



**Working Smarter**

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# *Understanding Major Trends in Unified Communications*



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29<sup>th</sup> November 2010

# Agenda

1. Key Highlights in the Enterprise communications Market
2. UC Trends in the Australia Market
3. Key Highlights – UC End User Analysis
4. Conclusion



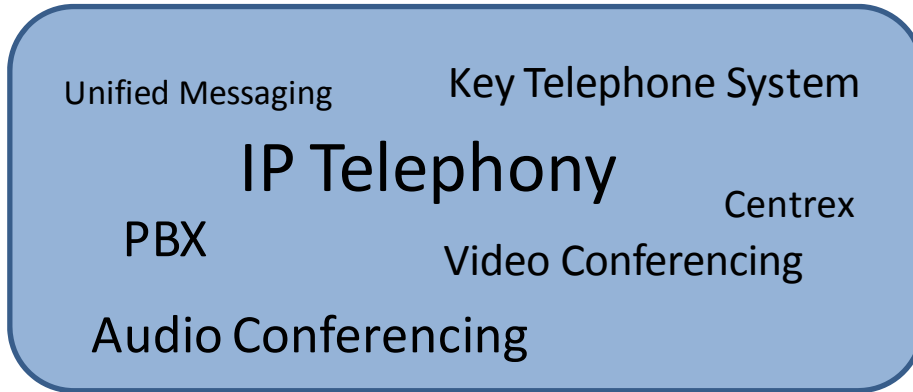
# Key Trends in Enterprise Communications

# The Evolution of Communications



# # 1 Collaboration is the key “Buzzword” now.....

2005



## A Comparison of Buzz Words

2010

Evolution to  
**Rich, Collaborative,  
 Social**  
 Communications



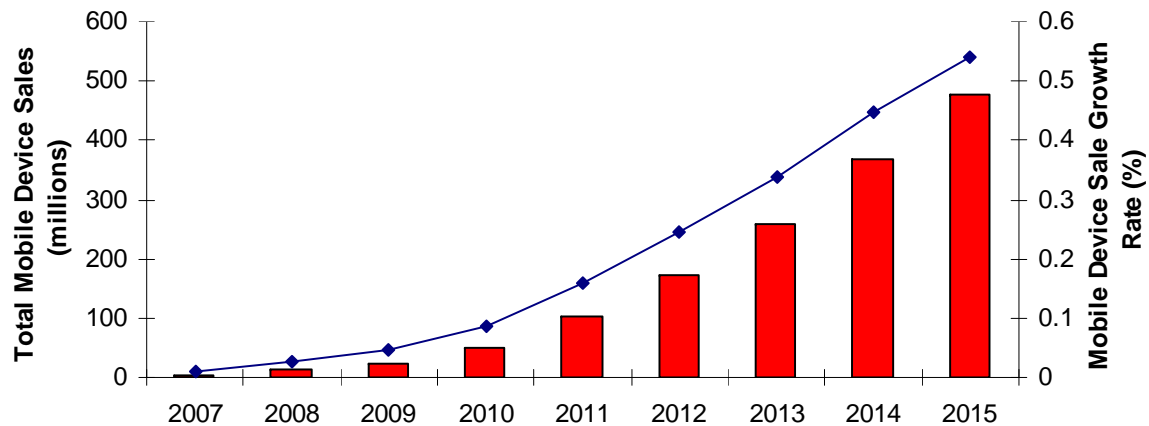


# #2 Mobility - Smart devices changing the way employees work and collaborate



2010 -4B people have cell phones & 450M full web experience – McKinsey Quarterly

2020 -Two Trillion devices connected to the internet – The Economist



Robust growth in smartphone sales in the coming years

By 2015 the APAC region will sell over 477 million smartphones representing 54% of all devices sold in the region.

■ Total Smartphone Sales (000s) ◆ Smartphone Sales as a Percentage of Total Device Sales (%)

Source :Frost & Sullivan ;Base year is 2009

## #3 Social Networking – Is this another Fad?

### *Time to reach an audience of 50 million*

<b>Radio</b>	<b>: 38 years</b>
<b>TV</b>	<b>: 13 years</b>
<b>Internet</b>	<b>: 4 years</b>
<b>iPod</b>	<b>: 3 years</b>
<b>Facebook</b>	<b>: 2 years</b>

**500 Million+ Facebook users**

**(35 years+ fastest growing demographic)**

**2 Billion+ photos on Facebook per month**

**1 Billion+ tweets on Twitter**

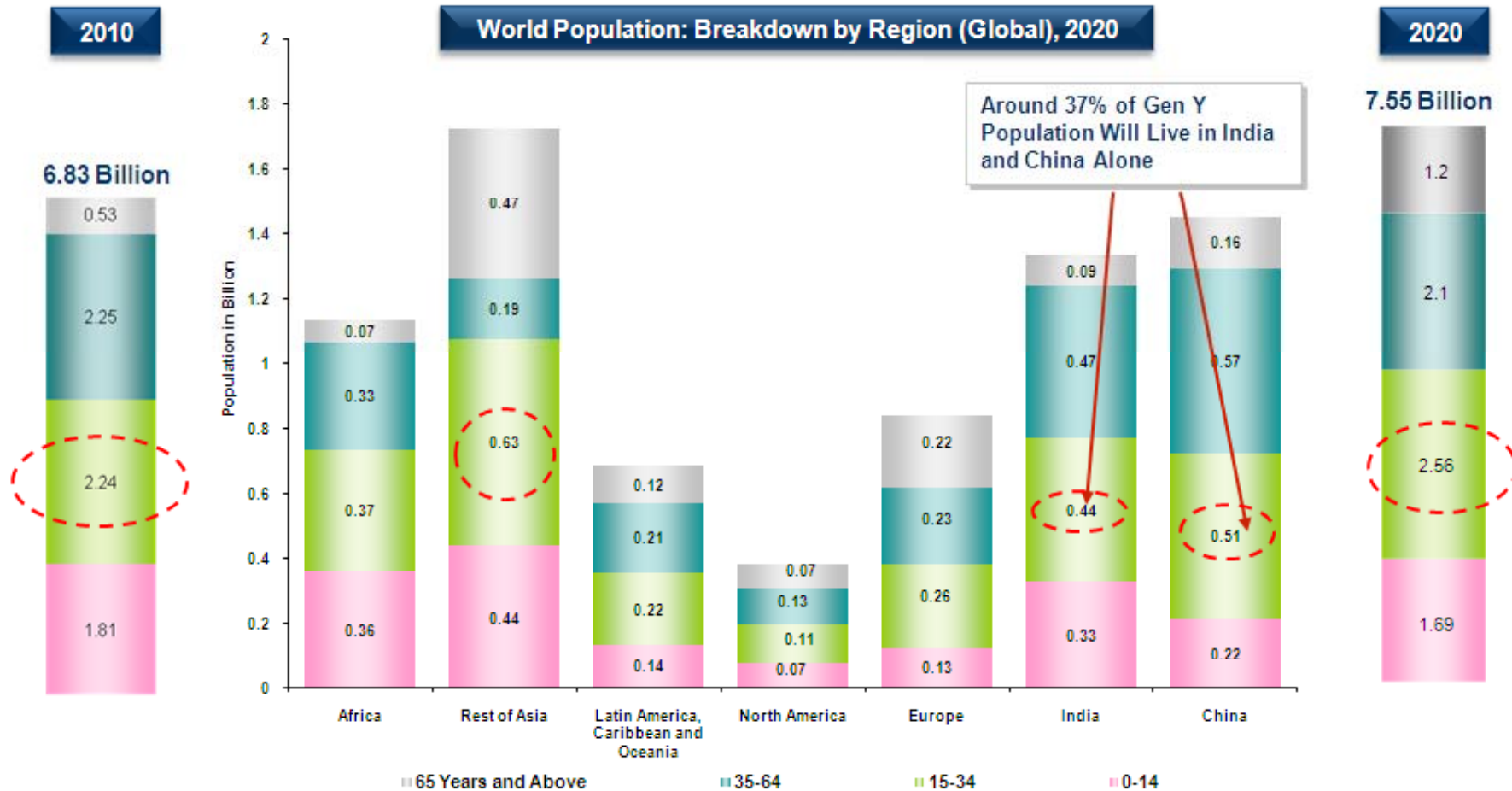
**100 Million+ videos on Youtube**

**200 Million+ blogs**

**13 Million+ Wikipedia articles**



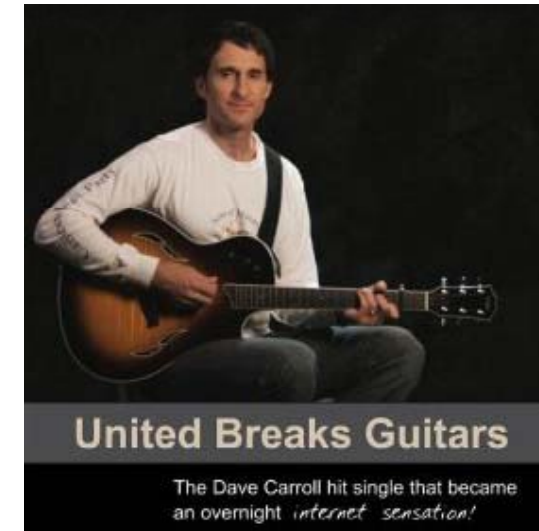
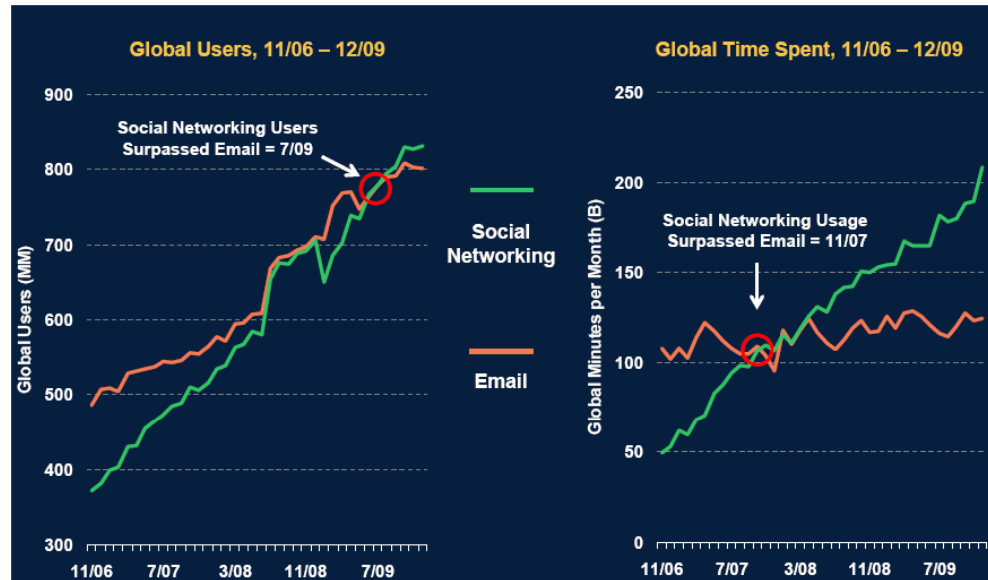
# # 4 World Population in 2020: Out of 2.56 Billion Gen Y Population - Around 61% from Asia Alone



Note: Gen Y : Population between 15 – 34 Years

Source: US Census Bureau, 2010 and Department of Economic and Social Affairs of the United Nations

# #5 Enterprises are realising they cannot ignore Social Media



- Customers and employees are sharing experiences online
- Social Media gives you the ability to listen to customers, even when they are not calling you
- Social Media has the power to significantly impact your business, so ignoring this channel is no longer an option

twitter

Home Profile Find People Settings Help Sign out

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@Folta Dell Outlet U.S. limited hardware\* warranty is same as new. More info here: <http://bit.ly/19EfyY>

5:54 AM Nov 23rd from CoTweet in reply to Folta

Dell digital camera deals! <http://bit.ly/1qU7vJ> (limited time offers)

1:40 AM Nov 20th from CoTweet

Name Dell Outlet  
Location For USA customers  
Web <http://Dell.com/CO>  
Bio Refurbished Dell™ computers, electronics. Question/comment? Contact Stefanie Nelson at @StefanieAtDell. More Dell Twitter accounts at www.Dell.com/Twitter

25 following 1,432,044 followers 1,229 listed

Tweets 794

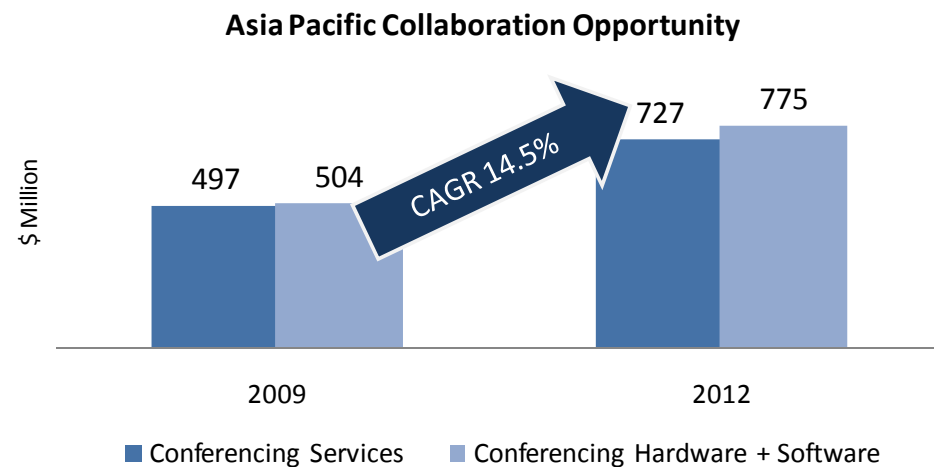
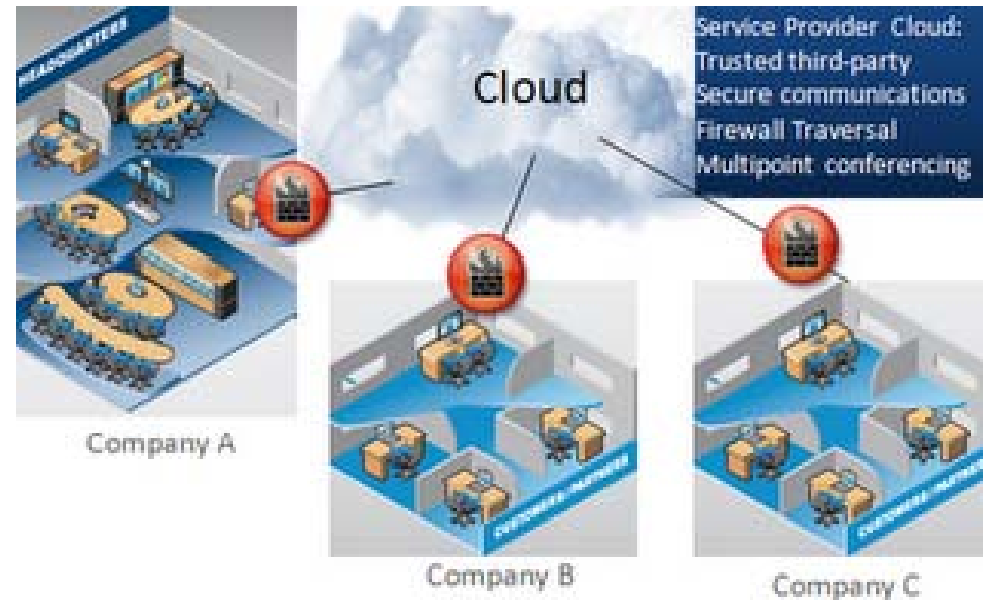
Favorites

Lists  
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View all

Actions

# #6 Cloud Based Enterprise Offerings

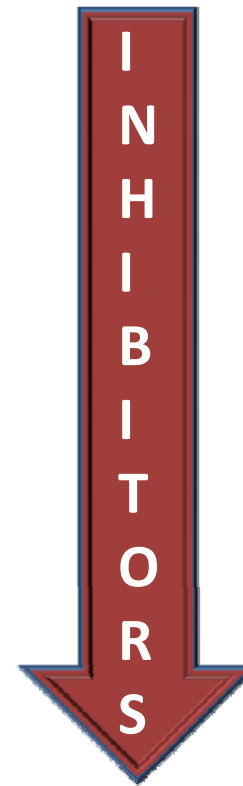
- Web Conferencing, Hosted Email, Voice, Video, Collaboration in the cloud
- Carriers and vendors working to offer cloud based offerings
- Still in its early days but applications such as e-mail and web conferencing and office related applications witnessing good traction



# UC Trends in the Australia Market

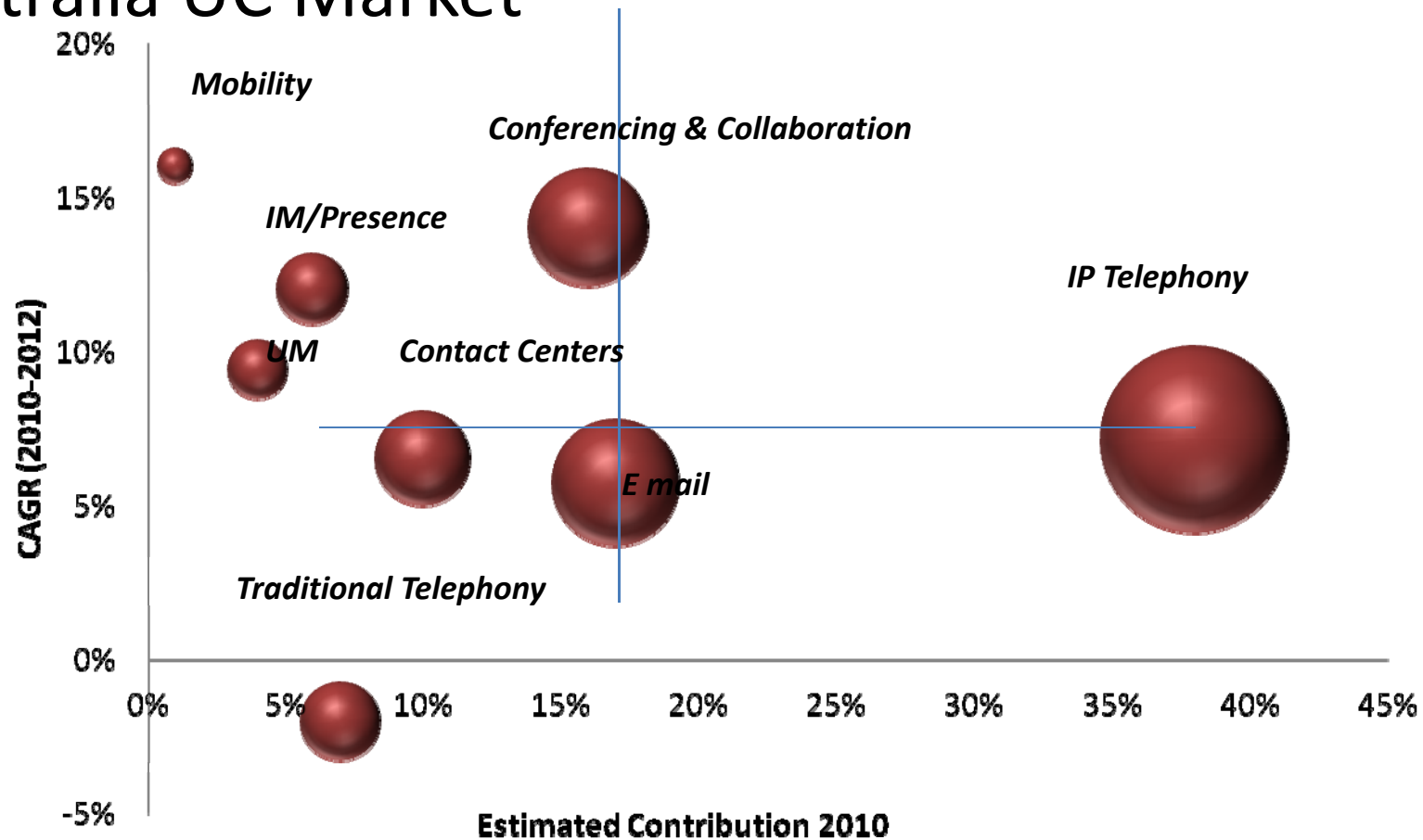
# Drivers and Restraints

- + Mobile access across multiple devices & networks
- + Reduced travel costs
- + Increased productivity
- + Work/Life Integration



- ROI
- Interoperability with existing tech investments
- Change in culture

# Collaboration is witnessing good growth in the Australia UC Market

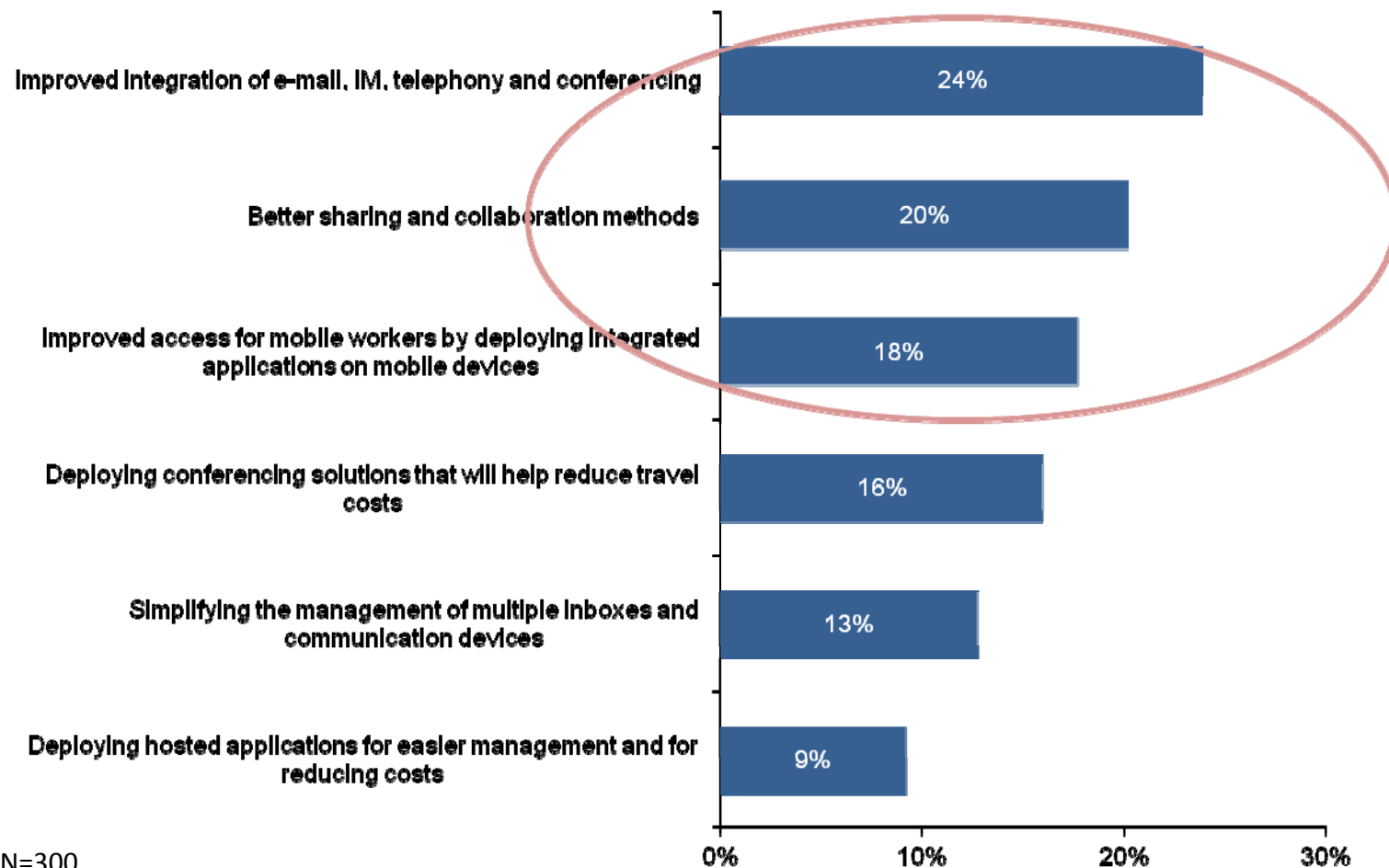


Source: Frost & Sullivan

- Australia UC Market was worth close to \$800 million in 2009
- IP Telephony and email contribute bulk of the UC opportunity in Australia.
- Mobility, conferencing & collaboration and Instant Messaging & Presence will be the high growth applications in the 2010 to 2016 period.

# Integration, Collaboration and Mobility are top needs for IT Managers in Australia

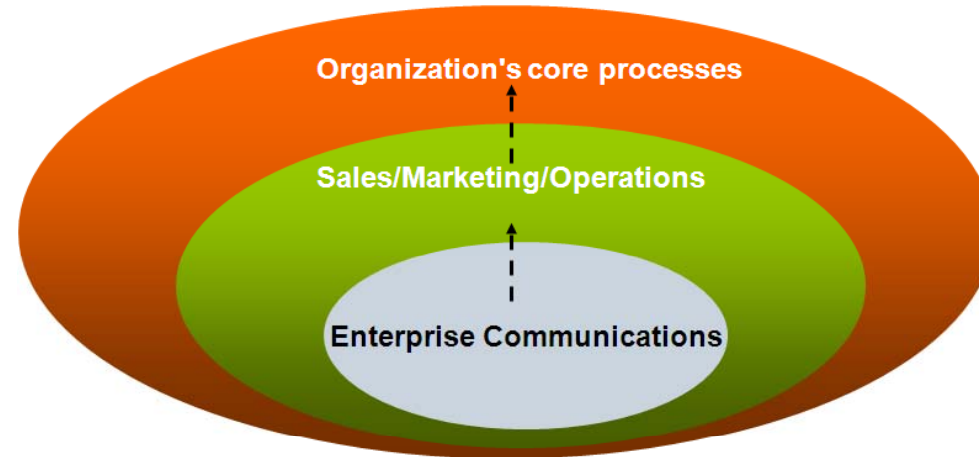
Q. What are your top Enterprise Communication needs?



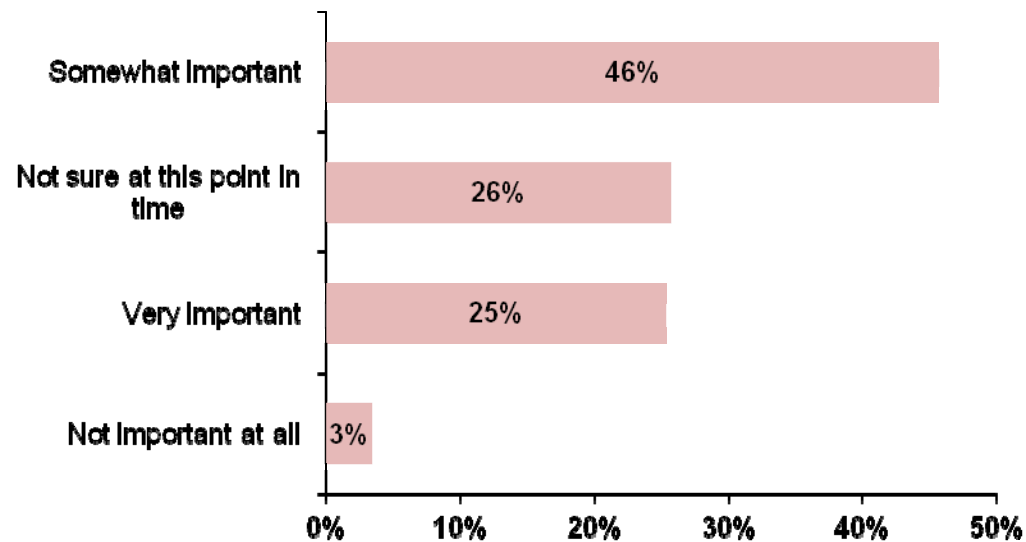
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# Over 70% of IT managers see the importance of UC integration to Business Processes



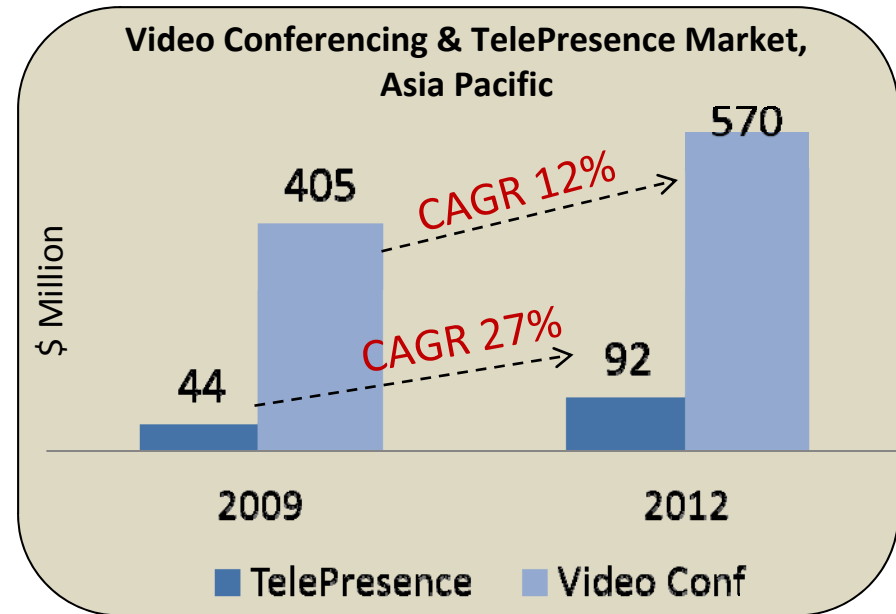
Q. How important is the integration of UC with your Business Processes such as ERP, SCM, CRM or Business Intelligence?



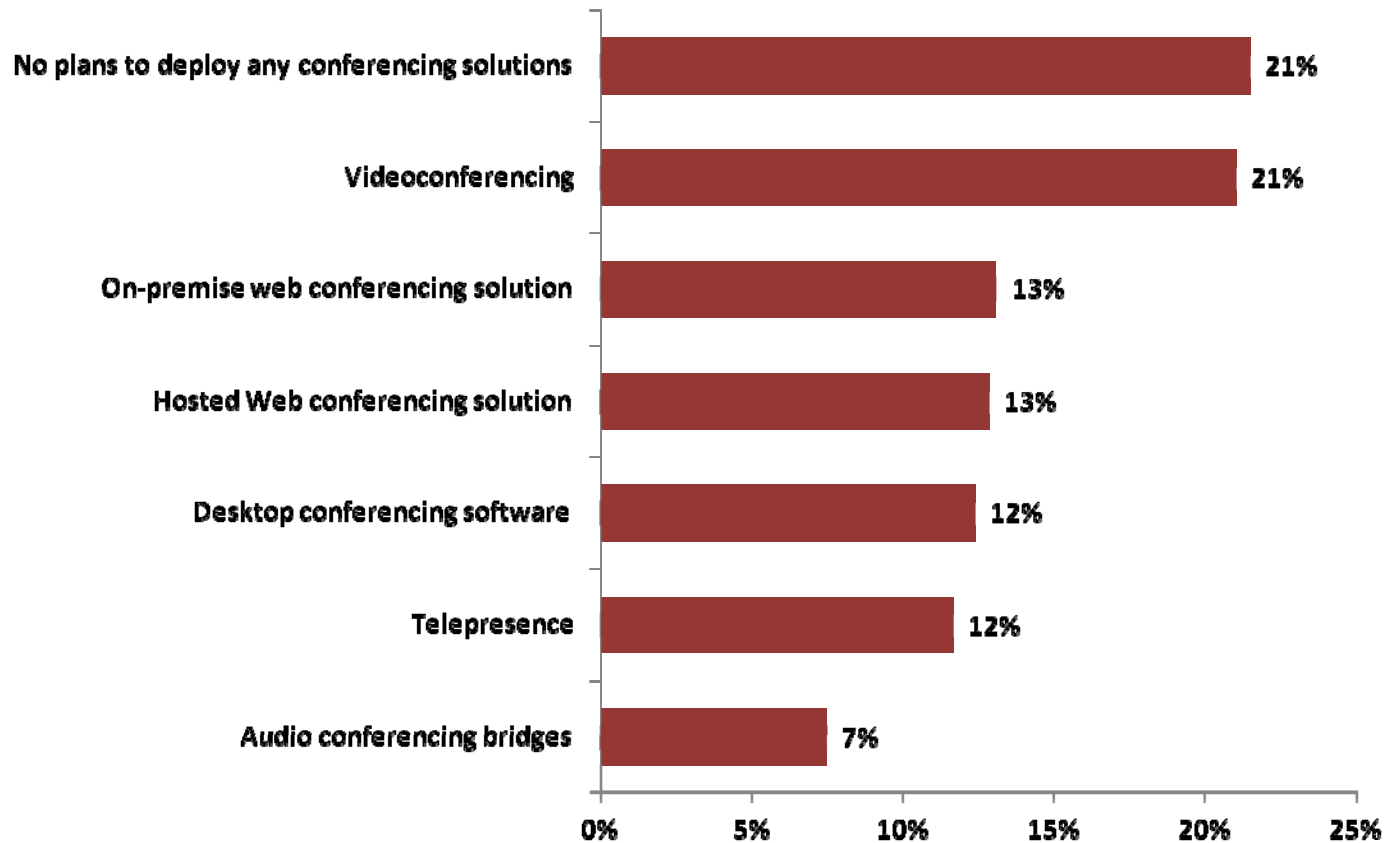
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# Video and Collaboration – Witnessing good growth

1. Video becoming more pervasive - Improving consumer usage of video, improved bandwidth, reducing price points
2. Portable or Desktop/PC-based video solutions are gaining interest
3. TelePresence & HD Video conferencing end-points to continue to grow

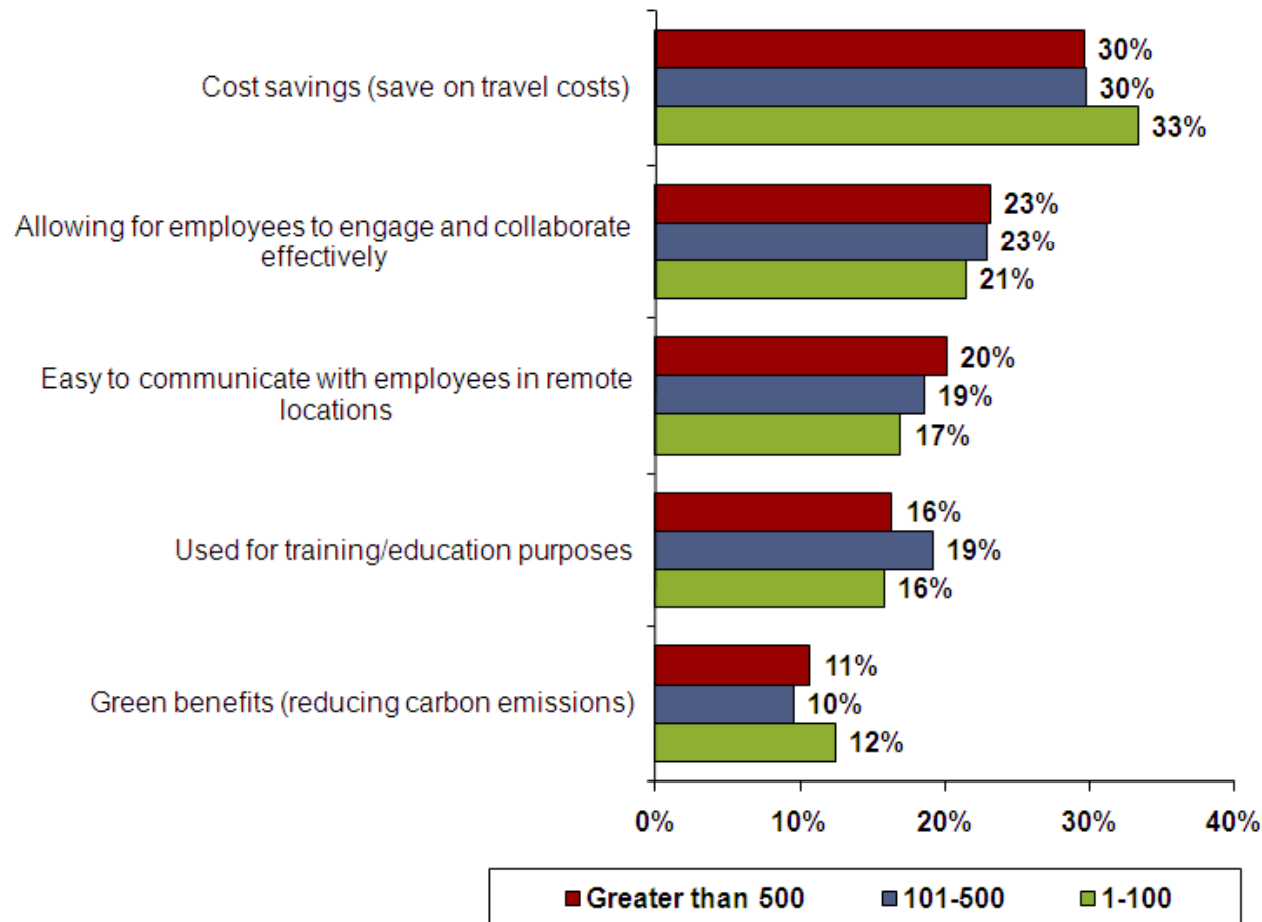


# Close to 80 % of respondents have plans to deploy conferencing and collaboration solutions



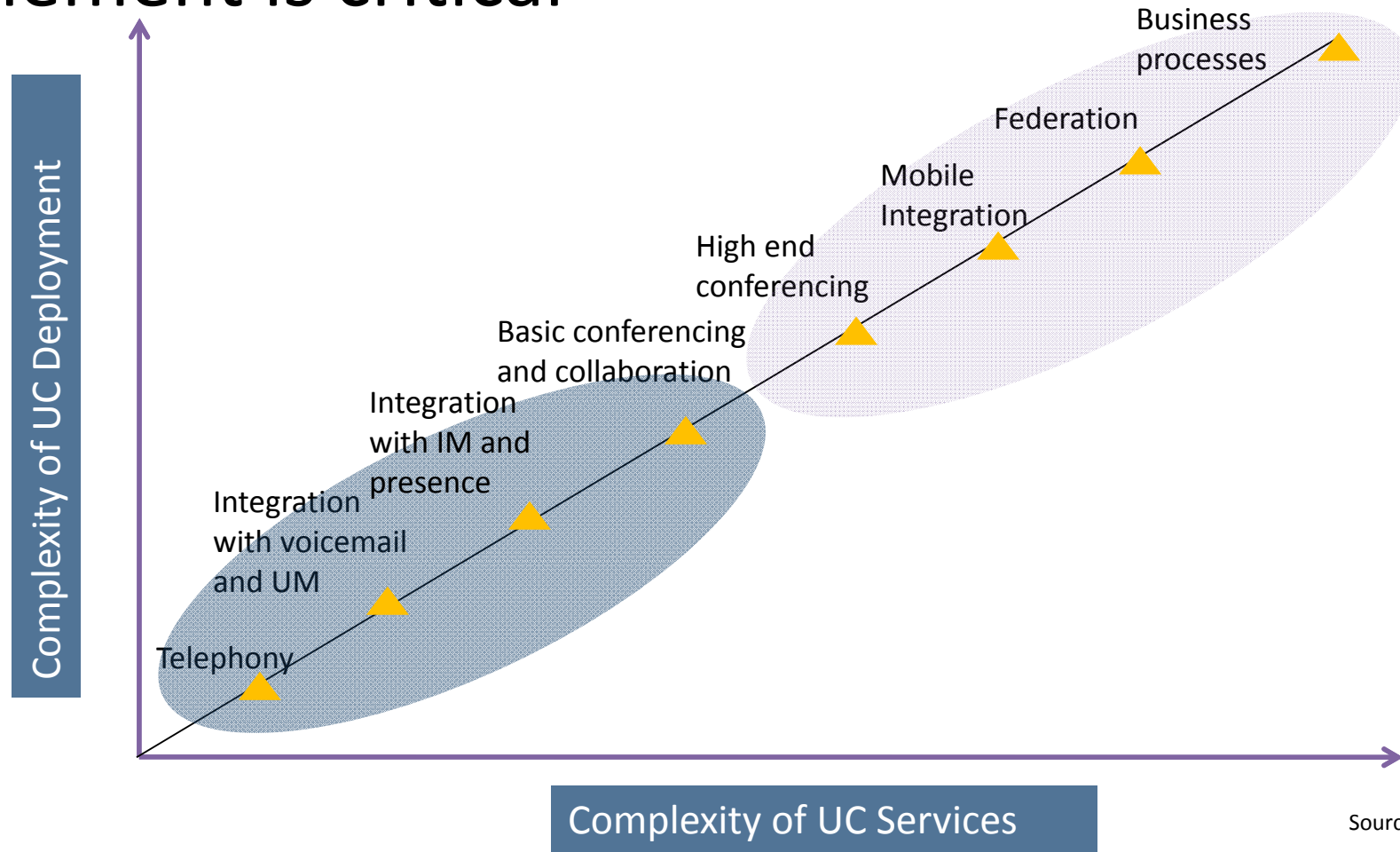
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# Market Drivers for deploying conferencing solutions



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# UC Integration is complex hence the SERVICES element is critical



# Summary

- The Australia Unified Communications market is witnessing good growth .
- Technologies witnessing good growth include Telephony, Mobile Solutions and Video
- High interest around Social Networking, Mobility and Cloud based services. Important to understand these trends and how it will play an important role in enterprise adoption and usage
- Integrating applications to business processes will be key and hence working with the right vendors and systems integrator is important

# Thank You!

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