



the global ICT network group

**ATUG-EVUA Conference  
Unified Communications & Regional  
Development  
16-17 September 2008, Sydney**

**Global Network Services  
EVUA-OVUM Surveys**

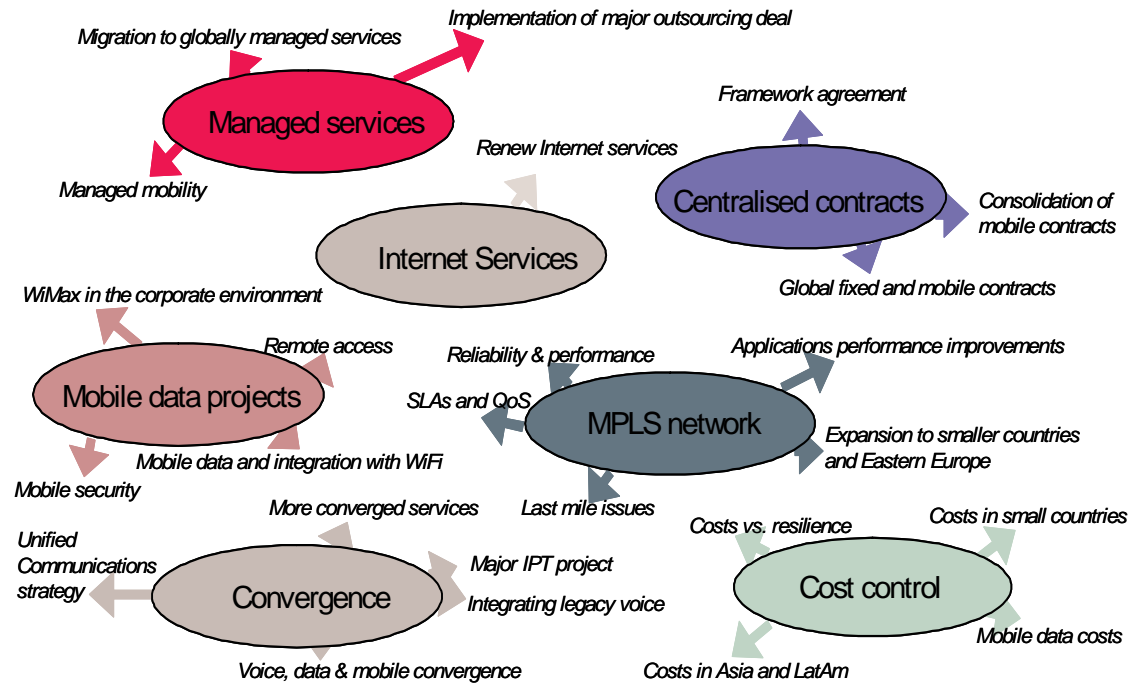
**John Sale  
Director, EVUA**

## **EVUA-OVUM Annual Survey Key findings - 1**

- Cost management remains a huge concern
- Convergence and integration projects dominate activities
- Mobile data will be a major area of growth
- Managing legacy approaches continues to be a challenge
- Tight budget control continues, but mobile data expenditure will grow
- A trend to managed mobility services

## EVUA-OVUM Annual Survey Key findings – 1

What are your three major network services concerns over the coming 2-3 years?

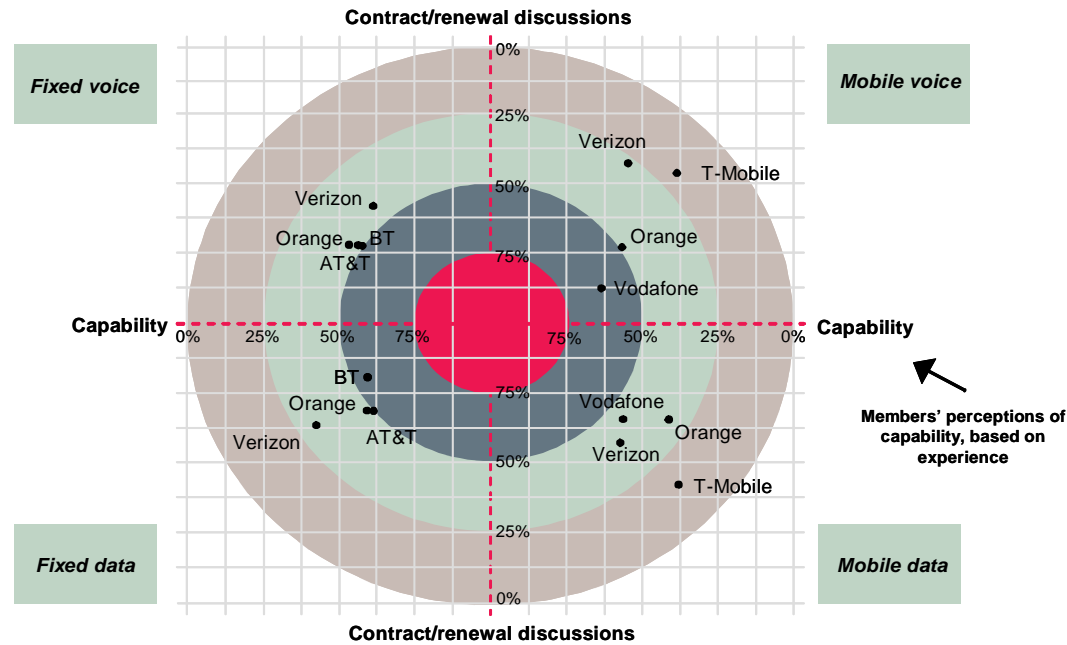


## **EVUA-OVUM Annual Survey Key findings - 2**

- The key delivery criteria for service providers are costs, quality of service and coverage
- No international service providers achieve excellence
- AT&T, Orange and BT lead in international fixed services
- Vodafone consolidates its lead in mobile services
- Telcos are not considered credible application service providers

## EVUA-OVUM Annual Survey Key findings – 2

### Supplier positioning – capability v new/renewed contract



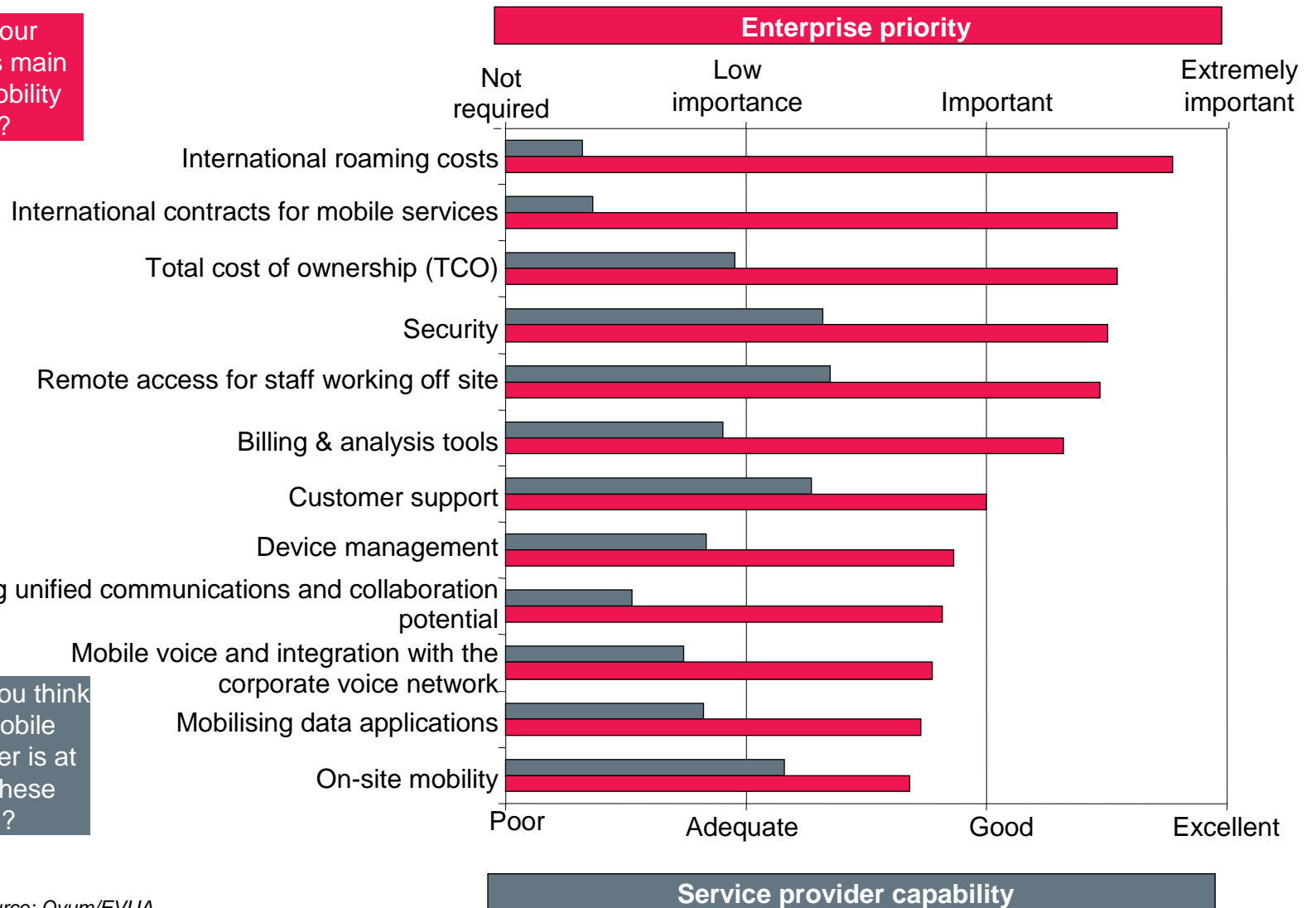
Source: EVUA/Ovum

Note: closeness to the centre is a measure of high ranking

# EVUA mobility priorities vs. supplier capability

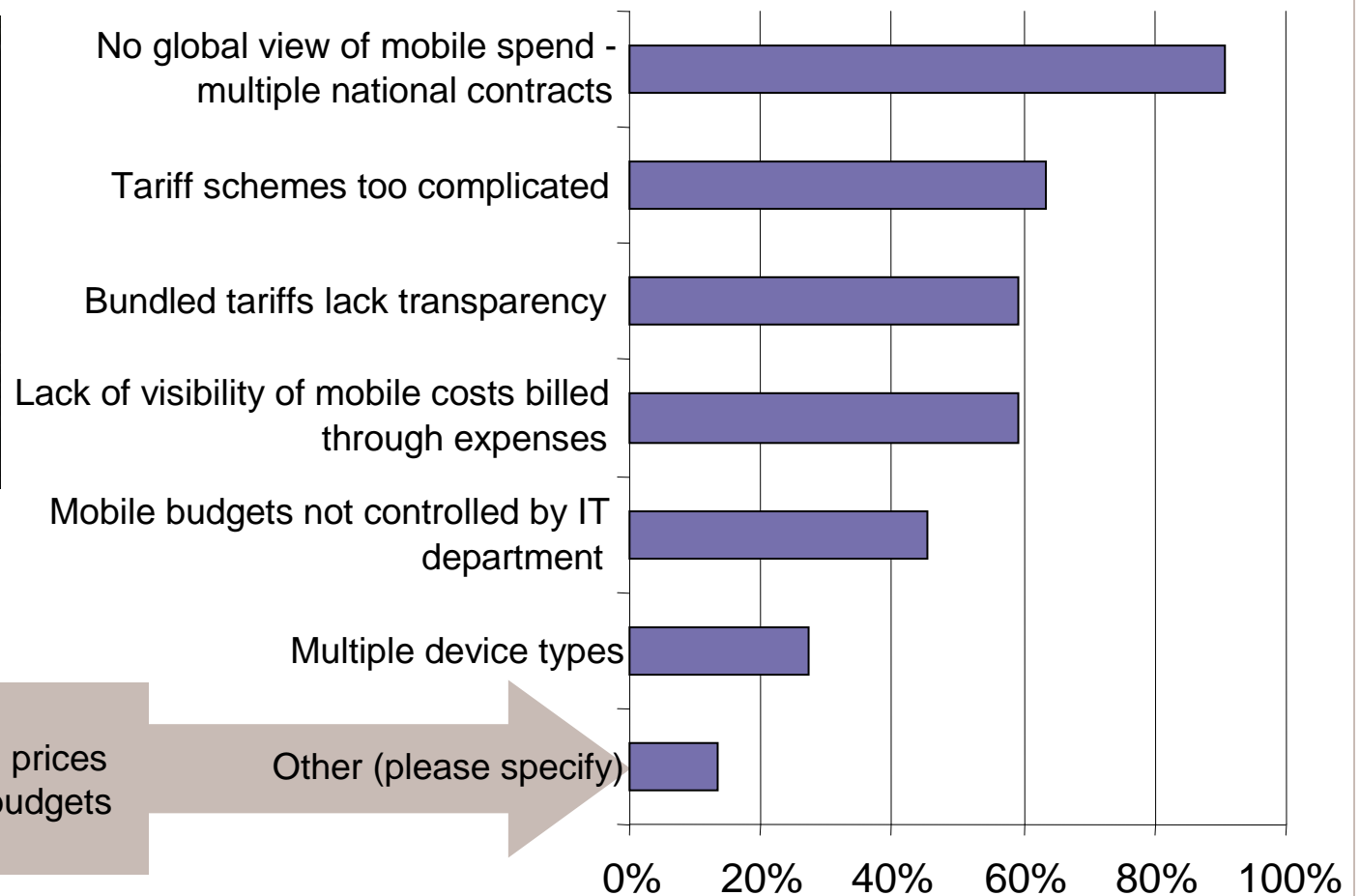
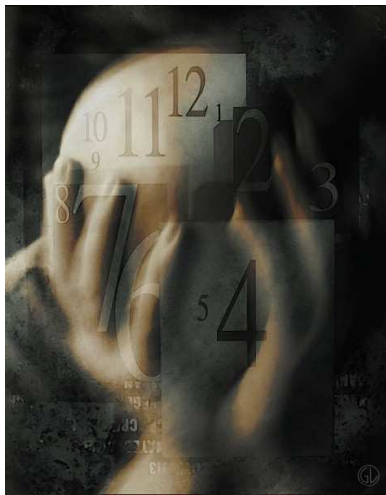
What are your organisation's main enterprise mobility priorities?

How good do you think your main mobile service provider is at addressing these priorities?

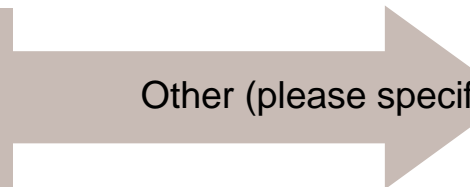


# Still many difficulties in measuring TCO for mobile

*What difficulties, if any, do you have in estimating Total Cost of Ownership for mobile?*



- Sponsored handsets
- No reasoning behind prices
- Difficulty managing budgets
- No global reporting



Source: Ovum/EVUA

# Mobile data applications



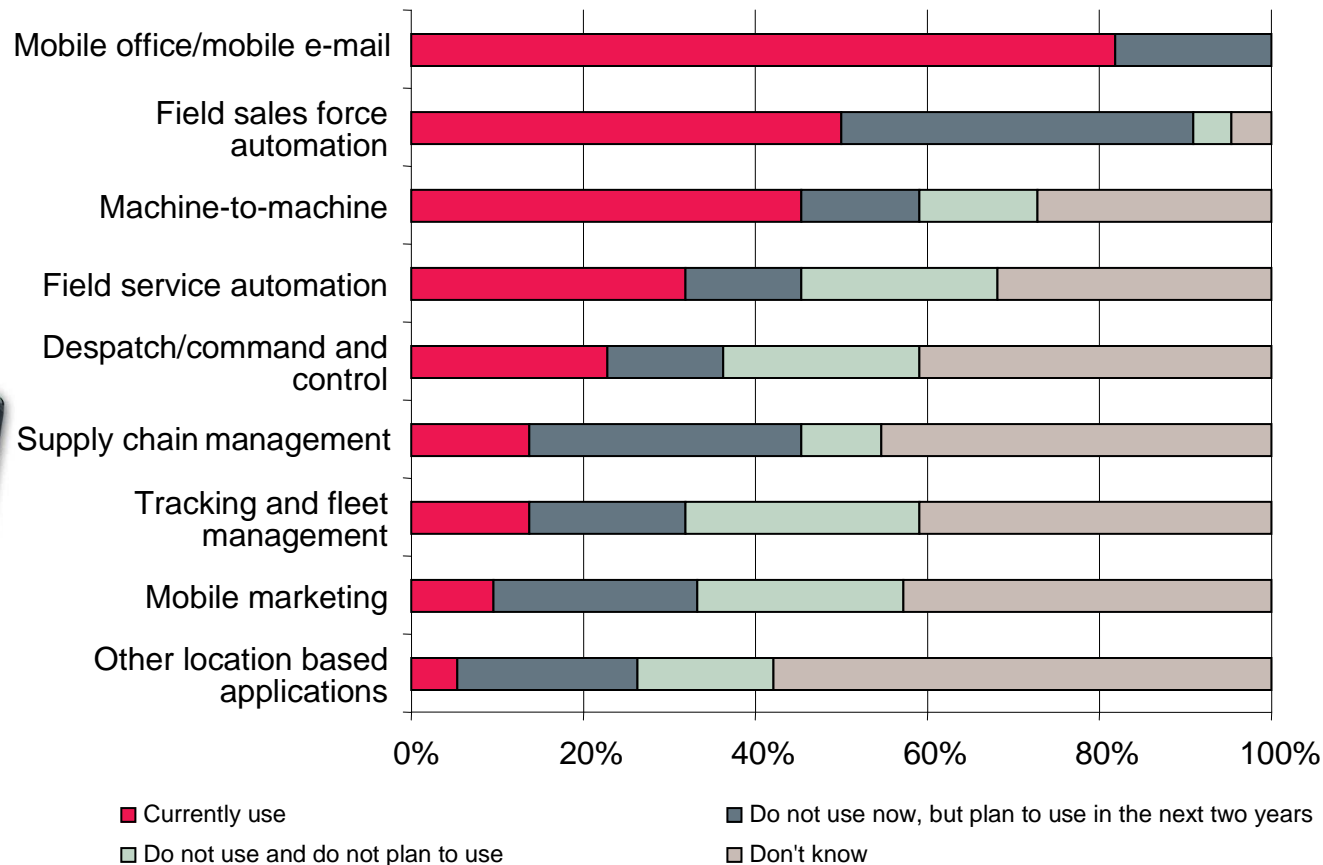
Which mobile data applications does your company currently use or plan to use?



Source: Ovum/EVUA

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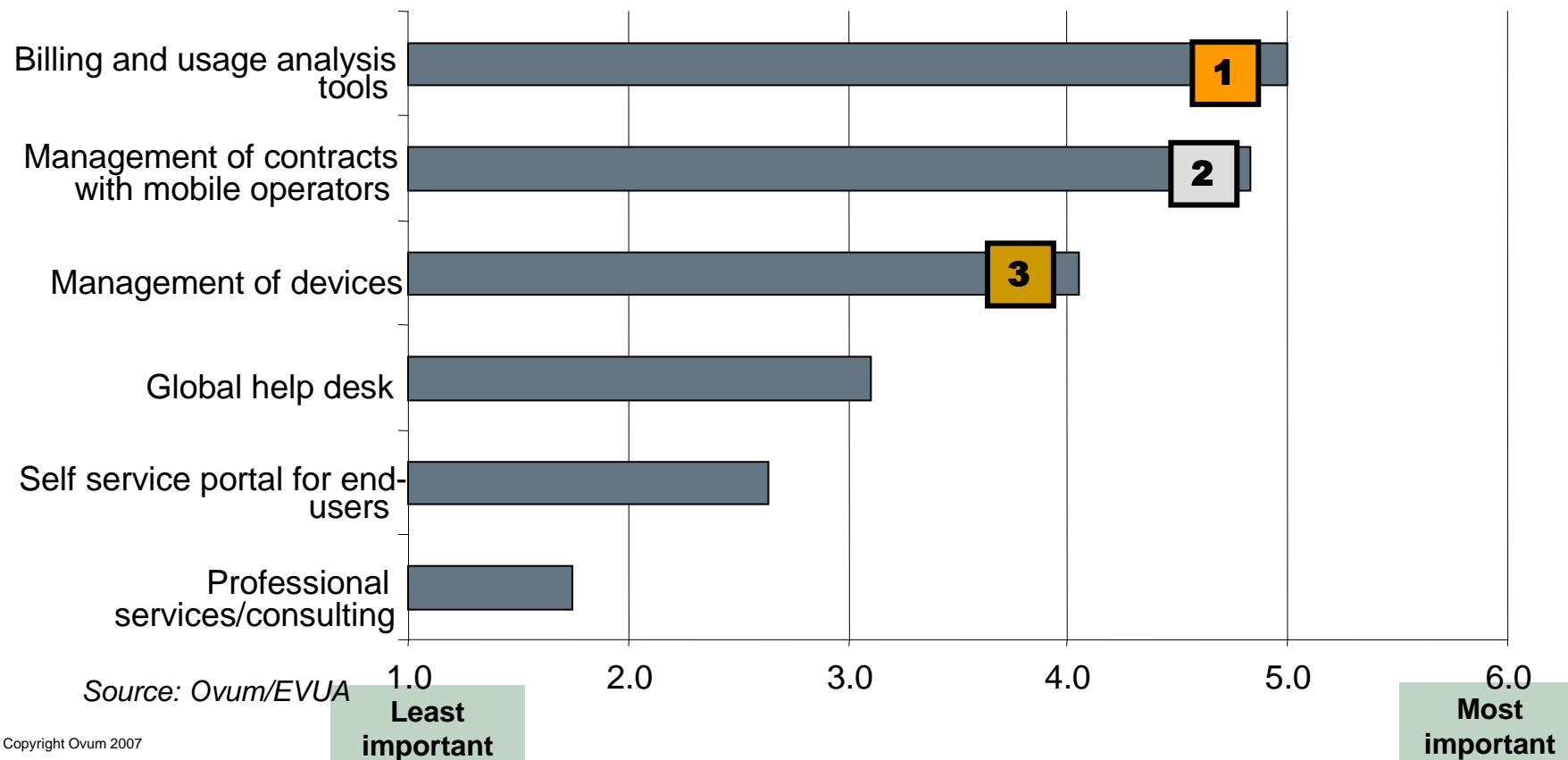
- Mobilising email and office applications still dominates
- More use of other applications - SFA, FSA, M2M, than in 2007



# The most important aspects of managed mobility are...

- Billing & analysis tools, management of contracts and device management

*Which aspects of a managed mobility service do you consider most important? Please put the following in order of importance*



# Changing mobile service providers

- Top 5 reasons to change service provider:

1. Reduced cost of service (95%)
2. Global contracts (76%)
3. Consolidation of service providers - enabling more global coverage (57%)
4. Improved products and services (48%)
5. More effective alliances (24%)



- Also: global, harmonized service; managed end-to-end asset-less services strategy

- Top 5 barriers to changing service provider:

1. Cost of migration (62%)
2. Internal organisation (57%)
3. Risk of a break in service (52%)
4. Need to port numbers (29%)
5. Subsidised devices (19%)



- Also, lack of global managed service player for mobile; coverage & quality (especially indoor)



Source: Ovum/EVUA

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