

THE RADICATI GROUP, INC.  
A TECHNOLOGY MARKET RESEARCH FIRM

## ***On-Premises Corporate Unified Communications Market, 2008-2012***

<http://www.radicati.com>

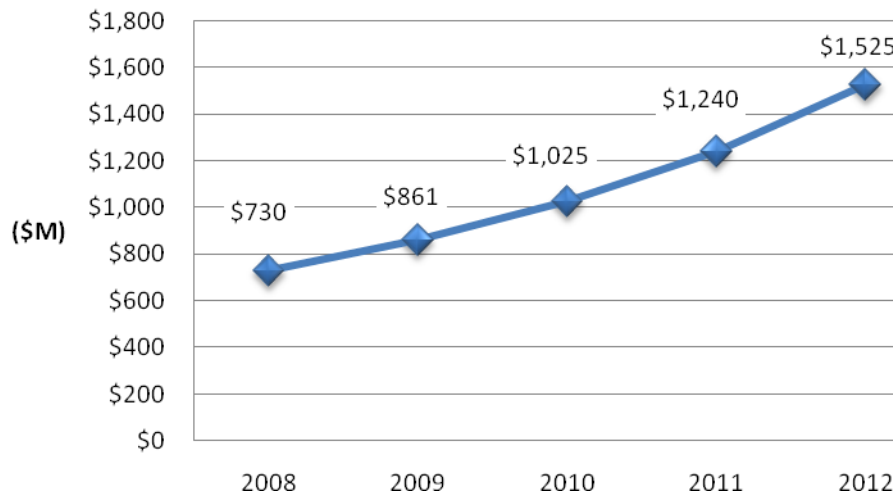
Cost – US \$3,000 by company P.O. or \$2,500 by credit card

A comprehensive analysis of the *Corporate Unified Communications* market, including:

- ⊗ Market Trends, Market Drivers, and Market Barriers, Installed Base and Revenue Market Share by Vendor, Four-Year Forecasts, and Installed Base by Region and Business Size.
- ⊗ Analysis and key figures from the Radicati Group's *Corporate IT Survey – Messaging and Collaboration 2008-2009*.
- ⊗ In-depth analysis of leading market players: *Active Voice, Alcatel-Lucent, Avaya, AVST, Cisco, CommuniGate, Genesys, IBM, Interactive Intelligence, Microsoft, Mitel, Nortel, Objectworld, ShoreTel, Siemens*, and others.

This report is intended for Organizations, Vendors, and Investors who need to make informed decisions about the *On-Premises Corporate Unified Communications* market.

**On-Premises Corporate UC Revenue Growth,  
2008-2012**



Headquarters: 595 Lytton Avenue  
Palo Alto, CA 94301  
phone: (650) 322-8059  
fax: (650) 322-8061

Europe: 29E Fitzjohns Avenue  
London NW3 5JY, UK  
phone: +44 (0) 20 7794-4298  
fax: +44 (0) 20 7431-9375

## About The Radicati Group, Inc.

The Radicati Group covers all aspects of email security, email archiving, regulatory compliance, wireless technologies, web services, identity management, instant messaging, unified communications, VoIP, and more. The company provides both quantitative and qualitative information, including detailed market size, installed base and forecast information on a worldwide basis, as well as detailed country breakouts.

The Radicati Group works with corporate organizations to assist them in selecting the right products and technologies to support their business needs, as well as with vendors to define the best strategic direction for their products. We also work with investment firms on a worldwide basis to help them identify and assess new investment opportunities.

The Radicati Group, Inc. is headquartered in Palo Alto, CA, with a Hong Kong Office, European office in London, UK and an Australian office in Melbourne.

**ORDER FORM** *To order, please fill out the following form and return it to The Radicati Group at the address or fax shown on the front.*

On-Premises Corporate UC Market, 2008-2012	<i>Name</i>	
Cost (circle one): P.O \$3,000      Credit Card \$2,500	<i>Company</i>	
International Orders: Payment must be in US dollars, drawn on a US bank and must include bank routing numbers.	<i>Address</i>	
<b>Payment Method:</b> <input type="checkbox"/> Payment Enclosed	<i>Please indicate street address - NO P.O. BOX please!</i>	
<input type="checkbox"/> Please send invoice, P.O.#:	<i>City, State, Zip</i>	
<input type="checkbox"/> VISA <input type="checkbox"/> MasterCard <input type="checkbox"/> Amex	<i>Country</i>	
<i>Card Number:</i> _____ <i>Exp. Date:</i> _____	<i>Phone</i>	<i>Fax</i>
<i>Signature</i> _____	<i>Email</i>	

**PLEASE SEE THE FOLLOWING PAGES FOR THE REPORT'S FULL TABLE OF CONTENTS.**

## TABLE OF CONTENTS

<b>SCOPE.....</b>	<b>9</b>
<b>METHODOLOGY .....</b>	<b>11</b>
<b>EXECUTIVE SUMMARY .....</b>	<b>13</b>
<b>CHAPTER 1 – MARKET ANALYSIS .....</b>	<b>15</b>
1.1 MARKET DEFINITION .....	17
1.2 MARKET SEGMENTATION.....	19
1.3 MARKET ANALYSIS.....	21
1.3.1 Key Market Drivers For UC.....	25
1.3.2 UC Market Barriers.....	27
1.4 UNIFIED COMMUNICATIONS CORPORATE SURVEY.....	29
1.4.1 Conclusions - Unified Communications Survey .....	33
1.5 ON-PREMISES CORPORATE UC MARKET SHARE .....	35
1.6 ON-PREMISES CORPORATE UC FORECAST .....	39
1.7 PENETRATION OF UC VS. EMAIL.....	41
1.8 ON-PREMISES CORPORATE UC REVENUE BY REGION.....	43
1.7.1 Revenue Market Share by Vendor in North America.....	44
1.7.2 Revenue Market Share by Vendor in Europe.....	45
1.7.3 Revenue Market Share by Vendor in Asia-Pacific.....	47
1.7.4 Revenue Market Share by Vendor in Rest of World.....	48
1.9 ON-PREMISES CORPORATE UC IB BY BUSINESS SIZE .....	49
<b>CHAPTER 2 – UNIFIED COMMUNICATIONS VENDORS .....</b>	<b>51</b>
ACTIVE VOICE, LLC .....	53
ALCATEL-LUCENT .....	57
AVAYA, INC.....	61
APPLIED VOICE & SPEECH TECHNOLOGIES (AVST) .....	65
CISCO SYSTEMS INC.....	69
COMMUNIGATE SYSTEMS.....	75
GENESYS TELECOMMUNICATIONS LABORATORIES.....	79
IBM.....	83
INTERACTIVE INTELLIGENCE INC.....	87
MICROSOFT CORPORATION.....	91
MITEL NETWORKS CORPORATION .....	97
NORTEL NETWORKS CORPORATION .....	101
OBJECTWORLD COMMUNICATIONS .....	105
SHORETEL.....	109
SIEMENS AG.....	113

## LIST OF FIGURES

FIGURE 1: WORLDWIDE ON-PREMISES CORPORATE UC MARKET REVENUE, 2008 - 2012.....	14
FIGURE 2: TRADITIONAL “VOICE” UC PYRAMID .....	21
FIGURE 3 : NEW "IT" PYRAMID .....	22
FIGURE 4: UNIFIED COMMUNICATIONS PLAN.....	30
FIGURE 5: WHAT UC SOLUTION IS YOUR ORGANIZATION DEPLOYING .....	30
FIGURE 6: WHAT ASPECT OF UC IS MOST IMPORTANT TO YOUR ORGANIZATION .....	31
FIGURE 7: HOW ARE YOU GOING ABOUT SELECTING A SOLUTION.....	32
FIGURE 8: WHAT UC VENDOR ARE YOU PLANNING TO GO WITH?.....	32
FIGURE 9: ON-PREMISES CORPORATE UC VENDOR - IB MARKET SHARE, 2008.....	37
FIGURE 10: ON-PREMISES CORPORATE UV VENDOR - REVENUE MARKET SHARE, 2008 .....	38
FIGURE 11: CORPORATE INSOURCED MAILBOXES & ON-PREMISES UC DEPLOYMENTS, 2008-2012 .....	42
FIGURE 12: ON-PREMISES CORPORATE UC - REVENUE BY REGION, 2008-2012 .....	44
FIGURE 13: ON-PREMISES CORPORATE UC – NORTH AMERICA REVENUE MARKET SHARE, 2008 .....	45
FIGURE 14: ON-PREMISES CORPORATE UC – EUROPE REVENUE MARKET SHARE, 2008.....	46
FIGURE 15: ON-PREMISES CORPORATE UC – ASIA/PACIFIC REVENUE MARKET SHARE, 2008.....	47
FIGURE 16: ON-PREMISES CORPORATE UC – REST OF WORLD REVENUE MARKET SHARE, 2008 .....	48
FIGURE 17: ON-PREMISES CORPORATE UC IB BY BUSINESS SIZE, 2008 & 2012 .....	50

## LIST OF TABLES

TABLE 1: ON-PREMISES CORPORATE UC VENDOR - IB AND REVENUE, 2008.....	35
TABLE 2: WORLDWIDE ON-PREMISES CORPORATE UC IB AND REVENUE, 2008-2012.....	39
TABLE 3: CORPORATE UC VS. EMAIL PENETRATION, 2008-2012 .....	41
TABLE 4: ON-PREMISES CORPORATE UC REVENUE BY REGION, 2008-2012 .....	43
TABLE 5: NORTH AMERICA - ON-PREMISES CORPORATE UC REVENUE MARKET SHARE, 2008.....	44
TABLE 6: EUROPE - ON-PREMISES CORPORATE UC REVENUE MARKET SHARE, 2008.....	46
TABLE 7: ASIA-PACIFIC - ON-PREMISES CORPORATE UC REVENUE MARKET SHARE, 2008.....	47
TABLE 8: ROW - ON-PREMISES CORPORATE UC REVENUE MARKET SHARE, 2008.....	48
TABLE 9: ON-PREMISES CORPORATE UC - IB BY BUSINESS SIZE, 2008-2012.....	49