay, and SMBs are on the look out for the right suppliers and technology to keep their staff, suppliers and customers connected.

### SMB cloud software technology drivers

Cloud technology is fundamentally changing the way businesses connect and collaborate with their teams, customers and suppliers, allowing for secure access to software and data from the office, at home and on the move. Cloud software addresses more demanding interactions and provides quickly implementable solutions, allowing companies to innovate and work smarter.

The shift from on-premises to cloud is growing rapidly at an expected 25% CAGR between 2019 and 2023. This growth is fueled by more SMBs entering the market and beginning to use cloud products for the first time, and those already using the cloud are migrating their remaining on-premises solutions.

Forecasts for spend on telco and cloud are pointing towards sustained growth rates at 13%. If we combine the two markets and think about SMB customers who want to build a business that relies on fibre, mobile and cloud, we have an extremely exciting growth runway for the next few years.

**£10bn SMB**  
comms market in 2021 -  
**growing at**  
**13% CAGR**



### Want to know more?

View the full presentation to discover more about the SMB market and how you can take advantage of the opportunities available to Channel partners.  
[www.digitalwholesalesolutions.com/brochure](http://www.digitalwholesalesolutions.com/brochure)





# EVERY BATMAN NEEDS AN ALFRED

At Giacom, we like to think of ourselves as your Alfred Pennyworth. Trusty cloud services support you can rely on - working hard in the background to provide the expert know-how, tools and back-up you need to be a super hero for your customers.

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IT BUSINESS**

**GIACOM™**  
It's all about you

## What is All-IP?

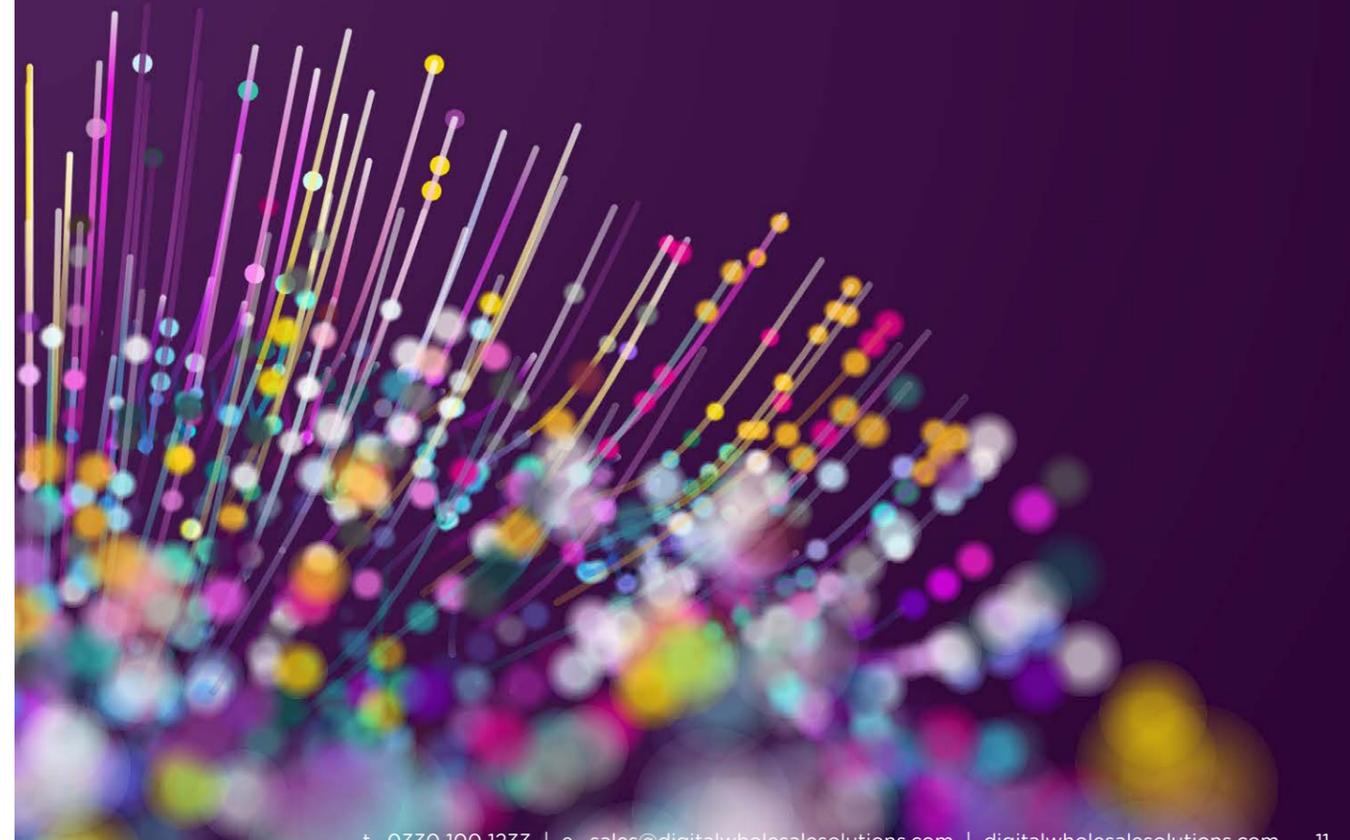
An All-IP network is the future of communications, encompassing all Single Order connectivity and hosted voice solutions. These new technologies will replace the traditional copper telephone network, which supports legacy broadband and voice communications, moving from an analogue, telephony-led approach to a digital-based, connectivity-first future.

## Why are we transitioning to All-IP?

In 2018, Openreach announced that they would be retiring the PSTN and ISDN network in 2025, meaning users need to transition to a future-proof replacement product before the deadline.

The PSTN is the copper network that was originally built to support voice communications via landline and was later adapted to support broadband connections such as ADSL and FTTC.

This infrastructure is now degrading and has become expensive to maintain, which has driven costs up. The old technology is no longer able to support the constantly growing demand for data, which is why the industry is driving digital transformation, making sure all businesses and consumers alike have access to faster, more reliable solutions.



# When is this happening?

The short answer is **now**.

The migration to All-IP has already begun, with 40% of UK businesses already using an IP voice solution, while providers work to increase Single Order broadband availability across the UK, enabling more businesses to make the move.

Any Channel partners not already offering future-proof voice and connectivity solutions should start now, or they'll risk losing business to other All-IP providers.

### Great Switch Off Hub

To find out more about the PSTN Switch Off and Fibre Rollout, head to our Great Switch Off Hub, where you can access all our sales and marketing resources and catch up on the All-IP interview series with industry experts.

[www.digitalwholesalesolutions.com/brochure](http://www.digitalwholesalesolutions.com/brochure)




### HV.Select



**Multi Award Winning**

Our hybrid VoIP solution, HV.Select, enables users to manage all voice communications in the Cloud, offering advanced call routing features and UC&C with Cisco Webex for BroadWorks.

### SIP Trunking



**Keep existing PBX**

A direct replacement for ISDN, SIP Trunking allows users to take their first step to IP communications, without completely replacing their on-site PBX.

### SIP2teams



**Bring Voice to Teams**

Take advantage of the huge Teams opportunity with our Direct Routing solution, enabling voice within Teams.

**SIP 2teams**

### PBX2teams



**Retain compatible IP PBX**

The Direct Routing solution for businesses who aren't ready to give up the PBX, this solution enables full Teams integration while the user maintains their PBX functionality.

### Microsoft Calling Plans



**Utilise our Cloud expertise**

Utilise Microsoft expertise from Giacom to deploy a digital add-on that sits on an existing or new O365 subscription.

**GIACOM™**

### V-IP



**NEW! Virtual IP**

V-IP is our new Single Line Voice replacement, bringing IP voice to micro businesses and home workers.



*"Technology has changed the way we communicate for the better. Businesses can stay connected and make calls from anywhere, on any device. At DWS, we can support our partners through the IP transition with a full suite of competitive and innovative voice products to suit every customer requirement."*

Claire Richards, Head of Voice Services Portfolio Product @ DWS

### FTTP



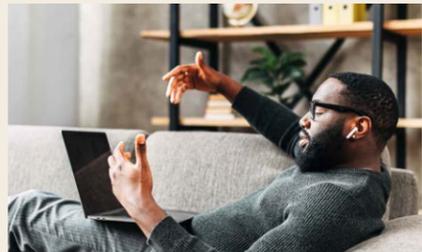
At DWS, we offer full fibre broadband on a range of tariffs to help you choose the best package for your customers. With bandwidths up to 1Gbps, FTTP is the fastest broadband solution available, guaranteed to see your customers through the PSTN switch off.

### Full Fibre Ethernet



With Full Fibre Ethernet, your customers benefit from a dedicated fibre connection offering simultaneous upload/download speeds of up to 1Gbps and enhanced SLA for downtime. It is capable of dealing with large numbers of users and any high bandwidth cloud-based application.

### SOGEA



Single Order Generic Ethernet Access is a data-only broadband solution offering speeds of up to 80Mbps. With a simple migration journey through the DWS portal, you can bring future-proof connectivity to your customers today.



*"FTTP is the future of Broadband; it delivers a revolution in connectivity through a reliable and cost-effective connection, with up to 1Gb bandwidth and beyond in the future. FTTP will provide the platform for generations of digital innovation and transform how we work and live. The opportunity is clear for our partners: technology innovation enables new opportunities to win business and to lead their customers on the next stage of their digital journey, underpinned by FTTP."*

James Montague, Head of Connectivity Portfolio @ DWS



# The transition journeys

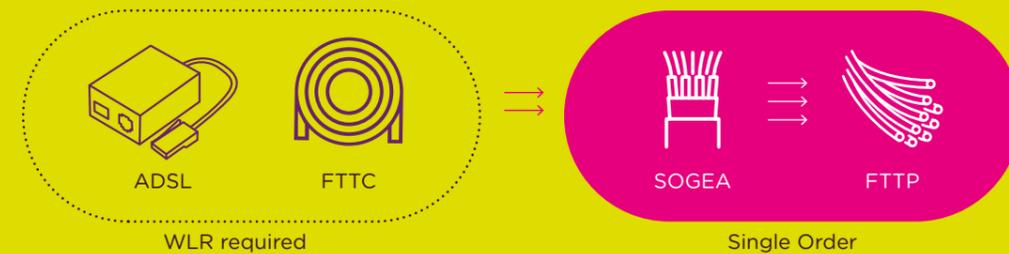
When migrating your customers to All-IP, there are many routes available. Are your customers ready to take the leap from copper broadband to full fibre and landline to IP voice? Or would they prefer to take smaller steps towards the future of communications?

With DWS, you are equipped to support every customer on their journey, no matter which road they take.

## Broadband

Broadband technology has come a long way in the past 30 years, from the dreaded dial up tone to speeds of up to 1Gbps, that we could never have dreamed of in the 1990s. Whether your customers are still utilising ADSL or have taken the first step to fibre with FTTC, you can enable their digital transformation with SOGEA and FTTP.

Remember, FTTP should be the number one choice where it's available!



## Voice

When taking your customers on the journey from WLR to VoIP, there are options to suit every business. If your customer is locked into a long contract on their PBX or just doesn't feel ready to take the plunge, you can offer multiple steppingstones to All-IP, with SIP trunking or Hosted SIP services helping them get a feel for the future of voice before migrating to a fully hosted solution. Alternatively, if they're excited to step into the future, it's easy to take them from PBX to VoIP, moving all their voice communications into the Cloud for a future-proof solution that will meet all their needs.



# Benefits of All-IP

## Simple order and provisioning process

With just one line for data that can support the OTT voice solution, it's much easier to manage an All-IP solution.

## Multiple options

There are so many options to enable digital transformation, just choose the route that is best for your customer.

## Reduced costs

All-IP solutions offer reduced costs with lower cost-per-minute on voice solutions, no line rental and little to no maintenance costs.

## Future-proof

Once a customer has migrated to a Single Order connectivity solution and OTT IP voice solution, they can be confident that their communications services are going to stand the test of time.

## Faster, more reliable connectivity

Data demands are constantly on the rise, with businesses needing more from their connectivity solutions. Future-proof full fibre offers the highest bandwidths and most robust broadband connection available.



# Glossary of terms

## Old Technology

**Wholesale Line Rental (WLR):** Traditional copper phone line

**Public Switched Telephone Network (PSTN):** Analogue telephony network

**Integrated Services Digital Network (ISDN):** Digital network used to transmit both voice and data signals

**Fibre to the Cabinet (FTTC):** Broadband solution that uses a combination of fibre technology and a copper phone line

**Asymmetrical Digital Subscriber Line (ADSL):** Broadband solution run solely over copper phone lines

## New Technology

**Single Order:** Broadband service that doesn't require a phone line

**Fibre to the Premises (FTTP):** Full fibre solution offering the fastest broadband available

**SOGEA:** Data-only FTTC broadband solution with no phone line

**Voice over IP (VoIP):** Future-proof voice solution that is run over the internet

**Over The Top (OTT):** Service that relies on an internet connection

**SIP Trunking:** Internet-based voice solution that enables users to retain their existing hardware

## The PSTN Switch Off

**Stop Sell:** When an area becomes FTTP-enabled, meaning you can no longer purchase any copper technologies

**Exchange:** The centre that connects analogue and digital signals to establish calls



# Don't get in a pickle over your billing

Union Street's well seasoned billing and provisioning software can spice up your business. We're driven to keep tinkering with our (award winning) recipe.

We invest millions each year to continually enhance our products and improve our customer service for one reason; to put your business streets ahead.

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Isn't that tempting?



# Are you ready to maximise your portfolio?

The IT, Comms and Cloud industry is changing.  
Take advantage of the billion pound opportunity  
with DWS, Giacom and Union Street.

Get in touch with our sales team to find out more.

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