Enterprises Place 2013 Unified Communications Bets:
How Many Horses In This Race?

February 2013

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Introduction

Unified Communications (UC) has been one of the most far-reaching developments in enterprise networking, and represents a technology that continues to grow and evolve. Initially focused on integrating all of a user's real time (voice and video), near real time (instant messaging or "IM"), and asynchronous (email, fax) communications together in single dashboard with instant access to colleagues' presence status (in/out of office, in a meeting, on the phone, etc.) and available modes of communications, UC has now expanded to embrace collaboration (audio/video conferencing, web meetings, and desktop sharing) as well as social networking functions like user profiles, skills search, and collaborative workspaces.

Along with an expanding range of capabilities, UC type solutions are now being offered by a wide and diverse range of companies. Much of the original drive to UC came from the traditional PBX vendors and Cisco, Avaya, Siemens, NEC, ShoreTel and the rest continue to build their UC portfolios. However, the incorporation of IM, presence, and email (particularly with the use of unified messaging) has attracted desktop vendors like IBM with its Sametime offering and, more importantly, Microsoft with its Lync UC solution. Finally, the expansion in the direction of social networking in combination with comsumerization has seen the introduction of UC-like capabilities from Google, Skype (now part of Microsoft), LinkedIn, and even Facebook, though that company is clearly focused more on consumers than enterprise users.

In December 2012, Webtorials surveyed more than 200 Enterprise IT professionals in organizations with 1,000 to over 100,000 employees to determine their interest in UC, levels of deployment and drivers for adoption, as well as identify preferred vendors for the various UC functions with a particular focus on Microsoft Lync .

Among the key findings were:

- Fully 78% of respondents had either partially or fully deployed UC solutions, and most of the rest were or would soon be in the planning phase. Only 6% reported having no plans to deploy UC.

- Currently, 65% of UC deployments are premises-based, though that is expected to drop to 31% as future deployments move more to the cloud. Hybrid deployments are the preferred approach to UC in the future.

- When asked about the most important factors in the selection of UC suppliers "enterprise voice" led the way, followed by "unified messaging" and "mobile clients for smartphones and tablets." In a major surprise, "desktop video conferencing" beat out "soom size video conferencing" two to one, and "web conferencing" rounded out the top five.

- Going forward, it appears that Cisco and Microsoft's shares of the UC market will increase at the expense of the other IP PBX vendors. Cisco held a clear lead for enterprise voice, video teleconferencing, and web meetings, while Microsoft was cited more often for IM, presence, and enterprise social functions like internal corporate user profiles, directories, and skills search.

- Cisco clearly dominates the on-premises enterprise voice market, cited by 64% of respondents, while Microsoft's enterprise voice base is expected to grow from 28% today to 39% in the future.

The bottom line is that UC will continue to evolve and grow until there is no longer any question as to what "is" or "is not" UC. Rather, just as the lines between telephony and "data communications" dissolved in the past, the distinction between "applications" and all modes of communications will no longer exist.

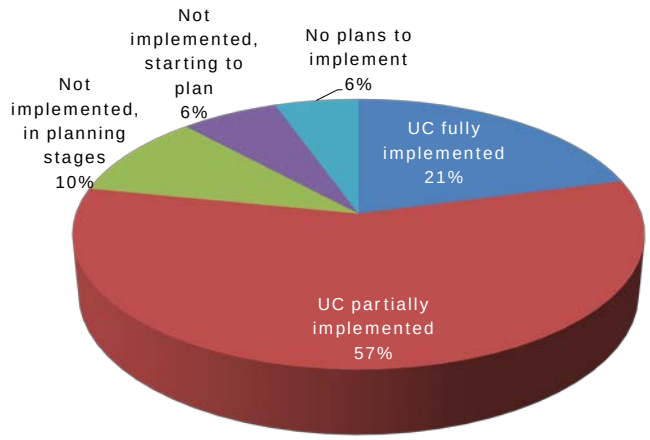
It also appears at this point there will be a "soft" duopoly of vendors supplying UC functions, with Microsoft and Cisco having a plurality of market shares but a continuing strong presence from other players. As such, the need for standards-based interoperability via Session Initiation Protocol (SIP) and related protocols, implemented on platforms such as session border controllers (SBCs), will be the key to supporting this multi-vendor environment.

In the following pages we will look at the results in more detail to provide a clearer picture of what is driving the UC market, how users intend to deploy both enterprise voice and UC, the preferred vendors for different UC components, and how Microsoft's position in the UC and enterprise voice markets is shaping up.

UC Drivers

The level of UC deployments was surprisingly high with 57% having partially deployed UC and 21% reporting full deployments; there were only minor differences among U.S./Canada and most non-U.S./Canada, though 90% of Asia-Pac respondents reported partial or full UC deployments versus 78% overall. Other surveys have shown lower overall penetrations, so the high totals, particularly, the large percentage of "partial" implementations, may indicate that respondents may have implemented only one or a few UC applications like web meetings and unified messaging.

UC Implementation Stage

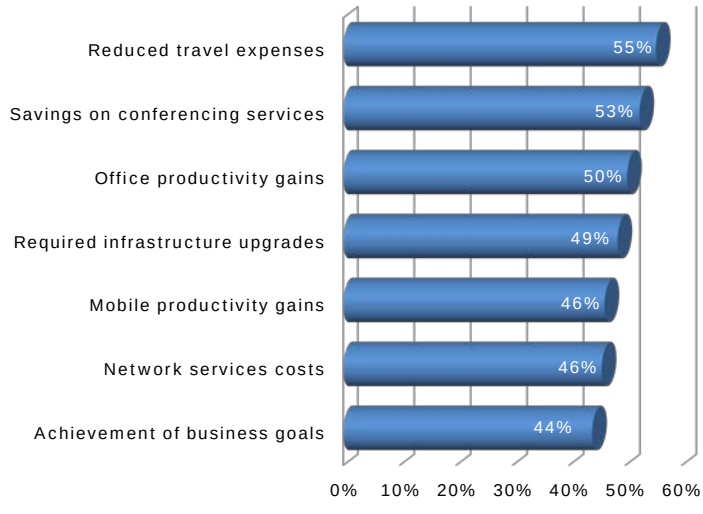


There were relatively few respondents who claimed to have no plans to deploy UC (only 6% of respondents), and of those, 70% gave the reason to be that "other projects had higher priority."

We also asked, "Who was the primary champion for your UC deployment?," and found that, despite UC's "voice" roots, only 13% of respondents identified the Telecom Manager/Director as the primary champion for UC. Over 61% identified the CIO, CTO, or IT Manager/Director as the UC champion, and 8% responded that it was the CEO. It appears that as the various communications modes are "unified," the decision is shifting out of the "voice" area and into IT. Such a development will be good news for Cisco and Microsoft who are seen as the leaders in the UC space, but bad news for the traditional PBX manufacturers.

An ROI analysis was used in all but 12% of organizations, and respondents took a number of factors into account. The vendors' focus on conferencing and collaboration capabilities was clearly on target as 55% of respondents cited "reduced travel expenses" as was "savings on conferencing services" that was cited by 53%. While those savings are in the "hard dollar" category, organizations are recognizing the efficiencies UC can offer as "user productivity gains in the office" was cited by 50% and "user productivity gains while mobile" was cited by 46%; that latter number confirms the findings of our Mobile Unified Communications survey published in October 2012.

Elements included in computing ROI

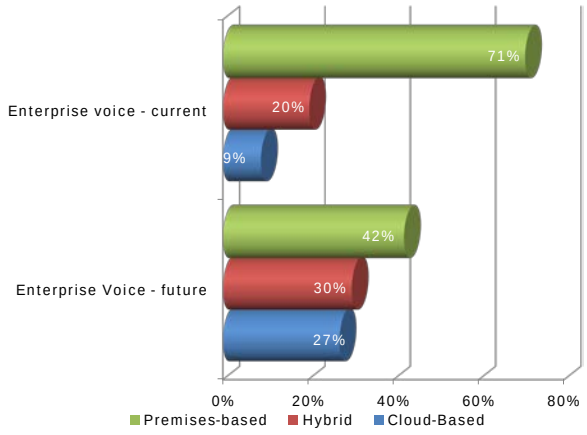


A cloudier picture emerges when the questions shifted to direct business impact. Overall, 44% took "increased ability to achieve business goals" (e.g. shortened product development cycles, improved customer service, reduced sales cycle, etc.) into account, but that was more often cited by Europe and Latin-South America respondents. Of the U.S./Canada respondents only 36% reported that they took that into account versus 51% of Europe respondents and 80% in Latin and South America. "Savings through communications enabled business processes" also scored poorly with 25% overall though Asia-Pac respondents were an exception citing it as an ROI factor by 58% of respondents. So it appears that our international population was looking at the overall business implications of UC to a much greater degree.

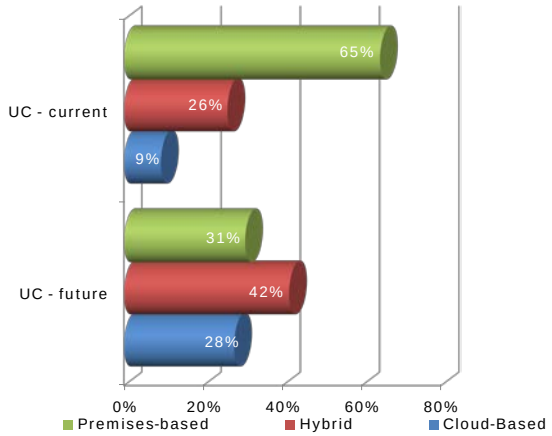
UC Deployment Plans

While the majority of deployment are premises-based today, the survey also found a clear trend towards cloud-based deployments for both UC and enterprise voice. Currently, 65% of UC deployments and 71% of enterprise voice deployments are premises-based; cloud and hybrid deployments for enterprise voice are 35% and 29% respectively. So the predicted migration of both voice and UC to the cloud, either totally or partially, does seem to be coming to pass.

Current / Planned Use of On-Premises, Cloud, and Hybrid Deployments for Enterprise Voice and UC



Enterprise Voice



Unified Communications

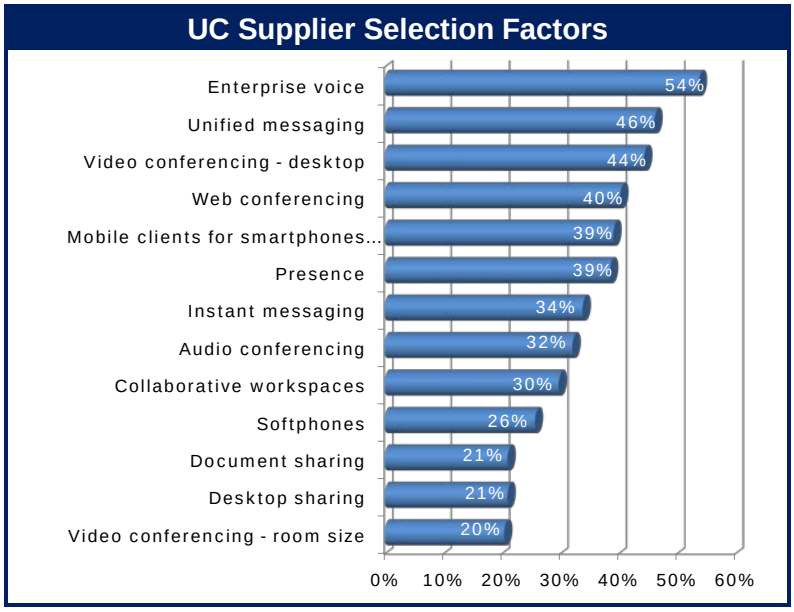
When asked about their future deployment plans, premises-based deployments of UC dropped to 31% and enterprise voice dropped to 42% while combined cloud and hybrid deployments were 70% for UC and 57% for enterprise voice. In both cases, premises deployments are expected to drop dramatically while cloud and hybrid deployments will essentially double, though with a hybrid deployment some users or locations will still be served by on-premises systems.

We also asked respondents for the *current status* and their *goal* for UC solution vendor(s) with regard to "single vendor" versus "best-in-class." For current deployments, "a few best-in-class proprietary vendors" led the way with 34% of responses, followed by "single vendor but standards-based" with 24%. Going forward the goal for 39% is "a few best-in-class standards-based," though 34% are still looking for "a few best-in-class proprietary vendors." Given the rather woeful state of multi-vendor UC interoperability, some of these organizations may need to adjust their goals or adopt a primary vendor and use its "proprietary" implementation as the "standard."

There were also some interesting differences among regions when we asked which factors were most important in the selection of UC suppliers; to make respondents "choose," we limited them to five out of 17 possible responses plus "other."

Overall, "enterprise voice" was selected most often being cited by 54% of respondents; however that also means that almost half of respondents didn't rank enterprise voice in their top five functions for UC; again, not good news for traditional PBX suppliers.

As "unified messaging" was one of the root capabilities that spawned the move to UC, it's not surprising that is was picked by 46%. However, we were surprised to see that 44% chose "desktop video conferencing" versus only 20% who included "room size videoconferencing," so it appears that the move to increased use of video and video in a more "informal" setting is starting to take hold.



The vendors have been pushing "collaboration" as a key element in UC, many even relabeling their UC offerings "UC&C"; that emphasis is clearly reflected in the survey results. Many of the key collaboration capabilities were among the top choices with 40% citing "Web conferencing," 32% choosing "audio conferencing," and 30% picking "collaborative workspaces," " which were particularly important in Latin and South America whose respondents chose it 80% of the time.

"Document sharing" was picked by only 21% of respondents, but since we limited the choices to five our guess is that "Web conferencing" was seen as a good substitute.

"IM" and "presence," generally considered to be two of the cornerstones of UC, showed up in 34% and 39% of responses respectively. The biggest regional difference was seen with regard to "presence." That capability was picked by 47% of Asia-Pac respondents; U.S./Canada and Europe respondents chose it 36% and 38% respectively, just about the average of 37%. We are speculating that the significant time difference between Asia-Pac and both Europe and North America may be a factor in why presence is valued so highly there.

Among the factors that didn't score well were "softphones" (25%), so it appears that desk phones will not be disappearing as we move to UC. "Simultaneous ring, find me/follow me" (18%), "advanced directory services (internal corporate user profiles, directories, skill search)" (18%), "APIs to integrate communications capabilities in other applications" (19%), and "voice over Wi-Fi" (15%) also scored poorly. Our assessment is that "simultaneous ring" is so widely available respondents may have simply assumed it would be part of any UC solution.

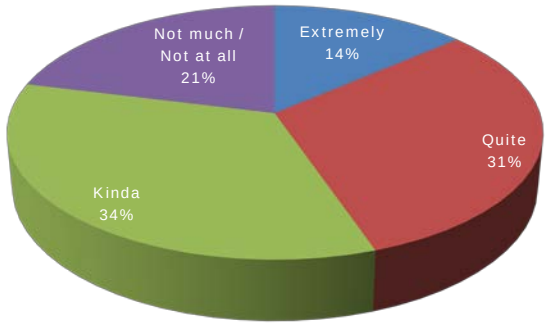
The low score for "APIs to integrate communications capabilities in other applications" jives with the low number of users who looked at "communications-enabled business processes" in computing the ROI for their UC deployments; as with that question, the highest percentage of respondents came from

Asia-Pac. With regard to the lack of interest in "advanced directory services" and "voice over Wi-Fi" we can only conclude that buyers simply don't recognize the value.

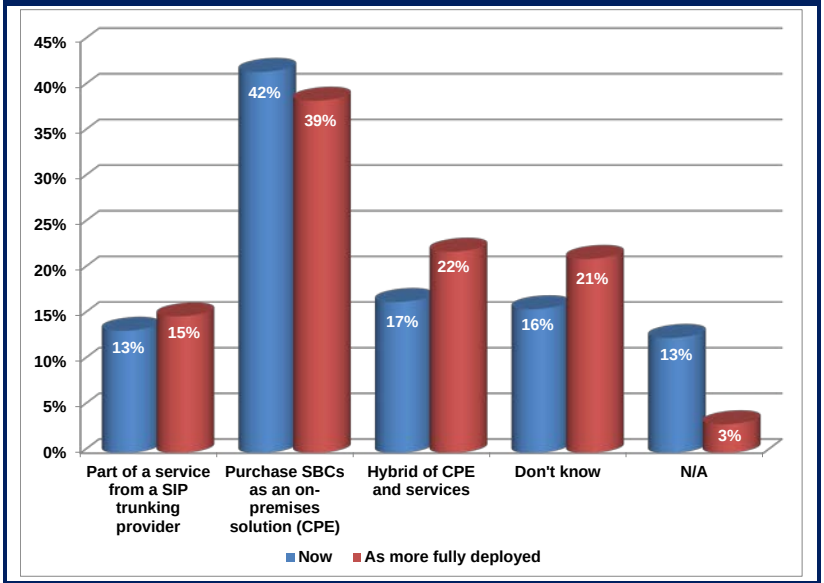
One of the key capabilities of UC is that it allows users to freely mix communications modes (IM, voice, video, etc.) and move easily between them. Most UC solutions allow a user to start with a chat session but then upgrade it to a voice or even a video call. Of course, traditional circuit switched communications services are ill equipped to deliver the types of flexible communications services required for those applications. As a result we anticipate a sharp rise in the use of SIP-based services in both MPLS backbone and SIP trunking configurations as users move to UC. Given the requirement for session border controllers (SBCs) in those SIP-based network architectures, we anticipate a surge in demand for those devices as well.

Given the importance of those SIP-based services, we also asked respondents a couple of questions about their familiarity with SBCs and how they planned to deploy them. With regard to "the roles and capabilities of SBCs," only 21% admitted to little or no understanding while 45% ranked their familiarity "Extreme" or "Quite High," so the SBC vendors' education efforts have indeed paid off.

SBC awareness



Deployment Mix



We then asked how the need for SBC functions are addressed now and will be addressed in the future – as an on-premises solution, as a part of a service, or in a hybrid fashion. As shown, CPE-based solutions are currently in the lead, though there is a shift toward hybrid deployments.[1] This shift is entirely reasonable as the reach of these solutions becomes more all-encompassing. The precipitous drop in "N/A" responses and the increase in "Don't know" leads us to believe that the picture surrounding SIP trunking and how to best implement the capabilities is still firming up. However, regardless of how SBCs are acquired, their role in UC deployments should bode well for SBC manufacturers.

[1] Respondents indicating "Not much / Not at all" for awareness were excluded from this analysis.

Preferred UC Suppliers

In crafting the survey we were particularly interested in which vendors would be preferred for different functions, and particularly how Microsoft's Lync UC offering would fare; we did allow respondents to choose multiple suppliers. As you might imagine, we discovered significant differences in vendor preferences in different regions. We first asked users to specify which vendors they currently use and planned to use for on-premises and off-premises enterprise voice; we specifically chose the term "off-premises" rather than "cloud-based" as Centrex is still a significant component, and were afraid respondents would not recognize Centrex as "cloud-based."

For current on-premises enterprise voice, Cisco led the pack with 62% of respondents followed by Avaya with 39%. Microsoft came in with a surprising third place having been cited by 27% of respondents; that is far above the market share attributed to Microsoft from other market researchers like MZA who compute market shares based on sales rather than surveys. MZA puts Microsoft's share of the worldwide PBX market at below 3% (technically it's buried in the "other" category). As we allowed multiple replies, users could choose Microsoft even if they were testing only a few lines, hence the higher representation in our survey.

Looking forward, Cisco's responses for enterprise voice grew to 68% while Microsoft moves to 39% passing Avaya's whose share drops to 28%. Siemens, NEC, Mitel, and "Other" PBX suppliers with the exception of ShoreTel also see their shares drop. ShoreTel registers a slight gain from 2% to 4% of respondents comparing current to planned usage, though 100% of that is from U.S./Canada respondents.

When we asked about use of "off-premises enterprise voice," "cellular providers" pulled the most responses with 22% and Skype came in second with 27%. Microsoft Office got 14% (doubling to 28% in the future), "Private cloud" got 16% and "Centrex" came in at 10% of respondents. Again we attribute Skype's strong performance to the fact that we allowed multiple responses, and unless it is purposely blocked, "everybody uses Skype."

To get the clearest picture for the UC components, we asked about the different UC functions separately. First we asked about audio conferencing, and "internal audio conferencing" came in first with 61% of respondents followed closely by "service providers" at 59%; Lync was cited by 44%. When responding about future plans, "Lync" grows to 51% and "service providers" drop to 35%, which is not surprising given that one of the fastest paybacks from a UC deployment can come from bringing conferencing in-house.

Microsoft's Exchange dominates in the email category with 86% of respondents currently and 77% in the future. The other big shift is in cloud-based email like Office 365 and Yahoo Mail that go from 1% currently to 11% in the future. We asked separately about Gmail which is cited by 4% of respondents currently growing to 11% in the future. So it appears that more email is going to the cloud, but despite all of the attention paid to Gmail, Google is not walking away with all the cookies. IBM's Lotus Notes was cited by 9% of user's currently but drops to 2% in the future.

When we got to the UC functions it turned into a two-horse race between Microsoft and Cisco. For "basic UC functions" which we identified as "IM, presence, and unified messaging," Microsoft topped Cisco 56% to 45%; the only other significant player was Avaya who came in with 18%. When we shifted

to the future, the responses changed only slightly with Microsoft at 58%, Cisco at 53%, and Avaya dropping to 17%.

The next few categories showed decided preferences. For “video teleconferencing” Polycom, whose equipment is supported by multiple vendors, came in just behind Cisco 44% to 43%, followed by Microsoft with 25%. Avaya pulled 8% and LifeSize garnered only 5% of respondents. For the future, Cisco pulls away from Polycom 57% to 39%, with Microsoft growing to 36%. Avaya’s share grows from 7% to 9% and LifeSize goes from 5% to 8%.

Cisco also lead in the category of “collaboration” which we identify as “Web meetings and desktop sharing” with 56% of respondents to Microsoft’s 48%; Citrix GoToMeeting comes in third with 17%, and none of the other entries clears the 10% bar. When we shift to the future, Microsoft is catching up with Cisco (53% to 57%) while Citrix drops to 19%.

Where Microsoft does show a commanding lead is in “enterprise social capabilities” which we define as “internal corporate user profiles, directories, and skill search.” Microsoft has 65% of current and 68% future respondents while Cisco grabs a mere 17% today and 26% in the future. IBM, who has made “Social Business” a key element in its Sametime messaging, got a paltry 5% of current respondents and that drops to 2% in the future.

So it does appear that our respondents had made some clear decisions regarding what vendors they preferred for each major component of UC. For current use, those elements that were more closely related to traditional voice communications veered toward Cisco while those that were more desktop or IT oriented fell to Microsoft. Looking at the difference between current and future plans, most of Microsoft’s gains will be coming from the other (non-Cisco) PBX providers.

To put this all in perspective we did a put together a chart of the top three vendors in each of the categories and the percentages of total respondents who selected that vendor for the current and future timeframes.

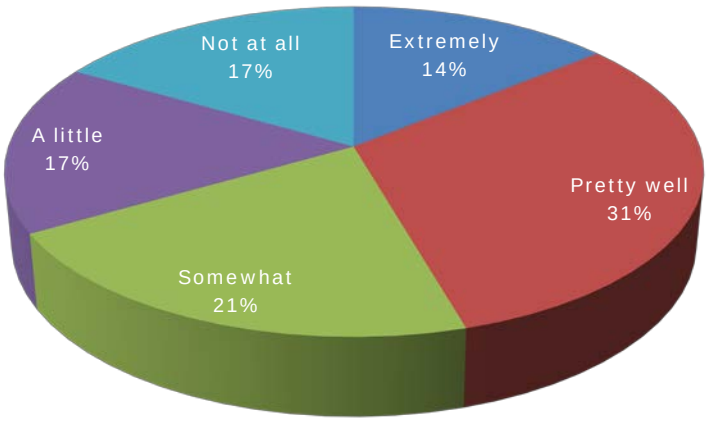
Which vendor(s) are you using or planning to use for:	Time Frame	First	Second	Third
On-premises enterprise voice functions?	Now	Cisco (64%)	Avaya (41%)	Microsoft (28%)
	Future	Cisco (68%)	Microsoft (39%)	Avaya (28%)
Off-premises enterprise voice functions?	Now	Cellular provider (38%)	Skype (29%)	Private cloud (28%)
	Future	Private cloud (33%)	Cellular provider (30%)	Microsoft Office 365 (28%)
Audio conferencing functions?	Now	Internal audio conferencing solution(s) (40%)	Service provider (39%)	Lync (29%)
	Future	Lync (38%)	Internal audio conferencing solution(s) (37%)	Service provider (26%)
Corporate email functions?	Now	Microsoft Exchange (89%)	Lotus Notes (6%)	On-Premises Unix-based SMTP/POP (4%)
	Future	Microsoft Exchange (86%)	Other Cloud-based (e.g. Office 365, Yahoo Mail) (12%)	Google (7%)
Basic UC (IM, presence, and unified messaging) functions?	Now	Microsoft (56%)	Cisco (45%)	Avaya (18%)
	Future	Microsoft (58%)	Cisco (53%)	Avaya (17%)
Video conferencing functions?	Now	Cisco (49%)	Polycom (48%)	Microsoft (25%)
	Future	Cisco (57%)	Polycom (39%)	Microsoft (36%)
Collaboration (web meetings and desktop sharing) functions?	Now	Cisco (WebEx) (56%)	Microsoft (Live Meeting) (48%)	Citrix (GoToMeeting) (21%)
	Future	Cisco (WebEx) (57%)	Microsoft (Live Meeting) (53%)	Citrix (GoToMeeting) (19%)
Enterprise social capabilities (internal corporate user profiles, directories, skill search) functions?	Now	Microsoft (65%)	Other (21%)	Cisco (17%)
	Future	Microsoft (68%)	Cisco (26%)	Other (20%)

Opinions about Microsoft as a Potential Voice/UC Provider

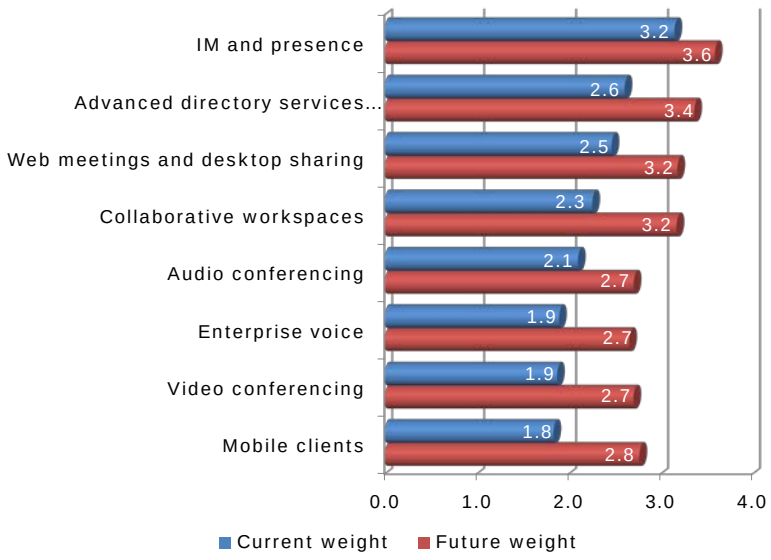
The other area we were interested in exploring was how buyers felt about Microsoft as a potential voice supplier and the potential for its Lync UC platform to have a major impact on the make-up of the PBX business. To that end we asked respondents to tell us how familiar they were with Lync, to what extend they were currently or planning to use Lync for various functions and if they agreed, disagreed, or were neutral regarding a number of statements expressing different opinions about Lync. We took pains to develop position statements that included a mix of positive and negative opinions regarding Lync. In charting the replies we eliminated the "neutral" votes to focus on those respondents who expressed an opinion one way or the other

When we asked about general familiarity with Lync, only 14% rated themselves "extremely familiar," 31% chose "pretty well," 21% "somewhat, and 17% said "a little"; only 17% said they were "not at all" familiar. So if you add the first three groups together, two-thirds of respondents are somewhat to extremely familiar with Lync, so it's clear that Microsoft's marketing message is getting through. When we broke it out by region, U.S./Canada led the way with 70% in those three categories with Europe close behind at 66%. Latin and South America reported the least familiarity with 33%, all in the "somewhat" category.

Microsoft Lync familiarity



Microsoft's Weighted Scores for Various UC functions



To get a better picture of where Microsoft fit with regard to the various UC functions, we used a weighting function to score the various replies ("Extensive," Quite A Bit," Some," "A Little," etc.) on a 1 to 5 scale so we could have a more concise picture of where Lync is used today and where respondents intend to use it in the future.

"IM and Presence" scored highest with 3.2 growing to 3.6 in the future. Recognizing Lync's extensive use for those functions today, many UC solutions integrate Lync presence so a user can get their IM and presence from Microsoft and the other UC functions elsewhere. "Advanced

directory services (internal corporate user profiles, directories, skill search)" scored 2.6 presently and jumped to 3.4 in the future, and we saw similar jumps in "Web meetings" and "collaborative workspaces."

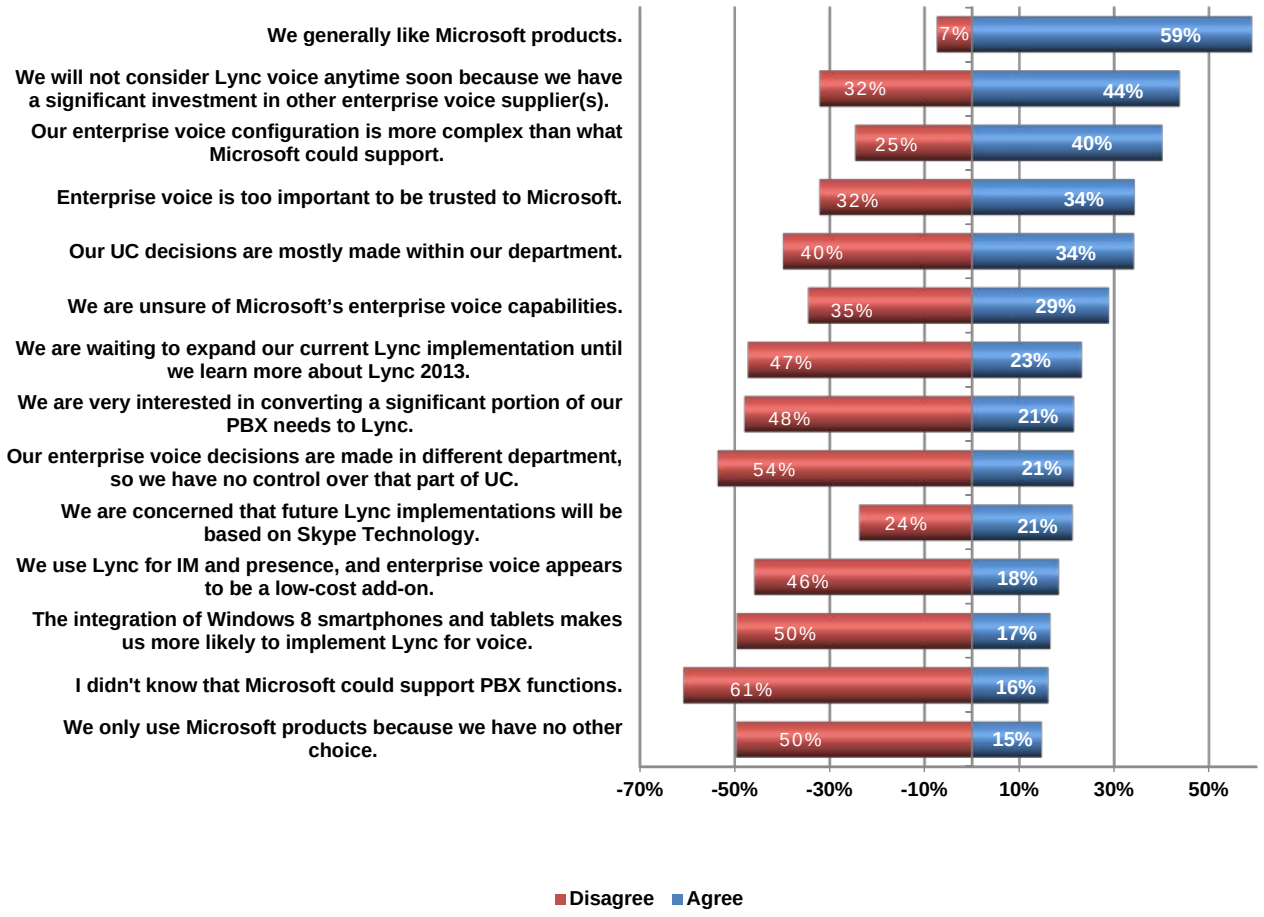
Of course the defining function for Lync adoption is "enterprise voice," and Microsoft shows some promising growth there. The current use score is 1.9, but that grows to 2.7 in the future. By the same token, 53% responded that that are not using Lync at all for voice today and 31% chose that for the future. From our viewpoint, Microsoft appears to be particularly strong in the more advanced UC applications, but the company still faces challenges on the voice front. A good reception for the next version of Lync - dubbed Lync 2013 - could change that.

When we switched to opinions regarding Lync, the statement that drew the highest percentage of "disagrees" with 61% was "I didn't know that Microsoft could support PBX functions"; only 16% "agreed." So if nothing else, Microsoft has clearly communicated the fact that it is indeed a player in the PBX market. Respondents were about equally split on the question of whether enterprise voice was too important to be trusted to Microsoft with 34% agreeing and 32% disagreeing. In a related question, 29% agreed with the statement "we are unsure of Microsoft's enterprise voice capabilities," while 35% disagreed.

When asked if they were "very interested in converting a significant portion of PBX needs to Lync" only 21% agreed, while 48% disagreed with the highest percentage of "disagrees" coming from the U.S./Canada region. It was clear that our respondents will be involved in the decision regarding Lync voice as 54% disagreed with the statement "our enterprise voice decisions are made in different department, so we have no control over that part of UC," while only 21% agreed. The highest percentage of agrees (59%) were generated by the statement "we generally like Microsoft products;" only 7% disagreed.

Incumbency also appeared to be a factor as 44% agreed with the statement "We will not consider Lync voice anytime soon because we have a significant investment in other enterprise voice supplier(s)."

Microsoft Assessment ("Neutral" perceptions not shown)



Summary

UC appears to be gaining significant traction, at least among the Webtorials audience, and there is considerable awareness and interest in Microsoft's Lync as a potential vehicle. Microsoft is already experiencing considerable uptake for IM and Presence, and appears to have the inside track with many buyers when it comes to the more advanced UC functions like Web meetings, desktop sharing, and advanced directory services. Further, the fact that 61% of respondents reported that the CIO or IT Manager/Director was the primary champion for the UC deployment versus 13% who said it was the Telecom Manager/Director means that UC will be less "voice driven;" that's not a good prospect for traditional PBX suppliers.

From a market share standpoint, Cisco and Microsoft appear to be the leaders in most categories with Avaya coming in third. Polycom is a major player in its specialized market of video teleconferencing. It appears that Cisco is scoring better in areas more associated with traditional telephony while Microsoft is the pick for more desktop oriented functions. When we compare current versus planned deployments, the participation of traditional PBX suppliers is clearly diminishing.

There is also a clear movement toward the cloud for both enterprise voice and UC deployments, though a significant part of that falls in the "hybrid" category where some portion of the deployment remains premises-based. Given the way the question was structured we cannot determine the percentage of seats that would be serviced by an on-premises solution in those hybrid deployments. The typical arrangement we see today is that main sites employ on-premise solutions and smaller locations are cloud-based, so the final split between premises and cloud might come down to how geographically distributed an organization is.

With the ongoing trend towards comsumerization in IT, we have some concern that the impact of consumer-oriented products may be underrepresented. Some 65% of respondents identified their job function as IT or telecom related and there could be a tendency to discount the impact of those consumer-oriented tools.

With all of these trends – including the lack of dominance of a single vendor, hybridization of various functions, and consumerization and BYOD – it is clear that the overarching need will be for standards-based interoperability among a wide range of products and services. And while this interoperability is most important for the stronger players (Cisco and Microsoft), their collective strength is not sufficiently strong to be able to ignore significant support for other entities.

In the end, the prospects for UC are strong and growing stronger, and there appears to be a high degree of understanding regarding the technology and its potential applications. There are also defined preferences that indicate the players market positions will continue to change as we go forward.

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The primary author of this study is Michael Finneran, dBrn Associates, with additional analysis by Steven Taylor and Leslie Barteaux, Webtorials Michael Finneran is principal at dBrn Associates, Inc., a research and consulting firm specializing in UC and mobility. He has provided assistance to wireline and wireless carriers, equipment vendors, end users, and investment firms, and his views on the UC market are frequently quoted in the trade press. As well as writing for Webtorials, Michael is also a regular contributor to NoJitter, UC Strategies.com, Information Week, and The Voice Report, and he makes frequent appearances at industry conferences including Enterprise Connect, InterOp, and the Information Week 500.

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