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Unified Communications Market, 2011-2015

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SCOPE

This study provides an analysis of the Unified Communications market in 2011 and its potential growth over the next four years. The study provides a detailed analysis of market trends, and also examines features, strengths, and weaknesses of leading UC solutions in both the on-premises and hosted markets.

For each market segment, we provide data on current worldwide installed base, service provider market share, revenues, and forecasted market growth from 2011 to 2015.

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.

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 service providers, 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.

The focus of this research was worldwide.

EXECUTIVE SUMMARY

- UC solutions today are available as On-premises or Hosted services. This report looks at the UC market as comprising three segments: On-premises UC vendors, Hosted UC Providers, and Telecom UC Providers, defined as follows:

    - *On-premises UC Vendors* – These vendors focus on developing UC hardware and software solutions, specifically for the enterprise.

    - *Hosted UC Providers*: These are pure-play UC providers that deliver Hosted UC services targeted mainly at business customers.

    - *Telecom UC Providers*: These are ISPs, fixed, and wireless carriers that deliver UC services to subscribers as part of a broader telecom service bundle targeted at either consumer or business customers.

- Mobility is the primary driver for innovation and adoption in the UC market. The popularity of high-end smartphones is driving corporate demand for UC solutions to support an increasingly mobile workforce. In the last 12 months, the majority of UC providers and vendors have integrated rich mobile support that leverages the evolving capabilities of smartphones. Features such as voicemail-to-text, fixed-mobile convergence, and mobile presence have been introduced in the last few years, and have had time to develop and mature into popular and reliable features.

- Video has been another major driver in the Unified Communications market. The main benefit of video communications has been its role in enriching UC’s conferencing capability. The added element of video communication helps to emulate face-to-face interaction between users. When video is added to a conferencing suite that can also share documents, presentations, and communicate on voice and text channels, it heightens the productivity of online meetings and saves money on travel costs.

- Enterprise Social Networking will continue to permeate UC solutions and how they develop going forward. Integration between UC and social networking is not yet a standard feature in the UC market, but as social networking becomes a more popular form of communication and collaboration in the workplace, more UC solutions will integrate social networking streams and features onto their solutions, and provide interoperability with Enterprise and Consumer Social Networking services.

- The UC market, including the On-premises UC, Hosted UC, and Telecom UC segments, will grow from over $4 billion in 2011, to $7.7 billion in 2015. Figure 1 shows this growth.

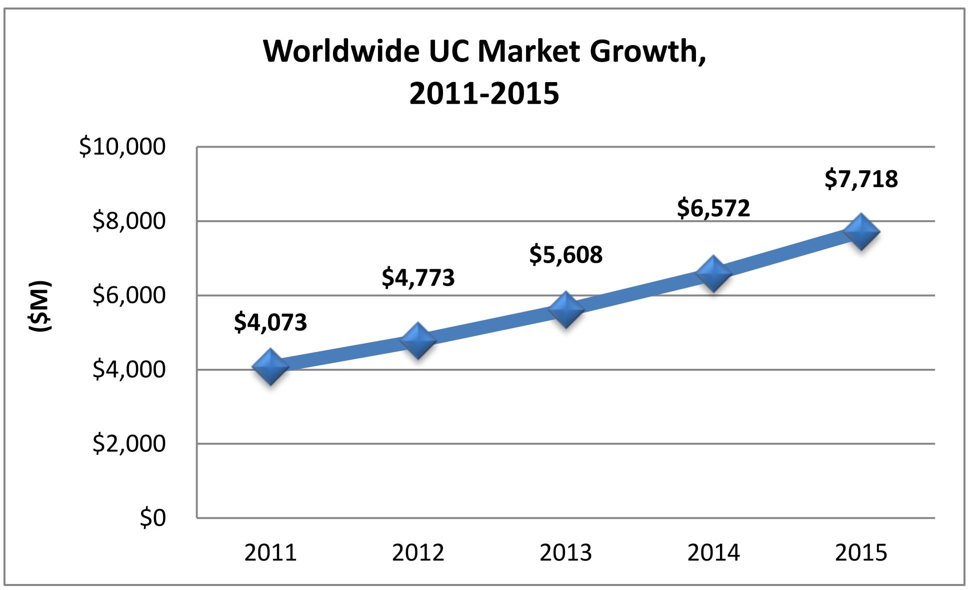

Figure 1: Worldwide UC Market – Revenue, 2011 – 2015

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