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FMC and its role in the enterprise market

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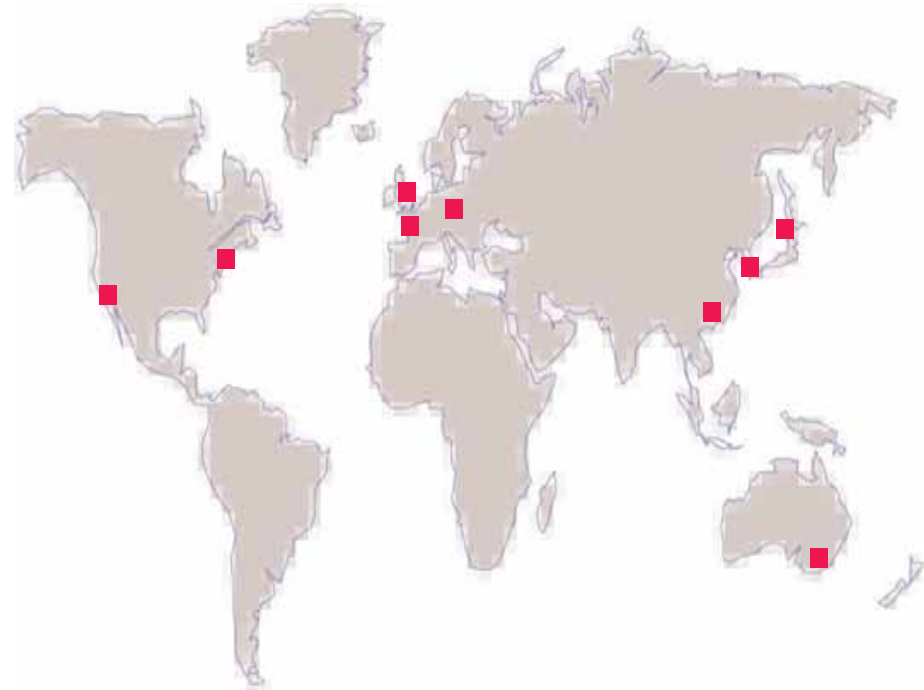
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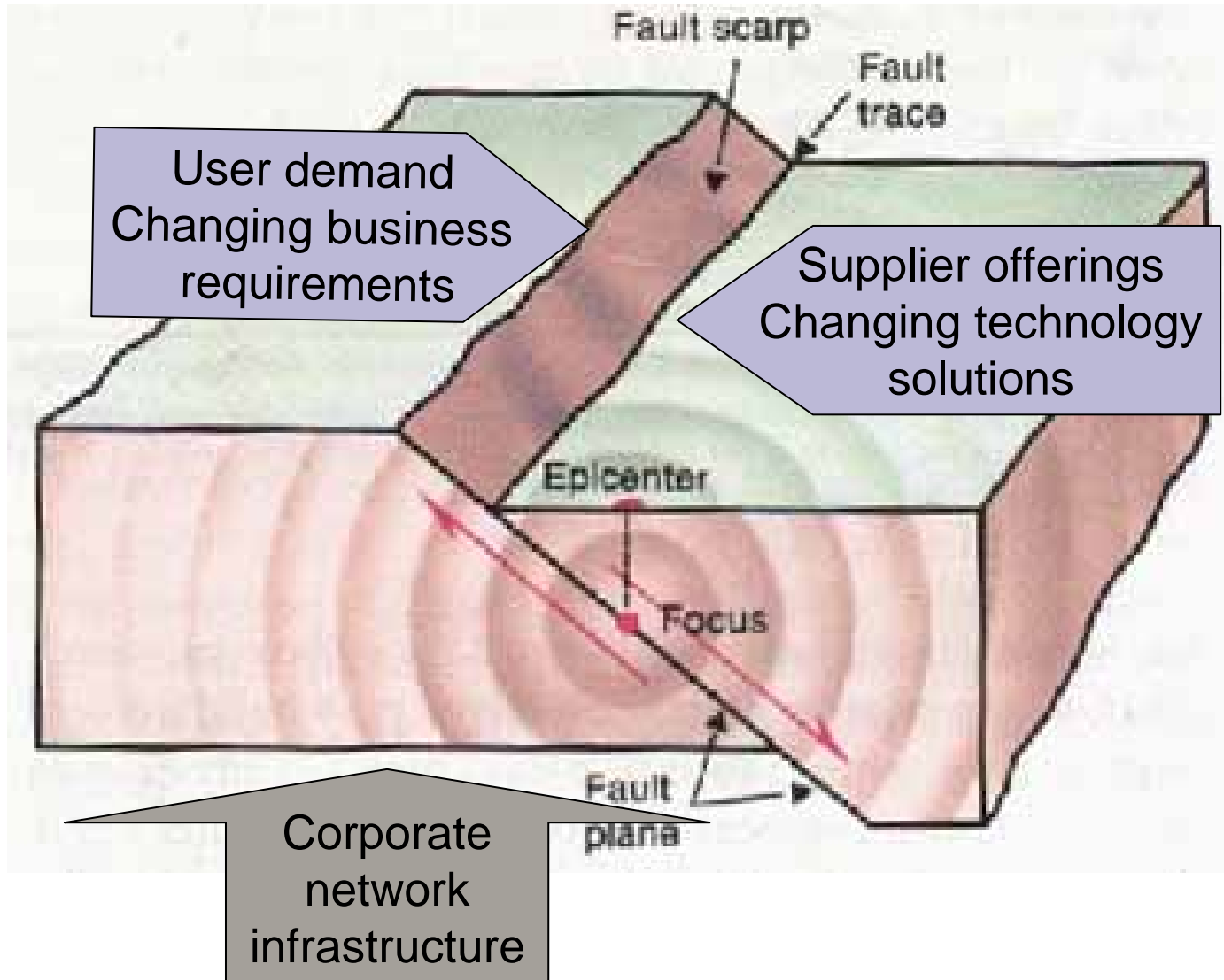


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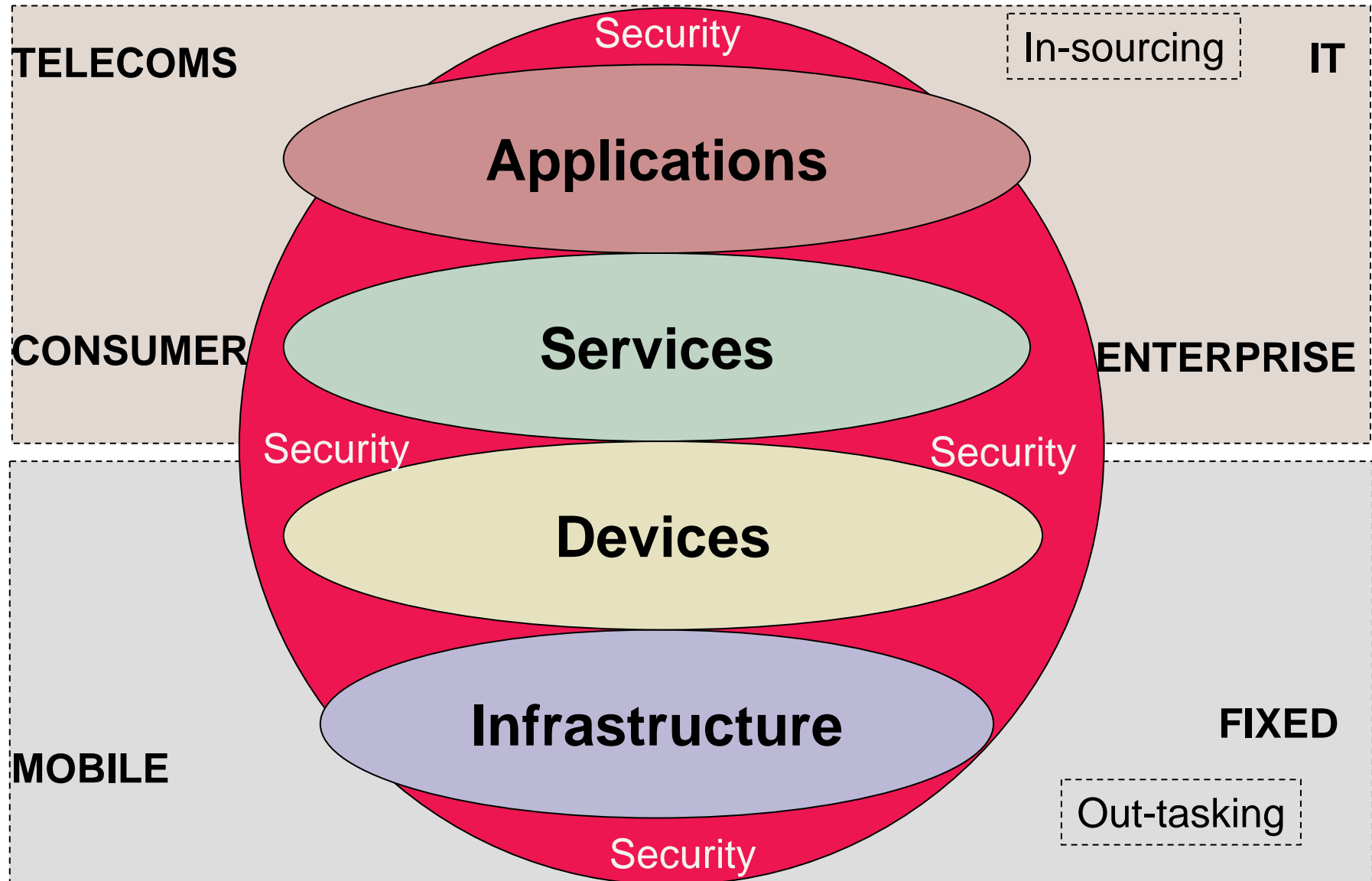
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End user demand and supply are not in harmony



Convergence means cost savings to users and anticipated revenues to the industry?



Mobility: more than mobile



Local/campus mobility

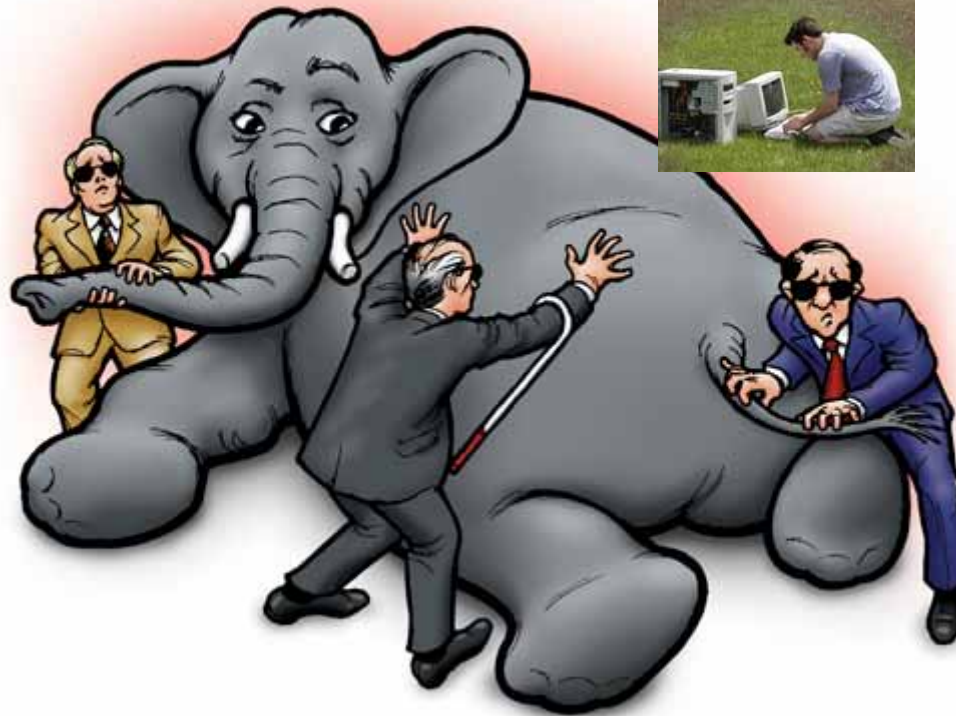


Moves adds and changes

Remote access



Hot desking



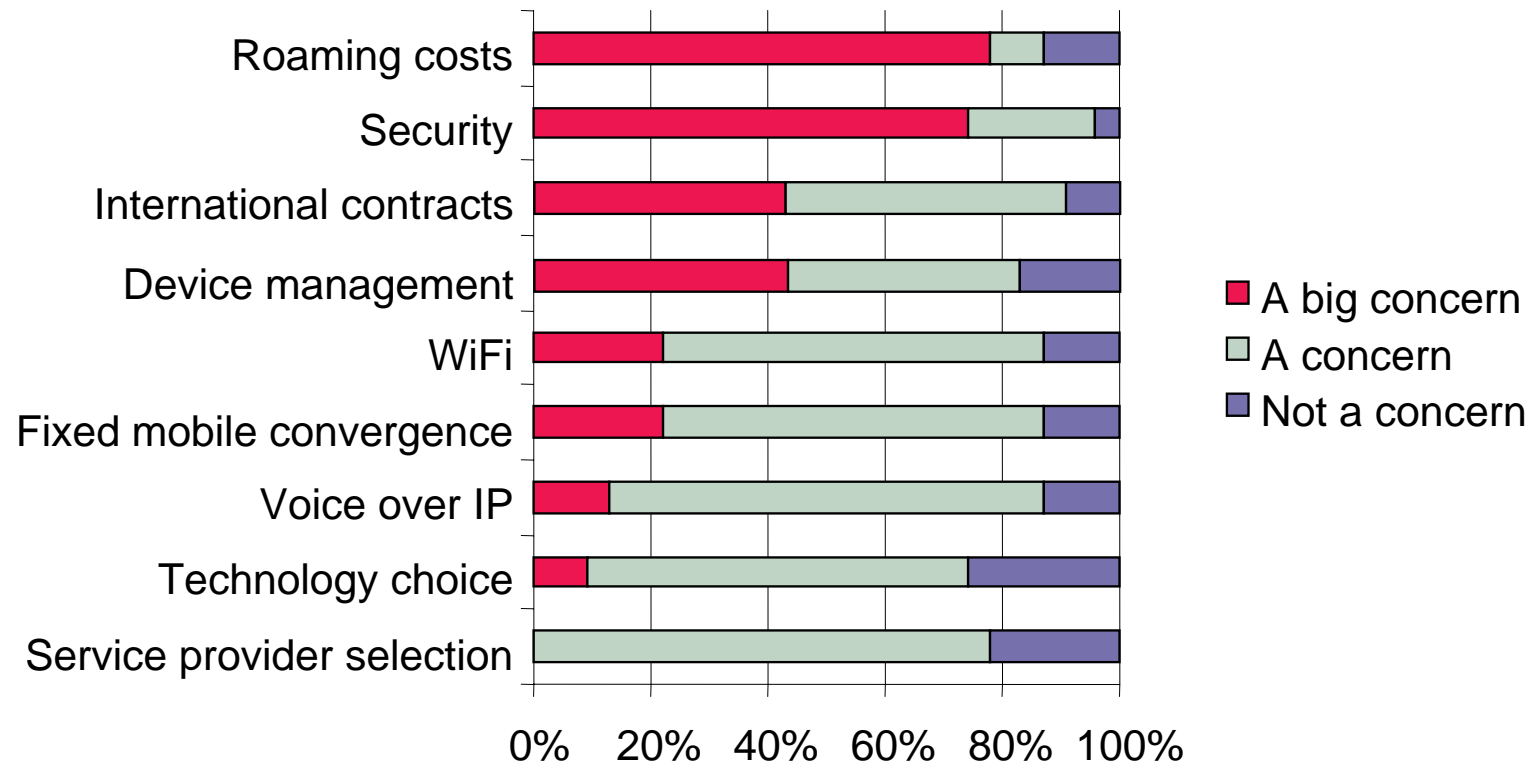
“Road warriors”



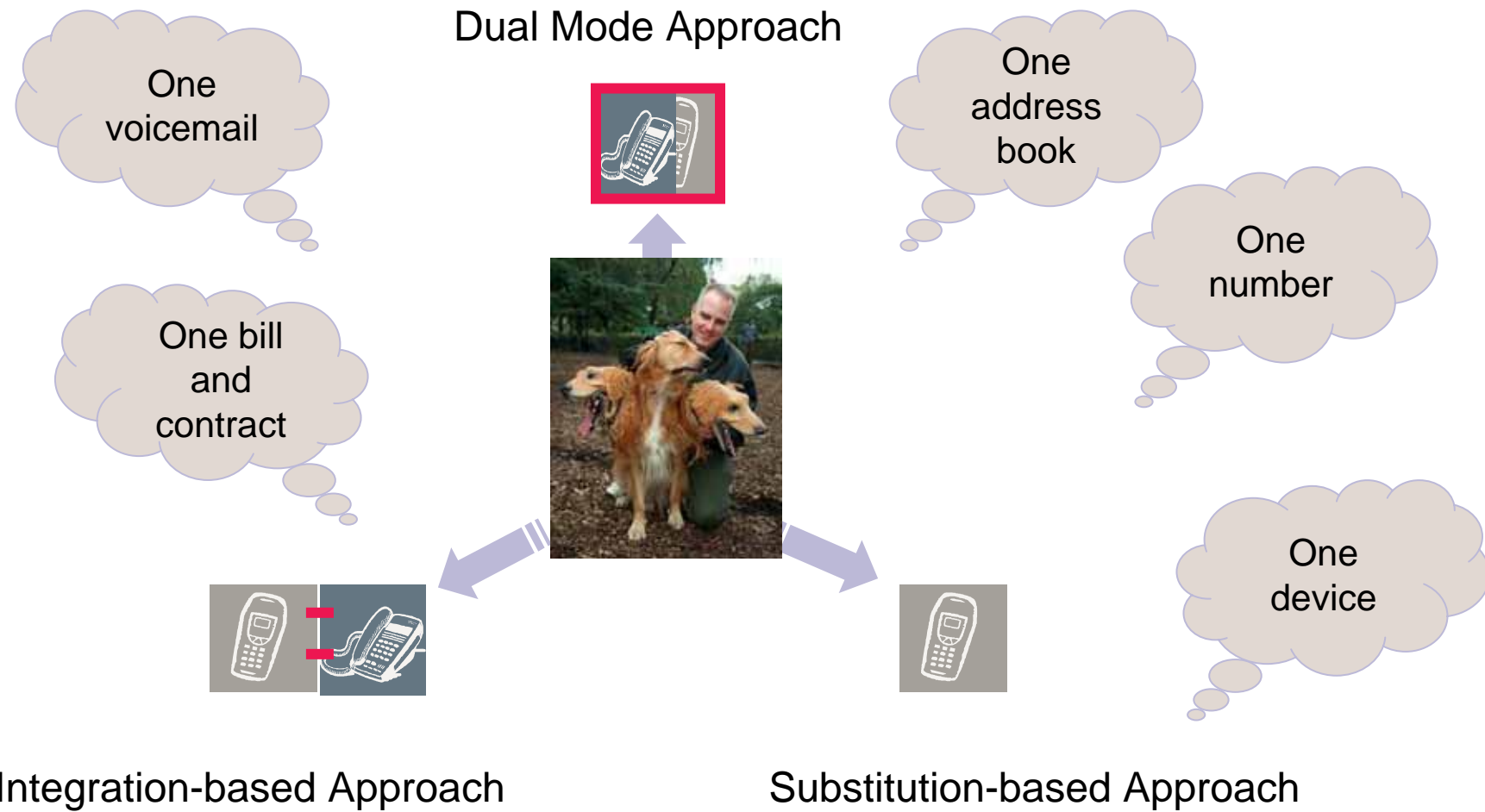
Teleworking

Mobility concerns

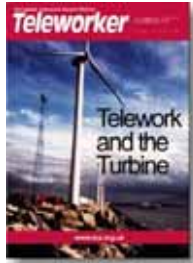
What are your organisation's main enterprise mobility concerns?



FMC : three faces



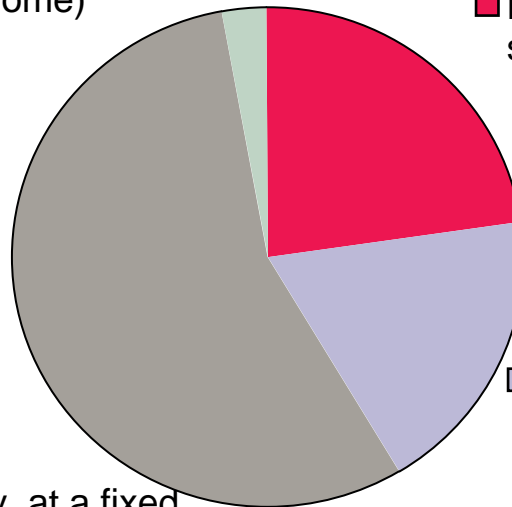
Nearly half of Italian SME workers are 'mobile'



Q11. What is the share (by percent) of your company's employees who work in each of the following scenarios?

■ Home worker (e.g. at a desk at home)

■ Highly mobile (e.g. field or sales staff)



■ Moderately mobile (e.g. occasional travel, frequent on-site movement)

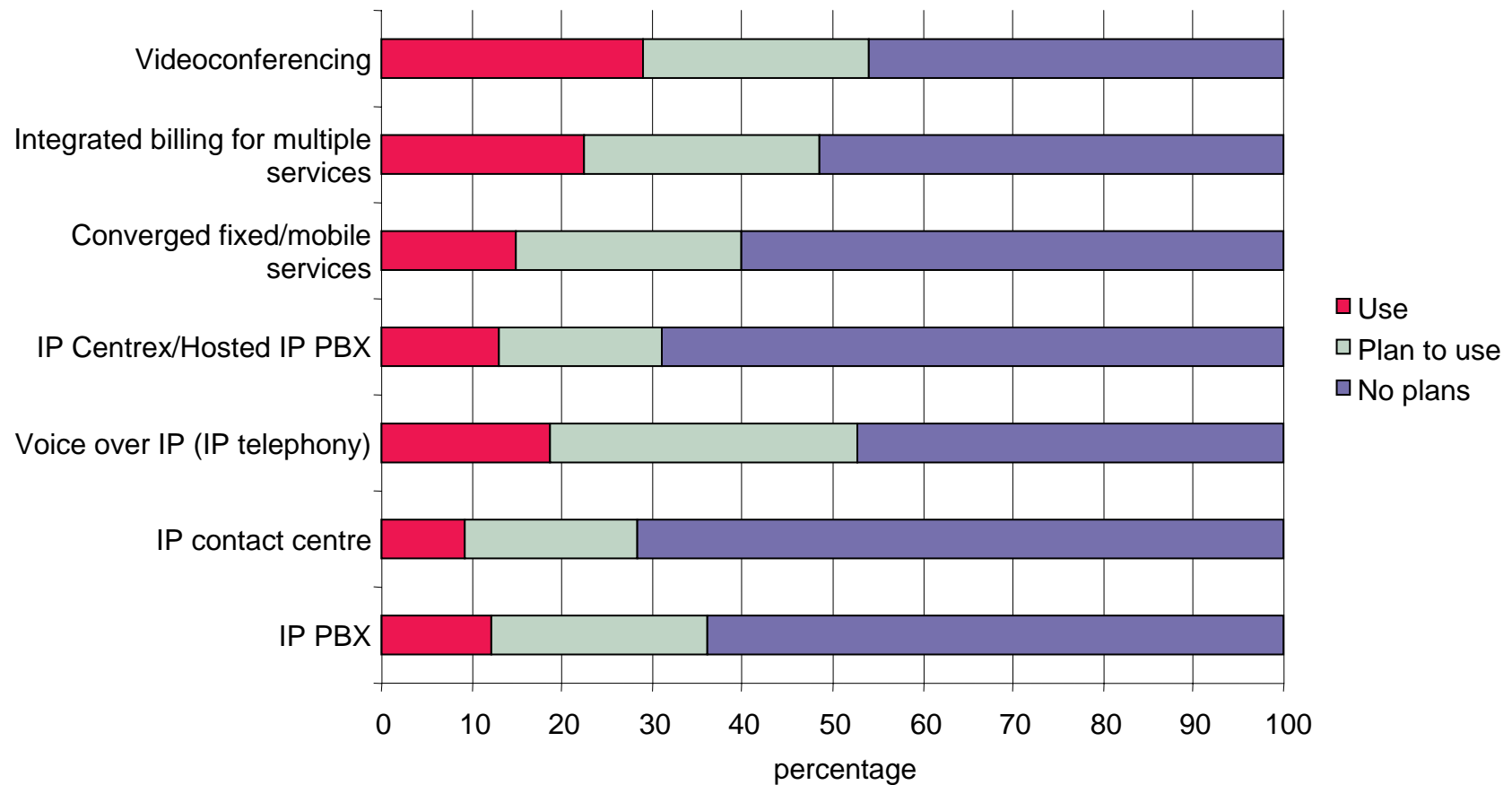


■ Low mobility, at a fixed workplace location (e.g. mostly at a desk in office)

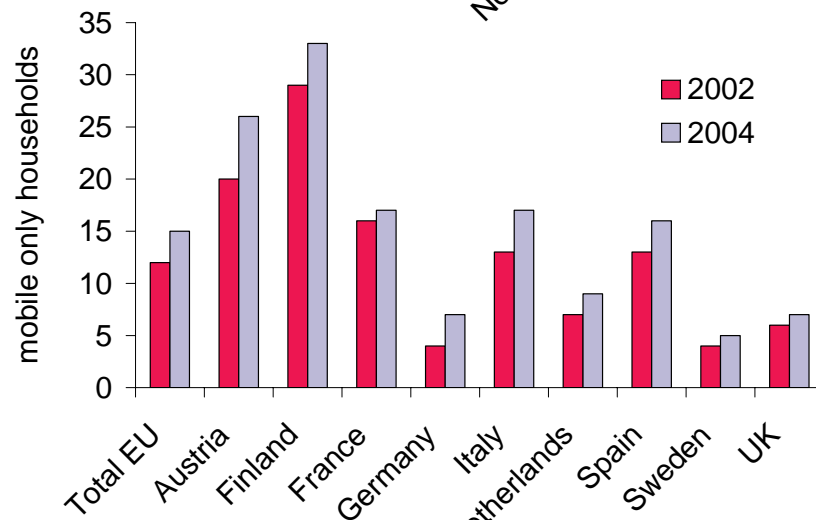
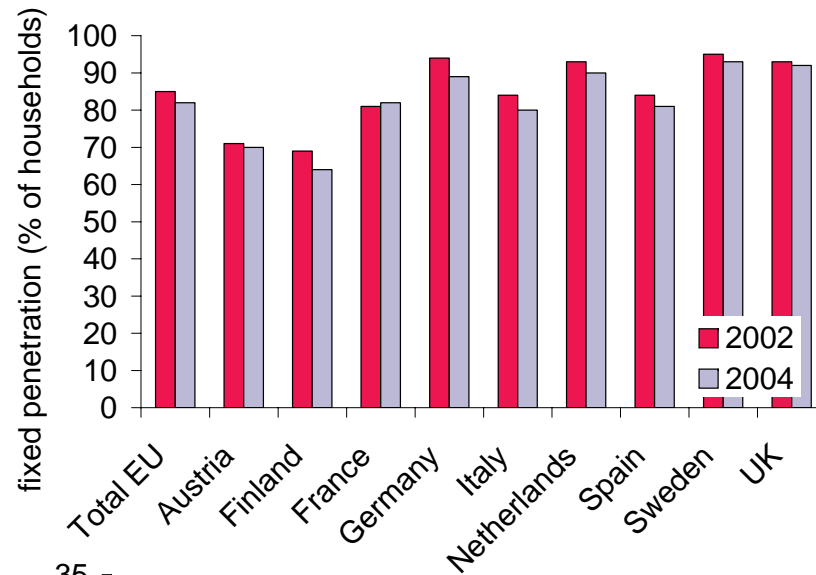


Plans for new/IP services - Italian SMEs

Q51. What are your company's plans with respect to the following technologies and services?



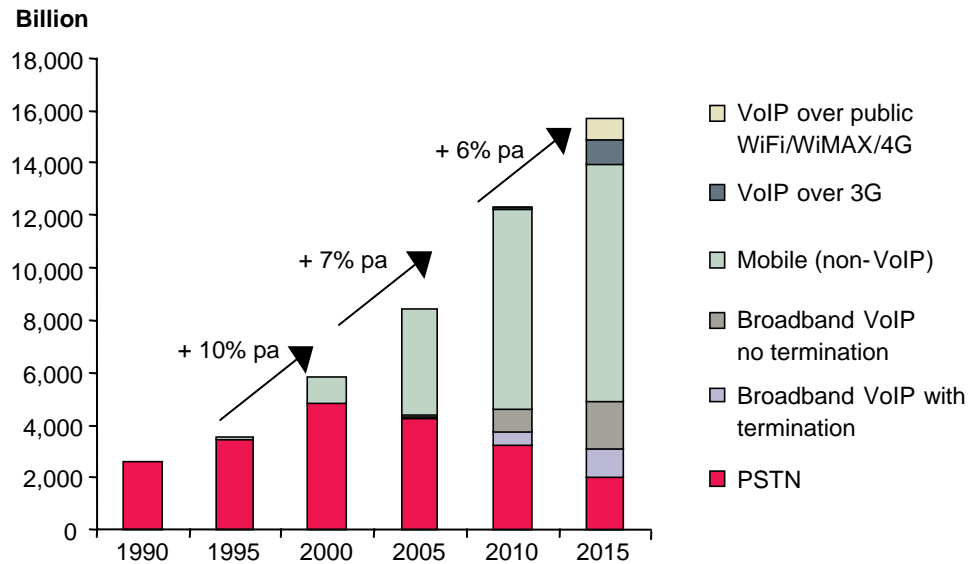
The story so far...



Access substitution (s)low so far

- Some 'cutting the cord'
- Greater 'straight to 'mobile' trend
- Mobile only users typically:
 - Young
 - Single
 - On low income/unemployed
- A lot could change with 'naked DSL'

...but call substitution is happening

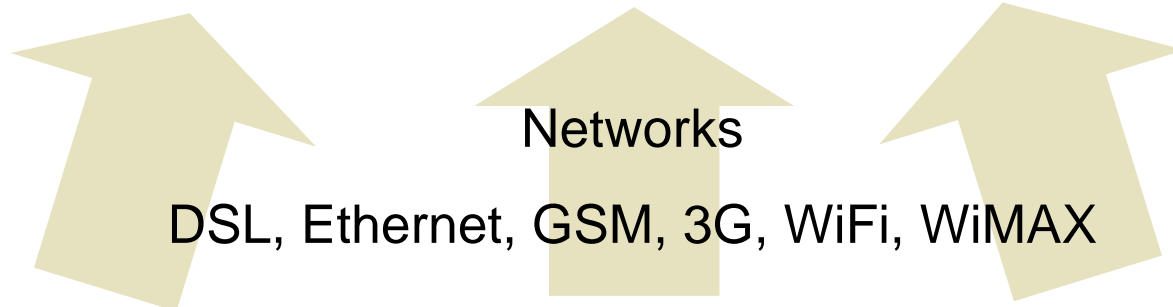
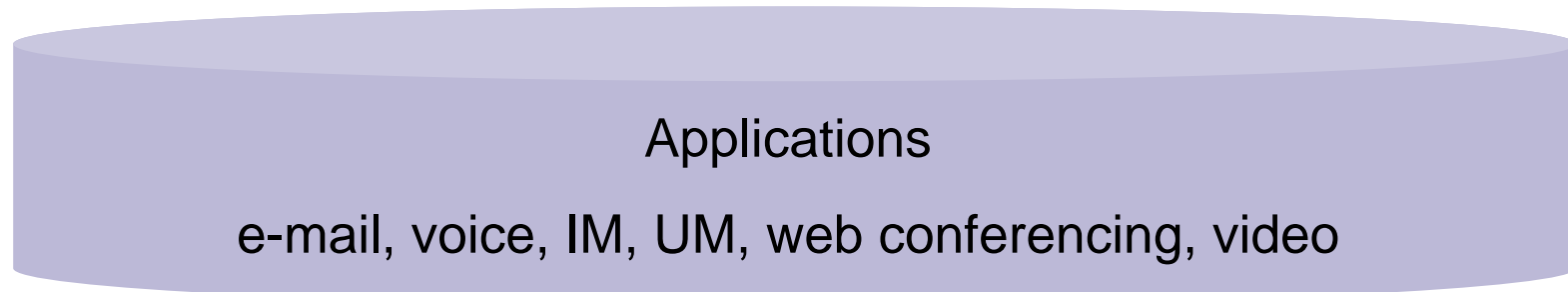


Call substitution: in progress

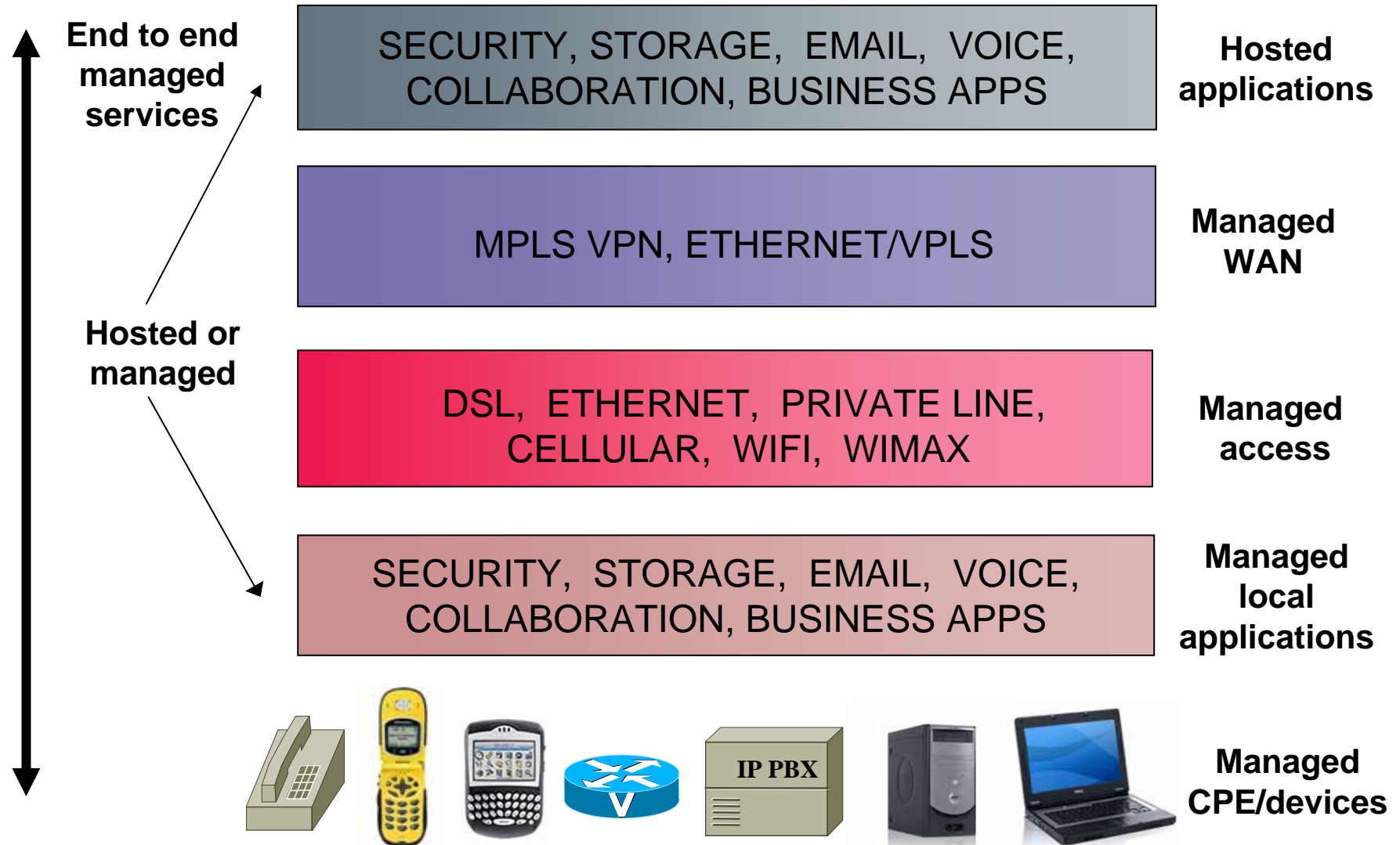
- Gradual decline in fixed minutes of use
- Steady to strong rise in mobile minutes of use
- Much informal substitution at home and work
 - 30% of mobile calls made at home (BT)
 - 88% of mobile calls made at 'fixed' locations (Nokia)
 - 48% of UK employees make mobile calls while at their desk



Unified communications - device and network independent access to applications



The future for managed services



Deployments and trials worldwide

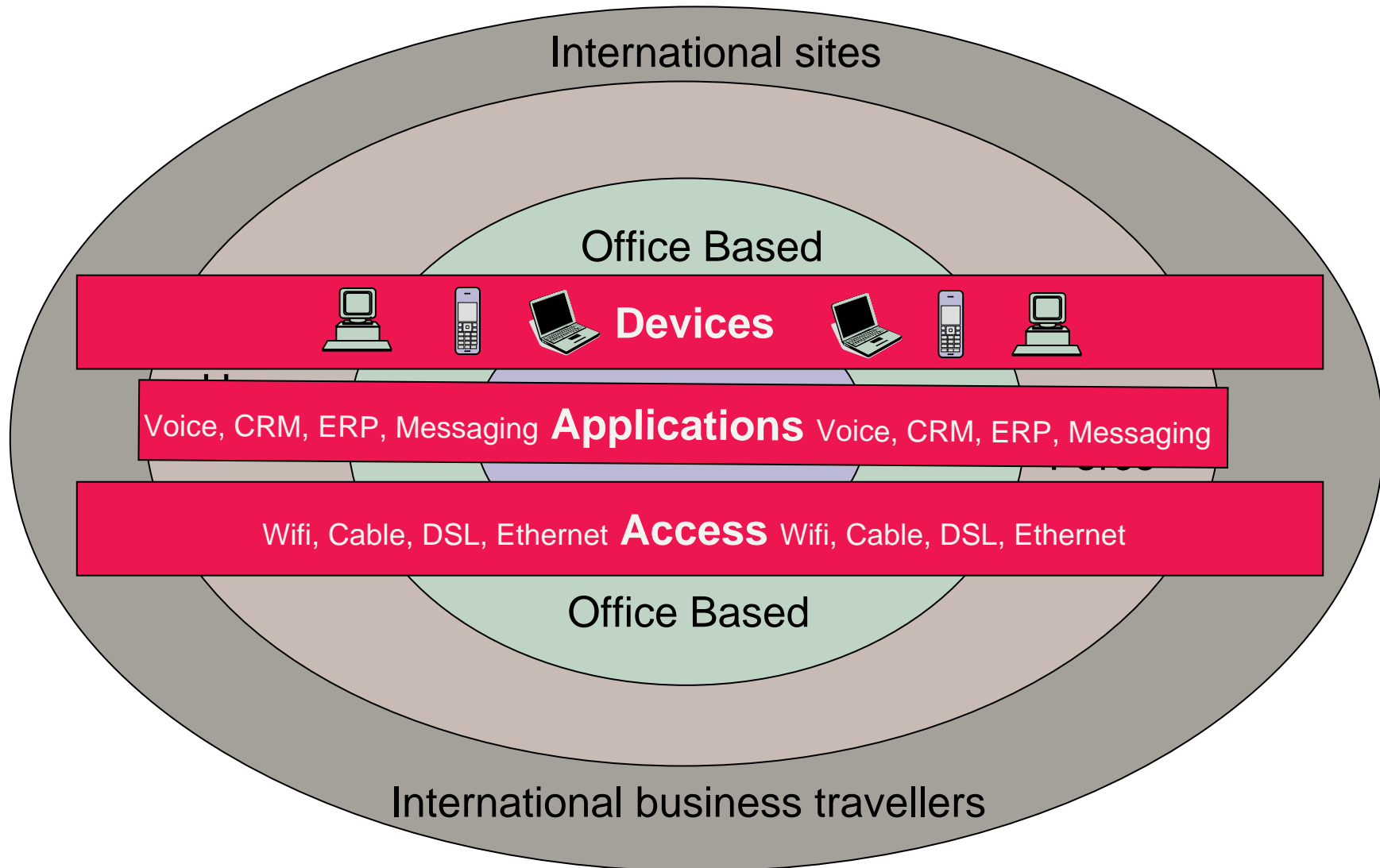
Launches

Trials

UMA



Profiling the internal customer



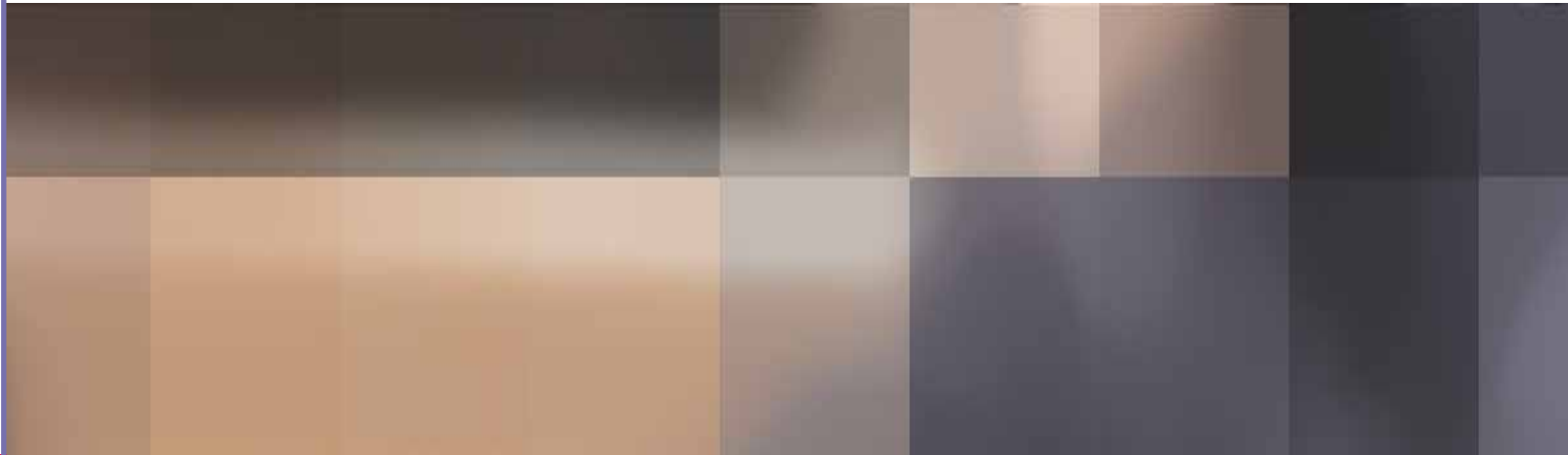
L'enigma FMC



Punto di vista del cliente



Punto di vista del fornitore



Conclusions & questions