



CISCO CONTACT CENTER CONTINUES TO GAIN MARKET SHARE

April 30, 2013

Executive Summary: The latest industry report from Synergy shows that Cisco continued to gain worldwide contact center market share in CY2012, with 2.7% growth for Cisco (measured in revenue). This, combined with Avaya again lagging the market, enabled Cisco to close the market share gap with Avaya by over 7 points worldwide and by nearly 11 points in North America. Here is a summary of key *worldwide* Synergy market share data (in revenue):

Manufacturer	Market Share 2009	Market Share 2010	Market Share 2011	Market Share 2012	Change from '11-'12
Avaya/Nortel	33.1%	36.9%	36.5%	31.9%	-4.6%
Cisco	9.5%	16.1%	15.3%	18.0%	+2.7%
Genesys				13.3%	---

Cisco's gains are even more compelling in North America:

Manufacturer	Market Share 2009	Market Share 2010	Market Share 2011	Market Share 2012	Change from '11-'12
Avaya/Nortel	38.8%	42.2%	37.6%	32.9%	-4.7%
Cisco	14.0%	24.2%	24.3%	30.3%	+6.0%
Aspect	12.8%	14.4%	15.3%	11.7%	-3.6%
Int. Intel. (I3)	6.5%	8.8%	11.0%	11.0%	0%



Analysis and Key Talking Points:

- ***In just the last three years, Cisco has closed the market share gap with Avaya by nearly 10 points worldwide and by over 22 points in North America.***
- Cisco should overtake Avaya for #1 contact center market share in North America this year (2013).
- Consistent with Synergy, Gartner ranked Cisco #2 in contact center worldwide in CY2012, as measured in *seats*. However, Genesys reported significantly higher numbers since breaking off from Alcatel, which resulted in Gartner ranking Genesys # 2 in *revenue* worldwide--barely ahead of Cisco. Synergy and other analysts do not rank Genesys nearly that high. Based on conversation with Gartner, most of Genesys' stated growth can be attributed to upgrades of existing agents, not to new business.

Cisco's drive to #1 began in North America, and that success is being repeated in other geographies. Here is a summary of Cisco's CY2012 performance in key theaters, as derived from Synergy data:

Theater	Cisco Market Share CY2012	Change in Share from CY20101
Americas	27.5%	+5.5%
APJC	9.3%	+1.9%
EMEAR	11.0%	-0.3%

Cisco remains on track to achieve our goal of #1 worldwide in contact center, with continued strong execution validated by customer success. Given our focus and the trends, we expect to overtake Avaya/Nortel for the # 1 spot in 2015-2016.

For general information on Cisco contact center products and solutions, visit:
www.cisco.com/go/cc

Additional information on Cisco customer collaboration solutions is located on the Cisco Contact Center Partner community:

<https://communities.cisco.com/community/partner/collaboration/contactcenter>