



Unified Communications Market Trends, 2009-2012

Report Focus

This report focuses on demand for unified communications and related technologies in the North American market. The research conducted for this report, as well as the report itself, are focused on the needs of vendors, investors and others who are interested in participating in the unified communications market in some fashion, whether as providers of the underlying technology, security systems that are focused on protecting a unified communications infrastructure, archiving systems or other systems. The information presented in this report is designed to help these organizations to make informed decisions about the future opportunities available in this market.

Key Findings and Trends Discussed in this Report

- **Most Organizations Have Not Yet Deployed Unified Communications...**
Respondents to the survey conducted specifically for this report indicated that most organizations have not yet deployed a unified communications system. However, when reviewing the data by organization size, we found that smaller organizations (with up to 1,500 employees) had significantly lower penetration of unified communications.
- **...But Most Organizations Want to Unify Their Capabilities**
Our research found that a significant proportion of respondents are keen to have integrated email and telephony management capabilities, while about one-third really care either way, and about one in five want the management of the two systems to remain separate.
- **UC User Base Will Grow Quickly**
Conventional communication environments -- where end users have a separate email client, instant messaging client, desktop telephone, fax machine and browser-based web conferencing capabilities -- predominate today. Respondents indicate that the vast majority of their users work with such a conventional communication environment, and forecast that this will drop significant in 2010, but much more in 2011. At the same time, the proportion of users employing unified communications will increase significantly through 2011.
- **The Politics of UC**
A minority of organizations believes that there would be a significant amount of difficult politics between the email management group and the telephony group. Not surprisingly, larger organizations are much more likely to anticipate significant political difficulty in migrating to unified communications.



- **Will Security Be Worse in a Unified Environment?**
Only 14% of respondents believe that security issues will be better in a unified communications environment. Of the remainder that do not believe it will be better, 10% believe security issues will be much worse, and 76% believe it will be somewhat worse or about the same.

- **Various Drivers for Moving to UC**
The four most mentioned drivers for moving to a new unified communications system are telephony and voice services, Web conferencing services, enterprise instant messaging, and video conferencing services.

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About Osterman Research, Inc.

Osterman Research, Inc. provides market research, cost modeling, benchmarking and related services to vendors of messaging and collaboration products and services.

We help vendors, IT departments and other organizations make better decisions through the acquisition and application of relevant, accurate and timely data on markets, market trends, products and technologies. We also help vendors of technology-oriented products and services to understand the needs of their current and prospective customers.

Part of what makes us unique is our market research panel: a large and growing group of IT professionals and end-users around the world with whom we conduct our research surveys. This allows us to conduct surveys quickly and accurately.

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