

### **Unified Communications Battle Lines**

*Don Van Doren, UniComm Consulting*  
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The shape of the unified communications marketplace is becoming more clear – applications, vendor positioning, benefits, and ROI. Two major industry conferences – VoiceCon San Francisco in August, and VON-Unified Communications in Boston in October – have a focus on this emerging industry. Here are some highlights of presentations and announcements, and how the battle lines are emerging.

Enterprises interested in implementing unified communications have some important choices to make. Unified communications capabilities are emerging from four different types of vendors, and companies purchasing these systems should consider how they intend to use these capabilities. The contrasting approaches center UC around:

- Telephone equipment suppliers (Avaya, Nortel, Cisco, Siemens, NEC, Mitel, and many others)
- Desktop suppliers (Microsoft, IBM)
- Business applications software suppliers (Oracle, Salesforce.com, BEA, and many others)
- Portal companies (Google, AOL, Yahoo)

To select among these, enterprises need to determine the center of their UC implementations, considering the driving forces of UC applications and their strategic vendor relationships. The conferences offered plenty of examples of suppliers from the first two categories, but less participation from application software and portal suppliers.

This representation is consistent with the development of the industry, in which the initial applications being discussed are centered on personal productivity improvements – the ability of an individual user to see presence of and have access to buddy list members. As companies begin to understand the power of UC, they will, in some cases, begin embedding communications capabilities directly into business applications or workplace portals, although these vendors will likely take advantage of infrastructure put in place by the telephony or desktop suppliers.

Announcements at the recent VoiceCon San Francisco conference have added substance to the shape of the emerging unified communications marketplace. While it seems that each of the vendors on the show floor is in some form of “partnership” with each of the others, there are clearly some lines being drawn, and some of the partnerships will be more strategic than others – the ICA alliance between Microsoft and Nortel of last year, or the relationship between IBM and Siemens announced at VoiceCon.

Mike Rhodin, General Manager of IBM Lotus Software, made the Siemens announcement during a keynote speech. He also announced IBM’s purchase of WebDialogs, which will

improve Sametime's web capabilities. The announcement with Siemens signals IBM's direction in the UC market. Lotus Sametime is now a product family with three levels of offerings, each of which includes telephony integration software, supported by Siemens' OpenScape software. OpenScape is notable for its ability to work with a wide spectrum of other telephony equipment manufacturers' products. The selection of Siemens is consistent with IBM's strategy of enabling enterprise customers to build UC capabilities on top of an existing multivendor PBX infrastructure.

In contrast, the keynote address by Mark Sunday, Oracle's CIO, showed a different approach. Oracle has made a corporate decision to standardize on Cisco gear for all of its UC and telephony applications. Sunday emphasized the benefits Oracle derives from, for example, replacing perfectly good systems when acquiring another company. This approach brings the new staff immediately into the communications infrastructure of the rest of Oracle, and eases maintenance and operating challenges. Sunday noted that the IT support staff had declined 6% in the face of a 42% increase in company headcount - a 55% productivity increases that he said was due in part to the standardization strategy.

Sunday also spoke about Oracle's overall strategy for UC deployment as having three waves: 1) TCO reduction, 2) Business Agility - for example, seamlessly integrating acquired companies, and 3) Business Transformation - integrating UC applications into business processes. This approach to application deployment tracks what's recommended by [UCStrategies.com](http://UCStrategies.com) and the new consulting firm announced at VoiceCon, [UniComm Consulting](http://UniCommConsulting.com).

Another keynoter was Gurdeep Singh Pall, Microsoft's VP responsible for UC development and deployment. Last Spring, Jeff Raikes of Microsoft gave a keynote at VoiceCon Orlando that threw down the gauntlet to the telephony equipment suppliers, promising telephony capabilities at half today's prices. This time, Pall offered olive branches, promising interoperability and flexible functionality. Microsoft's current line seems to be not that they will replace the PBX, just that PBXs will no longer be needed. I guess there is a distinction in there somewhere. Then, the week after VoiceCon, Microsoft announced the acquisition of Parlano, adding secure group chat functionality to OCS.

In summary, the industry conferences are starting to show how the alliances and partnerships in the UC market will likely develop. There are now a number of strong suppliers, building good functionality and supportive ecosystems. These positive developments will support enterprises working to incorporate the benefits of unified communications into their business operations

*Don Van Doren is Principal of UniComm Consulting, an independent UC consulting firm, and a co-founder of [www.ucstrategies.com](http://www.ucstrategies.com). Don is also President of Vanguard Communications. Contact Don at [dvandoren@unicommconsulting.com](mailto:dvandoren@unicommconsulting.com).*