



Unified Messaging Market Trends, 2008-2011

Report Focus

This report focuses on demand for unified messaging 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 messaging market in some fashion, whether as providers of the underlying technology, security systems that are focused on protecting a unified messaging 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.

The research was conducted, and this report was written, from an objective viewpoint, not with any predisposition for or against unified messaging. Because multiple vendors were involved in funding this report, no particular vendor's viewpoint had an influence on shaping the research focus, although early subscribers to the report were given the opportunity to provide input to the questions fielded to the survey audience.

Key Findings and Trends Discussed in this Report

- **Unified Messaging Adoption to Increase**
The overwhelming majority of organizations have yet to deploy unified messaging, but that's likely to change in the next year when adoption rates are expected to jump and increase rapidly by 2010.
- **Unified Messaging Leads to Productivity Gains**
More than three-quarters of organizations indicate that users would see some productivity benefits from unified messaging. The greatest percentage thought that IT staff would see some productivity benefits, followed by senior non-IT managers and then by typical end users.
- **IT and Telecom Departments Merge**
With the convergence of data and voice there has been a similar consolidation in the organization. Nearly two-thirds of the organizations surveyed for this report indicated that IT would manage a unified messaging deployment. One in eight organizations indicated that the email or telecom group would be responsible.
- **Consolidation Has Already Started**
A significant plurality of organizations looking at unified messaging has consolidated their telecom and IT departments to reduce their operating expenditures. Typically, telecom becomes a department within IT. This suggests that unified messaging vendors coming from a telecom background must understand whether their targeted prospect comes from the telecom or the IT side. Only then they will they be able to tailor their messaging appropriately.



- **Decreased Messaging Costs**
Most respondents believe that unified messaging will decrease messaging costs, while more than one-quarter of respondents indicate that it will increase these costs.

- **Linux and Windows Server as Messaging Platforms**
While Microsoft continues to dominate the vast majority of messaging platforms, that is starting to change. Linux has gained significant momentum since last year.

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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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