

# How Tarantula adapts to optimise the operational and commercial processes of towercos with different business models



Udhay Mathialagan discusses how Tarantula is helping towercos perform in new markets



Udhay Mathialagan, CEO, Tarantula

Tarantula, the leading telecom site portfolio management solution provider, has been consolidating its global growth and now has a presence in 19 countries across the globe, including nine in Asia. Drawing on the know-how of its management team, each with over ten years of hands-on telecoms tower industry experience, Tarantula is continuously developing its set of 29 default processes to deliver a flexible solution to help towercos deal with a variety of physical and commercial challenges in different markets.

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## Read this article to learn:

- How Tarantula supports clients operating in various Asian markets
- Overcoming physical and commercial challenges
- Optimising tower management in the Asian market

**TowerXchange:** When we last spoke Tarantula had just entered the South East Asian market, can you give us an update on the past year's developments?

Udhay Mathialagan, CEO, Tarantula: Over the past year we've been moving deeper into the Southeast Asian market and we have built a significant presence in the region from our global headquarters in Singapore and our development and delivery centre in India.

We've expanded our operations in Indonesia, Myanmar and Malaysia where we have been focused on deployments for business that we won last year with a range of tower players in these markets. We've gained a great deal of insight into issues on the ground in a variety of markets across Asia, and our true local presence has enabled us to work closely with clients and build our relationships.

From a product perspective, we have utilised the lessons about the nuances of the towerco model as it's practiced in different countries. We've integrated this knowledge and experience into the development of our platform and we now have 29 out-of-the-box processes or default processes that are highly relevant to towercos operating internationally. This offers our customers greater choice about how to implement our tool when building a quality business management software platform.

One thing we've learned is that one size certainly

doesn't fit all when it comes to the tower business – it's presumptuous to assume a pre-determined, cookie-cutter type solution can handle all processes. The towerco model has evolved in different ways in different countries from the original American model; we have observed its evolution over the past fifteen years and respectful of the market differences and thoughtful about how we engage with it.

**TowerXchange: How has your product evolved over the past year and what differentiates it from others on the market?**

Udhay Mathialagan, CEO, Tarantula: The tower business operates on two planes: the physical plane with towers, antennae, power systems, property management, et cetera, and the commercial plane including contracts, financing and accounting. Most companies operating in the tower software space don't necessarily bring the physical and commercial elements together. The industry has made a lot of progress solving physical and commercial challenges in developed markets, but applying the same solutions in emerging markets like Myanmar comes with new challenges. Everything changes, over time, from the master lease agreements to the actual structures and equipment being deployed, and these are the scenarios that we aim to provide solutions for.

We have an out-of-the-box product; we don't customise each deployment. However we're focussing on creating 'best practice' processes

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based on our observations across multiple markets, and anything that we can automate we do automate. We listen closely to the market and try not to tell companies how they should operate, but how we can best help them to operate. Our aim is to arrive at the best possible outcome, to learn how our users adopt our services, and we stay in close contact with the commercial people.

One of our key differentiators goes back to essence of our company: we're run by tower experts for the tower industry. Our focus is undiluted; we're not involved in general real estate or other industries, nothing outside of the tower and telecoms space. All four of our top managers have more than ten years direct experience in telecoms including towercos and MNOs. This makes us very different from typical software tech firms; we know the

pains and joys of the towerco experience first hand.

**TowerXchange: How is Tarantula supporting towercos that operate in different markets across Asia?**

Udhay Mathialagan, CEO, Tarantula: We've learned that in this part of the world, implementations are not easy. We need to work with our clients to understand their business processes, and what the specific challenges they face on the ground are. It's important for towerco partners to have empathy for the towerco business model, to speak their language, and collaborate with them fully. And the challenges faced in different markets vary considerably; in the US and Europe there is a lot of standardisation; in Asia the markets are

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more fragmented, the geographies are varied and in some cases there are less established business processes. Our aim is to understand our customers, understand how they can benefit from our default processes, and how to adapt these to get the optimal business outcome for them. This is an ongoing process; we have to work closely with clients, absorb their feedback and then work with it.

In terms of product development our philosophy is to be nimble and adapt to the different markets our clients operate in as quickly as possible. We don't park customer requests into a development process that may take up to 18 months. Instead we're constantly developing our product and applying lessons learned on the ground into new default processes with the expertise of our dedicated development team in India.

**TowerXchange: Is your solution purely out-of-the-box or do you also provide support?**

Udhay Mathialagan, CEO, Tarantula: We do have a professional services group, but we use it judiciously. We believe the right type of professional services is important to help customers polish and shape business processes.

We don't just offer our clients a tool and send them off, and in many cases the perfect solution doesn't exist; but we work with them to get as close to that as possible. This is different from working with a general enterprise software vendor that typically requires lengthy development time with vendors



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who don't have an instinctive grasp of the issues at hand. We work closely with C-level executives, division heads and operational heads to share best practices and sharpen business processes; the improvement phase is a collaborative effort. We focus on TCO as opposed to list prices, and often a specific scenario will need a particular element for it to work and we will see this through to implementation so the customer gets as close to an end-to-end solution as possible.

In some markets there are issues with data hosting, and this is another area that requires flexibility. As a result we don't limit our services to SaaS implementations, and can deploy our solution in other robust ways if required by local regulation.

**TowerXchange: What are some of the specific challenges that your solution can help with in these variable market conditions?**

Udhay Mathialagan, CEO, Tarantula: The main issues are broadly around energy, predictability of the workforce and communications, and all these require a new approach to data management. In the more developed markets energy is taken for granted, but it's not a given in parts of Asia like Myanmar, India and a few other countries in Southeast Asia. Towercos need data that comes from different energy systems; they need to bring the physical data into the commercial layer and produce reports and outputs that can help them manage their business.

For those not familiar with this part of the world, there are also often issues around security, in Myanmar and Indonesia for example, and getting the supervision of assets right is important. In terms of workforce there are more "moving parts" and activities done on tower sites on a regular basis compared to countries like the U.S. or Australia where sites are often visited once or twice a year. In several Asian markets the sites need regular physical inspections, fuel checks, tower load checks, and a general higher level of activity optimisation. Towercos need to be sure that the deployed assets on their towers are actually there and therefore a different approach to maintenance management and security are required. Our software enables towercos to manage operations and maintenance of their assets, including those related to energy

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management, in a proactive and comprehensive manner.

Communications infrastructure can be another challenge in some markets; as the industry increasingly relies on connectivity for reporting from field staff, companies need to develop methods to continue building up data when offline.

The towerco model as it’s known in the U.S. is quite different; for example ‘right of use’ of space is well managed there. Some Asian markets are less prescriptive than the U.S. regarding space on towers. In some cases there is a greater number

of variations in contracts or terms in different markets. Our towerco management experience and efforts to develop better processes have created the ability to manage master lease agreements to key terms linked directly to asset management. Towercos can better manage pricing for different customers and integrate automated processes to reduce revenue leakage caused by discrepancies between what’s on the contract and what’s on the towers. These gaps can have a noticeable impact on tower cash flows.

Due to our sharp focus on the bridge between the physical and commercial aspects of the

tower business our clients can access granular financial information that enables compliance and management of different tax situations. They can integrate a high level of automation in handling local and national taxes and in handling master contracts. We understand the need to be aware of local situations to develop the most flexible solutions.

Our solutions are also designed to assist with M&A activity, and this continues to be a hot topic in the Asian tower industry. Buyers can now benefit from a tower acquisition module – a recently launched product feature - enabling rapid assimilation of assets which is one of our default processes. From a sellers’ perspective this tool can give an accurate picture of assets at a country level and group level and can help to substantiate their valuation, provide access to quality data and current contracts, which helps with the due diligence process.

**TowerXchange: Do you anticipate a lot of tower industry M&A in Asia in the near future?**

Udhay Mathialagan, CEO, Tarantula: Yes, while the ongoing requirements for new builds support the formation of greenfield towercos in a few Asian markets, the market is moving into a phase of consolidation with larger players and regional players executing a roll-up strategy by buying up smaller players or stranded assets. Telcos still own the vast majority of the towers in this part of the world, these assets will make their way into more independent structures progressively, over time ■