The Future Of Unified Communications and Collaboration is Managed

Key findings from a major global Dimension Data and Ovum study
The Future Of Unified Communications and Collaboration is Managed

why now?

Why now?

There’s nothing new about unified communications and collaboration (UCC). Yet, many organisations are still challenged by different UCC technologies, even a decade after the first IP-based PBX. Recent developments have caused IT decision-makers to formulate – often for the first time – comprehensive UCC strategies, and to invest in them substantially.

Smartphones, the bring your own device (BYOD) trend and strained budgets are compelling IT divisions to act. Meanwhile, advances in enterprise video technologies and services, and the adoption of social media for business use provide more collaboration options for employees... and more headaches for IT.

Dimension Data wanted to know how IT decision-makers in large organisations view UCC. What aspects do they prioritise in their strategies and how do they react to market pressures? We also contrasted decision-maker responses with those of their employees. Somewhat worryingly, we discovered a significant difference...

Our method

**Decision-maker survey:**
- >1,320 respondents – all enterprise ICT decision-makers with significant UCC policy and procurement influence
- 18 countries
- most respondents (23%) from manufacturing
- financial services, banking, insurance, IT/telecoms each >10% of respondents
- education, healthcare, retail and transport each >5% of responses

**User survey:**
- web-based interviews of 1,390 employees
- demographics mirrored countries, industries of decision-maker survey
- size bands mirrored decision-maker survey, as did questionnaire

Which of the following best describes the main business sector of your company?

| Business & Professional Services | 68 |
| Education                       | 61 |
| Financial Services & Insurance  | 84 |
| Banking                         | 58 |
| Government / Public sector      | 64 |
| Life Sciences / Pharmaceuticals | 35 |
| Healthcare Provider             | 67 |
| IT & Telecoms                   | 146 |
| Manufacturing                   | 315 |
| Retail / Wholesale              | 85 |
| Transport / Logistics           | 59 |
| Energy                          | 31 |
| Other                           | 253 |

Source: Ovum
What does the research say you should do?

Create a UCC strategy and have a budget to invest
Of all IT decision-makers, 78% report they already have a strategic plan and a budget for at least some components of UCC. This is good news, but it will also compel them to measure their UCC investments—and demonstrate positive results.

Consult your users and let them influence your decisions
Decision-makers report that they frequently consult line-of-business managers, local managers, and users, but only 20% of respondents felt users contributed significantly to the UCC strategy. It’s risky not to consider users: their adoption of your technology is critical to ensuring UCC success.

Approach BYOD as part of your overall enterprise mobility strategy
It’s important to support UCC applications on the majority—if not all—of the devices used for enterprise collaboration, including mobile phones and tablets. Just under half (46%) of large businesses provide support for corporate approved employee-owned devices, but reactions vary and plans are still being formed.

Think about standard UC, mobile UC clients and social collaboration
There’s keen interest in and concrete plans for further investment in the next year across the array of UCC applications. Of large organisations, 22% plan to roll out standard UC within a year, and 22% have such plans for mobile UC. Social collaboration uptake will double in two years: by 2015 the majority of large businesses will have deployed an enterprise social collaboration tool.

Choose your delivery model
Of UCC applications, 21% – 36% are currently premise-based but managed by a third party. There’s good interest in cloud: 20% of businesses plan to seriously consider cloud for UCC deployments in the next 24 months. But there’s even greater interest in the managed service model. In two years, 34 – 42% of large businesses will seriously consider UC as a premise-based, but managed service. Don’t ignore cloud options, especially as more become available for large organisations. But also look for a services partner to manage your evolving UCC assets and investments.

‘look for a services partner to manage your evolving UCC assets and investments.’
highlights

1. Enterprises view UCC strategically, and have budgets to invest

UCC has not typically been the subject of strategic ICT planning. Until recently, UCC was mostly synonymous with the corporate PBX, and the idea of formulating and rolling out a UCC strategy, even among large firms, was alien even just a few years ago. However, our research indicates a surprising shift: 78% of IT decision-makers report they have both a current strategic plan and a budget for at least some components of UCC, with over half having a plan and 43% a budget for ‘most components of UCC’. It is clear that Unified Communications is being treated as a strategic opportunity by many large businesses. This is good news, but will also bring additional pressure on IT decision-makers to measure and demonstrate positive results from UCC investments.

2. Users are consulted, but rarely have influence

Decision-makers report that line of business managers, local managers, and users are frequently consulted for UCC investment planning, with over half of enterprises reaching out to each of those stakeholder communities. This is relatively good news, until enterprises are asked whether such stakeholders make a major contribution. The answer is that they do not: as expected, IT managers and WAN managers are the most influential, with over 70% of enterprises making a UCC investment relying on global IT directors for major contributions compared to less than 20% getting major contributions from users.

UCC decision-making, especially as the breadth of UCC technologies and services expands, is not a zero-sum game. IT directors and managers should be making major contributions, but it seems organisations are not taking user and line-of-business feedback as seriously as they could be, increasing the risk that UCC investment will not be matched by employee uptake. There is a great deal of risk inherent in not granting significant weight to user expectations and requirements, since our research also indicates that user uptake is a critical success metric for UCC investments. A user-aware, or even user-centric, UCC strategy implies that these requirements help shape UCC investment strategy. In the future, users will increasingly be the catalysts for evolution in the UCC market.

3. The BYOD challenge should be approached as part of an overall enterprise mobility strategy

An important element of a UCC strategy is to support UCC applications on the majority of, if not all, devices used for enterprise collaboration, including on mobile phones and tablets. From a device perspective, both our user and decision-maker research indicates that BYOD is a growing trend which must be managed. In emerging markets such as Brazil, China, India and South Africa, more than 70% of employees who own a smartphone or tablet report using it for work. But less than 30% of enterprises say they support any employee-owned smartphones or tablets.

These organisations recognise the gap, at least to some degree: our decision-maker survey reveals that in many countries massive investment in BYOD support is planned (UK, Spanish, German and Chinese companies have the most immediate plans). But in others, investment plans in supporting BYOD are patchy at best. It is clear that, in general, companies are keen to do something, but reactions and plans vary and are still in a formative state.

As such, it is important to see BYOD in context. BYOD strategies and solutions may help organisations manage and control a specific sub-set of devices used for enterprise communications or network access, but ideally BYOD should be part of an overall enterprise mobility strategy which treats device ownership status as just another parameter, such as employee type, mobile operating system, device type, tariff plan, and remote access management.
4. Standard UC, mobile UC clients, and social collaboration are key
Decision-makers report keen interest in further investment, and concrete plans in the next year, across the array of UCC applications. But three stood out: standard UC (unified messaging, presence, softphone), mobile UC (UC client on smartphones and tablets), and enterprise social software. 22% of large enterprises report plans to roll out standard UC within a year, and 22% have such plans for mobile UC. Social collaboration uptake will double in two years, and by 2015 the majority of large businesses will have deployed an enterprise social collaboration tool as part of an overall UCC strategy.

But our user survey points to some dissonance. Decision-makers believe users have a good understanding of UC clients and enterprise social collaboration tools, with 75% estimating their user base is at least somewhat familiar with business social tools, and a surprising 85% believing users are at least somewhat familiar with mobile UC clients. But in sharp contrast, 58% of users surveyed have either not heard of UC clients or believe they would provide little work benefit.

It is clear that further user consultation and profiling is required, and will likely result in an increase in influence of users on UCC planning.

5. Cloud will come, but managed UCC is here
Despite the existence of private cloud solutions for a number of years, enterprises are taking a cautious approach to cloud adoption, with premise-based accounting for 88% of IP-PBX systems and 83% of audioconferencing bridges. 20% of enterprises plan to seriously consider cloud for UCC deployments in the next 24 months and across all UCC applications, less than 30% of companies will seriously consider traditional premise-based unmanaged deployments.

What is most interesting is that between 21% and 36% of UCC applications are currently premise-based but managed by a third party, and there is very keen interest in the managed model. In two years, between 34% and 42% of our large enterprise respondents would seriously consider UC as a premise-based, but managed service. Businesses should not ignore the cloud options, especially as more become available for large enterprises, but it is also clear they are also looking for a services partner to manage their evolving UCC assets and investments.

‘In two years, between 34% and 42% of our large enterprise respondents would seriously consider UC as a premise-based, but managed service.’
A more managed and cloud-based world

**In an increasingly cloudy world, management will be key**

Despite the existence of private cloud UCC solutions (often single tenant) for a good number of years, and the recent launch of multi-tenant public cloud UCC by vendors and service providers, enterprises report relatively slow adoption of UCaaS (UC as a Service), especially for core IP-PBX services, with only 9% of large enterprises running these in a dedicated cloud and just 3% dipping their toes in the water of public cloud. Large enterprises remain conservative about adopting cloud communications even for applications such as audioconferencing, with over 80% of respondents reporting they operate their own conferencing bridges.

**At the global level there is a marked preference for managed solutions**

IT decision-makers at large businesses expect the future to be more managed, with a clear expression of preference for managed UCC. While many cloud UCC services are just emerging, managed UCC has been a feature of the enterprise communications landscape for some time, with enterprises turning to systems integrators, telecoms carriers, value-added resellers and even vendors themselves for such management and support.

**Figure 1: UCC delivery today**

UCC delivery – if you have the following, how are these delivered?

<table>
<thead>
<tr>
<th>Service</th>
<th>Premise-based and managed internally</th>
<th>Premise-based and managed by third party</th>
<th>Dedicated hosted or private cloud</th>
<th>Multi-tenant hosted or public cloud</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephony (IP-PBX)</td>
<td>55%</td>
<td>33%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Telephony (Microsoft Lync voice)</td>
<td>42%</td>
<td>32%</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>Instant messaging and presence</td>
<td>50%</td>
<td>31%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>Standard UC (unified messaging, presence, softphone etc.)</td>
<td>42%</td>
<td>36%</td>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>Audio / web conferencing</td>
<td>48%</td>
<td>35%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Team workspaces and content tools (SharePoint)</td>
<td>53%</td>
<td>27%</td>
<td>15%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Ovum

While enterprises may be taking a cautious approach to cloud UCC, premise-based managed UCC is already significant, almost as pervasive as premise-based internally managed. The fact that enterprises have opted for managed services in the past across such a broad range of UCC applications indicates that they understand these areas are complex and often do not have the in-house expertise (or the budget) to support UCC evolution on their own. This result is reassuring when one considers that the next wave of UCC investment will be dependent on translating such investment into increased business agility.
Figure 2: UCC delivery in the future
If you are considering new investment in the following in the next 24 months, which of the following delivery methods would you seriously consider? Check all that apply.

- Telephony (IP-PBX)
  - Premise-based and managed internally: 38%
  - Premise-based and managed by third party: 52%
  - Dedicated hosted or private cloud: 8%
- Telephony (Microsoft Lync voice)
  - Premise-based and managed internally: 30%
  - Premise-based and managed by third party: 46%
  - Dedicated hosted or private cloud: 13%
- Instant messaging and presence
  - Premise-based and managed internally: 33%
  - Premise-based and managed by third party: 48%
  - Dedicated hosted or private cloud: 12%
- Standard UC (unified messaging, presence, softphone etc.)
  - Premise-based and managed internally: 32%
  - Premise-based and managed by third party: 49%
  - Dedicated hosted or private cloud: 12%
- Audio / web conferencing
  - Premise-based and managed internally: 29%
  - Premise-based and managed by third party: 54%
  - Dedicated hosted or private cloud: 21%
- Team workspaces and content tools (e.g. SharePoint)
  - Premise-based and managed internally: 30%
  - Premise-based and managed by third party: 50%
  - Dedicated hosted or private cloud: 29%
  - Multi-tenant hosted or public cloud: 14%

Source: Ovum
The Future Of Unified Communications and Collaboration is Managed

a more managed and cloud-based world

There is a good appetite for private cloud in the next two years. Our research finds that large enterprises still need convincing of the applicability and appropriateness of public cloud UCaaS to their organisations. One reason could well be the more comprehensive views which organisations are taking towards UCC strategy, with change management and business process improvement goals implying a tighter link between UCC applications and specific core business processes. There seems to be a perception that cloud could preclude such a tight knitting of UCC technologies to organisational issues, and enterprises may increasingly turn to systems integrators with business process expertise as they invest further in managed UCC. Systems integrators with either deep enterprise networking expertise, or those with extensive desktop management portfolios, are in a position to benefit from such a business-centric approach to UCC.

Interestingly, there are some significant variations by region in future delivery model preferences. The results below illustrate that European enterprises have a much greater interest in managed premise-based solutions in contrast with the US, especially for applications other than voice where the US is similar to Europe. Both US and European enterprises are willing to consider private cloud solutions though US businesses show appreciably more openness to the public cloud/UCaaS model, particularly for applications other than voice.

Figure 3: UCC delivery in the future, by region

If you are considering new investment in the following in the next 24 months, which of the following delivery methods would you seriously consider? Check all that apply.

<table>
<thead>
<tr>
<th>Service Type</th>
<th>United States</th>
<th>Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephony (IP-PBX)</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>Telephony (Microsoft Lync voice)</td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>Instant messaging and presence</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>Standard UC (unified messaging, presence, softphone etc.)</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>Audio / web conferencing</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Team workspaces and content tools (e.g. SharePoint)</td>
<td>29%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Source: Ovum
Executive Summary

Cost predictability and pay-per-use underlie shifts in delivery

In line with an expressed preference for managed UCC, IT decision-makers also expressed that they prefer to pay for UCC investment as an amortised expense of a set number of contract months or years, which is exactly the system typically used in managed services contracts.

In sharp contrast, decision-makers favoured pay per seat/month the least, just behind capital expense up front. This points to a need for providers to evolve from a pay per seat/month operational expense model towards volume pricing: in other words, from seat-based pricing to use-based pricing, with the flexibility for enterprises to scale down as well as up at short notice.

Enterprises that are seriously considering cloud-based UCC, whether private or public, should ensure their suppliers support true volume-based pricing.

Figure 4: Preferred payment methods

Paying for UCC – how would you prefer to pay for your UCC solutions? Please rate the following payment methods on a scale of 1 to 4, with 1 being undesirable and 4 being the most desirable.

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amortised expense over a set number of contract months or years</td>
<td>2.70</td>
</tr>
<tr>
<td>Pay for use (volume) / month</td>
<td>2.65</td>
</tr>
<tr>
<td>Mixture of above / mixed models</td>
<td>2.63</td>
</tr>
<tr>
<td>Capital expense up front</td>
<td>2.53</td>
</tr>
<tr>
<td>Pay per seat / month</td>
<td>2.52</td>
</tr>
</tbody>
</table>

Source: Ovum
what’s motivating and inhibiting UCC investment

What’s motivating and inhibiting UCC investment

Cost is not playing the only major role

When we asked UCC decision-makers about barriers to investment, the results were surprising: cost did come out on top, but it was extremely closely followed by organisational and decision-making issues. For specific applications, cost weighed in at a more serious challenge when it comes to IP-PBX and videoconferencing investment which, considering the capital expenditure each involves, is understandable.

In contrast, organisational and decision-making challenges were the greatest barrier to investment in two domains: enterprise mobility and business social collaboration. In many organisations there is no central responsibility for mobility (which itself runs across many enterprise business and IT functions and systems), and there are few large businesses with central responsibility for internal social collaboration tools. These have yet to be integrated into a ‘UCC’ stack and so tend to be addressed at departmental level.

Figure 5: Barriers to investment

Barriers for investment – Which of the following do you think present the most serious challenge to potential future investment in UCC? Please choose the most serious challenge for each UCC application.

<table>
<thead>
<tr>
<th></th>
<th>Cost / business case issues</th>
<th>Lack of user demand</th>
<th>Organisational / decision-making issues</th>
<th>Complex vendor landscape</th>
<th>Support issues</th>
<th>Impact on network</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed telephony (IP-PBX)</td>
<td>30%</td>
<td>20%</td>
<td>24%</td>
<td>8%</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Enterprise mobility and BYOD</td>
<td>25%</td>
<td>19%</td>
<td>27%</td>
<td>9%</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>Standard UC (unified messaging, presence, softphone etc.)</td>
<td>27%</td>
<td>21%</td>
<td>23%</td>
<td>10%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Videoconferencing</td>
<td>28%</td>
<td>23%</td>
<td>21%</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Business social collaboration tools</td>
<td>24%</td>
<td>23%</td>
<td>27%</td>
<td>9%</td>
<td>11%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: Ovum

It is significant that organisational issues are almost as important overall – and more important in some cases – than cost in holding back UCC investment. Enterprises seem ready to recognise the organisational unity which is required to evaluate and procure many UCC solutions, but they should also ensure they understand the importance of tackling organisational barriers when it comes to making a success of their investment.

‘understand the importance of tackling organisational barriers when it comes to making a success of their investment.’
Catalysts for investment centre on business process and the user

When asked what they hoped to achieve from their UCC investments, direct savings finished in fifth place. The key benefits of UCC deployments, which formed the foundations for investment, were:

- **Business process improvement.** Organisations are increasingly looking to UCC as a means to communications – enable business processes and reduce decision-making latency.

- **Supporting employees who work remotely.** While companies have long paid lip-service to supporting remote workers, the reality of working practices finally seems to be reflected in UCC investment choices.

- **Increased productivity.** It is now a given that, done right, UCC enables more and better communications among employees, especially those in disparate parts of the organisation or among teams with members around the globe.

- **Business agility.** UCC has, until lately, rarely been associated with business agility. In our view, this is a mark that the role of UCC is seen as supporting the success of the business as a whole, and not just as a productivity or cost saving initiative.

**Figure 6: UCC investment drivers**

Which two statements do you agree with most? (please choose your top two) “My investment in UCC is based on...“

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business process improvement</td>
<td>397</td>
</tr>
<tr>
<td>Supporting more flexible working patterns for employees</td>
<td>350</td>
</tr>
<tr>
<td>Future calculations of increased productivity</td>
<td>308</td>
</tr>
<tr>
<td>Readying the business to increase its agility</td>
<td>302</td>
</tr>
<tr>
<td>Direct savings – reducing current spend levels on enterprise communications</td>
<td>292</td>
</tr>
<tr>
<td>Directly improving sales or service performance</td>
<td>251</td>
</tr>
<tr>
<td>Finding savings in another part of the IT budget to apply to UCC</td>
<td>228</td>
</tr>
<tr>
<td>Supporting key executives with new technology</td>
<td>222</td>
</tr>
<tr>
<td>Making savings for operational units / LOB</td>
<td>185</td>
</tr>
<tr>
<td>Retaining and attracting staff</td>
<td>138</td>
</tr>
</tbody>
</table>

**Source: Ovum**

To an extent, much of the focus on business process improvement, flexible working, increased productivity and business agility may be aspirational, since many enterprises have not yet worked out exactly how UCC can help with critical business processes, such as delivering goods faster to customers, helping with stock control, or providing faster responses to customer applications or questions.

In order to meet these aspirations, which in many cases are expressed in concrete terms in business cases, enterprises will have to map UCC investment to specific business and employee requirements.
The Future Of Unified Communications and Collaboration is Managed

tackling UCC successfully

Tackling UCC successfully

Address user demands, even if you don’t always meet them

It is clear from our research that users have an increasing voice in UCC decision-making. IT directors acknowledge the importance of user consultation. But this has not yet translated into a close correlation between investment plans and user requirements. There will always be some users who pressure the IT organisation to support the ‘newest and latest’, but our user survey revealed that most employees have reasonable expectations of support. In a world in which decision-makers are measured on user uptake and business process improvement, it is imperative to at least take full account of user requirements, even if some of them can’t be prioritised.

Overcome barriers to investment

Our decision-maker survey revealed that, while cost is a barrier, and often the most important one, in several domains it came second to organisational challenges. This was particularly true of social collaboration and mobile UC, both of which are also key areas flagged for significant investment in the next two years. There is often no single owner in the organisation for mobility across the board, and mobile procurement often occurs at departmental, country or regional levels, with the added headache of BYOD. Similarly, as primarily consumer applications made fit for business, social collaboration tools rarely have a single owner in the enterprise. It is essential for clear lines of responsibility and accountability to be established at senior level for social and mobile UC investments. But it is also essential to allow for device-neutral access to collaboration services. This is all much easier said than done, but clear lines of responsibility and a robust enterprise communications architecture should be guiding principles which can help successfully shape decisions.

Prepare for a mobile, social world – but also for what comes next

Our research indicates strong interest in social collaboration, mobile UC and standard UC as well. We also asked decision-makers what the biggest disruptor would be in the next three years, and social, mobile and video were taken as givens. However, cloud came top, and this is perhaps not too surprising. When faced with a domain which is growing ever-more complex, but where users demand simplicity and elegance, a majority of firms plan to turn to managed services (whether premise-based or cloud) and solicit the help of third parties to realise their UCC strategies. While this may help mitigate some investment risks, and smooth out costs, supplier and contract management will be an ever-more important skill for enterprises – one they may wish to invest in.

Put suppliers through their paces

Enterprises value technical expertise, service and support capabilities, professional services capabilities and vendor expertise as key skills which they would want their preferred UCC supplier to demonstrate. This result is consistent with firms’ increasingly business-outcome oriented foundations and justifications for UCC investment, and is also a recognition of the complexity of the technology vendor landscape. Any large enterprise considering a UCC investment, even one which is incremental on the base of an existing investment, should draw up a list of agreed priority skills for prospective suppliers and make their own assessments. Issuing RFPs may require time and investment up-front, but such a process almost always bears fruit.

Measure success

Perhaps the most difficult, and often overlooked, process is one which should take place post-UCC investment. Our decision-maker survey respondents indicated they look for, and measure, cost savings data, employee productivity data and user uptake data. They also count on a successful technical implementation, most likely measured through fault detection and service incident frequencies, as well as mean-time-to-repair data. Through managed and cloud services, costs become more transparent, and therefore are potentially more manageable, if the contract terms and conditions are set correctly. But tackling the measurement of employee productivity and uptake will require an engagement with enterprise users which most firms seem to have so far avoided. Enterprises considering a major UCC investment should not shy away from full-on user engagement, both before and after implementation.

‘Through managed and cloud services, costs become more transparent, and therefore are potentially more manageable, if the contract terms and conditions are set correctly.’
About Dimension Data

Founded in 1983, Dimension Data plc is an ICT services and solutions provider that uses its technology expertise, global service delivery capability, and entrepreneurial spirit to accelerate the business ambitions of its clients. Dimension Data is a member of the NTT Group.

www.dimensiondata.com

About Dimension Data’s 2013 Global UCC Study

In August 2007, Dimension Data commissioned research firm, Ovum (then Datamonitor), to conduct a primary research study on the attitudes towards unified communications, its adoption and perceived benefits. 390 IT Managers and 524 technology users from 13 countries where interviewed. This year’s study has drawn even greater levels of participation with over 2,700 respondents from 18 countries. The report provides managers with a tool to understand current market conditions and identify best practices. The content of the report is ideally leveraged in the development of a UCC strategy.

www.dimensiondata.com/Solutions/UCC

About Ovum

Ovum is an independent ICT analyst firm with international presence. Ovum occupies a unique position with detailed insight across the increasingly overlapping worlds of enterprise technology and telecommunications. We provide our clients with independent and objective analysis that enables them to make better business and technology decisions.

This research project was led by Ovum’s Enterprise Communications practice, which examines companies’ adoption of communications services, working alongside Ovum’s Consumerization practice that examines the rising tide of smart consumer devices and their impact on the enterprise IT function and its broader business.

www.ovum.com