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# MarketScope for Unified Communications for the SMB Market, Western Europe

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Unified communications can improve the way that small and midsize businesses interact and perform tasks. With more technology providers offering solutions for this market segment, SMBs should review how this emerging generation of communications can improve their business operations and processes.

## What You Need to Know

This document was revised on 6 July 2010. For more information, see the [Corrections](#) page on gartner.com.

Unified communications (UC) is an emerging technology that is starting to gain traction among small and midsize businesses (SMBs). Until recently, many SMBs reluctantly concluded that UC wasn't for them, because they lack the resources (both financial and personnel) to invest in UC. However, this mind-set has been changing as vendors have introduced more-affordable and more simplistically packaged UC offerings aimed at this market segment.

While SMBs have many of the same business needs as their larger-enterprise counterparts, they require IT solutions that are developed with the specific requirements of smaller companies. SMBs require IT solutions that are easy to purchase, implement, use and maintain, providing the needed core capabilities with the ability to add on and grow as needed or when they can afford it. Western European SMBs particularly seek those technology vendors that have solid experience in key countries before they will consider them.

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## MarketScope

This MarketScope focuses on the premises-based UC market for SMBs. For the purposes of this MarketScope, an SMB is defined as having between 20 and 499 employees, which falls within — but doesn't align exactly to — Gartner's broader global definition of up to 1,000 employees.

This MarketScope is different from the existing Gartner UC Magic Quadrant because it focuses strictly on those offerings aimed at the needs and requirements of SMBs. The UC Magic Quadrant focuses on solutions for upper-midsize businesses, large businesses, very large businesses and multinationals. However, there is some overlap in vendors and offerings between the two. In addition, this MarketScope is focused on premises-based UC offerings, as opposed to the service-based offerings covered in the UC as a service (UCaaS) Magic Quadrant.

SMBs exhibit the following characteristics:

### ✦ 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.

### ✦ Gartner MarketScope Defined

Gartner's MarketScope provides specific guidance for users who are deploying, or have deployed, products or services. A Gartner MarketScope rating does not imply that the vendor meets all, few or none of the evaluation criteria. The Gartner MarketScope evaluation is based on a weighted evaluation of a vendor's products in comparison with the evaluation criteria. Consider Gartner's criteria as they apply to your specific requirements. Contact Gartner to discuss how this evaluation may affect your specific needs.

## MarketScope Rating Framework

### Strong Positive

Is viewed as a provider of strategic products, services or solutions.

- Customers: Continue with planned investments.
- Potential customers: Consider this vendor a strong choice for strategic investments.

### Positive

Demonstrates strength in specific areas, but execution in one or more areas may

- They are mainstream (as opposed to leading-edge) technology buyers.
- They highly value simplicity and ease of use.
- They require affordable offerings.
- They look for a technology provider that is easy to do business with.
- They look at the total customer experience when purchasing technology, so technology decisions are sometimes based on the strength of channel partners/system integrators.

These SMB characteristics formed the basis of this MarketScope's evaluation criteria and provider ratings.

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## Market/Market Segment Description

UC is a direct result of the convergence of communications and applications. Differing forms of communications 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 IT 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 communications methods. This can include control, management and integration of these methods. UC products integrate communications channels (that is, 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. For the SMB market, offerings are typically made up of single-server stand-alone suites meant to be plug-and-play ready. This eliminates the need for additional integration costs and complexity, and it typically simplifies the maintenance and management for resource-constrained companies.

UC products are used to facilitate personal communications and 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.

It's useful to divide UC into six broad communications 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 unified messaging (UM) in various forms.
- Presence and instant messaging (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 communications 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.
- Communications applications — This broad group of applications has directly integrated communications functions. Key application areas include consolidated administration tools, collaboration applications, contact center applications and notification applications. Eventually, other applications will be communications-enabled. When business applications are integrated with communications applications, Gartner calls these communications-enabled business processes.

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still be developing or inconsistent with other areas of performance.

- Customers: Continue planned investments.
- Potential customers: Consider this vendor a viable choice for strategic or tactical investments, while planning for known limitations.

### Promising

Shows potential in specific areas; however, execution is inconsistent.

- Customers: Consider the short- and long-term impact of possible changes in status.
- Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this vendor.

### Caution

Faces challenges in one or more areas.

- Customers: Understand challenges in relevant areas, and develop contingency plans based on risk tolerance and possible business impact.
- Potential customers: Account for the vendor's challenges as part of due diligence.

### Strong Negative

Has difficulty responding to problems in multiple areas.

- Customers: Execute risk mitigation plans and contingency options.
- Potential customers: Consider this vendor only for tactical investment with short-term, rapid payback.

## Inclusion and Exclusion Criteria

To be included in this MarketScope, solution providers must have:

- On-premises products that include three out of the following four UC areas: (1) voice capability; (2) conferencing; (3) messaging; and (4) presence and IM
- The ability to generate significant interest in the 20- to 499-employee segment
- An offering with significant market presence (defined as market share, differentiating innovation and/or mind share)
- Demonstrable UC for SMB portfolios/products, with references
- Specific offerings and support capabilities for a Western Europe-based customer

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## Rating for Overall Market/Market Segment

### Overall Market Rating: Promising

Our outlook for this market is promising because this market is still emerging, and solutions are still maturing. Vendors differ wildly in their ability to deliver and support focused UC solutions for the SMB market, and most vendors are still refining SMB offerings and strategies. However, it should be noted that European SMBs are more likely to consider communications-as-a-service offerings through communications service providers than their counterparts in North America or Asia. So the future direction of the premises-based UC market for SMBs in Western Europe is more uncertain than in other regions.

SMB adoption and interest in UC continue to increase; however, adoption rates remain low. This is, in part, because of the difficulty in justifying a business case. 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. The challenging global economic conditions have also hampered UC spending. Across Western Europe, end users have re-evaluated their communications budgets and, in many cases, delayed spending on communications technologies. In response to budget pressures, many decision makers opted to extend the life of existing communications equipment instead of investing in new solutions. Although budget pressures are expected to ease during the remainder of 2010 and in 2011, Gartner expects that UC investment decisions will face a high level of scrutiny, which will result in a longer-than-average sales cycle.

The bankruptcy of Nortel and its subsequent acquisition by Avaya created some uncertainty throughout 2009 about the future of Nortel's offerings and channel partners. However, since the acquisition was finalized in December 2009, Avaya has begun to lay out a road map for the combined entity. We considered the combined entity of Avaya and Nortel in the Avaya section of this MarketScope.

Several vendors offer UC solutions but were not included in this MarketScope because the inclusion criteria require that vendors have on-premises offerings. For example, BT was not included because its UC solutions are not available for deployment on the enterprise's premises. Capabilities of service-based solutions can be reviewed in the separate Magic Quadrant for UCaaS. There were also several IP telephony providers that were not included because, from a market share and/or mind share perspective, they are not considered as strong a UC player as they are an IP telephony player.

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## Evaluation Criteria

Table 1 outlines evaluation criteria, comments and weighting, while Table 2 outlines key criteria questions. Table 3 maps SMB offerings by size segment. Figure 1 is Gartner's MarketScope for UC for the SMB market in Western Europe.

### Table 1. Evaluation Criteria

Evaluation Criteria	Comment	Weighting
Market Understanding	Ability of the technology provider to understand buyers' needs and translate these needs into a UC solution. Vendors that show the highest degree of vision are those that listen and understand buyers' wants and needs and that can shape or enhance those wants with their added vision.	Low
Marketing Strategy	A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and marketing position statements.	Standard
Sales Strategy	The strategy for selling products and services that uses the appropriate networks of direct and indirect sales, marketing, service and communications affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.	Standard
Product/Service	Core goods and services offered by the technology provider that compete in/serve the SMB market. This includes current product capabilities, quality, feature sets, skills and so forth, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.	High
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 that the individual business unit will continue investing in the product, will continue offering the product and will advance the innovation within the organization's portfolio of products.	Low
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 and so forth.	High

Source: Gartner (June 2010)

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Table 2. Evaluation Criteria Key Questions

Evaluation Criteria	Comment	Weighting
Market Understanding	How targeted to the SMB market is the provider overall? How well does the provider understand SMBs' needs, such as ease of use, pricing and simple messaging? How well does the provider understand UC requirements? Where on the simplicity-versus-flexibility scale does the provider fit?	Low
Marketing Strategy	How often is the provider considered by SMBs? What is the marketing reach? Does the provider do any segmentation, such as role-based or vertical segmentation? Are messages easy to understand? Are the organization and channel aligned in marketing and sales strategy? Is the message consistent globally? How appropriate and innovative are the marketing programs?	Standard
Sales Strategy	How does the provider segment its channel partners? How appropriate are channel partners' skill sets? How complete are channel partners' support and training? How comprehensive is the channel coverage model? Is there an appropriate mix of direct versus indirect channels? How loyal and engaged are channel partners? How appropriate and innovative are technology partnerships?	Standard
Product/Service	Are the products built specifically for the SMB market? How complete and innovative is the product offering? Does it enable an appropriate amount of choice? How easy is it to use and maintain? What is the pricing? Is it	High

	transparent, easy to understand and affordable? How is the reliability? How much legacy equipment can be maintained when an SMB initially buys and when it gets larger? What level of expertise is required to run and support the offering?	
Overall Viability (Business Unit, Financial, Strategy, Organization)	What is the financial health and success of the overall organization and business unit? How likely is the individual business unit to continue to invest in the product, to continue offering the product and to advance its capabilities?	Low
Customer Experience	How easy is the offering to implement, use and maintain? How easy is it to find information or answers to questions? How easy is it to find the appropriate person to respond to issues and questions? How much emphasis is given by the provider on enhancing the overall customer experience? What is the level and feeling of support that the customer experiences?	High

Source: Gartner (June 2010)

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Table 3. UC for SMB Offerings Size Segment Map

	20 to 49 Users	50 to 99 Users	100 to 250 Users	250 to 500 Users
Aastra Technologies	BusinessPhone, EMEA: IntelliGate, OpenCom, MD Evolution, Aastra 800 (soft PBX)	BusinessPhone, EMEA: IntelliGate, OpenCom, MD Evolution, Aastra 800 (soft PBX)	BusinessPhone, EMEA: IntelliGate, OpenCom, MD Evolution, Aastra 800 (soft PBX; up to 200 extensions)	BusinessPhone, EMEA: IntelliGate, OpenCom; enterprise solutions such as the MX-ONE and Aastra 5000 can also scale down to address the SMB segment
Alcatel-Lucent	OmniPCX Office plus Extended Communication Server	OmniPCX Office plus Extended Communication Server	OmniPCX Office plus Extended Communication Server; Omni PCX Enterprise plus Business integrated Communication Solution	Omni PCX Enterprise plus Business integrated Communication Solution
Avaya	IP Office, Business Communications Manager 50	IP Office, Business Communications Manager 450, Software Communication System	IP Office, Business Communications Manager 450, Software Communication System	Aura
Cisco Systems	Smart Business Communications System	Smart Business Communications System, Cisco Unified Communications Manager Express	Cisco Unified Communications Manager Express, Cisco Unified Communications Manager Business Edition	Cisco Unified Communications Manager Express, Cisco Unified Communications Manager Business Edition
Critical Links	edgeBOX Office	edgeBOX Business	edgeBOX Enterprise	edgeBOX Enterprise
IBM	Lotus Sametime, Lotus Foundations Start, Lotus Foundations Reach	Lotus Sametime, Lotus Foundations Start, Lotus Foundations Reach	Lotus Sametime, Lotus Foundations Start, Lotus Foundations Reach	Lotus Sametime
				Office

Microsoft				Communications Server 2007 R2 plus Exchange 2010
Mitel	Mitel Communications Director (with Mitel Applications Suite and Unified Communicator)	Mitel Communications Director (with Mitel Applications Suite and Unified Communicator)	Mitel Communications Director (with Mitel Applications Suite and Unified Communicator)	Mitel Communications Director (with Mitel Applications Suite and Unified Communicator)
NEC	SV8100 or SphericaII with Business ConneCT	SV8100 or SphericaII with Business ConneCT	SV8300 or SphericaII with Business ConneCT	SV8500 or SphericaII with Business ConneCT
ShoreTel	ShoreTel	ShoreTel	ShoreTel	ShoreTel
Siemens Enterprise Communications	OpenScope Office MX	OpenScope Office MX	OpenScope Office MX, HiPath 3000 with OpenScope Office HX	HiPath 3000 with OpenScope Office HX

Source: Gartner (June 2010)

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Figure 1. MarketScope for Unified Communications for the SMB Market, Western Europe

	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
Aastra Technologies			x		
Alcatel-Lucent			x		
Avaya				x	
Cisco Systems			x		
Critical Links			x		
IBM		x			
Microsoft			x		
Mitel			x		
NEC			x		
ShoreTel			x		
Siemens Enterprise Communications				x	

As of 6 July 2010

Source: Gartner (June 2010)

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## Vendor Product/Service Analysis

### Aastra Technologies

Canada-based Aastra Technologies focuses primarily on the European telephony and UC markets, although the company's reach and presence extend globally. From 2000 onward, the company expanded its customer base through acquiring the following companies or divisions: Switzerland-based Ascom's PBX division, France-based EADS Telecom, Germany-based DeTeWe and Sweden-based Ericsson's Enterprise Communications Business. Aastra does not offer a single flagship SMB UC solution but instead positions a range of applications and solutions for different target markets across the SMB segment. Solution positioning varies, depending on the organization size segment and geography. Aastra's BusinessPhone and IntelliGate solutions, however, are positioned to address the entire market segment.

## Strengths

- Aastra offers cost-effective telephony-centric solutions throughout Europe. Throughout Aastra's acquisitions, the company has worked to retain the installed base of customers through retaining key local sales channel partners and customer support personnel. This allows Aastra unique insight into the local dynamics and end-user issues that go hand-in-hand with having a long-standing presence in a particular locale. The local expertise is especially important in the SMB market segment, in which customers frequently base their communications decisions on how easy the communications provider and its channel partners are to work with.
- Aastra can offer its end users a positive customer experience because customers are generally supported on their existing platforms (after acquisitions) and are allowed to adopt UC applications at their own pace. In addition, some channel partners from acquired companies tend to take a positive view of Aastra since they are able to engage in direct meetings with the company's executive leadership.
- Aastra has a range of solutions addressing mobility and open-standards requirements. In part leveraging Ericsson's mobility expertise, Aastra offers an array of mobile solutions, including IP Digital Enhanced Cordless Telecommunications (DECT), SIP DECT, Wi-Fi, and fixed-mobile convergence, to meet various customers' mobility requirements. Across its solutions, Aastra has leveraged open standards to support application integration with other vendors' UC applications and solutions.
- European SMBs should consider Aastra offerings if they are looking for simple cost-effective Europe-centric UC offerings with channel partners possessing strong local knowledge and support.

## Cautions

- While Aastra's SMB offerings are well-known and respected in Western Europe, they are known primarily for IP telephony and mobility functionality as opposed to UC functionality. As a result, many product lines that Aastra offers do not include advanced UC functionality, such as IM and presence or robust conferencing capabilities. While Aastra has outlined a strategy to consolidate its product portfolio, at present, the overall product line is not as unified as many of its competitors' UC offerings.
- Because Aastra supports a range of products in specific markets, it is Gartner's view that Aastra's product development funds and attention are stretched thin. Essentially, it is Gartner's opinion that the enhancements and product development funds for these solutions are distributed between too many product groups. Aastra customers should not expect development to continue at a fast pace simply because Aastra has various product lines to support.
- Because Aastra has continued to support and sell the majority of offerings of its acquired companies, Aastra's large product portfolio can make it difficult to market and position UC solutions to channel partners and, in turn, customers. For example, in the 50-to-99-employee segment, Aastra offers five different platforms: BusinessPhone, IntelliGate, OpenCom, MD Evolution and Aastra 800. However, Aastra does have a consolidation strategy under way. The company will need to continue to consolidate solutions and standardize product-naming conventions, as well as user and management interfaces, to compete in the UC market.

*Rating: Promising*

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## Alcatel-Lucent

Alcatel-Lucent offers two main product offerings for the SMB market. For the small-business market, Alcatel-Lucent has the Office Communication Solution, which includes the OmniPCX Office (OXO), the Extended Communication Server (ECS) and My Teamwork Office. It is primarily marketed to companies with 10 to 100 users, although the solution scales to up to 200 users. The solution is appliance-based and provides the following functionality: voice, network connection, IP phones, UM, rich presence and mobile UC. Fax server and push-mobile services, as well as Web conferencing, are available as stand-alone or bundled offerings.

For midsize businesses, Alcatel-Lucent offers the Business Communications Solution, which comprises both the OmniPCX Enterprise and Business integrated

Communication Solution (BiCS). The BiCS is a full-featured UC offering targeted to companies with 100 to 1,000 users and is set up as a flexible suite of preintegrated services. Included in BiCS is voice (the full OmniPCX Enterprise), UC (IP Call Server [ICS] elements), audioconferencing and contact center functionality. The Instant Communications Suite of Web services includes video, audio, Web collaboration, messaging, mobility and fax, and these are available as stand-alone or bundled offerings.

Alcatel-Lucent offers customized applications for healthcare, education, hotels (its target is small, private hotels) and local government. The company has garnered strong recognition in the retail industry segment.

### Strengths

- Alcatel-Lucent is focused on the SMB market and understands SMBs' needs for ease of use and intuitive communications solutions, as well as simplified solution bundling. Alcatel-Lucent makes it easy for its channel partners to position solutions and offers an intuitive catalog with simple solution pricing.
- Alcatel-Lucent has a reputation for producing reliable and well-engineered telephony products and offers a complete UC portfolio. It also has a wide range of handsets.
- Alcatel-Lucent is a well-known and respected company in Western Europe, and it has a strong presence, solid channel partners and delivery capabilities in place throughout EMEA.
- SMBs should consider Alcatel-Lucent if they are seeking a UC offering that is simple, reliable and easy to use and that has a good reputation with the SMB market within Europe.

### Cautions

- Alcatel-Lucent is particularly optimistic about the future of service-based communications offerings, so it is starting to more aggressively pursue a dual go-to-market strategy for the SMB market through both service providers and traditional channel partners. As a part of this dual strategy, Alcatel-Lucent has combined enterprise application development with carrier-focused R&D. In Gartner's opinion, this combined development group will dilute Alcatel-Lucent's focus on its premises-based business and could weaken the company's ability to come out with innovative enterprise developments in a timely manner.
- Although Alcatel-Lucent's UC offerings are quite reliable, when issues do occur, some partners have experienced problems with timely next-level support.
- The integration between Alcatel-Lucent's two SMB platforms is not smooth, and SMBs have to swap out the lower-end system (Office Communication Solution) for the upper-end SMB system (OmniPCX Enterprise or BiCS) as they approach 200 users. Alcatel-Lucent should provide ready integration between the two systems to simplify the transition, although there are commercial programs to allow SMBs to leverage their investment from the Office Communication Solution once they outgrow the system.

*Rating: Promising*

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## Avaya

With the acquisition of Nortel in December 2009, Avaya acquired additional product offerings for the SMB market and a large SMB-focused telephony channel, as well as a large installed base of key telephone system, PBX and SMB UC customers. Avaya has recently announced a road map for the combined Nortel and Avaya entity, including its consolidated offerings for the SMB market. In 2004, Avaya acquired Germany-based enterprise communications and service provider Tenovis. The acquisition expanded Avaya's presence and mind share not only in Germany, but also throughout Europe.

For small and lower-midsize businesses, Avaya currently has two premises-based UC offerings — IP Office and Nortel's heritage Business Communications Manager (BCM). As of publication, Avaya has announced that IP Office will become its flagship SMB solution, but the company has not yet announced an end-of-sale date for BCM.

IP Office is targeted at companies with five to 250 users, although it can scale to 384 users in a single site and 1,000 users in a multisite network. IP Office is sold in

role-based packaging and includes voice, messaging, conferencing, IM (included in release 6), mobile integration and applications, and a browser-based portal. IP Office is sold in editions: Essential for fewer than 25 users; Preferred for more-advanced UC functionality; and Advanced for SMBs with customer service departments requiring contact center applications. All three versions support both time division multiplexing (TDM) and IP on the same platform.

BCM is the Nortel heritage, premises-based UC offering. It includes the BCM 50, which supports up to 50 users, and the BCM 450, supporting up to 300 users. A new release on BCM is planned for 4Q10. These solutions include voice, presence, UM, conferencing, softphone, and basic contact center and interactive voice response functionality. While Avaya has not yet announced an end-of-sale date for BCM, the plan is to converge the functionality of IP Office and BCM before retiring BCM, likely within the next 24 months. Avaya says it will give a minimum of nine months' notice before BCM is retired and will then continue to support BCM for an additional three years. During this time, Avaya plans to continue to make upgrade and expansion options available for both hardware and software.

For midsize businesses, Avaya has Avaya Aura and Nortel's heritage Software Communication System (SCS), both of which it plans to continue investing in and selling.

For midsize businesses to large enterprises, Avaya has the virtualized platform Avaya Aura. Avaya Aura has a "sweet spot" of 250 to 1,000 users, although it scales to 2,400 users. Avaya Aura features more-robust native UC functionality, including video, IM, audio, Web conferencing and messaging. Customers can migrate from IP Office to Avaya Aura while maintaining their endpoints or integrate IP Office into Avaya Aura as a hybrid solution.

Finally, Avaya has the Nortel SCS. SCS is an open-standards-based (SIP and service-oriented architecture [SOA]) software solution targeted to more-IT-centric businesses. It includes presence/IM, videoconferencing and audioconferencing, UM, contact center functionality, and support Web services for communications enablement (using an SOA approach). Although the Nortel heritage SCS has experienced limited traction to date, the solution features robust UC functionality. The open-source SIP-based platform can serve IT-centric, data-savvy SMBs.

### Strengths

- Avaya and Nortel have solid reputations and name recognition in the SMB telephony market. Before the acquisition, both providers had a strong history of selling portions of UC (most notably, telephony, messaging and contact center functionality) and being recognized as reliable providers of these solutions. Partly as a result of the Nortel acquisition, Avaya has a large installed base of telephony and contact center customers to leverage across Europe.
- Avaya has a strong presence, ample channel partners and delivery capabilities across Western Europe. Before the Nortel acquisition, Avaya had an especially strong presence in the U.K., Germany and the Netherlands. With the Nortel acquisition, Avaya has expanded its presence and channel partners across Europe.
- Avaya's market pricing for all offerings has become more competitive, following aggressive price discounts during 2009 and continuing into 2010.
- Avaya has implemented changes with some internal processes that will likely make it easier for channel partners to sell solutions. It has restructured and simplified portions of its marketing, channel and distribution models, including new role-based bundled offerings that have received positive channel and end-user feedback. Avaya has also reduced the number of stock-keeping units across its product lines and now offers the Avaya EZ Quote quote builder to help channel partners sell IP Office. A similar quote builder tool is expected to be rolled out to support Avaya Aura sales. IP Office release 6 is moving toward a browser-based approach, so installers will not have to load software, which is expected to make selling and installing the solution easier.
- SMBs should consider Avaya offerings if their UC plans include telephony, messaging or contact center requirements, and if they are looking for a solid telephony name with an ample selection of channel partners.

### Cautions

- While Nortel has a strong channel heritage, Avaya's go-to-market strategy has been more mixed between direct and indirect. As of the first quarter of 2010, 68% of Avaya's business was indirect before the Nortel acquisition,

and it is currently 73% indirect after the acquisition. (The goal is to have 85% indirect by 2011.)

- In February 2010, Avaya rolled out Avaya Connect, a channel program intended to offer consistent channel support on a global level. Avaya will be challenged to ensure Nortel channel partners are rolled into the program and effectively trained in the various certification levels. Most UC product development and cultural mentality is being standardized on Avaya, so retaining Nortel's partners — the most direct link to Nortel's installed-base customers — will be a challenging task.
- Integrating two very large telephony organizations, including rationalizing the product lines, channel programs and partners and personnel, will require a lot of Avaya's focus. It will have to be seen whether Avaya can pull this off without losing the installed base and the partners that it acquired, and without losing sight of customer needs and support.

*Rating: Positive*

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## Cisco Systems

Cisco Systems is a strong global player in communications and networking. For the SMB market, Cisco offers three UC platforms:

- For small businesses, Cisco has the Smart Business Communications System (SBCS)/Small Business Pro. It is meant for the 20-to-100-user segment and is scalable to 100 users. SBCS includes the UC500 series platform and UC500 Call Control. SBCS is an all-in-one offering that includes voice, data, UM, autoattendant, video, virtual private network (VPN) and wireless LAN (WLAN) access.
- Cisco Unified Communications Manager Express (CME) is for 50 to 450 users and features the Integrated Services Router platform and Unified CME Call Control. Functionality includes voice, messaging, video, data, public switched telephone network (PSTN), Foreign Exchange Station, VPN and firewall.
- Cisco Unified Communications Manager Business Edition (CMBE) is for 100 to 1,000 users and includes the MCS 7828 platform and Unified CMBE Call Control. Functionality includes voice, messaging, mobility and video.

Each of these platforms has a different range of capabilities, so the target market segments may overlap between platforms. However, the offering choice for any given customer is based on the customer's specific business requirements for features, functionality and usability. For its overall SMB strategy, Cisco segments its SMB customers based on business maturity and business requirements, and this segmentation extends into its go-to-market approach for each segment.

In late 2009, Cisco acquired Norway-based Tandberg, a provider of videoconferencing solutions, which enhances its presence in Europe. Cisco's portfolio also includes WebEx for Web conferencing.

### Strengths

- Cisco has a well-aligned, consistent, global marketing message and is able to get its UC messages out to SMBs across Europe. This marketing strength has allowed Cisco to obtain strong mind share among midsize businesses and SMB channel partners, and it allows Cisco to be frequently considered in the SMB UC vendor consideration set.
- Cisco has a strong presence, ample channel partners and delivery capabilities across Western Europe.
- Cisco offers a robust and complete portfolio of UC functionality, from conferencing to video capabilities. Because of its strengths in development, Cisco can typically offer advanced UC functionality if the SMB desires specific applications.
- Cisco has strong financial viability and staying power in the global UC market. The previously data-centric organization now has a significant installed base of voice customers to migrate to UC.
- Cisco's channel partner program is strong, and Cisco partners are typically seen as competent and technically capable.
- SBCS is an easy-to-use, inclusive offering for small businesses looking for an all-in-one solution.
- SMBs should consider Cisco UC offerings if they are a small business considering SBCS, or if they have a robust network and adequate IT resources and are looking for more-advanced UC features and functionality.

## Cautions

- Depending on the platform and level of functionality implemented, the Cisco architecture could require a Cisco Certified Internetwork Expert (CCIE) to implement it, which is an advanced IT specialization that not many SMBs will regularly have in-house. After installation, it typically requires a Cisco Certified Network Associate (CCNA), backed by the local reseller, for ongoing maintenance. As a result, Cisco installations depend more heavily on channel partner service and support, with the partner having the certified network engineers on staff rather than the SMB attempting to maintain this expertise in-house.
- Cisco's three SMB UC solutions feature different management consoles and platforms, based on the choice of underlying operating system, which can make migration from one system up to the next more time consuming and expensive. If a small business outgrows SBCS, it must swap out the main platform to migrate up to CME and again for CMBE. However, most IP phones can be reused across platforms, as well as across most switches and routers. Recently, Cisco introduced features to make installation easier, such as installation wizards that allow installation with more basic system knowledge, as well as preinstallation configurations that allow partners to set up customers before physical installation begins.
- Pricing and licensing are not always straightforward. The positioning of specific applications can be confusing, and the associated costs (such as license fees and underlying network costs required to run the applications) can be deceptive and ultimately expensive. However, Cisco's introduction of user-based licensing and upgrades is an attempt to help simplify the process. Cisco's offerings also typically require a robust network that has been kept up to date.
- While Cisco has been able to attract and certify new channel partners across Europe, some of Cisco's partners might not have the resources and capabilities to support their customers through the UC implementation. Smaller channel partners have a hard time navigating through the written support materials intended to guide them through the UC design and implementation process, which means the implementation might be somewhat disruptive for the customer.

Rating: Promising

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## Critical Links

Critical Links is a small company that was originally started in Portugal. It positions edgeBOX, a UC appliance (based on Asterisk), for the 20-to-300-user segment, although the sweet spot is between 20 and 50 users. The solution is geared for price-sensitive small organizations with limited or no in-house IT staff. The UC portfolio consists of edgeBOX Office SOHO (up to 10 users), edgeBOX Office (up to 40 users), edgeBOX Business (up to 100 users) and edgeBOX Enterprise (up to 300 users). Each of the edgeBOX appliances is built as a single appliance and runs the same unified interface and management applications.

The edgeBOX solution provides traditional UC functionality, such as telephony, conferencing, IM and presence, and messaging (voice, unified and e-mail). Nontraditional UC functionality includes storage capabilities with file-server/shared-directory functionality, an e-mail and Web server, and a built-in router with Wi-Fi capabilities that supports up to 100 employees (for larger offices, it supports external Wi-Fi access points). edgeBOX also includes native security features, including a full-fledged firewall (stateful inspection), data encryption, antivirus, anti-spam, content filtering, Web server demilitarized zone and VPN access on all models. For enterprise-grade platforms, it also includes hot-swap redundancy features and dual power supplies. Finally, edgeBOX offers options for service providers, including remote management and administration tools.

The company's headquarters are in the United States, and its R&D facilities are based in Portugal. Critical Links is increasingly aligning with service providers to get the edgeBOX to market. The company is expanding in markets with a higher penetration of UC, as well as in emerging markets, where pricing and ease of use are especially important attributes.

## Strengths

- Critical Links' edgeBOX solution is a true all-in-one offering, and it is easy to

implement and use. The solution takes minimal time to get up and running, and it requires relatively straightforward user and administrator training.

Although the solution is based on open-source software and can be customized by small businesses with programming skills, Critical Links has created a wrapper that hides the complexity associated with open source.

- edgeBOX offers tailored applications called edgePACKs for different vertical market segments, including specialized offerings for the hospitality and education verticals.
- Since each edgeBOX offering uses the same unified interface and management applications, it's easier for growing businesses to migrate up to the next appliance when they outgrow their configuration.
- The edgeBOX solution is positioned at very low price points, which is appealing to many price-sensitive SMBs, as well as to end users in emerging markets.
- edgeBOX is well-suited to small organizations with extensive file storage and file-sharing requirements, as well as to organizations with employees working from home who require secure access to company servers.
- Small businesses should consider Critical Links if they are looking for an attractively priced, intuitive, all-in-one solution that includes networking capabilities.

### Cautions

- Critical Links is a small and relatively unknown company. As a result, Critical Links has limited brand recognition and channel partner resources. Because of its comparatively smaller size, Critical Links is not frequently in the UC vendor consideration set.
- Critical Links is a private company and does not regularly make its financial status public. While the company indicates that it is operating profitably, SMBs should conduct their own evaluation of viability before making long-term commitments.
- While Critical Links appears to be responsive in terms of deploying resources to assist with sales efforts and implementations in countries with a low saturation of Critical Links employees, the company does not have the support resource bandwidth that some of its larger UC counterparts have in place.

*Rating: Promising*

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## IBM

IBM's UC-for-SMB offering includes Lotus Sametime, Lotus Foundations Start and Lotus Foundations Reach. The Foundations offering is fairly recent, having been released in 2009, and competes with Microsoft's Small Business Server. Lotus Foundations Start and Reach are available as stand-alone offerings or as a platform for other telephony vendors' IP-PBX solutions:

- Lotus Sametime — Small businesses with simpler communications and integration needs could be satisfied with Sametime as a stand-alone UC suite. It includes presence and IM, online meetings, voice over IP (VoIP), video, and incoming-call control. However, it does not include PSTN voice. For businesses with 300 to 1,000 users, Sametime can be coupled with offerings from Alcatel-Lucent, Avaya (SCS), Cisco and 3Com as a single-server solution on IBM's Power platform. Sametime also provides Asterisk integration through iLink. Sametime is also offered through a cloud service model.
- Lotus Foundations Start — Foundations Start is a general multipurpose technology platform. It is a hardware and software platform meant to be managed remotely by IBM channel partners to simplify the user IT experience. The offering is positioned to 10 to 500 users with limited or no on-site IT skills, although the typical customer usually has fewer than 250 employees. It includes e-mail and calendaring, office applications, backup and recovery, network security, remote access, and file and print sharing.
- Lotus Foundations Reach — Foundations Reach is an optional add-on to Foundations Start that leverages Sametime functionality. The combination of Foundations Start plus Foundations Reach provides an integrated, all-in-one small-business server for e-mail, collaboration and business applications, file management and storage, and security. Lotus Foundations Start combined with Reach is complemented by strong technology partnerships, including close partnerships with ShoreTel, NEC and Mitel. For these third-

party UC offerings, Foundations Start and Reach provide automatic installation and configuration from a single interface, which simplifies the installation process, as well as the cost. For example, users can be added once and then automatically provisioned with access to all capabilities of Lotus Foundations and the third-party UC solution. Users are able to self-configure their own office phones by plugging them into an Ethernet jack.

### Strengths

- Sametime and Foundations Reach (which includes Sametime functionality) include a strong collaboration portfolio, including IM, online meetings, VoIP, video, incoming-call control and aggregated presence.
- Foundations Start and Reach address the needs of the SMB market where on-site IT skills are either extremely limited or nonexistent. Setup, configuration and everyday management of the system are autonomic, and applications are also automatically recognized. Very simple add-ons are required for telephony and other applications through third-party providers. Skill requirements for users are minimal, and skill requirements for channel partners are very light.
- Channel partners do not have to go on-site to support their Foundations customers, which improves the speed with which they can serve their customers, as well as the costs to serve them. Also, end users do not have to pay for expensive on-site support when problems arise.
- SMBs should evaluate IBM Foundations Start and Reach if they are looking for a technology platform (and not just a telephony system) to minimize the need for on-site IT.

### Cautions

- The Foundations product line is new, although it is based on technology that IBM acquired from the Net Integration Technologies acquisition in 2008. IBM must now establish the value of Foundations Start and Reach to SMBs and demonstrate that it can meet SMB requirements for simplicity. Also, since Foundations is new, there is a very limited universe of experienced users available to give their feedback, recommendations or best practices to SMBs.
- Currently, the strategic telephony partners for Foundations do not include the strongest players in the Western European UC landscape. As a result, IBM cannot rely on the pull that might come from a strong local brand and presence.
- Users should be committed to the platform to ideally run their entire IT infrastructure. While you can deploy Foundations Reach and just use it for UC, the value is really as a total IT platform. As such, this is not just a telephony consideration, but a more comprehensive IT consideration. Users must assess the applicability of the platform across their entire organization.
- Sametime and Foundations on their own do not include PSTN voice. For this, users will have to add on telephony offerings from partners such as ShoreTel and NEC, increasing the expense and potentially the complexity of the offering.
- IBM will have to overcome the preconception that, if customers are not Lotus Notes/Sametime users, then the Foundations offering doesn't apply to them. Since SMBs predominantly use Outlook, IBM will have to ensure that users understand the ability of Foundations to integrate with Active Directory and Outlook and even to run Windows.
- IBM will also have to achieve recognition as an SMB provider and overcome the preconception that IBM is solely focused on providing solutions for large enterprises.

*Rating: Caution*

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### Microsoft

Microsoft's UC offering for the SMB market is based on Office Communications Server 2007 R2 (OCS 2007 R2) plus Exchange 2010, which Microsoft offers via two acquisition models:

- For the fewer-than-250-employee market, Microsoft primarily positions this offering as a UCaaS solution, based on its Business Productivity Online Suite (BPOS).
- The on-premises version of this UC offering is focused on both larger SMBs (starting at around 250 employees) and extending to large-enterprise

customers.

In this MarketScope, we are focusing on the on-premises version of the offering.

Microsoft also leverages strategic partnerships in specific areas, such as live voice/IP-PBX and conference bridges, and a growing set of major system integration and channel partners. While Microsoft touts the ability of OCS 2007 R2 plus Exchange 2010 as a stand-alone premises-based UC offering, it is still typically being implemented as a hybrid solution on top of an existing PBX.

### Strengths

- Microsoft has strong brand name recognition and market reach. Because the SMB market tends to be highly Microsoft-centric in many areas, OCS 2007 R2 plus Exchange 2010 tends to land in the UC consideration set for most midsize businesses.
- Microsoft's historic strength in several UC areas, combined with promising emerging initiatives, results in significant potential. Historically strong areas include clients (desktop, Web and mobile clients), e-mail and collaboration (IM, presence, Web conferencing and SharePoint). 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.
- Strong partnerships with most telephony PBX providers mean that SMBs can incrementally acquire Microsoft UC functionality while still leveraging existing telephony investments. Microsoft's OCS 2007 R2 plus Exchange 2010 can sit behind an existing PBX offering in a hybrid environment, which would limit costs for existing Microsoft shops that want to add on specific UC functionality. This flexibility also extends to applications, allowing SMBs the opportunity to customize the offering for specific verticals or applications.
- SMBs should consider Microsoft's OCS 2007 R2 plus Exchange 2010 if they consider themselves to be Microsoft-centric, are looking to leverage existing PBX investments, and already have solid IT resources to integrate and manage the offering.

### Cautions

- The telephony functionality in OCS 2007 R2 remains in the early stage. Although this functionality has made progress in the past year, it is not yet competitive with best-of-breed products. In addition, there is not as much variety of endpoints that support OCS compared with competitor offerings at this time. However, new phones were recently announced by Polycom and Aastra that are optimized for Microsoft Communicator "14."
- The on-premises OCS 2007 R2 plus Exchange offering requires more IT skill and resources to manage it than do competitor offerings. The high level of flexibility of the system typically means complex integration (and typically a hybrid environment), which requires a greater budget for integration and dedicated IT resources.
- Many OCS 2007 R2 communications functions, such as telephony, video and PSTN integration, require solution integrators and employees with more-advanced telephony skills than most SMBs have. Planners should ensure that their providers and internal staff have relevant experience in key areas.

*Rating: Promising*

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## Mitel

The Mitel UC solution is based on the Mitel Applications Suite, Mitel Unified Communicator clients and the Mitel Communications Director. Contrary to the company's positioning in the North American market, Mitel's Western European positioning is more diversified, spanning small to large businesses. Mitel is also particularly strong in the hospitality industry, in which it is typically in the UC consideration set. Communications Director provides telephony call control on the 3300 switch or on industry-standard servers. The Applications Suite/Unified Communicator client includes support for audioconferencing and Web conferencing, desktop access, presence and IM, UM, and collaboration.

### Strengths

- The Mitel UC solution offers a comprehensive software suite. The solution's integrated design, administration and mobility functions provide a coherent

single-point solution.

- The suite can be integrated with Microsoft OCS, IBM Sametime environments, and IBM Foundations Start and Reach.
- Mitel offers its UC applications, including Mitel Communications Director, to run in a virtualized environment and is certified on VMware vSphere. Mitel is currently the only vendor with a call control application certified on VMware. The offering can help streamline communications infrastructure costs, simplify implementation and reduce ongoing operating costs.
- Mitel has had success with its managed services offering in Western Europe, which is offered through indirect channels. This offering is supported with managed service finance programs under its Total Solutions program.
- SMBs looking for an integrated UC approach, looking to run UC through a virtualized environment, or evaluating telephony communications functionality to go with Microsoft or IBM UC deployments should evaluate the Mitel UC solution.

### Cautions

- In the past, both the licensing strategy and management console have been seen as confusing and in need of simplification. Mitel launched an updated licensing model in January 2010 that attempts to address this issue. There has also been recent work on enhancing product administration capabilities.
- In the past, outside of the U.K. and the Netherlands, Mitel has had a very limited presence across Western Europe. However, Mitel has recently expanded its presence across Western Europe, with local sales and support resources in several countries.
- According to Gartner's latest financial vendor rating model, Mitel received a caution rating. SMBs should conduct their own evaluation of viability before making long-term commitments.

*Rating: Promising*

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## NEC

NEC has two main types of UC offerings for the SMB market. The first is NEC's traditional telephony-type offering. This includes Business ConneCT (BCT), which is NEC's UC offering available mainly in EMEA. BCT enables DECT integration and multilingual capabilities. BCT operates on NEC's Univerge SV8000 Series Communication Servers and offers an all-in-one single-server environment. The second UC option is based on the newer, scalable Univerge Spherically all-software UC solution, targeted to more-IT-centric businesses. Both solutions offer voice functionality, conferencing, messaging, IM and presence, a range of clients, and support for business process integration. NEC also has strengths in several key vertical markets, including healthcare, education and hospitality.

### Strengths

- NEC is a large, diversified, global firm. Within the communications segment, NEC has solid partnerships, including a recent IBM Foundations partnership with NEC's Spherically offering.
- NEC's UC portfolio is broad and boasts solid and reliable products, with a broad range of applications.
- NEC has a strong vertical market focus; its solutions within the healthcare, education and hospitality segments offer specific UC applications tailored for these specific industries. NEC also has internal vertical leads focused on positioning and implementing these solutions within industry segments.
- NEC is focused on the SMB market and understands and delivers on the need for simplicity and attractive pricing.
- SMBs should consider NEC if they are looking for attractively priced, solid UC functionality geared to small businesses or if they are a part of one of the key vertical markets that NEC addresses.

### Cautions

- NEC's UC solutions are not well-known in Western Europe and do not have as much brand recognition as those of competitors. As a result, NEC's offerings are not in the UC consideration set as frequently.
- NEC's channel and support capabilities in Western Europe should be examined carefully by prospective SMB customers. For NEC heritage solutions, customers and channel partners on some occasions have to go through Japan for advanced implementation or support issues, which can be

inconvenient and more-time-intensive for Europe-based customers.

- Despite attempts to unify NEC's product, marketing and sales operations on a global level, NEC's divisions do not appear to be fully unified in all regions. Some NEC divisions, including NEC Corp. of America in North America (previously NEC Unified Solutions, NEC Infrontia and NEC Corp. of America), NEC Unified Solutions in EMEA (previously NEC Philips Unified) and NEC Corp. (Asia/Pacific), take different approaches in different markets. This is partly a result of NEC's desire to offer local solutions based on cultural and business requirements. As a result, NEC's offerings are best for single-region SMBs as opposed to multinational SMBs since the customer experience and channel support will be different by region (and product).
- NEC can be slow to market new technologies, although when the offerings come to market, they typically work well. The management interface could be more intuitive for users.

*Rating: Promising*

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## ShoreTel

The ShoreTel 10 UC platform offers an appliance approach particularly suited to distributed organizations. The appliance at each site has no hard drives but uses flash memory, which lowers failure rates. Survivability is ensured with ShoreTel's N+1 failover capability, for which an appliance can fail over to another appliance located anywhere in the network. These remote appliances operate independently, and all switches are configured collectively from a single ShoreTel Director Web application. ShoreTel supports its own phones, as well as SIP phones and SIP trunking. ShoreTel's UC platform scales from 20 to 10,000 users for SMB and enterprise markets; however, the vast majority of customers are SMBs with 20 to 500 users. The average size deployment is 80 to 120 users. The ShoreTel offering is suited for SMBs with limited IT staff and distributed offices. ShoreTel recently announced a partnership with IBM to jointly market and develop ShoreTel for IBM Lotus Foundations, targeted to businesses with up to 500 users.

### Strengths

- ShoreTel offers a bundled all-in-one UC solution with limited installation and configuration requirements. The bundle includes IM, audioconferencing and Web collaboration, voice messaging that can integrate with third-party e-mail, and its own telephony presence service and client.
- The offering is very easy to understand and maintain, so that SMBs do not have to hire a highly skilled and expensive person to manage the solution, or even rely as much on channel partners. Pricing and licensing are also simple and transparent and typically include support and maintenance.
- ShoreTel focuses strongly on the customer experience, and channel partners and all ShoreTel employees are compensated based on customer satisfaction scores. This results in thorough, regular examinations of key customer touchpoints (both from ShoreTel and channel partners) and encourages efforts to optimize the experience overall.
- SMBs with distributed operations should consider ShoreTel for a cost-effective, highly reliable UC solution.

### Cautions

- Although ShoreTel is currently investing in global brand awareness initiatives and growing its European channel partner base, the company is still a predominantly North America-focused company, with more than 90% of revenue coming from the region. As such, European brand awareness is relatively low, and channel coverage should be examined before deployment.
- While ShoreTel includes most features that SMBs desire in an all-in-one package, the contact center and conferencing capabilities will not be as advanced as other competitors' offerings. In addition, ShoreTel's software is not supported on general-purpose platforms, and thus, it is not meant for operation by SMBs that desire that capability.
- For SMBs with larger, centralized environments, the appliance architecture can be less desirable than single-server solutions.

*Rating: Promising*

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## Siemens Enterprise Communications

Siemens Enterprise Communications' flagship SMB UC offering is OpenScope Office, which runs as an application on the HiPath 3000 platform and is built into the OpenScope Office MX platform. OpenScope Office MX is targeted to companies with up to 150 users, and it is an all-in-one UC offering, including telephony (voice conferencing and audioconferencing), UC (presence and IM, contact center, integrated directories, and calendars) and data networking (firewall, IPsec VPN, WLAN up to 10 access points, and WAN/LAN/PSTN/ISDN) capabilities. OpenScope Office running on the HiPath 3000 can support up to 384 users, serving both TDM and IP environments. UC functionality is embedded directly into Outlook/Office. Siemens also plans to introduce a newer variation in the coming year: OpenScope Office LX (Large Edition, scalable to 500 users).

### Strengths

- Siemens has a long history of selling voice and advanced communications applications and has an impressive installed base of SMB customers across Europe.
- OpenScope Office MX is built as a complete all-in-one voice and networking offering for small businesses, reducing the need for separate boxes.
- Siemens has a strong presence, ample channel partners and delivery capabilities across Western Europe.
- The OpenScope Office suite features a rich range of UC applications, including voice, conferencing, voice mail, messaging, mobility, multimedia contact center, and presence and IM applications.
- SMBs across Western Europe should consider Siemens if they are looking for an all-in-one, full-featured UC solution.

### Cautions

- Although Siemens is making efforts to reposition OpenScope Office as an all-in-one branded solution, the solution is not currently there. The former naming conventions of HiPath OpenOffice and OpenScope Office running on HiPath 3000 were confusing to the market. The new naming conventions of OpenScope Office MX (All in One — Medium Edition), LX (Large Edition) and HX (HiPath 3000 Edition) are new to the market and bring some clarity. The new naming conventions must be well-positioned to channel partners to sell to SMBs, where simple, easy-to-understand marketing messages resonate especially well.

*Rating: Positive*

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