

## Cisco claims top PBX call control position in EMEA, says Canalys

### ➤ Canalys issues Q2 2011 worldwide call control market report

Palo Alto, Singapore, and Reading (UK) – for immediate release

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Canalys today announced that Cisco captured the number one spot in the Europe, Middle East, and Africa (EMEA) PBX call control market in Q2 2011, with a share of 14.8% compared with 12.4% in Q2 2010. Market conditions in the EMEA region remained tough in Q2 2011, as volumes declined by 3.0% compared with Q2 2010, while sequentially the market regressed by 4.8%.

As with last quarter, the African and Western European markets declined in comparison with the same quarter of last year. The African market shrunk the most due to fallout from the Arab Spring uprisings, though country-level performances remained mixed. Western Europe, which was down 6.2% year-on-year, also revealed major variances at a country level, with Spain and Italy performing particularly badly. The Middle East experienced a modest year-on-year increase of 1.4%. Central and Eastern Europe demonstrated a much stronger year-on-year improvement, with a growth rate in the region of 20%. This was driven primarily by Russia, which has been recovering strongly on the back of sustained high oil and gas prices, though shipment volumes retreated in comparison with Q1 2011.

Competition in the EMEA market remained intense in Q2 2011, as the top 5 regional players – Cisco, Alcatel-Lucent, Siemens, Avaya, and Aastra – all achieved market shares of over 10%, with an average of less than 1% between them. It was a difficult quarter for market incumbents Alcatel-Lucent (France) and Siemens (Germany). Both vendors declined in their respective domestic markets, thereby boosting Cisco's lead. Siemens attained the number one position in Western Europe, while Aastra clinched the second spot and Alcatel-Lucent the third.

“Despite tough conditions in the core call control market, we expect IP enablement to bolster overall unified communications growth throughout the remainder of the year,” said Canalys Senior Analyst Duncan Clark. “IP adoption enables the easier integration of unified communications solutions, such as rich presence, messaging, conferencing, and integrated email. With the ongoing demand for enterprise mobility and the need to integrate multiple devices, such as tablets and smart phones, the opportunity to sell more sophisticated solutions increases. Vendors must help channel partners transition to value-added sales if they are to capitalize on this trend and survive today's tough business environment.”

### About the Canalys Unified Communications Analysis Service

Canalys has tracked the transition of enterprise telephony from traditional TDM to IP-based solutions and now to unified communications and collaboration technologies. For providers of enterprise communications systems, applications, and end-user devices, our comprehensive approach examines the uptake of key technologies and services, such as video telephony, messaging, conferencing, and contact center applications, as well as changes in distribution trends and end-user devices. We advise vendors on

the best approach for different markets through forecasts, trends analysis, and quarterly shipment information detailed by vendor, technology, size, and channel.

## About Canalys

Canalys delivers smart market insights to IT, channel, and service provider professionals around the world. Our customer-driven analysis and consulting services empower businesses to make informed decisions and generate sales. We stake our reputation on the quality of our data, our innovative use of technology, and our high level of customer service.

## Receiving updates

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