

# Magic Quadrant for Unified Communications

28 July 2010

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Gartner RAS Core Research Note G00201349

Unified communications offers the ability to improve how individuals, groups and companies interact and perform tasks. Enterprise planners and managers should review how this emerging generation of communications software and systems can improve their business operations and processes.

## What You Need to Know

Unified communications (UC) offers the ability to significantly improve how individuals, groups and companies interact and perform. UC also enables multiple communication channels to be coordinated. In some cases, separate servers may be consolidated; however, more frequently, UC adds functionality to existing communication applications. Key technologies include Internet Protocol (IP)-PBX, voice over IP (VoIP), presence, e-mail, audioconferencing and Web conferencing, videoconferencing, voice mail, unified messaging (UM), instant messaging (IM), and various forms of mobility. Another key capability of UC is that it offers a method to integrate communication functions directly with business applications; Gartner calls this capability "communications-enabled business process" (CEBP).

Although there is significant interest in UC from many enterprises, it remains a daunting and confusing topic. As a result, many enterprises find it difficult knowing where and how to start. One approach is outlined in "Developing an Enterprise Unified Communications Road Map." This research advises enterprises to review their inventories of communication equipment and business partners, then develop a vision for where their communication could be in five years. This plan can be accompanied by developing a UC center of excellence; this group brings individuals together from multiple areas, including IT operations, business applications and the line of business. This group then provides broad guidance and direction for the plans.

Despite the emergence of complete UC portfolios, these are still in an early stage, and no vendor product adequately addresses all of an enterprise's UC needs. As a result, a best-of-breed approach remains the surest way of ensuring adequate functionality, and planners should require vendor products to be interoperable. The evaluation in this research focuses on enterprise-premises solutions, and considers how well vendors can work with other vendors and with hosted solutions. Enterprises should consider interoperability as an important criterion. Gartner publishes separate research that reviews UC-as-a-service (UCaaS) solutions.

## ▸ Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

## ▸ Evaluation Criteria Definitions

### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets, skills, etc., whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability (Business Unit, Financial, Strategy, Organization):** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all pre-sales activities and the structure that supports them. This

The term "unified communications" sometimes is misused. This results in confusion. Users should be aware that some products that are labeled as "unified" cannot be integrated with other vendor products into a full portfolio. These mislabeled products are capable of being used only in a stand-alone and nonintegrated manner.

Many leading enterprises are developing UC road maps and plans, and some have trial or phased deployments under way, but few enterprises have a fully integrated communication environment. Adoption should continue to increase through the next several years as UC technology solutions mature and enterprises update their installed bases of communication infrastructures.

This research reviews relevant technologies and vendor offerings that can assist in these goals (see Figure 1).

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## Magic Quadrant

Figure 1. Magic Quadrant for Unified Communications



Source: Gartner (July 2010)

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## Market Overview

In 2010, vendor consolidation in the UC market continued with, most notably, Nortel being acquired by Avaya, and Cisco acquiring Tandberg. From a product perspective, Cisco and Microsoft maintained their strong leads, while Avaya continued to strengthen its portfolio. Product functionality overall increased, particularly in the areas of conferencing, mobility, server virtualization and session management. Additionally, we saw the emergence of complete UC suites from single vendors. Although

includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

### Market Responsiveness and Track Record:

Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements, etc.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

## Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and

the full suites are not yet competitive with best-of-breed portfolios, they suggest the direction for market leaders. Nonleading vendors will increasingly focus on niche market approaches and on best-of-breed capabilities. Most enterprises continue to leverage their existing strategic communication partnerships, and should expect to have two or three different UC vendors to complete their portfolio. Each vendor has at least one strength, for instance, in e-mail, telephony or networking, and each vendor seeks to expand its footprint within the enterprise. A common vendor strategy is bundling their lesser-known or weaker UC features with their stronger products. Another common strategy is the increased use of discounting and other incentives to allow new products into accounts.

Most enterprises take a longer-term approach to UC. They start by defining their strategy and longer-term direction. They then determine the most effective way to deliver this, while controlling costs, retaining control over their accounts and leveraging existing investments. Often, the UC initiative focuses on a particular project, and as some projects are completed, others are initiated. In this way, UC evolves as a process of continuous and incremental improvement. A strategy for accomplishing this is described in "Focus on UC Projects, Not on UC Technology," "Developing an Enterprise Unified Communications Road Map" and "Developing a Vision for Unified Communications." "Market Share: Enterprise Unified Communications Infrastructure, Worldwide, 2008" describes vendor market shares.

While most solutions today support key standards such as Session Initiation Protocol (SIP), an important distinction is the extent to which they federate and integrate with third-party products. Some solutions are intended primarily to enhance and operate within their own specific environments; although these solutions do work with third parties, their interoperability is often limited. Other products are clearly designed to interoperate in multiple environments, thus are more flexible. Currently, there is no best approach, and no vendor offers everything an enterprise needs for communication. Companies must make decisions by evaluating the emerging options based on their own objectives, and on how the options fit with the business's longer-term strategies.

The adoption of UC in enterprises by enterprises continues to increase; however, actual penetration as a percentage of market, and, in some cases, usage rates across an enterprise, remain low. This is the result of multiple technical and organizational issues, including:

- Enterprises have large investments in communication infrastructures that must be preserved; this leads to a slower evolutionary approach, rather than to the faster revolutionary "rip and replace" approach.
- Many applications and products are complex to deploy and may require organizational changes.
- The business case frequently is based on a soft ROI or a strategic investment, such as productivity improvements, rather than on hard ROI, such as cost savings. As a result, in a conservative economy, deployments occur slower, perhaps as part of a broader technology update.

Gartner expects these barriers to be resolved slowly, and during the next several years UC will become an accepted part of enterprise communication road maps and investments. As UC technologies and products are deployed, the challenge will shift from technology issues to organizational and change management.

Several vendors offer strong UC solutions, but were not included in this Magic Quadrant, because the inclusion criteria require that vendors have strong on-premises solutions in at least three of the six key technology areas. In the area of conferencing, Polycom offers strong solutions in conferencing, but does not offer solutions in other technology areas; Tandberg, which also offers a strong conferencing solution, is now part of

offerings to meet the specific needs of individual market segments, including verticals.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

Cisco. In the area of UM, Applied Voice & Speech Technologies (AVST) offers a best-of-breed UM solution. Finally, service providers, such as AT&T, Google, Verizon and BT, were not included in this document because they do not offer an on-premises solution. UC service solutions are described in the "Magic Quadrant for Unified Communications as a Service, North America."

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## Market Definition/Description

UC is a direct result of the convergence of communications and applications. Differing forms of communication have been developed, marketed and sold as separate individual applications. In some cases, they even had separate networks and devices. The convergence of all communications on IP networks and open-software platforms is enabling a new paradigm for UC, and is changing how individuals, groups and organizations communicate.

Gartner defines UC products (equipment, software and services) as those that facilitate the use of multiple enterprise communication methods. This can include control, management and integration of these methods. UC products integrate communication channels (media), networks and systems, as well as IT business applications and, in some cases, consumer applications and devices.

UC offers the ability to significantly improve how individuals, groups and companies interact and perform. These products may be made up of a stand-alone suite, or they may be a portfolio of integrated applications and platforms spanning multiple vendors. In many cases, UC is deployed to extend and add functionality to existing communication investments.

UC products are used by people to facilitate personal communications and by enterprises to support workgroup and collaborative communications. Some UC products may extend UC outside company boundaries to enhance communications among organizations, to support interactions among large public communities or for personal communication. Additionally, UC is increasingly being integrated or offered with collaboration applications to form UC and collaboration (UCC).

It's useful to divide UC into six broad communication product areas:

- **Voice and telephony:** This area includes fixed, mobile and soft telephony, as well as the evolution of PBXs and IP-PBXs. This also includes live communications, such as video telephony.
- **Conferencing:** This area includes separate voice, videoconferencing and Web conferencing capabilities, as well as converged unified conferencing capabilities.
- **Messaging:** This area includes e-mail, which has become an indispensable business tool, voice mail and UM in various forms.
- **Presence and IM:** These will play an increasingly central role in the next generation of communications. Presence services, in particular, are expanding to enable aggregation and publication of presence and location information from and to multiple sources. This enhanced functionality is sometimes called "rich presence."
- **Clients:** Unified clients enable access to multiple communication functions from a consistent interface. These may have different forms, including thick desktop clients, thin browser clients and mobile PDA clients, as well as specialized clients embedded within business applications.
- **Communication applications:** This broad group of applications has

directly integrated communication functions. Key application areas include consolidated administration tools, collaboration applications, contact center applications and notification applications. Eventually, other applications will be communication-enabled. When business applications are integrated with communication applications, Gartner calls these CEBPs.

Note that mobility is an element of each area. While there can be synergy in the mobile solutions deployed for each area, there is no one mobile solution for UC; there are many mobile solutions.

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## Inclusion and Exclusion Criteria

To be included in this Magic Quadrant, solution providers must have:

- On-premises products with significant market presence in three or more of the six core communication areas defined in Gartner's UC model
- Market presence that can be demonstrated in one of two ways: as significant market share or by differentiating innovation or mind share
- Sufficient sales, revenue and operational presence to support market objectives
- Demonstrable enterprise-premises UC portfolios/products with references
- The ability to enable a complete portfolio, even if the parts are offered via partnerships
- The ability to generate significant interest by leading client market segments

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## Added

No vendors were added.

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## Dropped

No vendors were removed.

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## Evaluation Criteria

### Ability to Execute

Gartner analysts evaluate UC product providers based on the quality, efficacy and overall maturity of the products, systems, tools and procedures that enhance individual, group and enterprise communications. Ultimately, UC providers are judged on their ability and success in capitalizing on their vision (see Table 1).

**Table 1. Ability to Execute Evaluation Criteria**

Evaluation Criteria	Weighting
Product/Service	high

Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	standard
Marketing Execution	standard
Customer Experience	standard
Operations	standard

Source: Gartner (July 2010)

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## Completeness of Vision

Gartner analysts evaluate UC product providers on their ability to convincingly articulate logical statements about current and future market directions, innovations, customer needs and competitive forces, and how well these map to Gartner's overall understanding of the marketplace. Ultimately, UC product providers are rated on their understanding of how market forces can be exploited to create opportunities for providers and their clients (see Table 2).

**Table 2. Completeness of Vision Evaluation Criteria**

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	standard
Vertical/Industry Strategy	standard
Innovation	standard
Geographic Strategy	standard

Source: Gartner

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## Leaders

The Leaders quadrant contains vendors selling comprehensive and integrated UC solutions that directly or, with well-defined partnerships, address the full range of market needs. These vendors have defined migration and evolution plans for their products in core UC areas, and are using their solution sets to enter new clients into their client rosters and to expand their footprints in their client bases in new function areas.

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## Challengers

Vendors in the Challengers quadrant offer solutions and capabilities with the potential to move into a leadership position, but lack critical elements. These solutions may lack specific capabilities or maturity, or are not successfully being delivered outside a captive installed base.

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## Visionaries

Vendors in the Visionaries quadrant demonstrate a clear understanding of the UC market and offer a strong and differentiating approach to one or more core areas. However, these vendors have limited ability to execute across the entire set of requirements, or have marketing and distribution limits to their ability to challenge established Leaders.

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## Niche Players

Vendors in the Niche Players quadrant offer stand-alone components in several UC areas, but do not have a comprehensive product; or, they have a solution that has limited market reach. Although these solutions often perform specific functions well, they do not represent a complete solution for the broader UC market.

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## Vendor Strengths and Cautions

### Aastra Technologies

Aastra Technologies, a global company with headquarters in Canada, continues to pursue a dual approach to UC. One solution approach is based on its own complete UC portfolio, which extends the products of companies acquired over the last several years. The second approach is to integrate the Aastra telephony solutions with industry-leading collaboration partners like Microsoft and IBM. Aastra is evolving its three telephony product lines: Aastra 5000, Clearspan and MX-ONE (acquired from Aastra's latest acquisition of Ericsson) toward common SIP and virtualized solutions. These will be extending with common UC software and internal components. The Aastra solution supports VMware virtualization, fixed-mobile integration, Onebox UM and Solidus eCare call centers, and offers the InConference audioconferencing solution and the ViPr videoconferencing solution. Aastra supports its HP Networking partnership across all platforms.

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### Strengths

- Over the last several years, Aastra has grown through acquisition of several PBX businesses and has improved its competitive position.
- Aastra's dual UC strategy enables it to address the needs of users wishing to leverage collaboration solutions from leading vendors, as well as the needs of users leveraging the more basic but cost-effective Aastra collaboration functions.
- Aastra offers cost-effective products; some are global, while others are tuned for specific niches and regional markets.

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### Cautions

- Because some of Aastra's products are specific to regions, users should ensure support of planned product acquisitions for each location.
- Aastra has defined a road map for converging its several telephony product lines by leveraging standards, including SIP. Users should determine whether the migration and product rationalization match their needs and remain on schedule.

- The Aastra UC suite is oriented toward telephony and lacks feature-rich UC functionality in some areas, such as IM, presence and Web conferencing. Enterprises should review their requirements to determine which Aastra products can address their needs.

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## Alcatel-Lucent

The Alcatel-Lucent (ALU) OmniTouch Instant Communications Suite (ICS) provides audioconferencing, videoconferencing, Web conferencing and Web collaboration capabilities. It is offered in combination with the OmniPCX (OXE) for SIP-based telephony functions and with the ALU Genesys Enterprise Telephony Software (GETS) solution, which provides integration middleware for interoperability with third-party PBXs and UC solutions.

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### Strengths

- ALU has a comprehensive UC solution portfolio, offering its own native functions in all areas, combined with integration options for a wide range of partners, for instance, for video or collaboration. It also has strengthened its proposition for UC applications by leveraging capabilities, such as intelligent Workload Distribution, and the development of a common management system.
- ALU has virtualized its UC portfolio, which has enabled its scalable and data-center-centric solutions for enterprises and service providers. ALU, combined with Genesys, is well-represented in most regions of the globe, and has the ability to offer integrated solutions that span carrier and enterprise environments. With its carrier relationships, the company is well-represented for solutions provided through network service providers.
- Enterprises should also evaluate the Omni family of UC solutions if they already have a commitment to ALU, have a carrier that can offer hybrid ALU functions, or believe that they could benefit from the multi-PBX integration capability offered by the My Teamwork conferencing, voice messaging and the GETS products.

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### Cautions

- It remains to be seen whether ALU can gain serious UC sales traction IN North America with a more direct approach, leveraging its Genesys sales force and HP alliance.
- Overall, ALU remains better-known as a telephony vendor, and has not yet established a market presence in other areas of UC, such as conferencing, messaging, IM or collaboration.
- The reorganization of the enterprise business unit, consolidating its product development with that of the carrier business, has the risk of defocusing the R&D for enterprise customers. ALU's strategy may lead to similar functionality being delivered through service providers as through channel partners, offering the potential for useful hybrid models, but competing interests from carrier divisions will likely hinder the progress of the enterprise-focused group.

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## Avaya

On 18 December 2009, Avaya completed its acquisition of Nortel's Enterprise Solutions (NES) business, and has rapidly defined a new management and operational structure, as well as product road maps for how the company plans to normalize the massive combined product and service portfolios. The acquisition brings with it Nortel's Agile Communication Environment (ACE) SIP-based platform, which positions Avaya to add software solutions to its flagship Avaya Aura platform.

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## Strengths

- UM is supported with the Modular Messaging platform, and Avaya Aura Conferencing supports videoconferencing and audioconferencing. Avaya also offers a market-leading enterprise contact center portfolio, a range of Avaya one-X software-based client options and CEBP, as supported by the Avaya ACE offering.
- The Avaya Aura Session Manager component, combined with its Session Boarder Controller (SBC) option, provides a migration path toward a secure, end-to-end SIP environment.
- Avaya's product directions and end-user migration options include movement toward a virtualized infrastructure, which should result in a cost-effective deployment of UC applications, as well as reduced operational complexity. The partner ecosystem includes Avaya's DevConnect developer program, and the combined Nortel and Avaya channels, which continue to mature.
- Consider Avaya's solutions when your UC plans include telephony, messaging, conferencing or CEBP requirements. Existing clients should ensure that their plans match the company's product direction.

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## Cautions

- Avaya's ability to rapidly restructure itself has eased uncertainty around the new combined company. However, Avaya products, organization and partners are going through a period of rapid change, accompanied by the need to keep up with many new offers and business processes. Additionally, the complex portfolio, while varied and deep, is not easy to understand. As a result, planners should ensure that their required functionality is available and mature, and that they understand longer-term product directions.
- The Avaya UC portfolio has areas of weakness. For example, Web conferencing capabilities are more limited than audioconferencing, Avaya Aura Presence Services solutions are new and have seen limited deployment; despite a broad set of integrations with Microsoft, Avaya has not clearly communicated or promoted the interoperability options with Microsoft collaboration products.
- While Avaya has moved quickly to combine Avaya and Nortel distribution and system integration (SI) partnerships, some clients report strong support, while others report lack of responsiveness and clarity. Users should ensure that they have the right partner, and that the partner has the necessary skills and commitment.

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## Cisco

With the Jabber IM and presence now integrated into the 8.0 release, and video convergence plans clearer due to the Tandberg acquisition, Cisco is

increasingly able to provide a complete UC portfolio, which goes broadly under the name of Cisco Unified Communication Manager. Key parts of the UC portfolio include, but are not limited to, Cisco Unified Communications Manager, Cisco Unity Connection, Cisco Unified Presence, Cisco Unified Videoconferencing, Cisco Client Services Framework and a range of client and device options. Cisco has moved significant portions of its software to VMware, which should increase efficiencies and deployment flexibility, and lower overall cost. Additionally, Cisco offers a broad range of integrated, on-demand UC capabilities as part of the WebEx brand.

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## Strengths

- Cisco offers a comprehensive portfolio, and is expanding integration and capabilities across its components, offering access to key products via public standards, such as SIP. Cisco also continues to expand its business application integration interface options and tools, as well as its intercompany collaboration options.
- Cisco's client base and strong global channel, services and SI partners position it well with enterprise UC buying and decision-making groups, including IT and operations departments. The addition of Tandberg further established its global capabilities and visibility.
- Cisco has advanced its vision for integrating the WebEx service and Enterprise premise architectures via the Client Services Framework, and has expanded WebEx functionality (and has delivered significant new functionality with the 8.0 release).
- Evaluate Cisco UCC solutions when you have or plan to have Cisco for key voice and conferencing functions. However, ensure that any expected interoperability with other vendor products, as well as among your planned Cisco products, is available. Also ensure that your system integrator has experience with similar UC deployments.

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## Cautions

- Cisco's UC architecture can create interdependencies between network infrastructure components and communication application software. Although there are benefits to embedding application-layer functions in the network-layer infrastructure, these dependencies can restrict options.
- Cisco is initiating a blended, on-premises and on-demand service offering across its UC portfolio, starting with conferencing. This new architecture will leverage WebEx for the service portion, expand existing on-premises solutions and embed some functionality in gateways, routers and the Cisco Client Services Framework. While promising, this approach is not proved, and users should expect more detail and proof points, as needed.
- Enterprises hoping to integrate Cisco's solutions with third-party UC environments and products, such as Microsoft Office Communications Server, (OCS), should consider using external system integrators experienced in these integrations. Additionally, some integrations, such as Cisco UC Integration for Microsoft Office Communicator (CUCIMOC) are new to market and must mature before achieving the desired level of reliability, a process made more difficult due to competitive positioning with Microsoft.
- Many organizations will find that Cisco Unified Workspace Licensing (CUWL) increases the cost of ownership, especially for firms that have yet to define a road map for UC and a partner strategy, and

that have developed user profiles to identify the value of each package. The addition of Entry Edition extends the choice for CUWL, but organizations should insist that channel partners provide proposals for a-la-carte licensing to make a direct comparison of cost of ownership.

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## IBM

IBM's Unified Communications and Collaboration (UC2) portfolio is based on Sametime collaboration products, Lotus Notes/Domino messaging and the Eclipse client framework. Together, these offer a comprehensive UC portfolio, with Sametime providing conferencing, presence and a range of telephony and collaboration options.

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## Strengths

- IBM has a clear partner strategy that is based on coexistence on the back end and consolidation on the front end. On the back end, IBM offers its own key server functions, but also supports coexistence by supporting multiple partner communication servers and business applications. On the front end, IBM encourages consolidation through the use of the Sametime client, or, alternatively, it enables services to be integrated via middleware and a common Eclipse client framework and Web services, which makes Sametime easier to integrate into new environments.
- IBM's extensive experience in delivering and enhancing business applications will assist the company in delivering communication as part of a business or collaboration application, rather than as a stand-alone solution. Additionally, IBM has an extensive network of partners.
- IBM continues to strengthen the small and midsize business capabilities of the Lotus Foundations Reach solutions.
- Enterprises should consider UC2 if they have investments in IBM UC functions, if they can leverage the collaboration strengths of the product, or if they wish to operate multivendor client and server application environments.

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## Cautions

- The Sametime Unified Telephony product is still establishing itself in the market. While there are current and planned user deployments and multiple announcements of partnerships, these remain limited, to date. Users should ensure that any solutions considered have demonstrated that they can meet enterprise requirements, including integration with enterprise IP-PBXs.
- Customers should review IBM's two approaches to telephony integration and how these fit their objectives. One approach focuses on a multivendor IBM telephony middleware (Sametime Unified Telephony), which enables multiple PBXs to be supported with an identical Sametime client. The other approach enables telephony vendors to extend the Sametime client, which may be useful for enterprises with one PBX environment.
- IBM is initiating a blended on-premises and cloud service offering based on Sametime and on the LotusLive service. While promising,

the details of this approach are not yet available.

- There is a perception that the IBM Sametime product is intertwined with the Lotus Notes product. As a result, this sometimes limits who considers the product. IBM must change this perception in order to increase its market opportunities.

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## Interactive Intelligence

The Interactive Intelligence Customer Interaction Center (CIC) is an all-in-one software solution. It includes telephony, audioconferencing, UM, rich presence with IM, business process automation, a range of client and device options, and the ability to integrate with contact center and other applications. The solution integrates with leading third-party UC and video solutions.

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## Strengths

- Interactive Intelligence has an established record for delivering successful products in this market. Its standards-based product integrates with market-leading UC products, including Microsoft's. It can function as an all-in-one solution, or as part of a broader enterprise UC portfolio. Additionally, the flexible interface and architecture enable customization for vertical applications, while the all-in-one approach enables simpler administration and operation.
- The solution seamlessly blends on-premises, on-demand and hybrid, which can be changed without disruption to operations.
- The product is well-suited to enterprises interested in integrating contact center functionality with enterprise UC functionality. Additionally, the solution offers a new model for business process automation with end-to-end workflow capabilities, and for the ability to integrate employees into the flow.
- Enterprises should evaluate the CIC solution when seeking a tightly coupled, all-in-one solution, or when seeking to integrate UC with contact center functionality.

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## Cautions

- Although the company is profitable and financially secure, and has a growing presence, it has limited market reach and visibility, especially outside North America, and continues to have trouble establishing itself in a market dominated by larger vendors.
- The company lacks visibility in IT departments, which reduces its effectiveness in delivering its broader UC product into enterprises.

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## Microsoft

Microsoft's UC solution is based on Exchange Server, OCS and Active Directory. Microsoft has strategic partnerships with Aspect and HP, along with a large and growing set of partnerships for gateways, survivable branch appliances, IP phones, audioconferencing service providers and SIP trunking, along with major system integrators and channel partners. OCS also integrates with collaboration and business applications like SharePoint.

The same OCS and Exchange application is also used for Microsoft's online collaboration suite, Business Productivity Online Standard Suite (BPOS).

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## Strengths

- Microsoft OCS 2010 R2 has seen year-over-year increased adoption for voice and audioconferencing, and now states that it has 100-plus deployments of over 2,000 telephony users. The next release of OCS, Microsoft Communication Server "14," scheduled for this calendar year, will add several critical telephony functions.
- Exchange UM continues to gain acceptance and maturity in the market. Deployments have expanded beyond smaller (fewer than 2,000 subscribers) into the midsize (2,000 to 5,000 subscribers), with a few deployments in the very large (10,000-plus subscribers) market. In Exchange Server 2010, calendar access is integrated with the UM telephone interface, as is text-to-speech rendering of audio messages.
- Microsoft's historic strength in collaboration and desktops, combined with promising, emerging real-time communications, results in significant potential. Emerging areas include increased visibility of SIP trunks from carriers and from IP-PBX providers, significant new end-to-end UC solution providers, such as HP, and increased presence in contact centers.
- Enterprises looking into UC, particularly those with Microsoft applications already in place, should understand Microsoft's broad UCC paradigm. When considering telephony specifically, OCS can be deployed in different configurations, depending on enterprise directions and requirements. It can be deployed with a PBX so that both are in parallel use for telephony, or it can be deployed to perform nontelephony functions, leaving telephony to the IP-PBX. As OCS matures in 2011, OCS may be able to perform complete stand-alone telephony services.

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## Cautions

- The telephony functionality in OCS 2007 R2 remains in the early stage, and OCS has not yet been proved as a complete telephony displacement. Enterprise planners should understand that OCS 2007 R2 has limitations, and should carefully evaluate some critical newer features in the forthcoming version of OCS, such as call admission control and E911.
- Microsoft's OCS audioconferencing and videoconferencing product set has expanded its interoperability and endpoint support abilities this year, but these functions remain new and have not yet been proved in the market.
- Many OCS communication functions, such as telephony, video and public switched telephone network (PSTN) integration, require solution integrators and employees with different skills than many firms presently have. Planners should ensure that their providers and internal staff have relevant experience in key areas.
- Currently, OCS offers an attractive initial price point for bundled communications and collaboration; however, voice capabilities will be priced separately in subsequent releases. Although some users will be allowed grandfathered pricing, others may see the competitive price advantage of the OCS bundle disappear.

## Mitel

The Mitel UC solution is based on the Mitel Applications Suite, which includes audioconferencing and Web conferencing, UM, and teleworker and mobility support. Mitel Unified Communicator Advanced provides the desktop clients, presence, IM and collaboration capabilities for the solution, while Mitel Communications Director (MCD) provides telephony call control that runs on platforms such as the proprietary Mitel 3300 family of controllers, industry-standard servers from Sun Microsystems (now part of Oracle), HP and IBM, or on VMware virtualized environments. Mitel Telecollaboration Solution is the recent addition of high-quality videoconferencing, with its own 1080 progressive-based endpoints.

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## Strengths

- The Mitel UC solution offers a comprehensive software suite. The telephony function can be distributed with the Mitel 3300 controllers or centralized in a data center solution with MCD running on a number of industry-standard servers or on VMware virtualized environments. The applications can run with Sun Ray desktop virtualization, and certification with VMware is largely complete for the range of UC applications.
- The Mitel UC suite can be integrated with Microsoft OCS and IBM Sametime environments. It also offers several strong options for messaging. In addition to interoperating with third-party conferencing offerings, Mitel has released its own videoconferencing solution with Telecollaboration, in addition to a range of audioconferencing and Web conferencing offerings, along with video desktop offerings that support 720 progressive resolution.
- The Mitel UC solution's integrated design and administration and mobility functions provide a coherent, single-point solution. A recent enhancement of the user interface integrates Web conferencing and videoconferencing capabilities into the single client.
- Organizations looking for an integrated UC approach, or that are evaluating telephony communication functionality to go with Microsoft or IBM deployments, should evaluate the Mitel UC solution.

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## Cautions

- Mitel is better-known for midsize solutions, and lacks visibility overall in many markets and segments. While it has developed its product set to fit better with larger businesses, it is taking time to develop the brand awareness against stronger competition in the large-business segment.
- Mitel is now a publically listed company. While it showed good growth in 2009, growth has slowed in 2010, and necessary improvements to profitability will come by way of transitioning customers to indirect channels. This is often a difficult time, as new partner relationships are established.
- Mitel currently lacks the UC partner ecosystem of many of its larger competitors, including those with UC application development skills and multicountry presence.

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## NEC

NEC offers a full UC suite on its Univerge Sphericall software-based product, which includes multiple voice and conferencing options, messaging, IM, presence, a range of clients and support for business process integration. NEC continues to also offer its existing, appliance-oriented SV8000 Series and iS3000 PBX servers, which for existing NEC customers can be migrated to the Sphericall product.

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### Strengths

- NEC is a financially strong, global firm with an established presence in all regions and a broad portfolio capable of addressing multiple markets and segments.
- NEC has developed a forward-looking UCC architecture based on its Sphericall software platform. Sphericall is standards-based and service-oriented, and fits well into IT environments and emerging cloud-based deployments, and enables CEBP solution development.
- NEC has reorganized its global marketing and product development, creating a single global approach while maintaining regional competency centers.
- Enterprises interested in a UC solution should consider the NEC Sphericall solution. Enterprises with existing investments in NEC PBXs that want to expand their communication functionality should consider migrating to NEC's Univerge Sphericall.

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### Cautions

- Some NEC sales and support partners are not qualified to address the challenges of software communication products. As a result, buyers interested in Sphericall should contact NEC to ensure that they are aligned with a partner that has the needed competencies.
- Legacy NEC telephony customers considering their options on how to migrate should seek the assistance of NEC or partners for assistance on a clear migration path. They should expect to migrate to Sphericall to achieve a UC solution.
- Over the last year, NEC has reorganized its marketing effort to have more of a global focus. It will take time for the changes to mature and prove their effectiveness in bringing Sphericall into NEC's key markets.

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## SAP

The SAP Business Communications Management (BCM) suite offers UC functions and interfaces that are natively integrated with SAP applications such as SAP CRM, SAP ERP and SAP Business Intelligence (BI). The same APIs are available for third-party applications and interfaces with NetWeaver. The SAP BCM product includes native telephony functions, several forms of voice and UM, its own IM and presence solution, and a range of clients. SAP is also developing an on-demand suite to be delivered via partners for some global regions.

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## Strengths

- The SAP BCM UC functions are natively integrated into the SAP product line, and SAP BCM is generally better-known for its contact center capabilities, which can be leveraged seamlessly together with its UC functions. These are delivered through SAP's strong global sales, support and partner network.
- SAP BCM offers out-of-the-box integration with Microsoft Office Outlook and OCS presence, SAP CRM (sales, marketing, service and interaction center business roles), SAP ERP and SAP Business ByDesign. This means that users with different roles across the organization can cost-effectively use SAP BCM telephony functionality through and with their most-used business applications.
- Enterprises should consider the BCM solution if they are SAP users and have individuals who would benefit from having communication functions directly integrated with their SAP applications.

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## Cautions

- Overall, the UC capabilities of BCM are limited, with particular limitations in specific areas, for example, conferencing. As a result, enterprises should verify whether the level of a particular functionality meets their requirements.
- SAP is a large-business application vendor, but has not yet established its credibility as an enterprise communication vendor.

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## ShoreTel

The ShoreTel 11 UC platform offers an appliance approach particularly suited to distributed organizations. The solution includes integrated IP telephony, contact center and UC functionality. The ShoreTel Communicator desktop client integrates telephony services with mobility services, presence-enabled IM, videoconferencing, audioconferencing, Web conferencing, and collaboration and UM that can integrate with third-party e-mail systems. The solution can integrate with Microsoft OCS and IBM Sametime for IM and voice with presence, and is integrated directly with IBM Lotus Foundations. Administration, management, mobility and UM are supported on general purpose servers via VMware, along with independent Linux-based telephony switch appliances containing solid-state flash memory, which lowers failure rates. Survivability is provided via the ShoreTel's N+1 switch failover capability, for which a switch can fail over to another switch anywhere in the network. All switches operate independently, but are all configured from a single ShoreTel Director Web application. ShoreTel supports its own phones, as well as SIP phones and SIP trunking.

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## Strengths

- ShoreTel offers a bundled UC solution with its all-IP-based system, which has limited installation and configuration requirements.
- Users report that the solution is easy to use, has intuitive user and management interfaces, and has a simple transparent pricing or licensing structure.

- Enterprises with distributed operations should consider ShoreTel for a cost-effective, telephony-focused UC solution.

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## Cautions

- ShoreTel is not known for stand-alone UC applications, with solutions primarily sold with its IP telephony solution.
- High customer satisfaction ratings are based primarily on small or midsize businesses, so receiving references from large customers is advisable.
- ShoreTel is a relatively small, emerging vendor primarily sold in North America that is slowly increasing its global market reach and mind share in a market dominated by large competitors.

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## Siemens Enterprise Communications

Siemens Enterprise Communications OpenScope UC Server is the core application platform. This solution includes presence management, IM, one-number service, audioconferencing, videoconferencing, voice messaging and softphone functionality, as well as integration with third-party Web conferencing platforms like Microsoft OCS.

OpenScope Mobility offers mobile dual-mode handsets, while OpenScope Xpressions offers UM. The OpenScope solution also offers integrations, such as OpenScope Fusion for SAP, and integrations for Microsoft and IBM UC applications, as well as integrations for social-media applications and vertical applications.

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## Strengths

- In a consolidating market of communication infrastructure vendors, Siemens Enterprise Communications' business is wholly focused on the provision of enterprise-class UC, contact center and networking solutions to large and small businesses, and its strategy is consistent with that of other market leaders in the provision of enterprise communication applications and services.
- OpenScope is a mature, fully functional, all-software, all-SIP UC solution. It is being fully certified to work as a virtual VMware environment, and offers its own components, including telephony. However, it can also be integrated with leading collaboration applications and with third-party SIP products, including IBM and Microsoft UC products.
- The company has expanded its collaboration capabilities with partner agreements with Jive's OpenFire for IM and, more recently, FastViewer for Web and desktop video collaboration, launched in June 2010. This will be in addition to the current offering as part of the OpenScope product suite. This will allow the company to increase market penetration and awareness.
- Organizations should evaluate the Siemens Enterprise Communications UC solution if they are looking for a full-featured, software-based solution, intend to integrate UC with business applications, or are an existing customer.

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## Cautions

- While the new organization has increased its focus on marketing, Siemens Enterprise Communications still lacks an effective go-to-market approach in North America, resulting in slow adoption and acceptance of the OpenScape portfolio.
- While an established vendor in traditional telephony, the OpenScape solution struggles for visibility in the UC market which involves different buying audiences, different competitors and new distribution methods. The lack of recognition may be exacerbated if the company must rebrand away from the Siemens name.

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## TeleWare

The TeleWare solution is focused primarily on providing mobile-focused capabilities integrated with UC functions via Intelligent Office for one-number, UM and conferencing capabilities, Intelligent Mobile for users in a private mobile network, or as part of a fixed-mobile integration solution, and intelligent eXchange (iX) for IP telephony, hosted voice, integration and trunking. Intelligent Connect completes the portfolio for call routing, autoattendant and interactive voice response (IVR) functionality associated with a contact center.

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## Strengths

- TeleWare's low-power GSM licenses in the U.K. and Australia enable it to provide mobile voice and data solutions for distributed enterprise networks, and with its own range of subscriber identity modules (SIMs) can provide deeper call control and message management than enterprise mobile communication solutions from premises-based providers.
- The platform can be provided as a hosted service, or as a premises-based solution, and is capable of being customized to meet specific enterprise requirements.
- Large enterprises that are interested in developing UC solutions with a strong mobile integration can include TeleWare in their reviews.

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## Cautions

- The Intelligent Mobile solution requires the right to use a specific wireless spectrum. In the U.K. and Australia, this can be provided by TeleWare; however, in other countries, the specific options must be investigated.
- While some progress has been made, the videoconferencing and Web conferencing portions of the UC portfolio offer limited functionality.
- TeleWare has some key global accounts and is developing a presence in the Middle East and Australia, but it has a limited market and technical presence outside the U.K. The TeleWare solution is based on the Intelligent Office suite, which includes functions for softswitch-based telephony, conferencing, messaging and presence, as well as other UC functions. Additionally, the Private Mobile eXchange product provides a range of mobility capabilities.

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## Toshiba

The Toshiba UC solution is based on the Strata CIX family of IP business telephone systems. In addition to telephony, bundled UC functionality includes several variations of UM: audioconferencing, Web conferencing and videoconferencing (up to eight parties); telephony-focused presence; a range of client options, including Web and SIP; and the ability to launch a softphone-enhanced telephony presence and remote call control from Microsoft OCS.

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## Strengths

- Toshiba has an established reputation for cost-effective and reliable IP telephony solutions. While the Toshiba UC solution scales up to 1,000 users, it does particularly well with small businesses of fewer than 100 users, partly because the vendor is especially price-effective in this range. Consider the Toshiba UC solution if you are a small or midsize business looking for a cost-effective, telephony-centric solution.

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## Cautions

- All the UC functionality requires the Strata CIX telephony environment, and this provides less UC functionality than many competitors. For instance, conferencing functions and presence do not integrate with third-party solutions, so separate investments are needed if larger or more-extensive capabilities are required.
- Most of Toshiba's sales efforts are concentrated in North America. Toshiba has a limited ability to sell complex software UC products in other regions, such as Asia/Pacific and EMEA, and lacks visibility in these regions. This limits its ability to deliver UC solutions to the global market.

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