

Will Google or Microsoft be Your Next Communications Service Provider?

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23 August 2007


Gartner®
Outsourcing &
IT Services
Summit 2007

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Key Issues

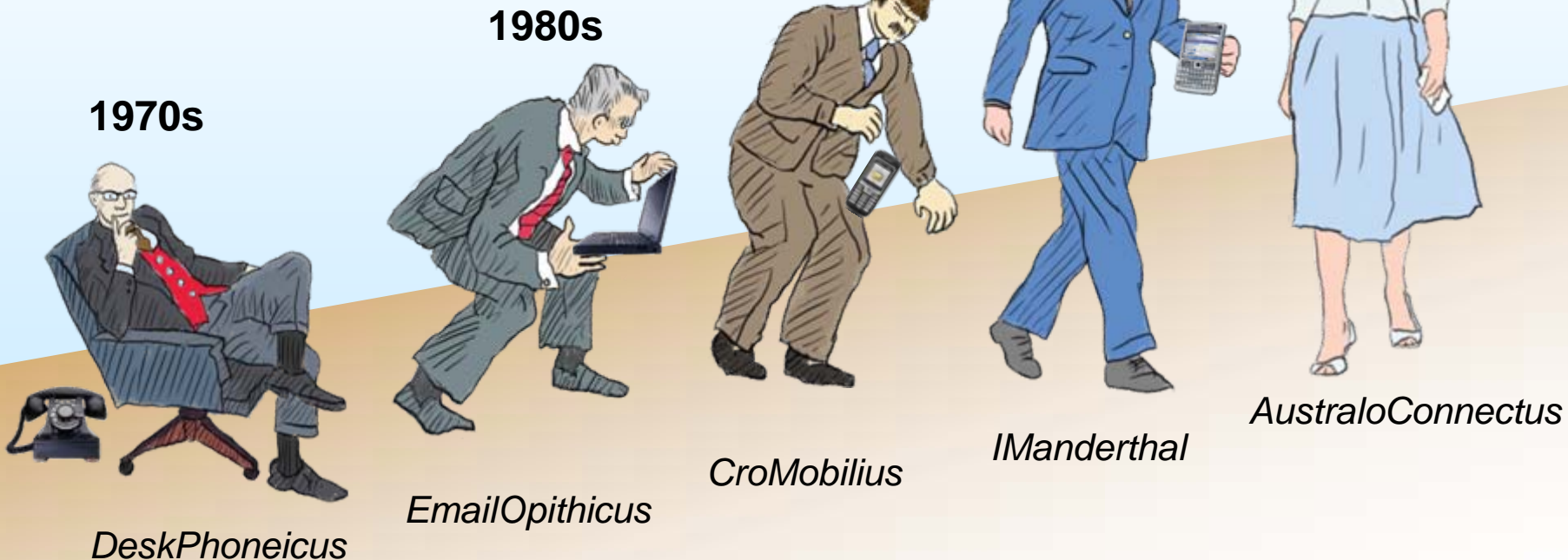
1. How will the emerging convergence of IT and communications create new opportunities for your business?
2. Which communications, network and IT service providers will serve you best?
3. Why will your enterprise need to adapt its communications and IT strategies?

Evolution of Communications Technologies Affects Behaviour and Procurement

Communications tell you whether a network is **accessible**.

With **Presence**, you can learn whether participants are **available**.

Context, sensors and social networking predict participants **amenability** for **Collaboration**.



Communications Procurement will Change as the Service Providers' Food Chain Morphs.

	Strength	Weakness	Opportunity	Threat
NSPs Fixed, Mobile Carriers	Large scale, reliable, ubiquitous.	Future as a commodity, utility.	Wealthy partner, deep resources.	Regulated returns, poor partnering skills
IT SPs, SIs HP, EDS, CSC	IT core skills, large talent pool.	Volatile contracts, skills retention risk	Master new technology	Must scale for productivity.
Enterprise Platforms (MS, IBM, SAP, Oracle)	Huge Mind Share, well financed	Innovation, portfolio challenges	Advance into emerging markets	Nimble start-ups, best-of-breed.
Disrupters (Google, Yahoo)	Overwhelming Consumer acceptance.	Unrealistic user expectations.	Willing mass markets.	Weak business channels.

.....to Managed Services Portals.

Unified Communications — Ultimately Controls ALL Component Communications

Buy Unified Communications as a Portfolio of Communications & IT Applications:

- **PBX** → IP Telephony and softphone
- **E-Mail**, Calendaring and Directory Services → Desktop Communications
- **Voicemail** → Unified Messaging
- **Separate Conferencing** for Voice, Video and Web → Converged Conferencing and Collaboration
- **Instant Messaging** → "Next-Generation Dial Tone," Presence and Status Services for All Communications
- **Rich Presence Services (New)**
- **Assistant** – Intelligent Agent with Notification

Contact Center



Business Process Integration



Collaboration



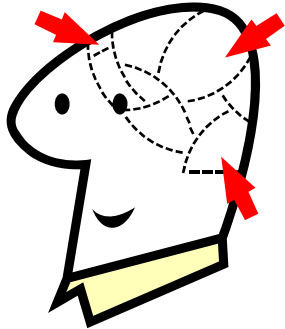
Mobility



.....and the Vision EndPoint:

Management, Control, Analysis of All Communications **Gartner**

Big Picture: IP Telephony Leads Communications-Enabled Business Process



Basic Telephony

Everyone

- Internet telephony
- P2P = key systems
- Enterprise "Skype"
- PBX replacement

Review: Infrastructure, Platforms, Applications

Horizontal Apps.

Office

- OCS (LCS); Sametime
- Identity
- Directories
- Billing
- Enterprise apps.
- Unified messaging

Enhanced Collaboration

Knowledge Workers

- Presence
- Voice & video
- Shared documents
- Personal assistant UC

Broad Integration

Service

- Reduced human latency
- Instant access
- Skills on tap
- Voice valet
- Cust. self-help
- Improved transactions

Transformational

Business Value

- Exquisite experience
- Always available
- Real-time enterprise
- Complete cycles

Best brand equity

Voice embedded in IT apps.

Ease communication; collaboration; IM

Leverage voice into e-mail; directories; enterprise systems

IP telephony infrastructure; VoIP; hybrid PBX migration; VLAN/WAN; QOS; broadband

Google: Building a Teraplex Near You to Support a \$100 Billion Revenue Scale

Business Model:
Self-Service, Full-Service Advertising Company

Clear Leadership:
Serge, Larry & Eric Rule.

Corporate Mantra:
You can make money without doing evil

Massive Capitalization Funds Infrastructure Investment in advance of Revenues

Values

Focus: Search is the Center of the Universe

Massive lit and dark Fibre-Optic Buyer; eyeing Wireless Spectrum auctions.

Google™



1,000,000+ Servers deployed to date 4th largest Worldwide Server deliveries in 2007.

Widely deployed Data Centers in shipping containers at NAPs & POPs optimize its Search & Applications traffic.

Infrastructure

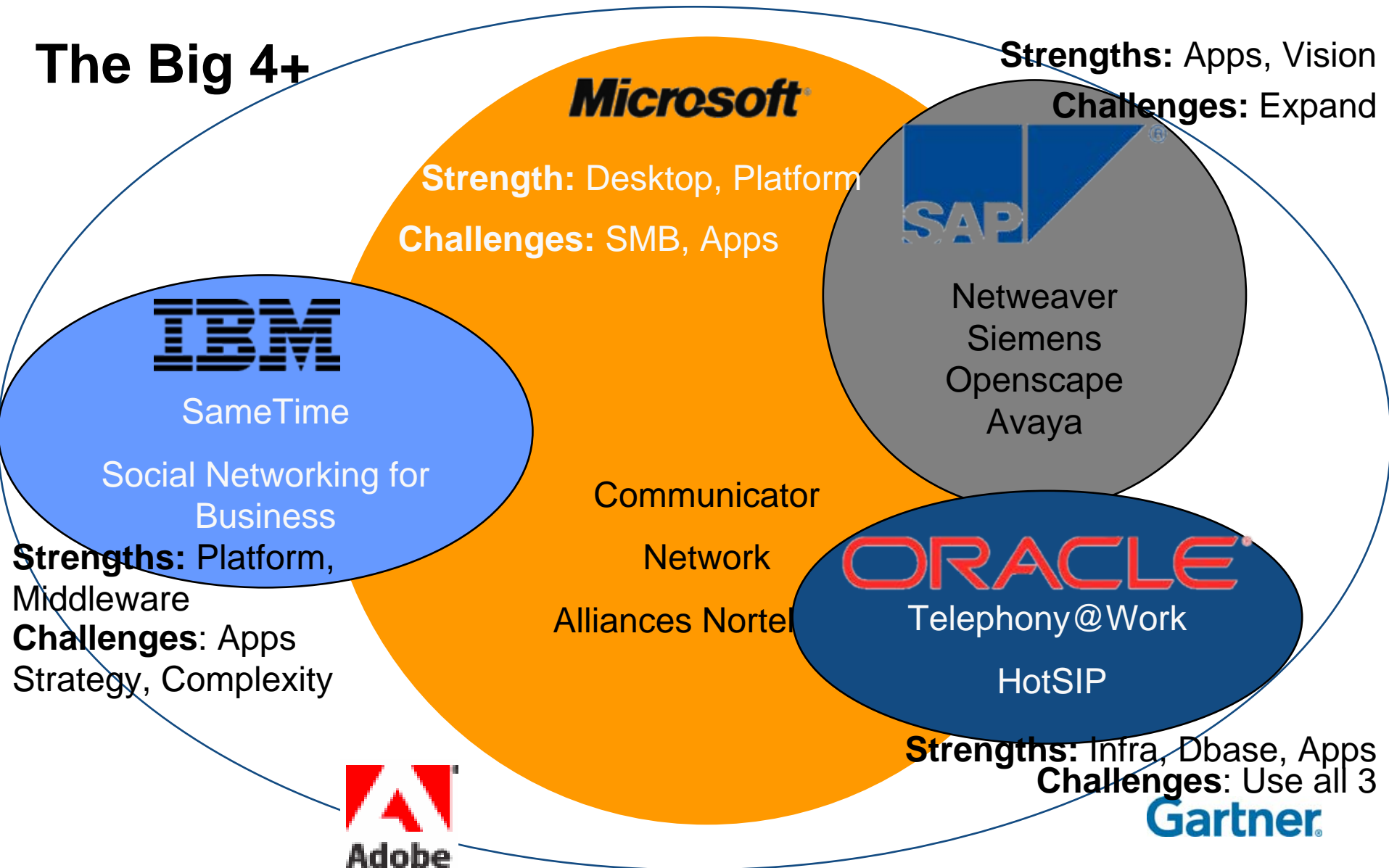
Numerous 'Googleplex' installations WW near cheap Power, Talent pools.

Google Teraplex:

Architecture, Geography & Cost Advantage 

Communications Choice: Led by the Incumbent IT Platform (Comms) Provider(s).

The Big 4+



A Framework for Evaluating Emerging Enterprise IT Platform Communications

The Big Four IT Platforms:

Microsoft
(Communicator)

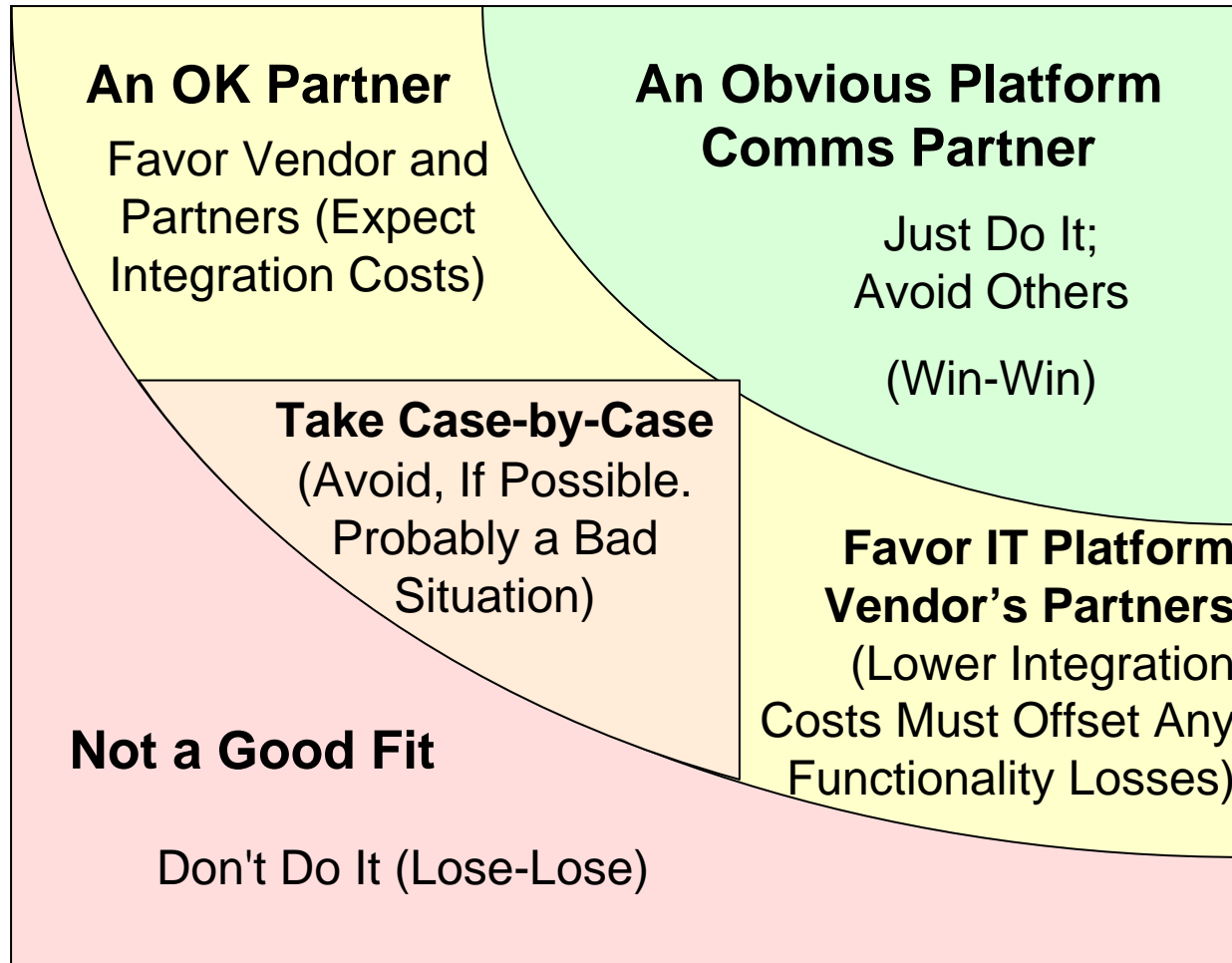
IBM
(SameTime)

SAP
(Netweaver)

Oracle
(Telephony @Work)

+

Adobe



↑
Fit With Customer Comms Needs

————— **Alignment With Platform Vendor** —————→

IT Platform Preference, Partners and Competitive Offers Drive Biz Strategy.

Evaluate Emerging Technologies



Microsoft
IBM

Test Competitive Solutions



SI or NI as Prime/Sub-contractor?

Enterprise
Reliance on
Installed
Vendors

Customer Service, Productivity

Choose Platform(s)

Developers

Business
Process Plans

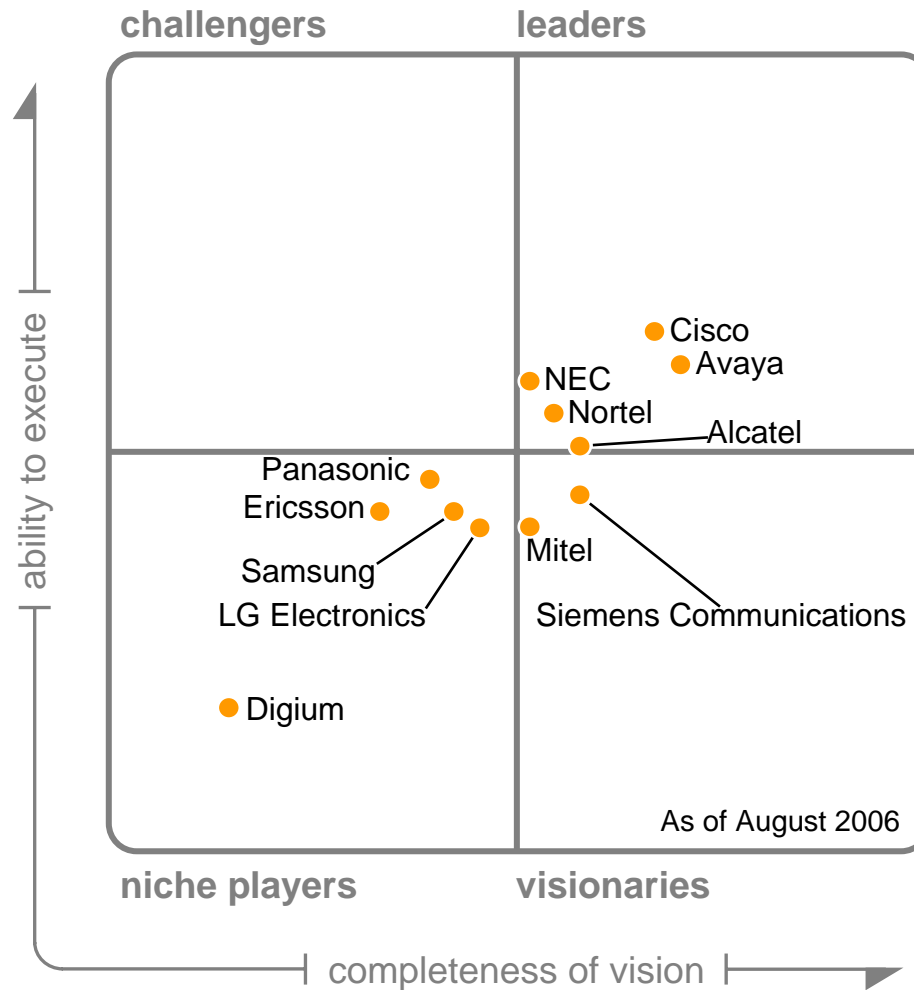
OEM & ISV
Support Ecosystem

IT Comms
Products

Gartner

Asia-Pacific Corporate Telephony Magic Quadrant Shows Infrastructure Vendors but...

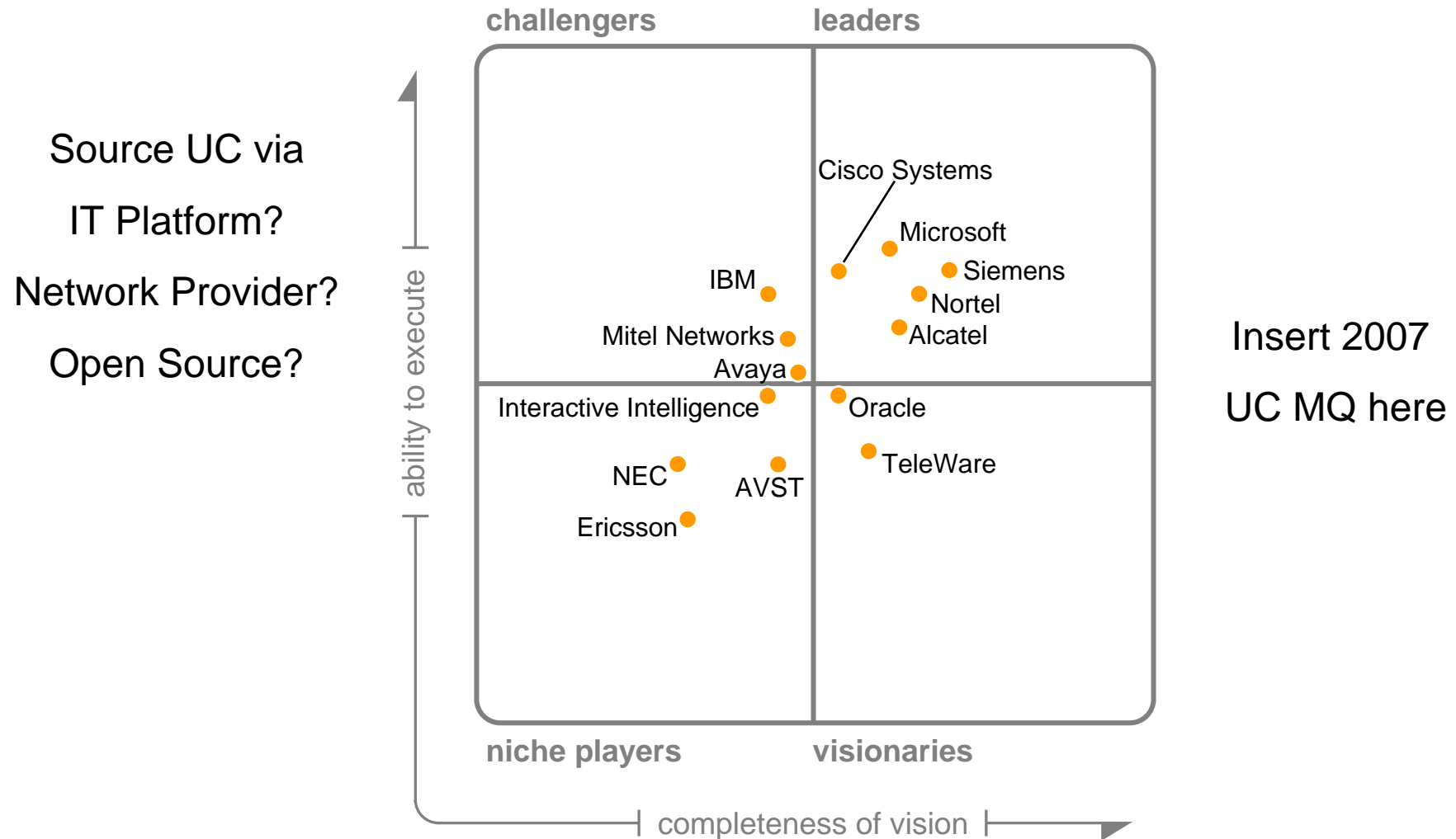
Use 2007
Telephony MQ



Add 2007
CCI MQ
here

(Magic Quadrant for Corporate Telephony in Asia/Pacific, 2006," 25 August 2006)

Magic Quadrant for Unified Communications Shows Complexity of Choice: IT or Comms?



Unified Communications Vendors are from IT Platforms & Network worlds.



Overall UC package	OmniTouch UC	Communication Manager	OCS (was LCS)	Cisco UC Mngr	MCS5100	Openscape
Telephony	MyPhone/OMNI-PCX	MultiVantage	OCS & Partners	Call Manager	CS1000	HP:8000
Unified Messaging	MyMessage	Modular Messaging	Exchange 2007 UM	Unity	CallPilot	Xpressions
Desktop Client	MyPersonal Commtr	One-X Desktop	Office Communicator	Cisco Desktop	MCS5100	OpenScope
E-mail	Partners	MM & Partners	Exchange	Partners	Partners	Partners
Instant Messaging	MyTeamwork	One-X Desktop	OCS	CUPS	MCS5100	OpenScope/partner
Audio Conferencing	multiple	Meeting Exchange	LiveMeeting/partners	MeetingPlace	MCS5100	OpenScope/partner
Video Conferencing	MyTeamwork	Partners	LiveMeeting/Partners	MeetingPlace	MCS5100	OpenScope/partner
Web Conferencing	MyTeamwork	partners	Live Meeting	MeetingPlace	MCS5100	OpenScope/partner
Converged Conferencing	MyTeamwork	none	Live Meeting (07)	MeetingPlace	MCS5100	OpenScope/partner
Notification Service	3d party	UCC	Wave-12/Partner	CallManager	Call Pilot & PA	OpenScope
Personal Assistant	MyPhone	UCC	Office Commuicator	PA part of CM	PA	CommAssistant
Rich Presence service	MyTeamwork & IRP	2008+	OCS	CUPS	MCS5100	OpenScope
CEBP	OTUC App Framework	CCS	APIs & toolkit	Some APIs	Application Center	Symphonia
Contact Center	Genesys	CIS	MSS & Partners	IPCC	NCC v6	HighPath ProCenter
Mobile solutions	Multiple	One-X Mobile Edition	Windows Mobile	Mobility Manager	Wireless clients	CorporateConnect
Collaboration	Partners	Partners	SharePoint	Partners	Partners	Collaboration Portal

Limited Capability



Advanced Capability



July 2006



Trial a Pilot of IT Platform Communications: Start with a UC Project (Given IP Telephony).



Begin with a Macro View of Platform Vendor's Future in Your Enterprise:

- Understand Legacy Telephony Infrastructure.
- Short-list IT Platform Vendors for Comms.
- Evaluate Communications Solutions esp. UC.
- Check OEM Partners, SIs, NIs for Prime Role.
- Choose Important, Time-sensitive but not Mission-critical tasks for Pilot Trial.
- Favour Projects with Communication-intensive Processes & Multiple communication channels
- Get Decentralized Participants; Defined, Bounded Problem, Measurable Outcomes.
- Seek Willingness to Adopt Technology; Change Process; Enhance Customer Experience.
- Soft Benefits are enough (Hard Benefits a Bonus)
- Example: Shell OCS on Nortel IP Telephony.

Best Practices in CSP Choice.

- Obtain a Business Unit Advocate & Executive Support.
- Use a Subset of the UC Portfolio, with View to CEBP.
- Measure the Success/Failure of the Trial (productivity, process improvement, financial).
- Provide plenty of End-User Training, Communication.
- Learn from the experience; keep investment tactical; be willing to start again.

Recommendations

Communications procurement has CHANGED.

**Now: NSPs/ISPs;
Equipment Vendors/Sis; IT
Platforms.**

**Future: Comms in Apps,
from IT Platforms.**

1 Build a 'Communications in IT Platforms' program oversight team and determine education needs of business process owners, application requirements, architecture, broad specifications and its mandate.

2 Prepare a strategy to optimize the whole planning and sourcing cycle. Obtain stakeholder "buy in" to plans, CSPs, emerging IT Platform Comms.

3 Post-pilot trials, leverage a two-stage process: RFI for market intelligence; RFP for specific requirements with Best and Final offers.

4 Evaluate bids according to planned evaluation criteria, scores and weightings. Overlay Risk Assessment.

5 Educate Stakeholders. Use mature-enough solutions. Obtain commitment to mandated requirements.

6 Review sourcing plans for "quality of fit" with application platform operations, plans.

7 Evaluate decisions considering Emerging Disruptive Technologies.