

# A Pathway to A Connected California: The Value of Converged Networks

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# Communications: Crossing the Divide

## The Old Way

- Scarce Capacity
- Telco-Defined Comms Services
- Aligned Competition
- Hardware-Centric
- Location-Bound
- Capital and Labor Intensive

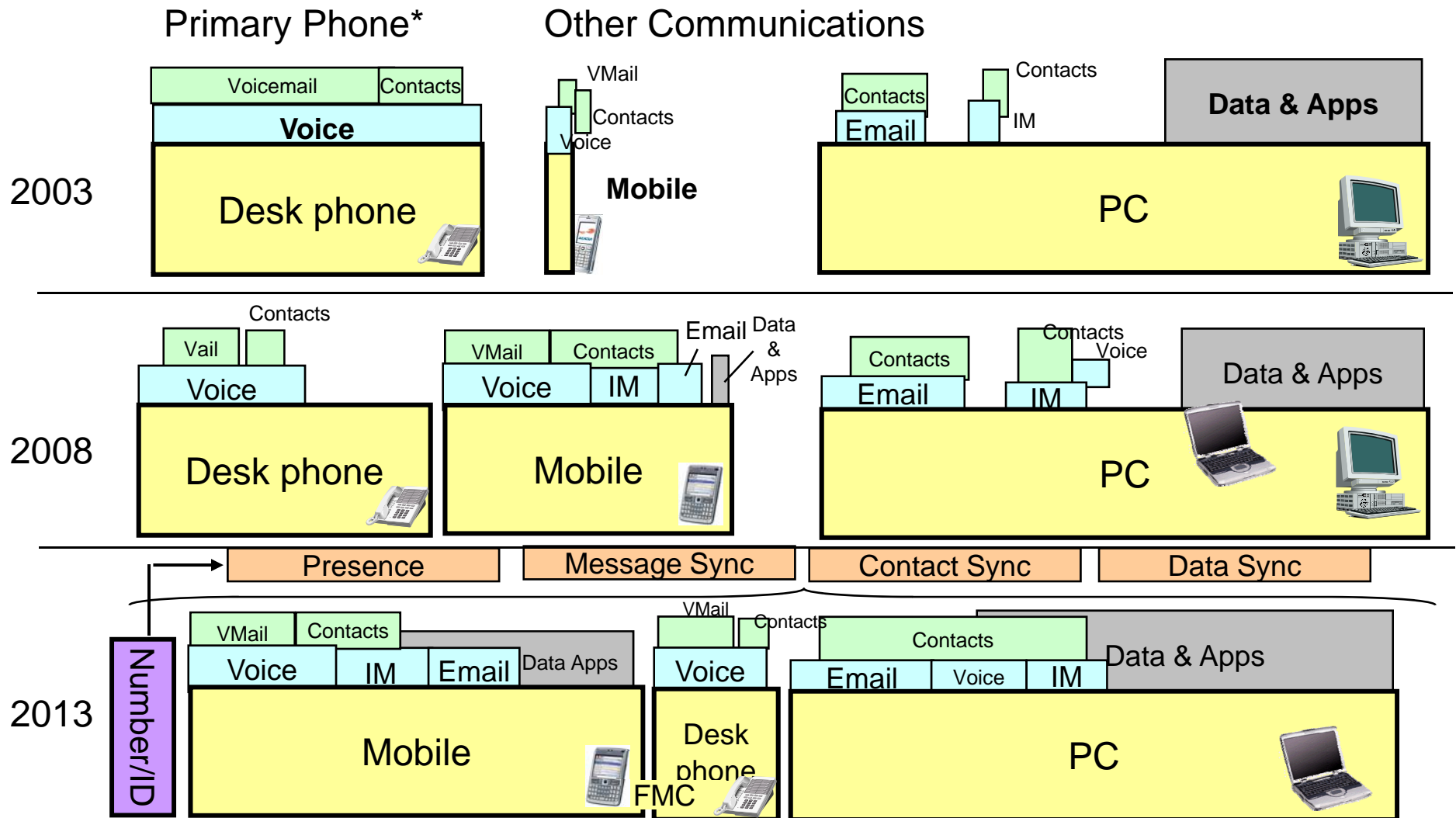
## The New Way

- Commodity Infrastructure
- User Experience Matters
- Nonaligned Competition
- Software- and Web-Centric
- Open Applications/Services
- Business-Intelligence-Driven

# Key Issues

1. What are the most critical trends and innovations in networking and communications for Governments?
2. How do you integrate context into communications?

# Future Communications: Mobiles and PCs Will Dominate



\* Which number do you put first on your business card?

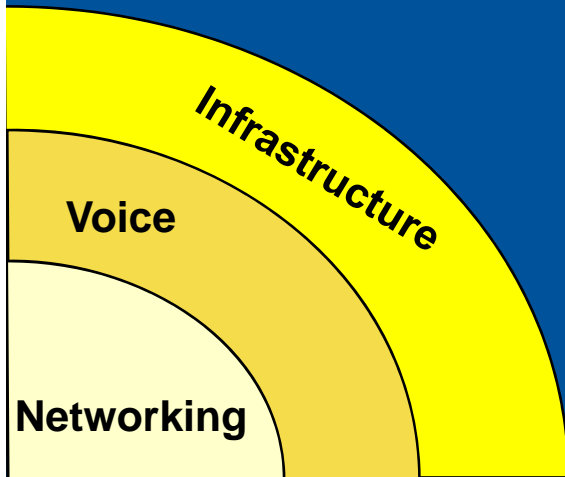
# Blurring the Lines Between Networks and Software : Unified Communications

## Communications

## Collaboration

Fixed – Mobile  
Convergence

Call  
Centers



Directory

Voice mail

Presence

Telephony

VoIP

Conferencing

Audio Video

Web

Email

Instant  
Messaging

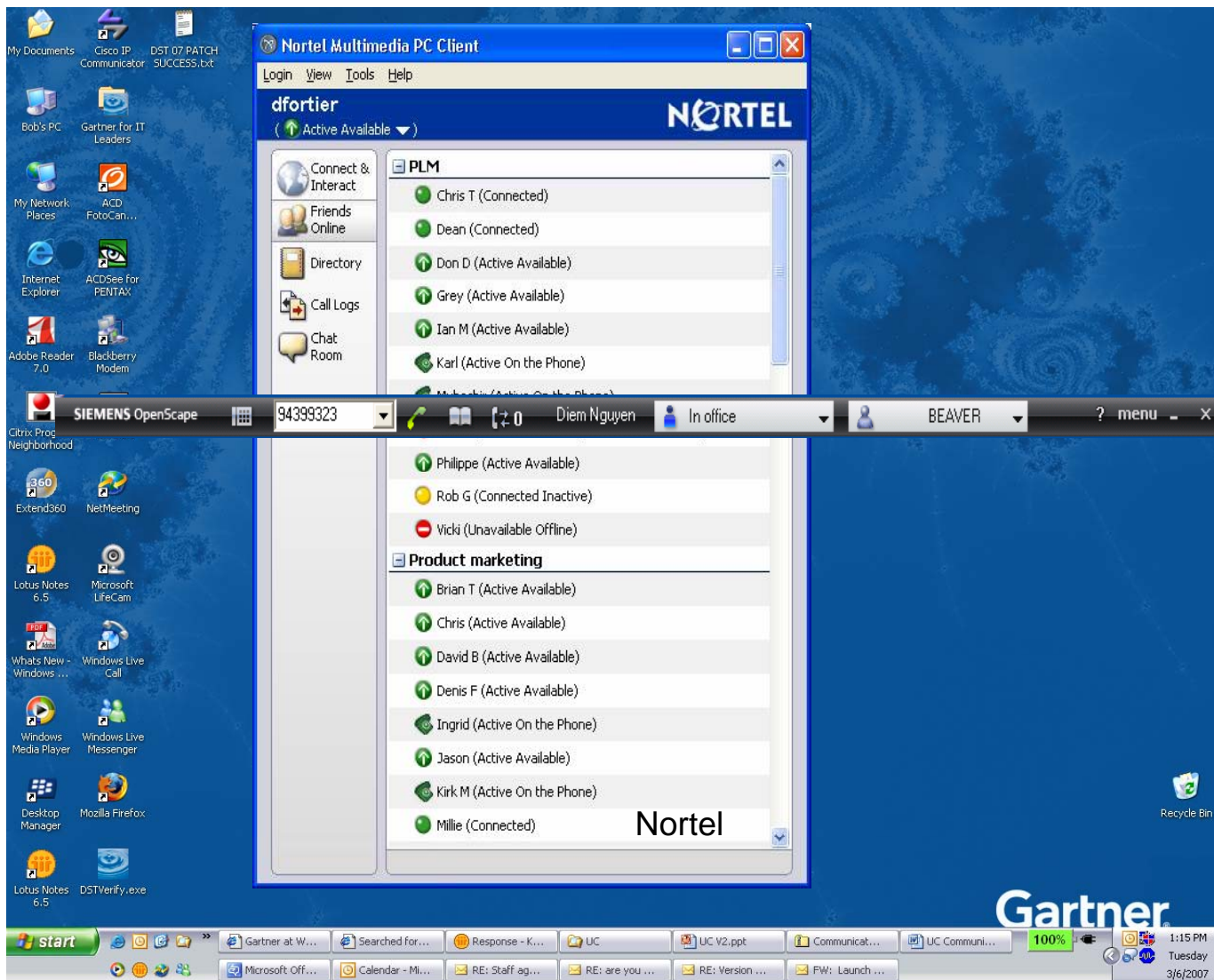
Team  
Workspaces

Social  
Software

Wikis

Blogs

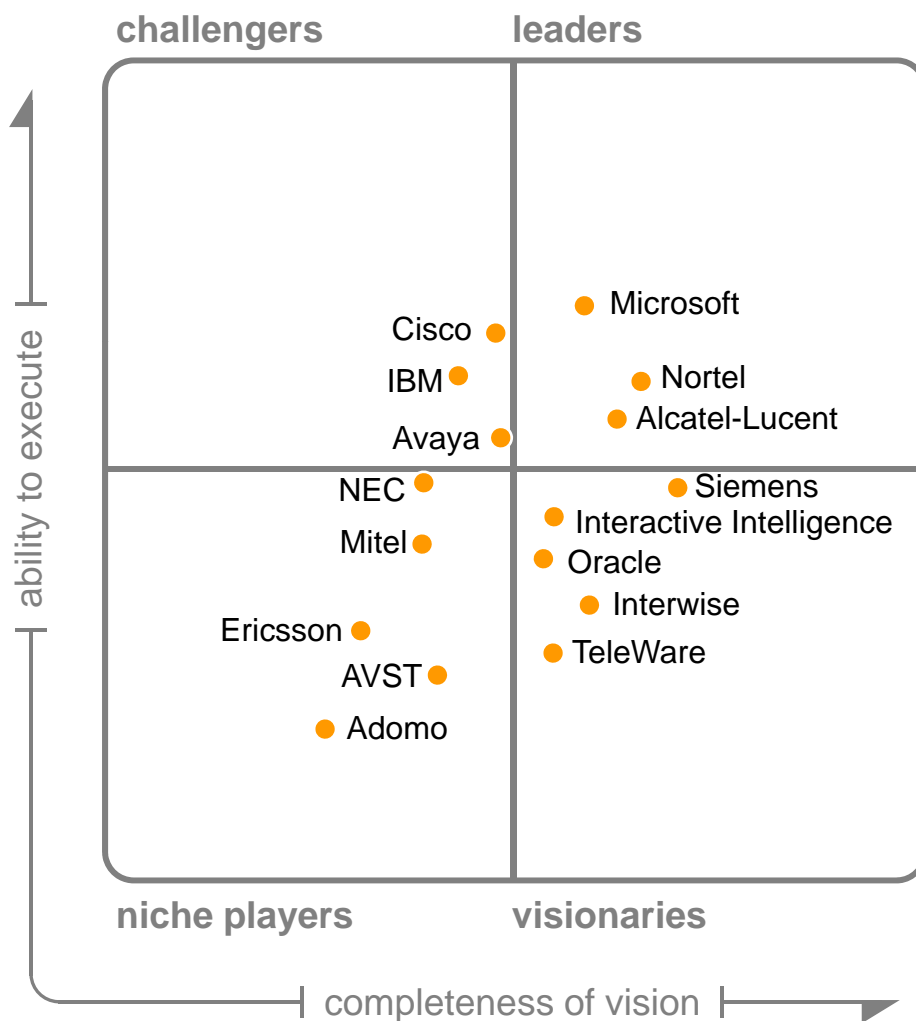
# A User's View – No Phone Required



## Partial Feature Set

- Softphone: audio and video
- IM
- E-mail
- Conferencing: audio, video and Web
- Keypad dialer
- Presence
- Preferred contact method
- Contacts
- Corporate directory search
- Call history
- Voice messages
- File transfer
- Whiteboard sharing
- Preferences

# The UCC Competitive Landscape Includes Equipment Providers, Software Incumbents, and Conferencing Centric Players



Vendor	MQ change from 2006	
Adomo	◆	Low cost, Linux appliance
Alcatel-Lucent	➔	Carrier and enterprise product portfolio
Avaya	➔	Widely deployed products
AVST	⬇	Lacks full spectrum of UC functions
Cisco	⬇	Network centricity may impede CEBP
Ericsson	➔	Premise & carrier integration for mobility
IBM	➔	Backend business application emphasis
Interactive Intelligence	⬆	Tightly bundled all-in-one solution
Interwise	◆	Conferencing centric (Audio, Video, Web)
Microsoft	➔	UC portfolio breadth
Mitel	⬇	Mitel lacks enterprise market penetration
NEC	⬆	Single management interfaces
Nortel	➔	Nortel / Microsoft alliance
Oracle	⬇	Fragmented UC solution
Siemens	⬇	Limited market awareness
TeleWare	⬇	Private Mobile Exchange (customization)

- 37% decreased their MQ position
- 25% increased their MQ position (new entrants included)
- 37% held their positions

**MQ Change (06 to 07)**  
 ◆ New    ⬆ High    ⬇ Medium    ➔ Low



(From "Magic Quadrant for Unified Communications, 2007," 20 Aug 2007)

# Video Is Exploding... and It's Only Just Started.

- The number of users of video sites nearly doubled from the end of 2006 to the end of 2007

*(Source: Pew Internet and American Life Project, 2008)*



*Photo courtesy of Polycom*

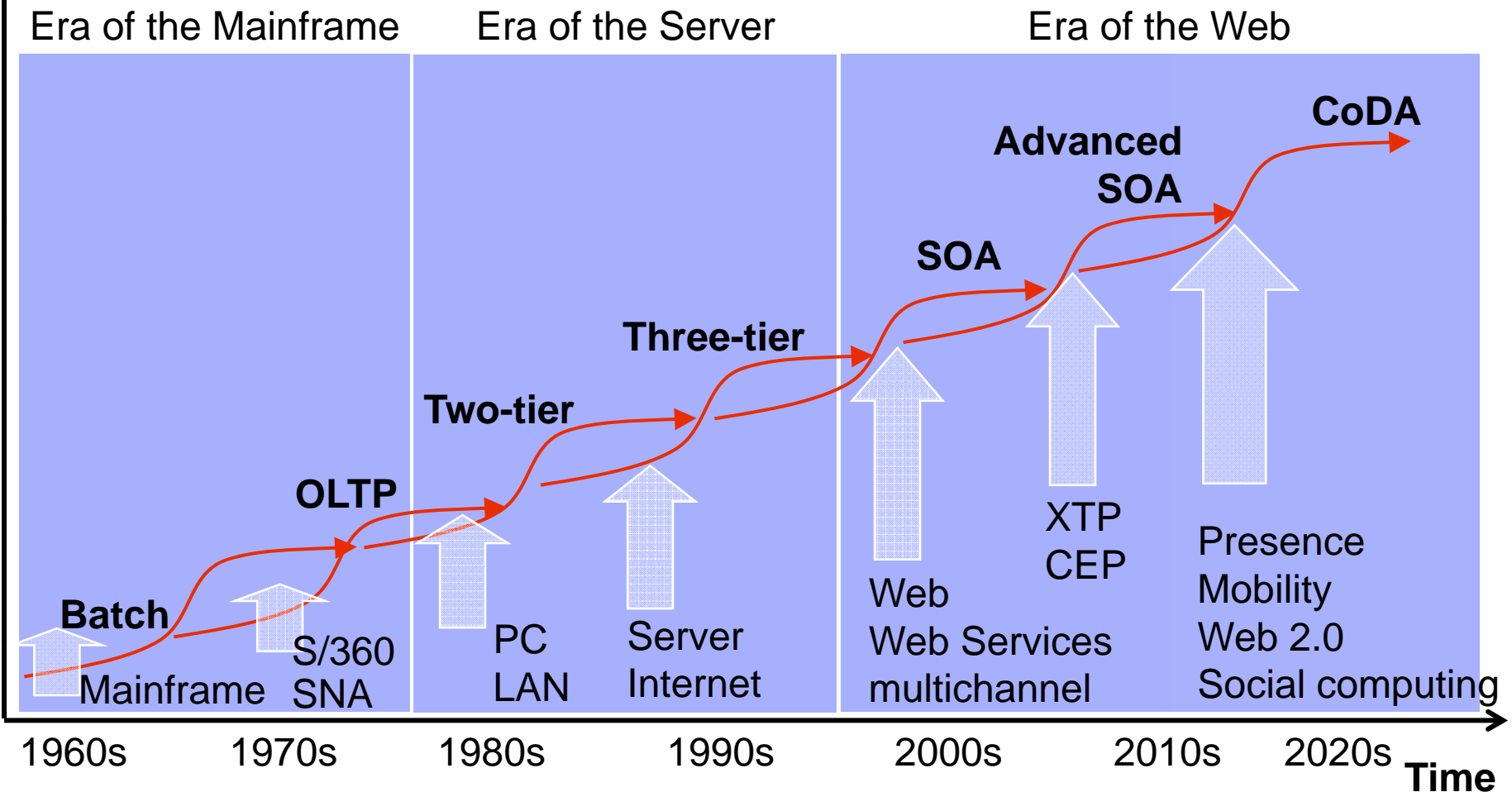
- Standard Videoconferencing is in stasis, but streaming, on-demand, and HD is hot.

**Strategic Planning Assumption:** Video usage for enterprise training and communications will reach an inflection point in 2009, with a 20+% increase in the number of users.

**Strategic Planning Assumption:** Video uptake will surge in targeted vertical applications (field force automation, law enforcement, surveillance, retail) during 2008-10.

# Context: The Next Step for Software and Communications Architectures

↑ **Agility of Enterprise IT**



Advanced SOA = Event-Driven SOA  
CoDA = Context-Driven Architecture

# Recommendations to Government Users

- Focus on bandwidth costs

*Safe bet: You will need more bandwidth than you've budgeted.*

- Expect and negotiate **communications pricing declines** through 2011 – yet budgets will increase due to volume demands
- **Consolidate networks** – focus on a unified, reliable, but multi-sourced network.
- **Embrace consumer-grade services** for select remote and mobile workers
- **Consider alternative suppliers** to keep your main suppliers on their toes

- Manage TCO

- Standardize, Automate, and Source

- Expect a Dynamic Market

- Expect a battle in the market – and your own organization - between the key market players
- *Watch Microsoft, Cisco, Google, and IBM.*

# Business Imperative Action Plan

- **In the Next 90 Days**
  - ✓ Pursue wide standardization and the use of industry standards to reduce TCO.
  - ✓ Squeeze cost out of traditional communications equipment (switching and routing) in order to free budget for application optimization, mobility, unified communications, and integrated security.
- **By 12-18 Months**
  - ✓ Move from network technology-centric skills to general infrastructure, customer advocacy and vendor management skills.
- **Long Term – Three to Five Years**
  - ✓ Measure success based on technical metrics, service delivery and customer satisfaction.