

# Key Drivers for 2010: Business Network and IT Services

*Current*Analysis

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# Agenda

## ❖ Who we are

- **Jerry Caron, VP Analysis**
- **Sandra O'Boyle, Service Director**
- **Brian Washburn, Research Director**

## ❖ Key Drivers 2010

- **Markets under intense pressure**
- **The telepresence opportunity**
- **Infrastructure as a Service**
- **Google and MS effect**
- **Managed mobility**

## ❖ Q&A: Replies at end. Please send to "ALL PANELISTS"



# Analytical Philosophy

- ❖ **The real-time imperative**
  - **Value of knowledge is immediate**
  - **Useful insight within 48 hours**
  - **Reliable updates**
- ❖ **Facilitating a more potent sales force**
  - **Energy devoted to tactical advice**
  - **Actionable: what it means...**
  - **...and what you should do about it**
- ❖ **Structured and consistent**
  - **Analysis is template-driven**
  - **Role playing enforced**
  - **Flexible delivery**



# Key Driver: Services Under Pressure

## ❖ **MPLS Port Prices Dropping**

- As are leased line prices
- Consolidation likely
- **Technology implications: CapEx sensitivity**

## ❖ **Managed Network Contract Flexibility**

- Financing key
- **Technology implications: Partner on managed services**

# Key Driver: Services Under Pressure

## ❖ **Global Network Efficiency**

- Packet-optical gaining traction
- **Technology implications: An opportunity to transform**

## ❖ **Ethernet Deeper into WAN**

- Hybrid Ethernet – IP VPN solutions taking hold
- Hybrid VPLS – IP VPN needs work
- VPLS – VPLS carrier interconnect also required
- **Technology implications: An opportunity to differentiate**

# Key Driver: Telepresence and UCC

## ❖ **Telepresence Gains Traction**

- Better financing
- Ease of use
- **Technology implications: Consolidation, lower costs**

## ❖ **Unified Communications Services Growth**

- Natural hosted opportunity for SPs
- Microsoft solutions mature
- **Technology implications: Better integration, flexible architectures**

# Key Driver: Infrastructure as a Service

## ❖ **On-Demand IT Model an Easy Pitch**

- Significant support-cost reductions
- Security and reliability trust issue
- **Technology implications: End-to-end story is crucial**

## ❖ **Advantage to IT Service Providers**

- Network operators, others (Amazon) leading the way...
- ...but ITSPs have the relationships and trust
- **Technology implications: The data center battleground**

# Key Driver: The Google and MS Effect

## ❖ **Google is an Enterprise Player**

- Google Apps getting wins and attention from ITSPs
- Global network and data center infrastructure
- **Technology implications: Monetizing collaboration with Google**

## ❖ **Microsoft as Service Provider**

- Cloud-based collaboration and business productivity
- Network and IT service providers are mere resellers
- **Technology implications: When to partner or not**

# Key Driver: Managed Mobility Heats Up

## ❖ Demand Growth for Managed Services

- Expense management (TEMS)
- Device management (MDM) and security
- Hosted applications
- **Technology implications: Outsourcing driver**

## ❖ Mobile IP Momentum Builds

- Mobile VoIP – cellular and WiFi
- Fixed-mobile convergence solutions
- Femtocells a viable option
- **Technology implications: Prove capability and ROI**

# Thank You

**Any Questions?**

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