



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

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## ***On-Premises Corporate Unified Communications Market, 2009-2013***

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### **SCOPE**

This study provides an analysis of the On-Premises Corporate Unified Communications market in 2009 and its potential growth over the next four years. The study provides a detailed analysis of market trends, drivers, barriers, and opportunities.

The study provides data on current worldwide installed base, vendor market share, revenues, and forecasted market growth (i.e. revenues) from 2009 to 2013.

All market numbers, such as market size, forecasts, installed base, revenue information, and any financial information presented in this study represent worldwide numbers, unless explicitly otherwise indicated. All revenue numbers are expressed in \$USD.

This report deals only with the on-premises corporate Unified Communications market. Hosted UC solutions offered by service providers are covered by our *Hosted Unified Communications Market, 2009-2013* report.

### **METHODOLOGY**

The data and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of data collected from vendors and corporate enterprises via interviews and surveys.

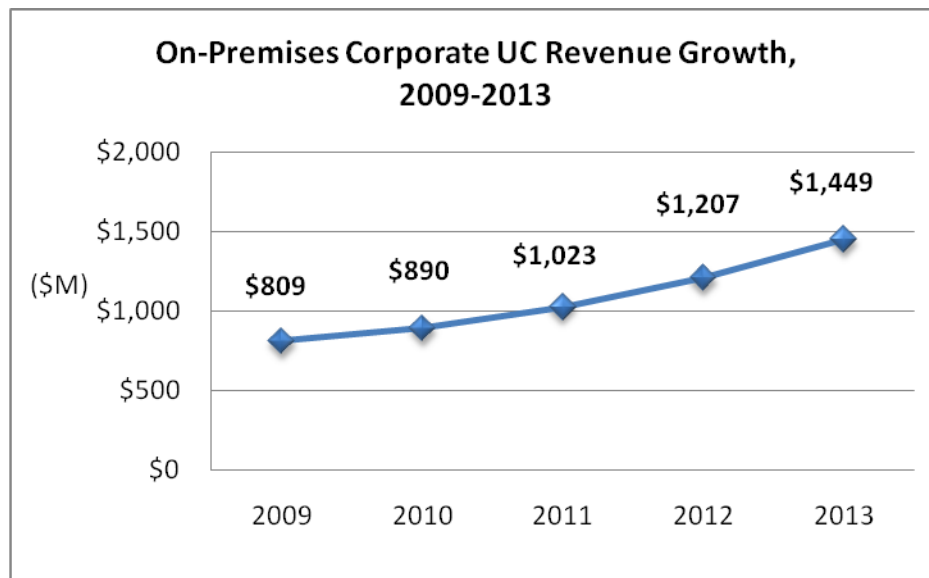
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Secondary research sources have also been used to cross-check the data collected. These include company annual reports and market size information from various related market segments of the computer industry.

## EXECUTIVE SUMMARY

- The Unified Communications market is comprised of solutions that offer integrated voice, messaging, collaboration, and presence capabilities which can be easily accessed and managed through a single interface. The goal of UC is to improve user communication, productivity, and efficiency, while reducing human latency and decision making time.
- We expect the On-Premises Corporate UC market to reach 37 million users by the end of 2009. The On-Premises UC market will grow to 75 million users in 2013, representing an annual average growth rate of 20%.
- Worldwide revenues are expected to reach \$809 million by the end of 2009. By 2013, the On-Premises UC Market revenues will reach \$1.4 billion.
- Over the last 12 months, the Unified Communications market has continued to evolve, with new technologies, and innovation driving demand. Worldwide economic pressures have driven interest as businesses seek to cut costs wherever possible. Businesses have identified reduction in travel as an area where money can be saved.
- The ongoing development of collaborative solutions such as high-definition video and audio conferencing, have proven to be a worthy cost-saving, and travel-reducing solution for many businesses. Today, a variety of collaborative tools are available, ranging from basic audio conferencing solutions, to sophisticated, high-definition video and web conferencing setups.
- Leading software vendors, Microsoft and IBM, are now providing telephony components integrated with their UC platforms. Microsoft added a voice component in early 2009, and IBM has recently released Sametime Unified Telephony (SUT), which can be added to their UC platform Sametime.

- Session Initiated Protocol (SIP) has become the protocol of choice for a majority of UC vendors today to route voice traffic over IP. Proprietary protocols are still used by some vendors, but the move towards an industry-wide standard continues to pick up momentum.
- The growth in popularity of the business social networking market has caught the attention of some UC vendors. Most of these UC vendors view the business social networks as a complementary component to their services, and solutions. The relationship of UC solutions and business social networks is still in the early stages of development. A simple example of the combined technologies is a click-to-dial feature that users would be able to access while browsing a colleague on a business social network.
- Mobility and the extension of desktop functionality to mobile and remote users has seen a rapid uptake. The mobile device segment has always grown at a quick pace, but it has been the UC vendors that have greatly improved on their solutions' interoperability with user's devices while away from their desks (i.e. mobile devices, laptops, netbooks).
- Worldwide revenues for the On-Premises UC Market are expected to reach \$809 million by the end of 2009. Over the next four years, the On-Premises UC Market revenues are expected to grow at an average annual rate of nearly 16%, totaling over \$1.4 billion by 2013.



**Figure 1: Worldwide On-Premises Corporate UC Market Revenue, 2009 - 2013**

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