

PRESS INFORMATION

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CMA ANNOUNCES KEY FINDINGS FROM ITS ANNUAL 'COMMUNICATIONS IN BUSINESS' REPORT

- Enterprise strategies are stable and mainly focused on maximising revenue but the challenges are evolving and the impact on communications & networks is high
- Convergence & workforce mobility are well established in the enterprise space and spending on IP and mobile keeps increasing
- Enterprise mobility is a key future strategy in which unified communications and fixed mobile convergence are central
- Reducing power consumption and making the best use of technology are the key sustainability and environmental focuses
- In the face of strong adoption of converged services significant challenges remain for suppliers in delivering customer satisfaction
- Customers want help to turn 'potential' into 'reality' especially in connection with unified communications, fixed mobile convergence and next generation networks

Results from the fifteenth annual survey of the CMA members were delivered to CMA's Annual Conference today at the New Connaught Rooms in London.

These CMA survey findings are included in CMA's 'Communications in Business Report' published in February.

A total of 353 senior communications & network professionals working for the UK's larger enterprises took part in the August 2007 survey.

Respondent Profile:

- **1 in 3** members work for organisations with £1billion+ turnover
- **1 in 3** members directly influence Board level strategy
- **1 in 4** of members' organisations spend over £10 million per annum on Communications & Networks
- CMA Members spend **£13 billion** in the communications market annually

Among the findings:

On convergence

- Senior communications professionals (55 per cent) inside the UK's private and public sector corporations said that their company had implemented a converged IP network. This has grown steadily from 47% in 2006 and 45% in 2005.

On unified communications

- Almost half (47%) of the CMA's survey respondents said that their own businesses had deployed at least one element of unified communications and that Cisco was the company they most associated with unified communications.

On next generation networks

- Although 71% said their company was unsure the impact next generation networks would have on their communications strategy, BT was the company they most associated with next generation networks.

On broadband

- More than half of the CMA's survey respondents (58 per cent) said that their own businesses and public service organisations want SDSL but can't get it where they need it.

On sustainability & the environment

- Over half (57%) of the CMA's survey respondents said that their own businesses were focused on minimising their impact on the environment and maximising their contribution to society.
- When it came to action 59% of respondents said that their own businesses were focused on reducing power consumption and 50% said they would make the best use of technology to reduce travel and energy requirements.

On quality

- Best performer in the fixed communications market for overall quality of customer experience to the customer was Verizon Business with a score of 3.00 on a scale of 1.00 to 4.00 where 1.00 was extremely dissatisfied and 4 was extremely satisfied. However this performance conceals an overall quality of service from the industry that still remains resolutely below the level at which customers could be described as satisfied.

- In the mobile market, T-Mobile was rated as the best performing network operator with a score of 3.44 on the 1.00-4.00 scale. Overall the mobile operators produced an improvement on their 2006 results with a rise in the overall level of satisfaction; however overall satisfaction levels have not yet regained the scores achieved in 2005.

On value for money

- Best performer in the fixed communications market for overall value for money was Verizon Business with score of 3.17 on the 1.00-4.00 scale; down from 3.4 in 2006. Overall levels for the fixed communications providers dropped on those achieved in 2006.
- In the mobile market, T-Mobile was rated as the best performing network operator for overall value for money with a score of 3.44 on the same scale; up on its result of 3.22 in 2006. Overall levels for the mobile communications providers dropped slightly on those achieved in 2006.

On voice over IP

- Many organisations (68%) said VoIP was a key element of their company's collaboration strategy.
- However, the reality of VoIP implementations appeared to take on a more pragmatic note with 52% saying their company's migration to VoIP had been more complex than expected.

On mobile

- A consistently robust number of business users (54% in 2004, 55% in 2005, 68% last year and 74% this year) see connected handheld devices as a 'key factor' in their communications and networks strategies.

On perceptions of the major brands

- Overall Vodafone was considered to be the most complete brand. Among a group of leading suppliers, Microsoft was seen to be the most 'innovative and exciting', HP Procurve was considered to have high quality products and Vodafone was seen to 'do what it says and treat customers well'.

- For the third year running BT was regarded as 'ethical and socially aware' while Nokia was again considered to be 'a cool company'.

On future spending

- The vast majority (91 per cent) of user businesses and corporations considered that their spending on IP services would either increase again or stay the same in the next 12 months. This was complemented by 86 per cent who said that their company's spending on Mobile would either increase or stay the same over the period.

The all encompassing reach of IP, enterprise mobility and unified communications, and the arrival of next generation networks, makes it critical that our members' companies get the service they need", said Glenn Powell, Chief Executive of CMA. "We challenge the industry to better the customer experiences and value for money that businesses are currently being offered and we call on the suppliers to redouble their efforts to deliver a quality service".

"Today the business agenda has moved on considerably," continued Powell, "enterprises are looking forward to minimising their impact on the environment and maximising their contribution to society. Communications & networks have a critical role to play as a key enabler and we look forward to helping our members and their own companies raise their awareness of and develop their commitment to environmental protection and societal well being".

For details on report availability and costs contact Rebecca Brierley or Andrew Stewart, CMA, on 01372 361234 or email research@thecma.com

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Note: CMA, Communications Management Association, is the UK's premier business communications user association. It represents individuals and enterprises focused on exploiting communications, networks and ICT for business advantage. In 2007 CMA joined the BCS Group to strengthen both organisations in the face of the ever increasing pace of convergence of IT and telecoms and to develop professionalism with the ICT community.

More information can be found at <http://www.thecma.com>