



Telsyte

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Telsyte Releases Third Report Series, 2007 Competitive Analysis

Sydney, 8th October 2007 - Telsyte, Australia's converged communications competitive intelligence expert, today released three studies as part of its **2007 Competitive Analysis Report Series**, offering a detailed competitive analysis of:

- Australia's DSL infrastructure installed base;
- Business smart phone vendors, and
- Enterprise communications sales channels.

Warren Chaisatien, Telsyte managing director, said "the current debates around broadband technology and availability, the proliferation of 3G devices and the rise of non-wireless email mobile usage in the enterprise, and the hype surrounding unified communications, have significantly altered market dynamics in the past 12 months, prompting us to take a fresh look at the major players in the marketplace."

Highlights of the major findings include:

- After Telstra, which operates the most extensive DSL network, Optus and iiNet now have the second- and third-largest DSL networks in Australia respectively.
- The vast majority of regional areas are exclusively served by Telstra, with only 7% of the DSL-enabled exchanges carrying DSLAMs from alternative providers, clearly pointing to the poor state of DSL infrastructure competition in regional areas nationwide. Competition in metro areas, however, has improved with almost two-thirds of the DSL-enabled exchanges carrying equipment from two or more carriers.
- The Australian business smart phone market is two-tier, with the first tier dominated by proprietary operating system device vendors Nokia and RIM.
- Strong preference for Microsoft Windows, however, is providing second-tier smart phone suppliers with a chance to emerge as the device becomes more mainstream.
- In the enterprise communications space, the 'partnering frenzy' has led to mediocre channel expertise in vendor products. This has been exacerbated by vendors introducing telephony products with little differentiation.

Published annually, the **Competitive Analysis Series** reports are designed to provide an investigation and comprehensive analysis of Australia's converged communications vendors, as well as unique insights and valuable recommendations to market players.

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About Telsyte

Telsyte is an Australian-based market research and consultancy specialised in the competitive intelligence of the converged communications market. Telsyte provides industry insights through custom research and consulting as well as ongoing research, which includes market reports and online databases. Telsyte is a business unit of Australia's largest independent telecom consultant Gibson Quai-AAS Pty Ltd.