


Recombinant Communications: 2010 and Beyond

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Recombinant Communications (RC)

An aerial photograph of a complex, multi-level highway interchange with numerous ramps and overpasses, serving as a background for the text.

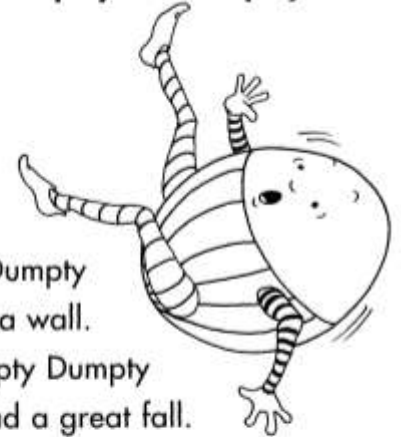
Opportunities at the intersection of highly capable phones, Web Services, cloud computing and a range of “open source” software and well-defined APIs

2009: A “Break Then Make” Year

- Recovering from economic chill
 - Doing more with less
 - Extending life of existing resources
 - Making the move to IP-based networks
 - Changing organization structures and cultures

- Reassembling the ecosystem
 - Focus on user experience
 - Add awareness of presence, status and preferences
 - Accommodate many networking options
 - Reaching mobile and remote workers and customers

Humpty Dumpty



Humpty Dumpty
Sat on a wall.

Humpty Dumpty
Had a great fall.

All the king's horses
And all the king's men
Cannot put Humpty
Dumpty together again.

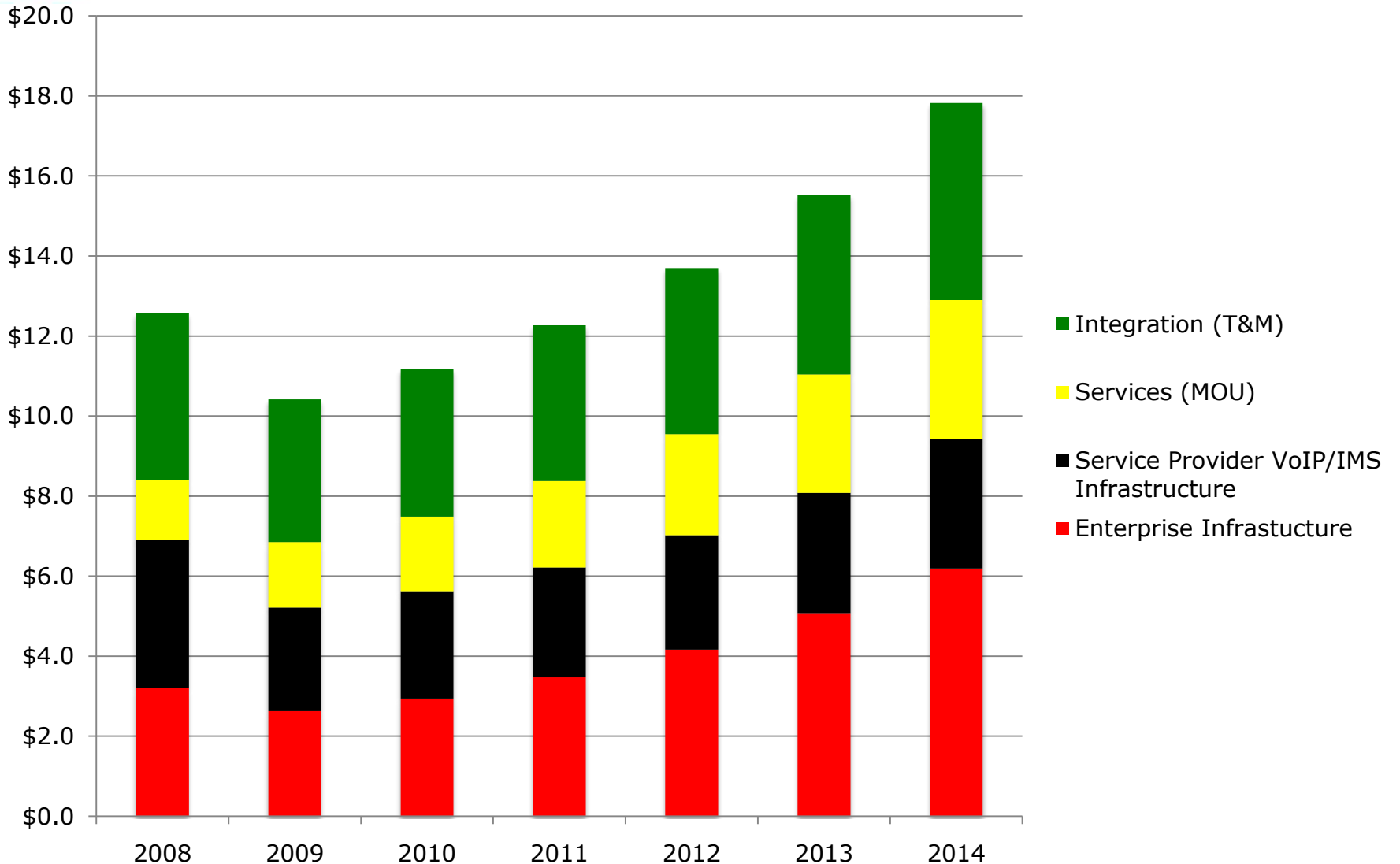
Not investing in unification so much as reassembly

Result: Recombinant Communications (RC)

- Seeds of a \$20+ Billion Opportunity
 - Solutions emphasize re-use/recombination
 - New generation of app developers
 - Accelerating life-cycles
- Splicing together infrastructure elements
 - APIs between private clouds & public clouds
 - Advent of “Porous Enterprises”
 - Crowdcenters and Cloudcenters supplant Contact Centers



The RC Opportunity



RC Legend: Definition of Terms

- Enterprise Infrastructure
 - Spending on telecom hw/sw
 - Middleware, desktop software and back office (database)
- Service Provider Spending
 - Capital spending (not enterprise)
 - Spending on servers etc to support ASP operations
- Service Providers Revenue (MOU)
 - Defining “smart pipe” strategy
 - New billing models (services grid)
- Integration and Application Development
 - Enterprise spending on apps, integration and maintenance
 - Mostly “cloud-based”

Blind men and the elephant in the room

- Arguing terminology
 - Unified Communications?
 - Communications-Enabled Business Processes?
 - Collaboration?
- When the issue is “problem solving”
 - From search → discovery → consultation → selection → purchase → support
 - Sensitive to context and state
 - Increasingly mobile
 - Responsive to end-user needs



These are the roots of Robust Recombinant Communications

- **Dan Miller**

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