

# *Unified Communications Market Update & Forecast*



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# What We'll Cover

- **Definitions & Components**
- **Value proposition and End User Survey Results**
- **Who are the players**
- **UC market numbers and projections**

# Some Level Setting

**Unified Communications is:**

- A. Unified Messaging on steroids**
- B. VoIP or a nice new IP PBX**
- C. A single product from a single vendor**
- D. A great name for a new rock band**
- E. None of the above**

**Correct Answer: E – None of the above**

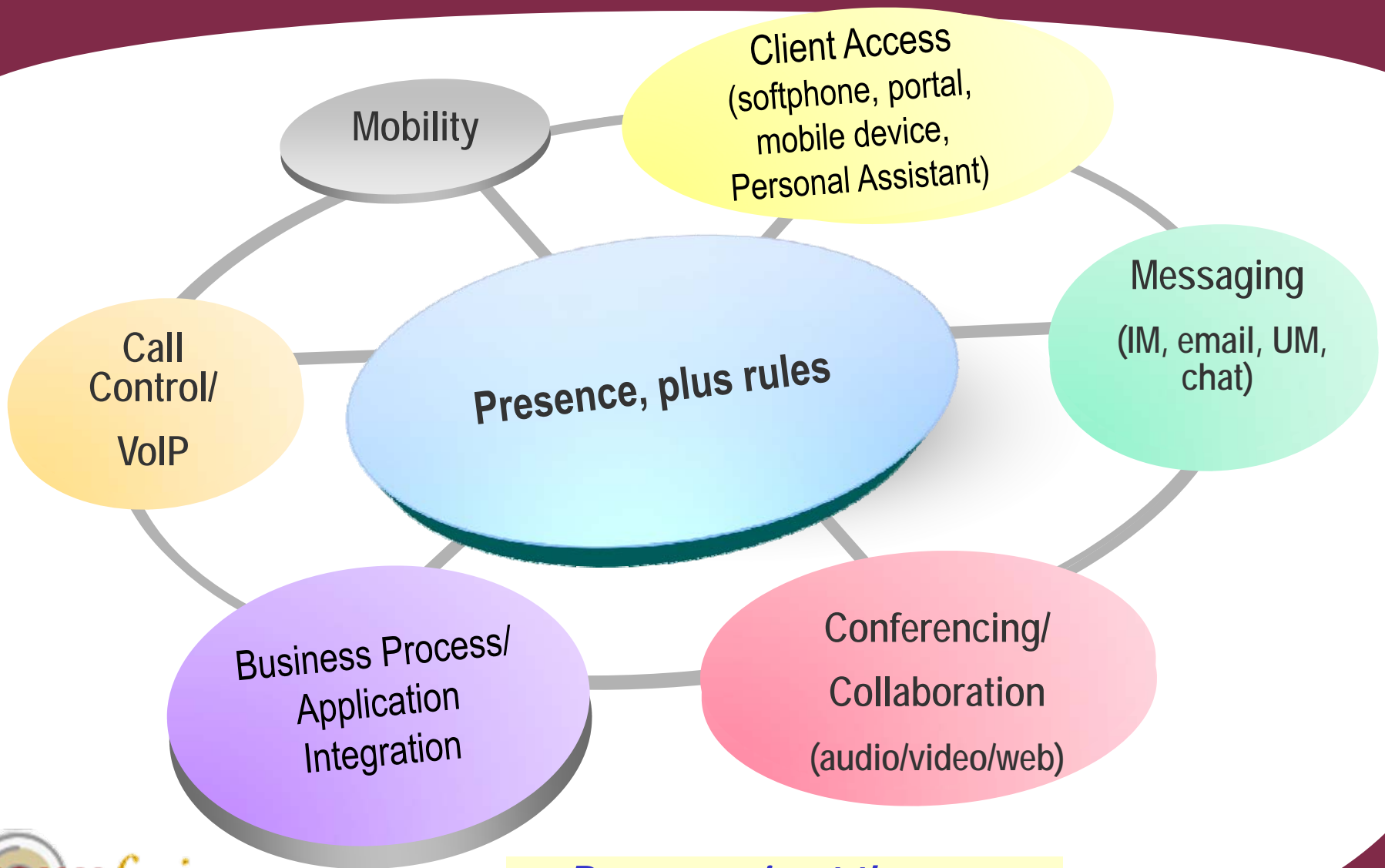
## Definition of UC

- ***Communications Integrated to Optimize Business Processes*** ([ucstrategies.com](http://ucstrategies.com))
- **Something that creates value (such as the way we work) has to change in the business**

***Helps people do their jobs better***

***Improves user and group productivity, drives dynamic collaboration, and simplifies business processes***

# UC Elements



*Presence is at the core*

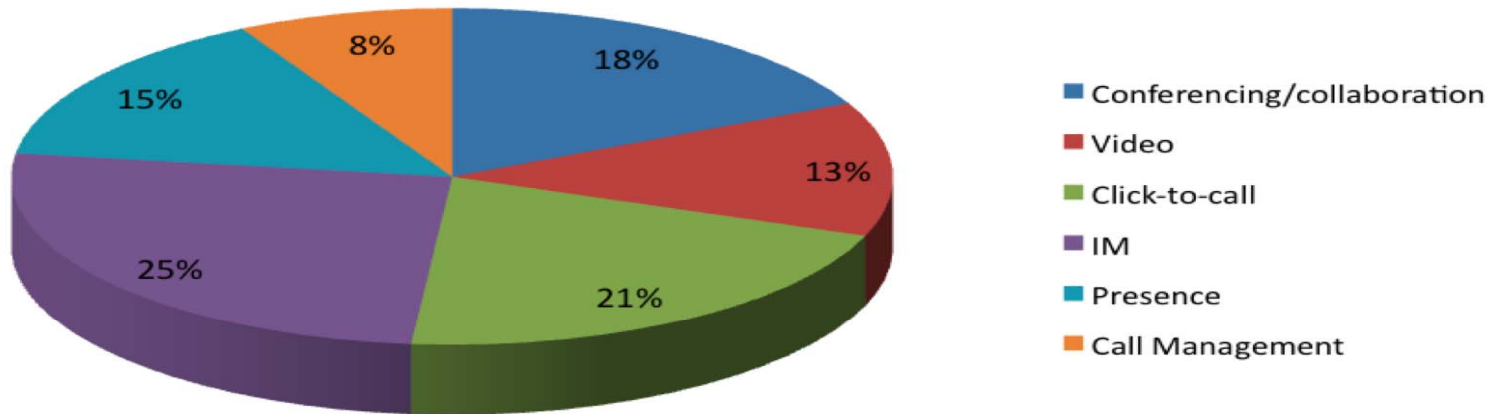
# UC Value Proposition

- **UC – User Productivity (UC-U)**
- **UC – Business Process (UC-B)**
- **Investments in UC capabilities are typically justified in personal, work group or enterprise-wide productivity improvements**



# UC End User Survey Responses

## Which UC Functions Provide the Most Use?



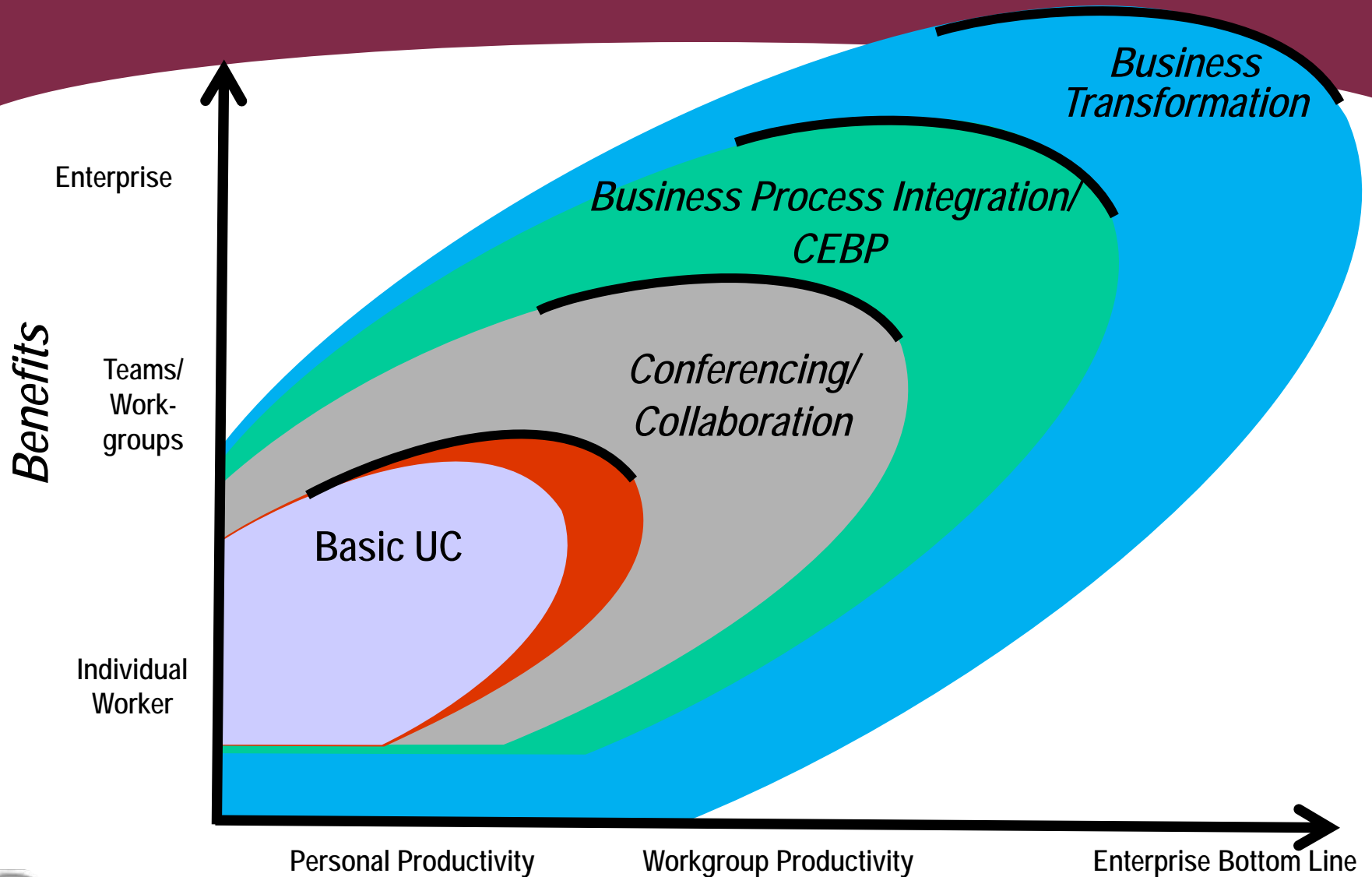
Source: UCStrategies.com End User Productivity Study

June 2008

# UC End User Productivity Study - Findings

- **Voice is still critical.**
  - **IM is useful for a quick comment or question, but not for lengthy discussions or conversations.**
- **Most valuable UC functions in terms of productivity are presence, IM, and conferencing/collaboration**
- **Real value is having access to the people & resources needed to do one's job more efficiently – not saving a few minutes.**
- **UC changes the way in which people work - more responsive, save time, find the right resources.**
- **More end-user training is needed.**
- **If you took UC away from end users they would “pitch a fit”.**

# UC Value



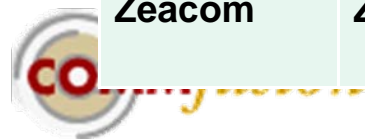
# A Look at the UC Players

# Who Are the Players?

- **Switch vendors**
  - All are becoming software vendors – moving to SOA, web services
  - May have their own IM/presence server or leverage 3<sup>rd</sup> party
  - Some offering hosted services – Nortel, Microsoft, Siemens
- **Desktop and IM vendors**
  - Microsoft – OCS, MOC, Exchange Server UM
  - IBM –UC<sup>2</sup>, Sametime, Sametime Unified Telephony
- **Application vendors**
  - Still not seeing much yet from Oracle, SAP, Salesforce, etc.
  - Partnering with switch vendors for UC
- **Mobile vendors: RIM, Nokia, Motorola**
- **Other: public IM, UM, conferencing**
  - Google, Yahoo, Skype. Second Life?
- **Service Providers/Hosted Providers**
  - Telstra, Verizon, Orange

# Switch Vendor Overview

Vendor	Product	Features
Alcatel-Lucent	OmniTouch UC Suite Genesys GETS	My Instant Communicator
Avaya	Intelligent Presence Server One-X versions	4 UC bundles. Also: CEBP Services: SIP, Speech, Mobility
Cisco	CUPS/CUPC WebEx Connect	Intelligence in network WebEx - SaaS
Mitel	Mitel Application Suite/Your Assistant 3300 Live Business Gateway	"Presence Everywhere" – contact center, UM, etc.
NEC	UC for Business, UC for Enterprise Business ConneCT – SMB	Unified infrastructure, UC applications, Unified Business
Nortel	Converged Office MCS 5100	ICA w/MSFT; Comm-Enabled Appls (CEA), Agile
Siemens	OpenScape UC Application OpenScape UC Server	Speech-enabled voice portal, multiple PBX integrations; OpenSOA
Interactive Intelligence	<i>Customer Interaction Center (CIC)</i> <i>Vonexus Enterprise Interaction Center</i>	Standards-based "All-in-One" Platform
Zeacom	Zeacom Communication Center	UC + UM + CC + Mobility SMB focus

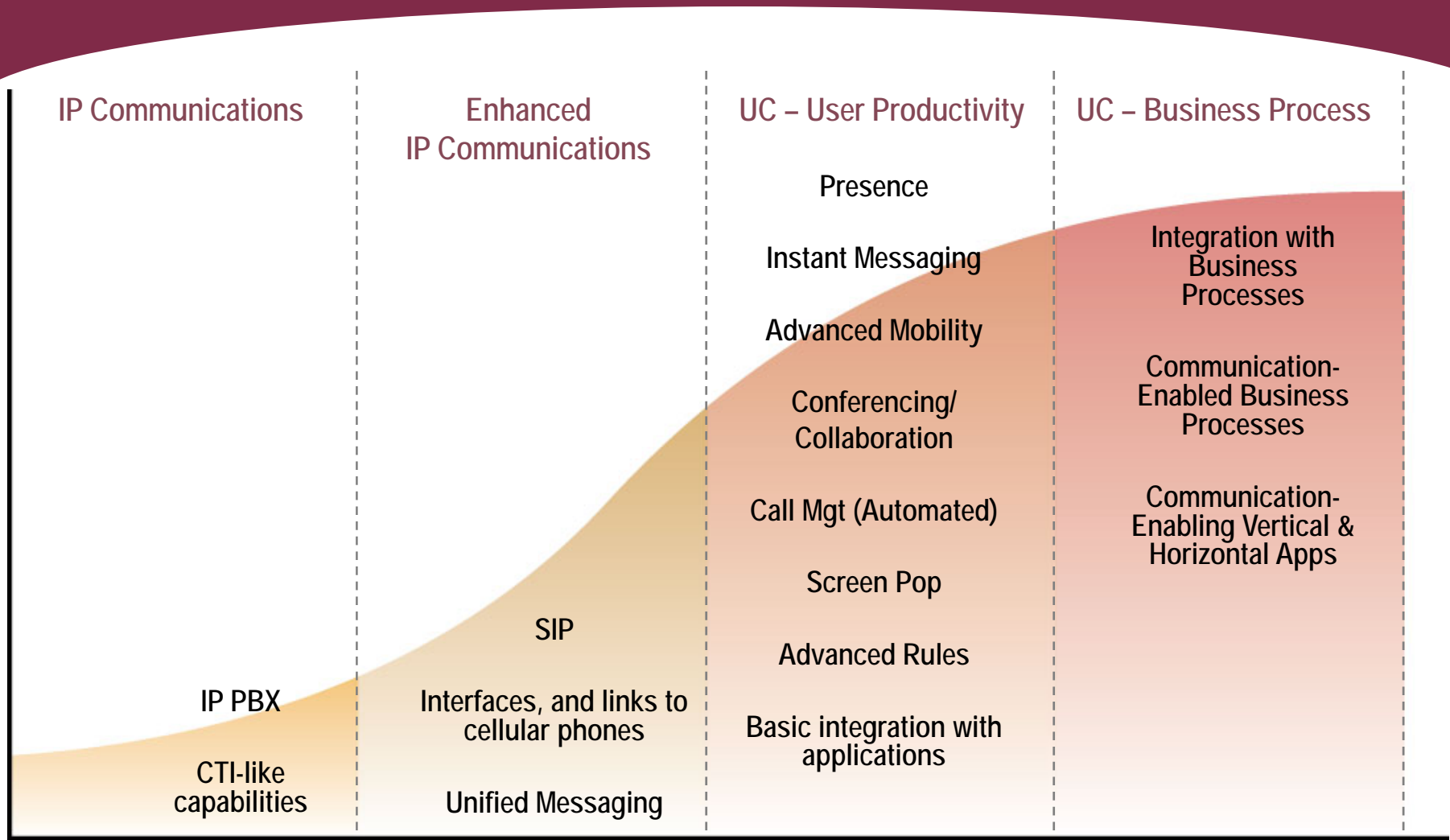


# Mobility is Happening

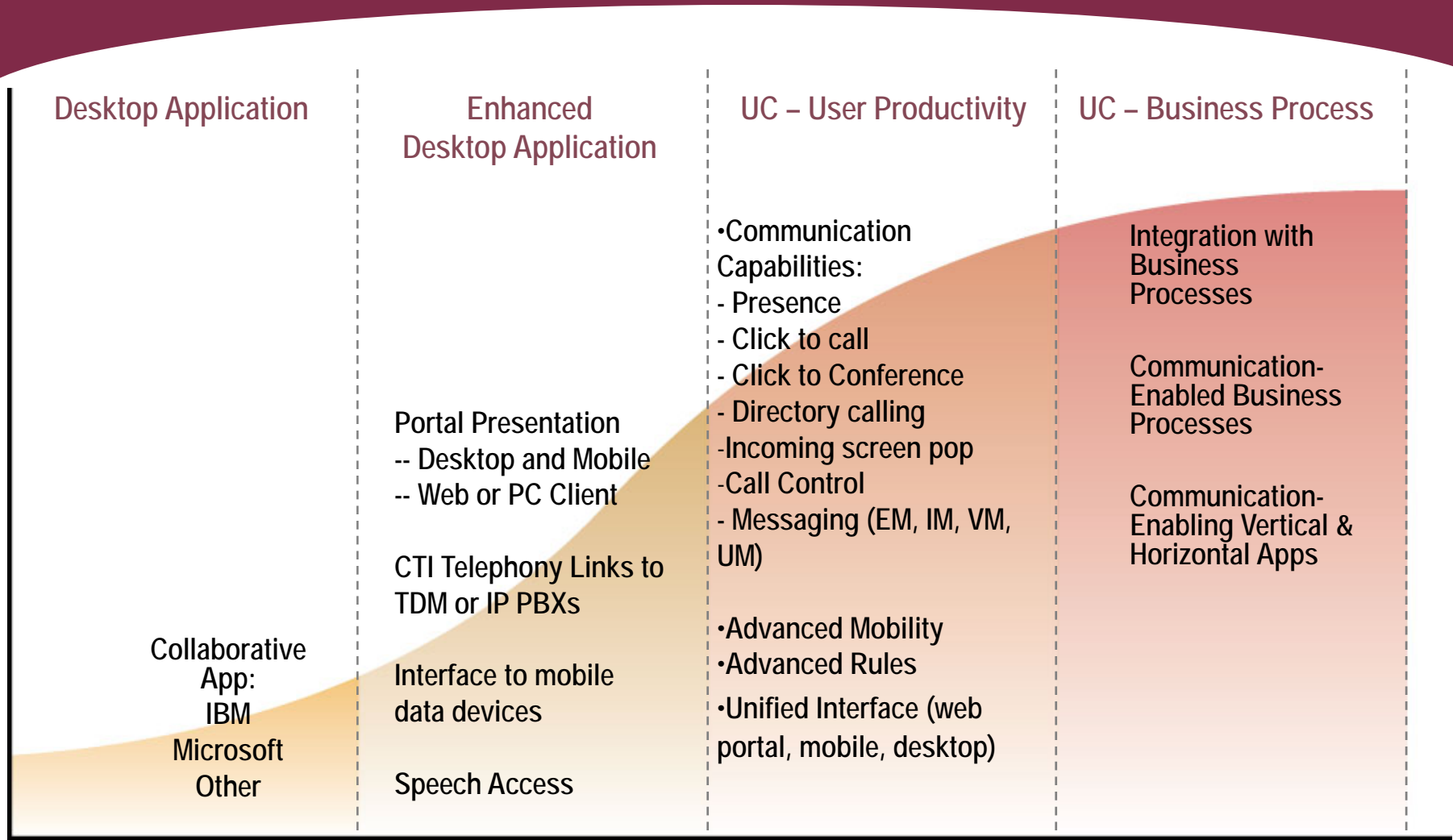
- **Mobility is where the big money is going in Enterprise Comms and UC**
- **Bring enterprise capabilities to the user's mobile device**
  - **Microsoft and IBM have mobile offerings**
    - Communicator Mobile
    - Sametime Mobile and WebSphere Everywhere
  - **IP PBX vendors targeting cell phone as business extension**
    - Offering “follow me” and cell phone clients
  - **Role of Fixed Mobile Convergence and Mobile UC**

# UC Adoption, Changes, Future

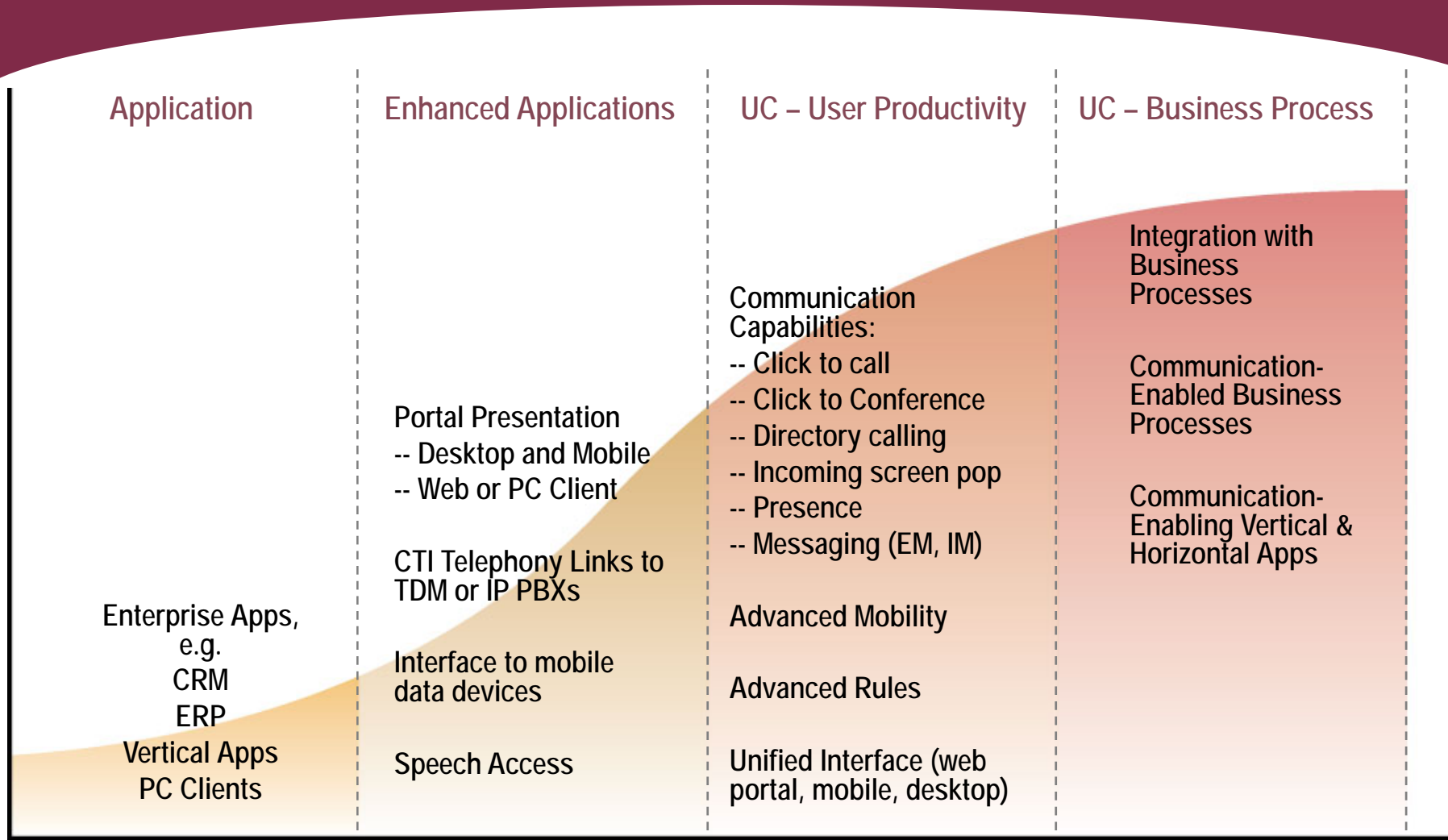
# UC Continuum – Telephony Model



# UC Continuum – Desktop Application Model



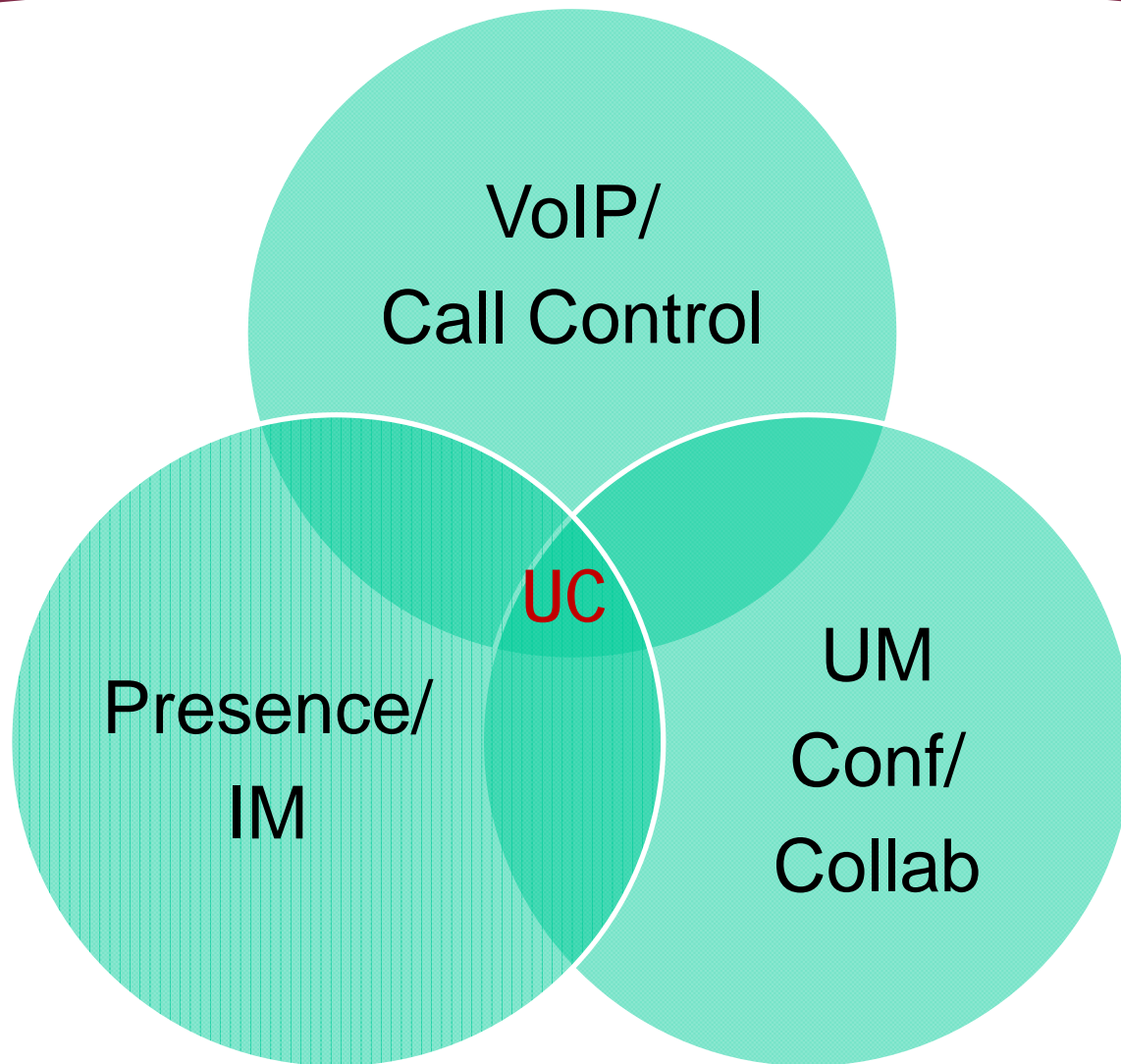
# UC Continuum – Enterprise Application Model



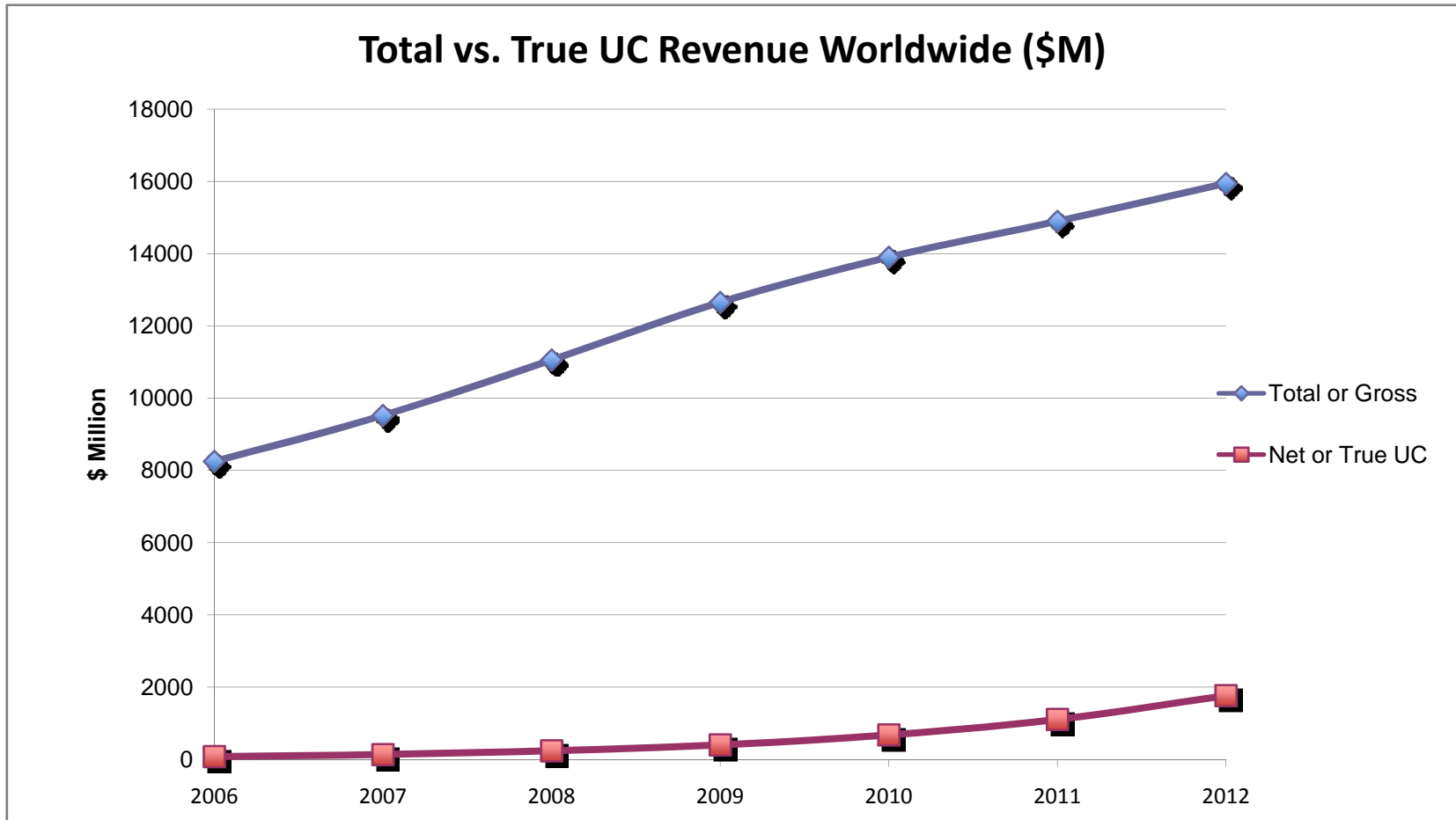
# What's Changed Since Last Year?

- **Hype and jumping on UC bandwagon**
- **More interest in UC (ie, VoiceCon roadshow)**
- **Some real world examples (not many, but some)**
- **Acquisitions**
  - Cisco/PostPath/Jabber; Nortel/Pingtel/Diamondware;
  - Gores Group/Siemens
- **More focus on CEBP**
- **Some new product releases**
  - IBM Sametime Unified Telephony
  - Cisco moves toward SaaS (WebEx Connect)
- **More channel and SI's getting into the game**
  - UC Summit

# Measuring the Market



# Total vs. "True" UC Market Forecast

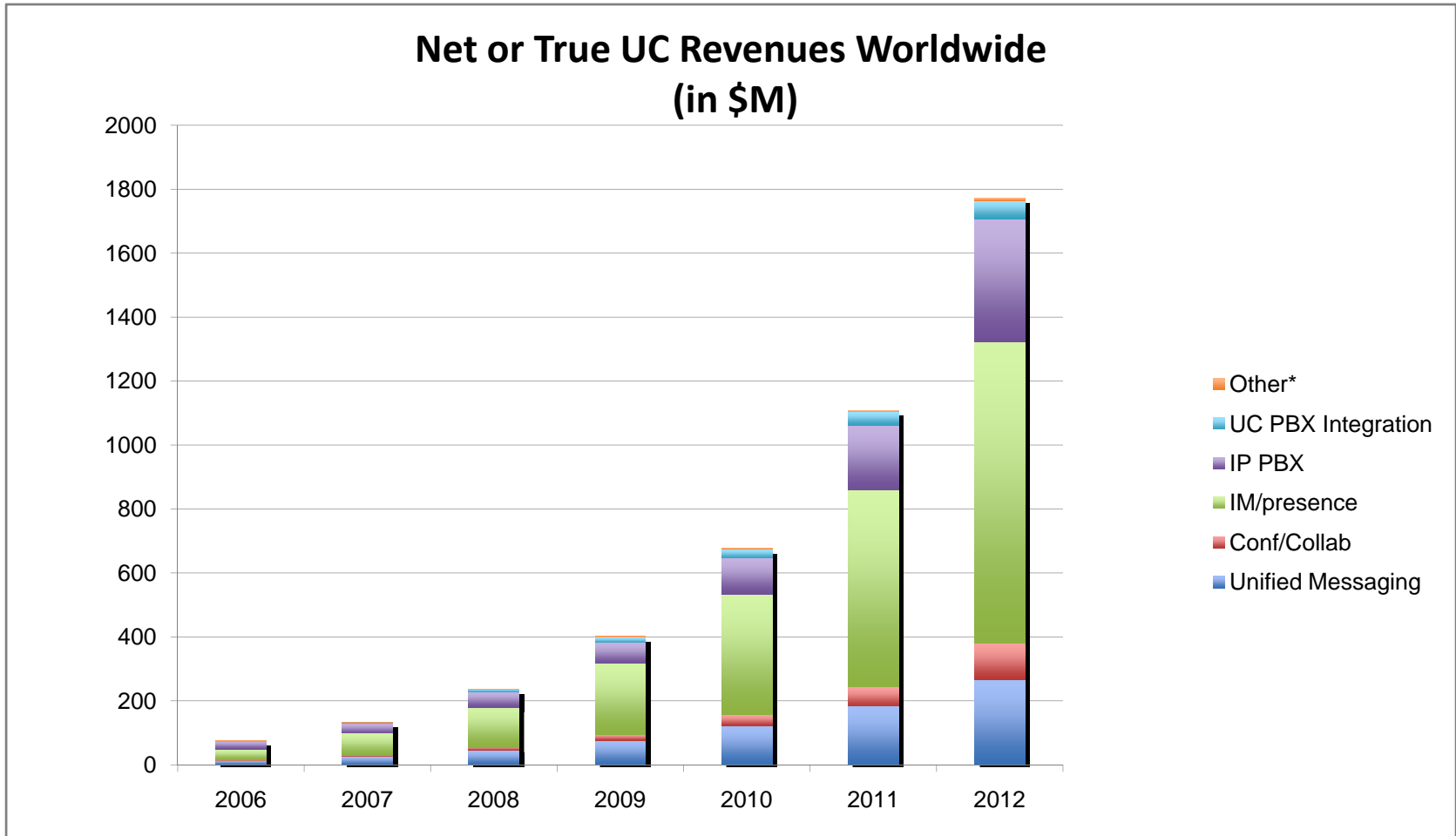


Source: COMMfusion LLC

Unified Communications Market 2007-2012



# Net or True UC Revenue Forecast



Source: COMMFusion LLC  
Unified Communications Market 2007-2012



# Forecast?

- **Voice will be integrated into enterprise business processes and applications**
- **Unified Communications can and will “Optimize Business Processes”**
- **UC will become a key competitive advantage – those who wait to figure out their UC strategies will be at a competitive loss**
- **Communication vendors will not only be the traditional switch vendors – new entrants will dramatically change the game**

# Final Thoughts

- UC is a vision or philosophy
  - that leads to solutions –
    - it is not a product!