



VENDOR PROFILE

ShoreTel Unveils Its Common Platform

Rich Costello

Amy Lind

IDC OPINION

Enterprise demand for unified communications and collaboration (UC&C) is rapidly expanding as evidenced by results from IDC's 2014 *U.S. Enterprise Communications Survey*, an online survey of 1,000 United States-based businesses. According to the survey, 32.5% of respondents said their company has implemented UC&C and an additional 53.7% plan to deploy it in the future; in comparison, only 13.7% of respondents said they considered but rejected or have no plans to use UC&C. ShoreTel Inc. is a major player in the global UC&C market with a broad and competitive portfolio ranging from on-premises systems to cloud-based and hybrid solutions. IDC believes that ShoreTel is well positioned to meet the growing enterprise demand for UC&C based on the following factors:

- The pending release of the company's common platform, ShoreTel Connect, across all delivery models – premises, cloud, and hybrid
- A track record of high customer satisfaction ratings in the UC&C market
- Support for a more consistent UC&C end-user experience whether on the desktop or mobile device

IN THIS VENDOR PROFILE

This IDC Vendor Profile analyzes ShoreTel (Nasdaq: SHOR), a leading IP telephony and UC&C vendor, and the company's pending release of its common platform ShoreTel Connect. IDC also reviews key success factors for ShoreTel, including its market potential, go-to-market and product strategies, and differentiators, and provides essential guidance for technology adopters.

SITUATION OVERVIEW

Company Overview

ShoreTel is based in Sunnyvale, California, and has regional offices in Austin, Texas; Rochester, New York; Maidenhead, United Kingdom; Sydney, Australia; Bangalore, India; Manila, Philippines; and Singapore. ShoreTel is a major vendor in the worldwide IP telephony and UC&C markets. ShoreTel provides on-premises systems to enterprises with 50-5,000 users, although it has spent the past several years investing in and expanding its product portfolio to include the delivery of cloud-based and hybrid telephony and UC&C solutions.

In 2010, ShoreTel acquired Agito Networks and assimilated its mobile technology and solutions into the ShoreTel UC portfolio. Soon after in 2012, ShoreTel acquired hosted VoIP and UC service provider M5 Networks for \$146 million including its customer base, distribution capabilities, and proprietary network. The M5 acquisition enabled ShoreTel to expand its telephony and UC portfolio into the cloud

and reach the rapidly growing segment of customers looking to deploy IP communications through a cloud or hosted model. ShoreTel folded M5's assets into the ShoreTel Cloud Division and rebranded its hosted UC offering as ShoreTel Sky. However, as part of ShoreTel's pending common platform release, its cloud offerings including ShoreTel Sky will become available as ShoreTel Connect CLOUD and ShoreTel Connect HYBRID beginning in late August 2015.

In fiscal year 2014, ShoreTel generated approximately \$339.8 million in revenue, and it is on track to end fiscal year 2015 with approximately \$355 million in total revenue. ShoreTel continues to execute on its strategic plan to transition the business to a recurring revenue model and position the company for growth in the cloud sector while maintaining its commitment to the on-premises environment. To that end, in 1Q15, ShoreTel reported that recurring revenue, which consists of hosted and related services revenue plus support revenue, represented 51% of total revenue for the first time ever and reached an annualized total of \$173 million. However, gains in recurring revenue – primarily from hosted revenue, which grew by 6% during the quarter – were not enough to offset declines in product (on-premises) revenue; as a result, ShoreTel ended 1Q15 with \$85 million in total revenue, a decline of 6.5% over the previous quarter.

Company Strategy

ShoreTel Connect Common Platform

A key component of ShoreTel's strategy has been the development of its common platform – ShoreTel Connect – which ShoreTel unveiled in April 2015 at its ShoreTel One Champion Partner Conference. ShoreTel Connect will be available in August 2015 and represents the company's largest software release ever, encompassing 4 million new lines of code and 50 platform upgrades.

The ShoreTel Connect common platform and common client are part of a single business communications software solution designed to:

- Simplify the way IT deploys, manages, scales, and secures phone systems for mobile, cloud, premises, and hybrid deployments by providing a single software platform.
- Offer the flexibility of delivering services and applications on-premises or as a service.
- Provide an end-user communications experience that is personalized on any device.

With ShoreTel Connect, UC&C is deployed either on-premises or in the cloud and delivered in one of three ways – that is, either in an on-premises or cloud-based model or as a mix of cloud and on-premises applications and services in a hybrid model. The three delivery models are examined in detail as follows:

- **ShoreTel Connect ONSITE** is the next release of ShoreTel's premises-based offering and includes more than 50 new features including Linux-based DVS, new voice switches, security and remote access, and the new Connect client. ShoreTel Connect ONSITE is a single tenant, customer-ready variant for customers and partners to deploy themselves. Existing premises-based customers have the option to migrate from ShoreTel 14.x to ShoreTel Connect ONSITE or to ShoreTel Connect CLOUD, although ShoreTel has explicitly stated it plans to continue supporting and sustaining ShoreTel 14.x.
- **ShoreTel Connect CLOUD** is a new highly scalable, carrier-grade multitenant hosted/cloud-based solution that ShoreTel will deploy with its own cloud operations. It includes the complete ShoreTel desktop collaboration suite, mobility (voice, video, content sharing), secure voice from desk phones to the cloud, Contact Center, and ShoreTel PBX features. Existing ShoreTel Sky customers have the option of migrating to ShoreTel Connect CLOUD as it becomes

available. The company has also stated that it has no plans to force ShoreTel Sky customers to migrate to Connect CLOUD as it plans to support and sustain the ShoreTel Sky platform for the foreseeable future.

- **ShoreTel Connect HYBRID** offers new applications such as Fax and Scribe (initially) and enables premises- and cloud-based solutions and locations to be combined while providing extension dialing, caller ID, point-to-point video, and automated directory integration across the deployment options. ShoreTel also has two other hybrid deployments: Site Survivability, which provides cloud call control with onsite failover switch, and Hybrid PBX Federation, which expands onsite systems by integrating new cloud accounts.

ShoreTel has also completely redesigned the user experience, describing ShoreTel Connect as "consumer like in its simplicity but with business-grade features." ShoreTel Connect provides a single user interface that is the same across deployment models and will support a consistent user experience between the desktop and mobile users, coupled with the use of common applications and endpoints.

ShoreTel Connect HYBRID

ShoreTel has been selling two different offerings – premises based and cloud – since its acquisition of M5 Networks, and it is not alone in doing so as most vendors have a mix of on-premises systems and cloud solutions that they typically separate with different capabilities. In the past, this meant that bringing together premises and cloud solutions in a hybrid environment resulted in separate user experiences and, in some cases, different features and functionalities even if the underlying architecture was from the same vendor, which it often was not.

Now, however, with its common platform, ShoreTel is aligned as one company with the single vision of providing *the* communications platform for midmarket and enterprise customers. Moreover, ShoreTel's common platform gives customers a migration path to a cloud-based or hybrid approach. The increasingly distributed, mobile, and virtual nature of workforces coupled with the proliferation of mobile devices and the BYOD phenomenon, as well as the desire by many enterprises to maximize their existing on-premises investments, are key factors spurring enterprise interest in hybrid UC&C deployments. At the same time, corporate workers are demanding the ability to communicate anytime, anywhere, and on any device.

The resulting enterprise migration to a hybrid UC&C environment is a rapidly growing trend and one that ShoreTel is fully embracing. ShoreTel believes that UC&C increasingly will be consumed in hybrid configurations consisting of software applications virtualized on general-purpose servers in on-premises deployments and additional applications delivered via the cloud in an "as a service" model for which all applications are functionally integrated together and made transparent to users and administrators. ShoreTel release 14.2 already incorporates support for software applications as a service to enable access to integrated cloud-based UC&C applications including fax, email to voice, and mobility with voice and video capabilities. Moreover, with ShoreTel Connect HYBRID, the company is addressing the growing hybrid opportunity by providing customers with flexibility and choice in how they deploy their communications platforms.

ShoreTel Connect CLOUD

One of ShoreTel's stated goals is to become the leading UCaaS vendor by the end of 2016 while still growing its premises business and offering customers a hybrid solution. A key strength of the company always has been its ability to deliver cost-effective, easy-to-manage premises-based voice solutions – particularly to small and medium-sized enterprise customers. With this in mind, ShoreTel is positioning

ShoreTel Connect CLOUD, its multitenant cloud platform, in a similar manner by highlighting how the cloud simplifies the purchasing decision and reduces deployment and management complexities. Furthermore, the addition of a cloud service delivery model adds choices for customers but does not change the underlying value proposition of UC&C for the end customer; instead, it enhances and makes ShoreTel's channel partners more valuable.

Areas of Innovation

ShoreTel Connect is designed for deployments of up to 20,000 users in a single system image. It features a modular, distributed architecture that allows customers to add capacity as needed. The system can also be deployed in a virtualized environment.

ShoreTel's strategy has been to build its UC&C applications in concert with its distributed IP-based architecture. For example, ShoreTel IM and conferencing are served by a Linux-based appliance, which automatically is identified by ShoreTel administration software when connected to the ShoreTel network. ShoreTel collaboration solutions are equally integrated with its client portfolio – users can start a call with an IM, turn that into a phone call, press a button for video, and another to automatically share a desktop with other users.

UC&C is a key part of ShoreTel's overall integrated solutions selling practice and the main focus of its core messaging; at the same time, cloud, mobility, and contact center solutions are core to its voice/UC&C development plans. ShoreTel Enterprise Contact Center (R9) is an integral part of the UC&C portfolio and includes features and functions such as geographic redundancy, multichannel routing (email and Web based), CRM integration, advanced routing capabilities, and real-time management, among others. With the common platform, ShoreTel is bringing the enterprise contact center solution to the cloud with ShoreTel Connect Contact Center, which is available for premises, cloud, and hybrid models. ShoreTel Connect Contact Center introduces a new Web-based agent interface for both premises and cloud deployments, with the contact center functions residing in the Web-based user interface.

ShoreTel is introducing redesigned UC clients for Macs, Windows, and Web clients, with ShoreTel Mobility available for a wide range of smartphones and tablets with the iOS and Android operating systems. ShoreTel is also bringing enterprise SMS to the desktop, allowing users to send and receive text messages to/from their desk phone without the need to share their mobile number. In addition, the ShoreTel Dock supports mobile phones at the desktop. ShoreTel Mobility is supported on ShoreTel 14.x PBX system, giving end users a tightly integrated solution and interoperability across the various UC endpoints including desk phones and desktop applications; however, the ShoreTel Mobility solution also works with other third-party PBX systems (Cisco, Avaya, Nortel, etc.). This type of deployment is typically used by customers that are taking a phased approach to migrating off existing PBX systems to the ShoreTel PBX. Wearable technology is a fascinating frontier for the mobile professional, and ShoreTel has plans to deliver the core UC capabilities of the ShoreTel Mobility client on the Apple Watch.

Business Strategy

Customers

ShoreTel is primarily focused on serving businesses with 5-5,000 lines or users, although it does have customers with 10,000 or more lines. Approximately 60% of ShoreTel's customer base has between 100 and 1,000 licenses.

ShoreTel serves roughly 32,600 businesses in more than 60 countries with more than 3.5 million individual users of ShoreTel premises solutions. Currently, ShoreTel has more than 172,000 installed cloud or recurring revenue seats.

Vertical Markets

ShoreTel continues to invest in key vertical markets including government, education, professional services, financial services, and healthcare. It has channel partners with expertise in these key segments:

- **Healthcare.** ShoreTel's strategy is to allow IT organizations to focus their efforts on projects serving patients rather than being bogged down with managing a complex phone system. ShoreTel Mobility is popular within institutions with mobile medical personnel.
- **Education.** ShoreTel is helping educational institutions be successful with education programs. For example, wireless solutions enable professors to be reached anywhere on campus. ShoreTel has specific financial incentive programs for this segment.
- **Professional services.** Many firms use ShoreTel technology to facilitate communications and a greater degree of client service. Law firms, for example, leverage ShoreTel's solutions, which often offer competitive capabilities at a lower total cost of ownership (TCO) than competing solutions.
- **Government.** Government agencies leverage ShoreTel solutions, which often have lower operating costs than traditional Centrex or legacy PBX solutions, to reduce communications costs as the cost savings from ShoreTel's solutions can often be applied to other essential programs. ShoreTel currently has approximately 2,200 local and state government customers in the United States.

Geographic Coverage

ShoreTel's primary focus has been on the North American market including Canada and Mexico, although it is broadening its reach in EMEA and Asia/Pacific (APAC). As part of its strategy to expand geographically, ShoreTel currently has a hosted cloud offering available through channel partners in EMEA and APAC, and it plans to bring to market ShoreTel Connect including ShoreTel Connect CLOUD in the EMEA and APAC regions late in 2015 and 2016, respectively.

Partners

ShoreTel has 1,060 channel partners worldwide ranging from resellers and distributors to service providers and systems integrators. ShoreTel operates a channel-powered model, relying primarily on channel partners to sell its solutions. Thus the company is invested in educating and bringing its partners along, particularly as its business model shifts from on-premises to recurring revenue-generating cloud and hybrid solutions. In early 2014, ShoreTel revamped its Champion Partner program, adding cloud tiers and allowing qualified and certified resellers to offer hosted services. A year later, more than half of ShoreTel's U.S. channel partners offered cloud services. In addition, partners that have engaged with ShoreTel on cloud account for roughly one-third of monthly recurring revenue bookings to date.

ShoreTel also has 100 partners in the United Kingdom and Ireland ranging from smaller, geographically focused resellers to service providers such as Vodafone. Service provider partners include Telstra in Australia, Bell Canada in Canada, BT and Vodafone in the United Kingdom, and AT&T, CenturyLink, and Windstream in the United States. Main ShoreTel distributors are ScanSource Communications in the United States, Canada, and parts of Europe; Ingram Micro in the United

States, India, and Singapore; and Tech Data in Canada. ScanSource is the first ShoreTel distributor to offer both ShoreTel's on-premises and cloud solutions. ShoreTel also announced at the end of April 2015 that Ingram Micro is offering ShoreTel cloud services in addition to premises-based solutions.

For business partners, ShoreTel leverages industry standards to enable desktop and mobile software applications to support room-based video systems from Polycom, Lifesize, and others. HP, one of ShoreTel's global technology partners, recently broadened its relationship with ShoreTel to include go-to-market programs for selling virtualized ShoreTel software applications on HP general-purpose server platforms. HP and ShoreTel, along with Ingram Micro, are also partnering on a cloud services offering that is expected to launch later in 2015.

ShoreTel Connect was unveiled at the company's channel partner conference so much of the focus was around educating and enabling ShoreTel's channel partners about the new common platform. The ShoreTel Connect ONSITE sales process will remain the same but selling ShoreTel Connect CLOUD and Connect HYBRID requires new sales approaches and strategies.

To that end, ShoreTel has made significant investments in training and enabling its channel partners to successfully sell and implement ShoreTel Connect. ShoreTel simplified its channel partner program, implementing a single set of tiers so that partners are rewarded consistently regardless of the mix of solutions the partner sells. Moving to a single common platform also means that ShoreTel's partners are able to get up to speed and start selling the solutions more quickly, particularly cloud and hybrid. Previously, partners had to learn and sell two solutions (ShoreTel 14.x and ShoreTel Sky) with different capabilities and features; now, with ShoreTel Connect, partners only have one solution to learn and sell regardless of how it is deployed. In addition, because ShoreTel Connect was built as an extension of the old platform, partners are already familiar with the solutions set, which significantly accelerates partners' ability to sell the solution. Finally, ShoreTel has adopted a more progressive approach to training, offering more online, self-paced, and interactive Webinars with the goal of reducing costs.

Pricing Model

Pricing for ShoreTel's on-premises solutions varies based on customer selection of the following components:

- **Telephony appliances.** Priced based on capacity and network interfaces
- **Software licenses.** The pricing model is an individual, user-based, one-time fee with no renewals for IP telephony, UC, contact center, and mobility.
- **Telephones.** Priced by functionality such as line appearance, color display, or Gigabit Ethernet connectivity
- **Professional services.** May include custom integration and/or software licenses
- **Services.** Price based on the services required by the customer

Pricing for ShoreTel Sky, the company's hosted UC solution, is based on a monthly recurring revenue-per-seat model. The two main components to the monthly fees are private network per location (i.e., data connectivity) and per phone. ShoreTel also charges separately for optional features such as contact center, hosted call recording, and voicemail-to-email transcription. According to ShoreTel's most recent earnings release, ShoreTel Sky's monthly average revenue per user (ARPU) was \$53, which is consistent with other hosted UC solutions in the market today.

ShoreTel plans to offer four packages for ShoreTel Connect: Telephony, Essentials, Standard, and Advanced, with additional features to the base Essentials package available for both Standard and Advanced packages. ShoreTel had not released specific pricing details for ShoreTel Connect at the time this document was written.

Competition

IP telephony and UC&C vendors including Cisco, Avaya, Mitel, Unify, and ALE are among ShoreTel's main competitors, particularly for on-premises and, increasingly, hybrid solutions. ShoreTel's cloud division, branded as ShoreTel Sky, competes with hosted/cloud-based offerings from a range of service providers including over-the-top (OTT) providers like 8x8 and RingCentral to network-based solutions from providers such as AT&T, Verizon, CenturyLink, and Broadview Networks and other providers including ThinkingPhones and Fonality. However, ShoreTel is also expanding its channel partner relationships to include service providers such as AT&T, BT, and CenturyLink.

Key Differentiators

ShoreTel's primary message is "brilliantly simple" business communications resulting in the lowest total cost of ownership. It promotes its solutions as easier to install, administer, and use than other premises solutions and boasts some of the highest customer satisfaction ratings in the UC&C market.

ShoreTel's strategy is focused on differentiating its solutions by offering enterprises the ability to choose how they want to communicate, collaborate, and consume applications – on-premises, in the cloud, or in a fully integrated hybrid model. Moreover, ShoreTel believes that hybrid is not just the ability to offer solutions within either model but rather the ability to offer both deployment models as an integrated solution that is transparent to end users. In addition, while ShoreTel is not the first vendor to offer premises, cloud, and hybrid solutions, a key differentiator for the company is its use of one common platform that can be deployed in multiple ways and that ensures a consistent user experience across delivery models.

ShoreTel's common platform also makes UC&C easier for its partners to deploy and support and for its customers to migrate from one model to another as needed. ShoreTel provides a fully integrated solution that enables channel partners to offer it in solutions selling opportunities rather than having to piece together complex solutions from multiple parties. However, ShoreTel does support best-of-breed solution selection, which leverages key business vendors such as Polycom for video.

A key differentiator between ShoreTel's new common platform and its existing on-premises and cloud offerings is in the UC and client-facing applications. Specifically, ShoreTel fully redesigned its platform, making its UC solutions and applications significantly easier to use and "more friendly" from a user interface and workflow standpoint. ShoreTel also significantly increased the capabilities of the new platform with the addition of more than 50 new core call control and platform-level capabilities with ShoreTel Connect. With the new platform, ShoreTel is also bringing its contact center offering into the cloud, which will allow it to offer rich integration and applications, giving it a significant advantage over competitors.

FUTURE OUTLOOK

ShoreTel's CEO Don Joos has stated that "ShoreTel's vision is to be the communications platform for small and medium-sized businesses by connecting people simply and however they choose." ShoreTel's new common platform puts ShoreTel in prime position to realize this vision by capitalizing

on the explosive growth of hosted and cloud-based UC solutions and UCaaS adoption while still leveraging its strong on-premises brand recognition and the reputation it has built around customer service and satisfaction. As a result, we expect ShoreTel to gain market share and customers in the highly competitive UC&C market, particularly in the small and medium-sized enterprise segment where it excels. Furthermore, the new common platform enables ShoreTel to offer customers what they want: a choice of premises, hosted, or hybrid solutions with a consistent user experience across a common software stream.

The cornerstone of ShoreTel's strategy revolves around the rapidly growing hybrid trend. ShoreTel firmly believes that hybrid is the wave of the future. A large portion of enterprises still have premises-based solutions and many are unwilling to completely scrap those investments, preferring instead to migrate specific applications to the cloud and/or link different offices via the cloud while also maintaining premises-based systems in other locations – that is, implementing a hybrid solution.

Enterprises are also moving to the cloud, and all players in the UC&C ecosystem will need to embrace the cloud if they are to ensure their continued success. Clearly, ShoreTel is more than willing to do so as the impending launch of its common platform and simplified, consistent user experience demonstrates. UC&C solutions have longer sales cycles than telephony, but most of ShoreTel's channel partners understand that only selling telephony is not the wave of the future. ShoreTel and its channel partners also recognize the increasing importance of selling cloud and hybrid solutions. ShoreTel is experiencing shorter sales cycles with its cloud prospects; however, channel partners need to understand their role in the value chain.

For ShoreTel to execute successfully on its one platform vision, it will need to work with the channel partners and help them sell solutions, particularly cloud and hybrid, with which many of them have limited experience. More importantly, ShoreTel's channel partners will need help adapting their business models from a primarily upfront payment model to a recurring revenue model. Channel partners must also recognize that they are not selling the cloud per se, but rather, they are selling solutions. Service providers have adapted their models from selling siloed services to solutions selling, and other channel partners need to do the same. With that in mind, ShoreTel has made significant investments in training its partners, simplifying its channel program including revamping how it compensates partners, and providing partner support with a unified toolset in a common support structure regardless of the customer deployment model. ShoreTel is also committed to further investing resources to make sure its partners stay central to the customers.

ESSENTIAL GUIDANCE

The concept of unified communications has been around for more than a decade, yet UC&C is still a relatively new technology for many organizations; consequently, organizations are not that familiar with it. Complexity and an unclear value proposition have also been barriers to UC&C acceptance. However, based on IDC projections that the global UC&C market will generate roughly \$23.6 billion in revenue in 2015, we are confident that acceptance and use of UC&C technology, applications, and solutions will continue to grow among enterprises and the channel.

At the same time, enterprises are embracing the cloud and cloud-based UC&C solutions. Service providers offer multitenant hosted/cloud VoIP and UC&C capabilities as network-embedded services that are not dependent on devices located on the customer's premises. UC hardware and software lives in the network cloud with end-user access facilitated by existing WAN or Internet access connectivity. Because cloud UC is a fully managed solution, the service provider is responsible for all

upgrades and maintenance of the equipment and applications as well as the introduction of new features and functionality.

The target markets for cloud-based and premises-based UC solutions vary. Premises-based solutions are predominantly targeted to medium-sized and large enterprises that have the budget for infrastructure and ongoing maintenance as well as the IT staff and expertise required to support the solution. Conversely, cloud UC solutions are predominantly targeted to SMBs and businesses that do not have the resources or business requirements necessary to deploy a premises-based solution. However, cloud-based UC solutions are gaining traction among large businesses, particularly those with multiple locations and a distributed workforce. Large businesses are also leveraging cloud delivery models to extend their premises-based solutions to other corporate locations in a hybrid approach.

Advice for ShoreTel

IDC believes ShoreTel is poised for success with the pending release of ShoreTel Connect, its single comprehensive UC&C platform. ShoreTel Connect offers enterprises a seamless and consistent UC&C user experience that can be delivered in an on-premises or cloud-based model or as a mix of cloud and on-premises applications and services in a hybrid model, effectively making it simple for partners to sell and support and making it easy for customers to migrate from one delivery option to another as needed.

However, ShoreTel still has some issues that it needs to address:

- ShoreTel must continue to invest and assist in its channel partners' success in deploying cloud and hybrid solutions, especially in EMEA and APAC. Cloud UC solutions can help alleviate the complexity of UC&C technology integrations for customers. As cloud solutions continue to gain traction with enterprises, channel partners with expertise across all delivery options – premises, cloud, and hybrid – will be critical for success going forward.
- ShoreTel should focus on messaging the key features and functionality that make up a cloud UC solution. Fundamental factors including security, reliability, mobility, integration with third-party solutions and applications, pricing, managed services capabilities particularly around migration strategies, and customer service and support play into the quality of a cloud-based UC deployment. Regardless of where customer needs fall within each of these factors, nearly all these factors will play a role in an enterprises' decision-making process about whether to implement a cloud UC solution.
- ShoreTel must also clearly articulate the benefits of implementing a multitenant hosted or cloud-based UC solution. When organizations think of UC&C today, most often the first names that come to mind are vendors such as Avaya, Cisco, and Microsoft. Although service providers have made tremendous strides in articulating the value proposition and capabilities of their hosted, managed, and cloud-based UC&C solutions, ShoreTel still lags behind the vendors in terms of UC&C brand recognition and mindshare, particularly among larger enterprise customers.
- ShoreTel and its channel partners need to seek out and develop growing "side door" sales opportunities within organizations with specific ShoreTel solutions and applications, such as ShoreTel Mobility or ShoreTel Enterprise Contact Center, amenable for best-of-breed deployments within departments and lines of business.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Unified Communications and Collaboration 2015 Vendor Analysis* (forthcoming)
- *IDC MarketScape: Worldwide UCaaS 2015 Vendor Analysis* (forthcoming)
- *Worldwide Unified Communications and Collaboration 2015 Top 10 Predictions* (IDC #254486, February 2015)
- *Market Analysis Perspective: Worldwide Unified Communications and Collaboration, 2014* (IDC #253059, December 2014)
- *Worldwide Unified Communications and Collaboration 2014-2018 Forecast* (IDC #252341, November 2014)
- *Worldwide IP PBX and Desktop Hardware IP Phone 2014-2018 Forecast* (IDC #248125, April 2014)

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

Global Headquarters

5 Speen Street
Framingham, MA 01701
USA
508.872.8200
Twitter: @IDC
idc-insights-community.com
www.idc.com

Copyright Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, telebriefings, and conferences. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/offices. Please contact the IDC Hotline at 800.343.4952, ext. 7988 (or +1.508.988.7988) or sales@idc.com for information on applying the price of this document toward the purchase of an IDC service or for information on additional copies or Web rights.

Copyright 2015 IDC. Reproduction is forbidden unless authorized. All rights reserved.

