



CONVERGED COMMUNICATIONS
COMPETITIVE INTELLIGENCE

Market reports

AUSTRALIAN ENTERPRISE TELECOMMUNICATIONS USAGE, TRENDS AND PREFERENCES, 2008

November 2008

The Australian Telecommunications Decision Maker Report is designed to highlight market and technological trends to assist decision makers in making informed technology decisions that are aligned to business strategies. The study provides recommendations and advice on telecommunications, based on Telsyte's consulting expertise and market research. It also provides deep insights into the minds of fellow decision makers, highlighting drivers and challenges in the various market segments and vertical industries.

Every year, Telsyte conducts Australia's largest telecommunications business end-user survey with over 900 decision makers' participation. It offers a detailed investigation and comprehensive analysis of telecommunications technology usage, preferences, adoption trends and key considerations among Australian businesses.

The analysis in this study primarily focuses on the medium and large enterprise market. However, where appropriate, selected analysis by vertical industry, geography and equipment vendor is also provided. This report covers 4 key areas of telecommunications:

- **Enterprise Communications – including Unified Communications (UC)**
- **Enterprise Data Networks**
- **Enterprise Mobility**
- **Green ICT**

Australian Enterprise Telecommunications Usage, Trends and Preferences, 2008 is a 38-page report costing \$2,495 (excluding GST) and includes 22 Figures and 4 Tables.

Table of Contents

Section	Description	Page
1	INTRODUCTION	5
1.1	Methodology	5
1.2	Definitions	6
2	EXECUTIVE SUMMARY	8
3	ENTERPRISE COMMUNICATIONS	10
3.1	IP Telephony Drivers	10
3.1.1	End of Contract/Replacement Cycle	10
3.1.2	UC – Driving IP Telephony	10
3.2	IP Telephony Inhibitors	10
3.2.1	Expanding Legacy Systems	10
3.3	Unified Communications	11
3.4	Enterprise Communications Spending Plans	12
3.5	Evaluation Criteria	13
3.6	Understanding and Knowledge of Unified Communications	15
3.6.1	Knowledge on Unified Communications	15
3.6.2	Perception on the UC Proposition	16
3.7	Timeframe and Reason for UC Deployment	17
4	ENTERPRISE DATA NETWORKS	19
4.1	Business Data Services Penetration and IP Migration	19
4.1.1	Half of all businesses have deployed data services	19
4.1.2	Move to all-IP networks to strengthen in the next 2 years	20
4.2	Migrating to the Next-Generation Network Technologies	22
4.2.1	Ethernet-based Network	22
4.2.2	IP/MPLS Network	23
4.3	Preferred Data Service Providers	24
5	ENTERPRISE MOBILITY	26
5.1	Mobilisation of Australian Workforce	26
5.2	Mobile Device Form Factor Penetration	26
5.3	Handset and Service Plan Selection Process	27
5.4	Mobile Application Use	28
5.4.1	Mobile email still leads but “2nd Wave” led by CRM rising fast	28
5.5	Mobile Technology Use	30
5.5.1	3G, smart phones and convergence lead adoptions	30

5.6	Enterprise Mobility Drivers and Inhibitors	31
5.6.1	Customer service and competitiveness becoming the name of the	31
5.6.2	Backend integration now biggest challenge	32
4	ENTERPRISE DATA NETWORKS	19
6	GREEN ICT	34
7	CONCLUSION AND RECOMMENDATIONS	36
7.1	Enterprise Communications	36
7.2	Enterprise Data Networks	36
7.3	Enterprise Mobility	37
7.4	Green ICT	37
8	RELATED RESEARCH	38

Figures

Figure	Page
Figure 1 – Unified Communications Drivers, 2008	11
Figure 2 – Enterprise Communications Equipment Spend Intentions, 2008	12
Figure 3 – Enterprise Communications Service Spend Intentions, 2008	13
Figure 4 – Most Influential Vendor Selection Attribute, 2008	13
Figure 5 – Most Influential Solution Selection Attribute, 2008	14
Figure 6 – Knowledge on Unified Communications, 2008	15
Figure 7 – Understanding of Unified Communications, 2008	16
Figure 8 – Timeframe for Unified Communications Deployment, 2008	18
Figure 9 – Reason for Not Deploying Unified Communications Now, 2008	18
Figure 10 — Business Data Services Penetration by Business Size, 2008	19
Figure 11 — Business Data Services Penetration by Technology by Business Size, 2008	20
Figure 12 — Planned Migration to All-IP Network, 2008	21
Figure 13 — IP Migration Inhibitors, 2008	22
Figure 14 — Business Data Services Primary Service Provider, 2008	25
Figure 15 - Proportion of Mobile Employees by Business Size, 2008	26
Figure 16 - Business Mobile Device Penetration by Form Factor by Business Size, 2008	27
Figure 17 - Mobile Handset & Service Plan Selection Process, 2008	28
Figure 18 - Current And Planned Usage of Business Mobile Applications, 2008	29
Figure 19 - Current And Planned Usage of Business Mobile Technologies, 2008	31
Figure 20 - Australian Enterprise Mobility Deployment Drivers, 2008	32
Figure 21 - Enterprise Mobility Deployment Inhibitors, 2008	33
Figure 22 – Importance of 'Greenness' in Vendor Selection, 2008	34

Tables

Table	Page
Table 1 – Top 3 Influence in Vendor Selection by Business Size, 2008	14

Table 2 – Top 3 Influence in Solution Selection by Business Size, 2008	15
Table 3 – Perception of Key Value Proposition of Unified Communications, 2008	17
Table 4 – Key Business Impact of Unified Communications, 2008	17

Report Pricing

All reports are delivered in password protected Adobe PDF format. Reports are Print and Search enabled.

Reports will be licensed to the subscribing company.

The subscriber will not be permitted to disclose the report or its contents to any additional third parties, and must ensure that any person within the subscriber company's organisation who has access to the content of this report abides by the requirements of this Confidentiality undertaking.

Report Description	Report Cost	GST	Total
Australian Enterprise Telecommunications Usage, Trends and Preferences, 2008	\$2,495.00	\$249.50	\$2,744.50

How to order

Purchase PDF-based report online

On [Market Reports](#) page, browse to **Australian Enterprise Telecommunications Usage, Trends and Preferences, 2008** report and click on "Purchase Now"

Fax the form to Telsyte at (02) 8297-4633 (International: +61-2-8297-4633) or

Call (02) 8297-4650 (Please have you credit card details ready) or

Email your order to: info@telsyte.com.au (include all information on the order form below):

Mr Mrs Ms: _____
First Name _____
Surname: _____
Position: _____
Company: _____
Postal Address: _____

Postcode: _____
Phone: _____
Email Address: _____

Payment Options:

- Cheque - Enclosed is a cheque for \$_____ (Cheques payable to: Gibson Quai - AAS Pty Ltd [Telsyte is a business unit of GQ - AAS])
- Please invoice my company (I understand that the report will be sent after the invoice is paid in full)

Please charge the following credit card:

- Visa
- Bankcard
- Mastercard
- American Express

Card Number: _____
Expiry Date: _____
Signature: _____