



The Aragon Research Globe™ for Intelligent Unified Communications and Collaboration, 2025

Intelligent Assistants Look to Power the Next Wave of Workplace Productivity.

October 17, 2024 | Research Note 2024-32

Author: Jim Lundy

Topic: Intelligent Unified communications and collaboration

Issue: Who are the unified communications and collaboration providers, and how will they evolve?



SUMMARY

Aragon Research releases its seventh Aragon Research Globe™ for Intelligent Unified Communications and Collaboration (iUC&C) that examines 14 major providers. The race to AI is here, and besides intelligence and assistants to help people get work done, agents will be using UC&C platforms to communicate with humans in ways we have not seen before. Omni-channel communications that include video, chat, and voice are powering the rise of integrated communications, which are crucial to business applications and processes. Increasingly, AI-based Intelligent Assistants will power UC&C platforms.

TABLE OF CONTENTS

Introduction.....	3
UC&C Platforms Become Strategic in the Age of AI and Security.....	3
Omnichannel UC&C Capabilities Badly Needed: Bundle vs. Build is a Trend	3
The Key Elements of the iUC&C Platform	5
Intelligent Assistants Part of the Modern Meeting Experience.....	5
Intelligent Agents/Digital Workers Will Leverage UC&C Platforms to Communicate	6
Intelligent Assistants Focus on Fixed set of Tasks	6
Intelligent Video Meetings—Automating Information Capture	8
Team Collaboration—and Messaging—A Key to Workplace Productivity	8
Separating Intelligence Platforms from the Rest	9
Communication Automation Going Beyond APIs	11
How to Use This Globe.....	11
The Aragon Research Globe™ for Unified Communications and Collaboration, 2025 ..	13
Leaders	14
Contenders	22
Innovators	25
Communications, Security, and the Digital Enterprise	28
Aragon Advisory	28
Aragon Research Globe Overview.....	29
Dimensions of Analysis.....	29
The Four Sectors of the Globe	30
Inclusion Criteria	30
Inclusions and Exclusions	31

Copyright © 2024 Aragon Research Inc. and/or its affiliates. All rights reserved. Aragon Research and the Aragon Research Globe are trademarks of Aragon Research Inc. All other trademarks are the property of their respective owners. This publication may not be distributed in any form without Aragon Research's prior written permission. The information contained in this publication has been obtained from sources believed to be reliable. Nevertheless, Aragon Research provides this publication and the information contained in it "AS IS," without warranty of any kind. To the maximum extent allowed by law, Aragon Research expressly disclaims all warranties as to the accuracy, completeness or adequacy of such information and shall have no liability for errors, omissions or inadequacies in such information.

This publication consists of the opinions of Aragon Research and Advisory Services organization and should not be construed as statements of fact. The opinions expressed herein are subject to change without notice. Although Aragon Research may include a discussion of related legal issues, Aragon Research does not provide legal advice or services and its research should not be construed or used as such. Aragon Research is a private company and its clients may include firms or financial institutions that have financial interests in entities covered by Aragon Research. Further information about the objectivity of Aragon Research can be found at aragonresearch.com

Introduction

We are in the midst of a profound shift towards Intelligent Communications and Collaboration, and it is an era where Assistants and Agents will play larger roles – with the goal of making work easier – by removing the mundane tasks that are involved with information capture and sharing. While the movement to intelligence started with video conferencing, voice intelligence started outside of UC&C, and now, AI-based Assistants are becoming part of a UC&C Platform. Team collaboration is a productivity enabler, and it can make it easier for humans and agents to work together. The key for enterprises is an integrated UC&C stack that can work with and integrate with other enterprise applications.

In 2024, the shift to intelligence was demonstrable as more providers announced intelligent capabilities for their offering. At the same time, many providers also decided to partner to build out their feature stack either for core capabilities or to add intelligence. This seventh Globe for UC&C platforms evaluates 14 providers in a market that continues to see steady growth and demand, given the myriad use cases that these platforms can support.

UC&C Platforms Become Strategic in the Age of AI and Security

The combination of Communications, Collaboration, and Contact Center is the second-largest market after Enterprise Security. With the shift from basic UC&C offerings to AI-enabled ones, it is now a strategic imperative to have an integrated communications stack to be able to compete as a high-performance enterprise. Omnichannel communications are emerging as the path forward.

One of the big changes that has arrived is ease of integration with more low code connectors becoming commonplace. Secure communication over multiple channels is important, as is the ease of with which users can switch between voice, messaging and video. Video and messaging are overtaking voice, but voice communications is the failsafe when other channels have issues. iUC&C will become more automated and will become a platform that humans and virtual agents will leverage in 2025 and beyond.

Omnichannel UC&C Capabilities Badly Needed: Bundle vs. Build is a Trend

There is no doubt that enterprises need fully fledged omnichannel communications and collaborations capabilities. However, in an era where resources are tight, providers are responding with bundling capabilities together instead of trying to build it all themselves. Regardless, the need for voice, video, and chat applications is growing and some of

these capabilities will be leveraged not only by humans but by virtual agents and assistants.

The shift we see in UC&C Platforms is bundling capabilities to free up resources to focus on new Intelligence capabilities. What's key is the ability to offer all of the communication modalities that allow an enterprise to communicate and collaborate over the right communication channel. So, the shift that is occurring is more providers are offering a full stack of omni-channel capabilities – it is just that some channels may have been developed by a partner but are bundled and offered as part of the UC&C Platform.

Given both employee and customer preferences for certain types of communications for certain types of events—calls, voice, video meetings, and enterprise-grade messaging need to be offered in tandem. In particular, the need to contact people during emergencies often requires omnichannel communication capabilities such as voice or messaging.

Emergency broadcast capabilities are becoming important features that many UC&C providers are now offering. However, with AI, more use cases, such as telehealth, are emerging. Telehealth will see significant growth as removing video meetings between patients and healthcare providers helps to reduce costs.

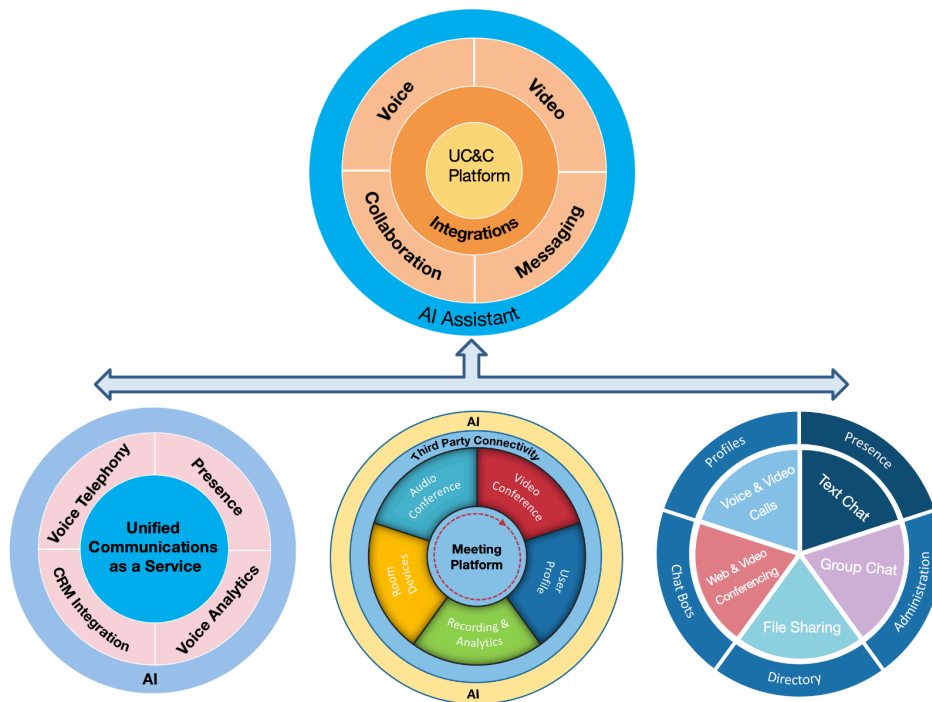


Figure 1: UC&C Platforms are replacing best-of-breed approaches that were popular in the SaaS era.

The Key Elements of the iUC&C Platform

UC&C platforms are about communicating across multiple channels—voice, chat, and video across a common client. Each element of UC&C is important, and moving seamlessly between modalities is key.

With the need for more omni-channel communications and application integration demand for the key elements of the iUC&C platform is being influenced by current shifts in the market.

The new addition to the iUC&C Stack is both Communication Automation (formerly CPaaS) and Intelligent Digital Assistants and now growing demand for customizable agents. These new additions, along with Voice Calling, Video meetings, and Team Collaboration, make up the new Intelligent UC&C Stack (see Note 1).

Intelligent Assistants Part of the Modern Meeting Experience

UC&C Intelligent Assistants have been around for several years and are now part of the communications experience, with a primary focus on meetings and calls. While there is still a debate about what to charge, the point is that they are here to stay.

Coaching Agents are emerging as well and with that a Virtual Coach can help both sales reps and Contact Center agents to improve their performance. (see Globe for Enterprise Coaching).

Intelligent Digital Assistants will do more for users by taking notes on action items, summarizing meetings and calls, and even splitting recordings into chapters. Intelligent Assistants have specific things they can do, and the great news for enterprises is that many firms are offering them. Intelligent Assistants are powered by Generative AI and Large Language Models (LLMs).

Note 1: Key Elements of UC&C

Voice: Cloud telephony, also called unified communications as a service (UCaaS), has been the largest trend in migrating legacy PBXs. Voice telephony is vital to both employee engagement and customer experience.

Video: Video meetings are here to stay, and video has become the new dial tone for UC&C platforms. The race is on for intelligent video, which is discussed in other parts of this Research Note.

Team Collaboration: Increasingly, team collaboration is becoming the container for work and work projects. Team collaboration is well-positioned to challenge email as a go-to application for day-to-day interactions and ad-hoc work.

Communication Automation: Integrating different communication modalities with and inside of other applications represents an evolution of Communication Platform as a Service (CAP). Note that CAP also means integration to enable virtual agents to use a UC&C platform.

Intelligent Assistants: From providing action items and notes to automating the setup of a call or a meeting, Intelligent Digital Assistants are here to stay. Some providers are also allowing for the creation of task-focused agents that can do specific things.

Intelligent Agents/Digital Workers Will Leverage UC&C Platforms to Communicate

With the rise of digital workers that are currently called agents, Aragon is predicting that these new digital agents will use UCC platforms to collaborate and communicate with humans. The best example of this is forthcoming sales agents that will perform as a sales development rep and reach out and contact prospects to try to confirm a potential next step appointment with a human.

While some firms are positioning these new agents as a sidekick to their human counterpart, buyers of this technology and sellers need to realize that this will change pricing models because it will not always be based on a human seat, but based on a seat that is used by a human or a digital worker/agent.

Intelligent Assistants Focus on Fixed set of Tasks

What has changed in last year is that intelligent systems have become part of the UCC platform, and these assistants can perform a fixed set of tasks such as dialing for calls, taking notes and action items, summarizing the new meeting with images and pictures, and even coordinating meetings and adjusting settings during a meeting.

Some providers have even offered a conversational interface that allows an admin to give commands to the assistant during and after the meeting. We expect conversational interfaces to become stronger and more commonplace over the next two years. Note that while UC&C Assistants will focus on recording and summaries and, in some cases, meeting or call setup, some Intelligent Assistants will do more. See Figure 2 below.

Prediction: By YE 2025, only 75% of UC&C providers will offer an AI-based digital assistant (80% probability).

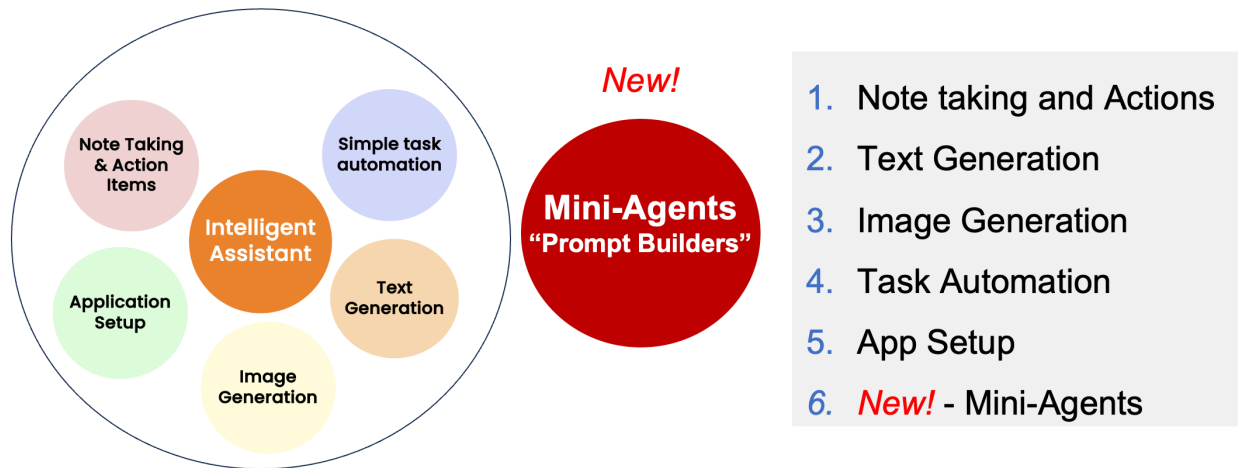


Figure 2: Intelligent Assistants keep adding features.

The Digital Divide Among Providers Will Grow

While a number of providers in this report are investing in their own assistants, others are looking to partner or white-label. Either way, the market is going through profound change, and not all providers will offer advanced assistant capabilities.

Pricing for Assistants vs. Agents

Aragon views intelligent assistants as an emerging part of the core UCC platform. Vendors may offer different usage plans. However, neither Cisco nor Zoom charges for their assistant features. Microsoft and Google are because these features actually are part of their workspace suite.

Software agents that are trained to do specific tasks, such as questions and answers for support centers or digital workers to perform things such as a digital sales SDR, will be among the roles affected. We expect monthly prices to be much higher because many of the tasks that these agents perform will replace what a human used to do. Enterprises will be attracted to agents and will need to use the UCC platform to perform any of these communications interfaces.

For UC&C, there is more of a focus on Assistants than virtual agents. This theme has been in place before LLMs came online. Webex helped pioneer the Webex Assistant, and now, with GenAI, more providers offer Assistants, which are also referred to as CoPilots. These Assistants offer summarization capabilities that include text summarization and, in some cases, video meeting scenes or snippets. These algorithms are what Aragon calls Content AI (see Figure 2 and Note 2).

Prediction: *By YE 2025, 70% of ICC providers will use third-party LLMs that they train on their own product and service information (80% probability).*

Intelligent Video Meetings—Automating Information Capture

The market was already headed towards Intelligent Video Conferencing (IVC) before the advent of LLMs. Today, IVC-based meetings offer better video quality and a better experience from set-up to the live experience.

These features include automated note-taking, real-time translation, action items, speaker tracking and speaker identity, background noise suppression, gesture control, virtual agents, and more. Meeting summaries are often more popular than recordings, but with chapter summarization, there is still a strong need for recordings.

Team Collaboration—and Messaging—A Key to Workplace Productivity

For many enterprises, team collaboration or chat has become the new way to communicate about work. While Team Collaboration is vital for many enterprises – for other enterprises, it is not getting the widespread adoption that many anticipated, partly due to work styles and the fact that SMS-based messaging is still very popular.

Note 2: Content AI as part of Generative AI

Content AI has been around for several years and refers to the ability to process and understand different types of Content. This includes:

Voice AI: The ability to listen to a voice call and understand key words or phrases or the entire conversation. This has been referred to as Conversational Intelligence.

Document AI: The ability to read and understand documents is foundational. With a generative layer added to Document AI, suggestions can be made to enhance an existing document or even to create a new one.

Image and Video (Computer Vision):

Image and Video AI is referred to as Computer Vision. This is the ability to identify Images and Scenes. A fair amount of training is needed to train models.

However, the ability to summarize a meeting by referring to a specific scene or even generating a video summary using specific scenes is now an emerging capability.

With GenAI added to the mix, new images and videos can be created. However, careful consideration of copyright and IP needs to be done before using such images in a commercial setting.

Aragon still feels that team collaboration is the stronger alternative to email in the office. Enterprises should be aware that not every UC&C provider offers Team Collaboration. For some providers, they have defaulted to WhatsApp or integration with Microsoft Teams. However, many leaders do offer their own messaging capability. Enterprises need to retire standalone messaging offerings and instead leverage Messaging as part of a broader UC&C offering.

Separating Intelligence Platforms from the Rest

The new level of intelligence that is being added to UC&C offerings means that the setup experience, the meeting experience, and the access to post-event content are more seamless and more automated (see Table 1 below).

Capability	Intelligent UC&C Platforms	Traditional UC&C
Intelligent Assistant	Yes	No
Emergency Broadcast	Yes	Optional
Sound Management	Yes	Optional
Auto Transcription	Yes	Optional
Assistant for Summaries & Action Items	Yes	No
Auto Language Translation	Yes	No
Gesture Control	Yes	No
Intelligent Cameras	Yes	Yes
Speaker Track	Yes	Optional
HD Video	1080P and higher	360P and higher
HD Content Sharing	Yes	Standard Resolution
Integrated Hardware and Software	Yes	Optional
Digital White Board	Yes	Optional
APIs and Integrations	Advanced	Basic
People and Meeting Analytics	Advanced	Basic
Intelligent Assistant	Yes	No

Table 1: Intelligent UC&C platform capabilities vs. traditional UC&C capabilities.

The UC&C and Intelligent Contact Center Becomes Important as Agents Come Online as a Bundle

More providers now offer a UCC and ICC bundle, particularly to meet the needs of small and medium businesses. Obviously, the key advantage for buyers is a package that offers omnichannel capabilities. The reason for an integrated bundle is both for humans

and virtual agents but also for advanced applications, including, but not limited to Telehealth and modern Prescription Refill.

With the growing demand for modern communications-enabled applications, Aragon feels that the advantage falls to providers that have UCC platforms to start with and can offer the integrated bundle. With Intelligent Assistants and Agents coming online, the integrated bundle takes on a more strategic importance.

Communication Automation Going Beyond APIs

Automating Communications and making it part of a business process goes beyond just API Connectivity. The emerging Communications Automation Platforms (CAP) market will leverage low code and Agents to integrate communications with business processes easier and faster than ever. Part of the challenge with many workflow automation tools is that they can deal with data but not communications. We expect that Communication automation will grow because virtual agents will need to have strong integration to be able to automate some of the things that people do.

An example is a dialer. In the future, calling and messaging will be part of what virtual agents will do. Easy ways to integrate them—the omni-channel and the agent—this is where the opportunity is.

While APIs have historically been the backbone for integrating applications with communication functionalities, as seen with the ascent of platforms like Zapier, this approach often leads to more compartmentalized applications, stifling the potential for innovative experiences. Such strategies are scarcely conducive to profound business evolution.

How to Use This Globe

With the features of UC&C well-established, the race to differentiate offerings through the shift to secure, reliable, AI-enabled omni-channel communications is now underway. Seamless switching between modalities is a given. Aragon recommends that all modalities—calling, meetings, and messaging—be full of UC&C capabilities when it comes to functionality. Intelligent assistants are here, and while most providers now offer an assistant, they vary in features and capabilities.

Our advice to enterprise buyers is to first consider what your core requirements are in regard to UC&C. We encourage buyers to go beyond just the positions on the Globe graph: consider which capabilities and products best fit the required use cases that pertain to your enterprise or buying center. For example, if the requirement is for global calling, this may change the list of finalist providers that you consider.

The table below segments the providers in this report by the key capabilities they support, including Intelligent Assistants:

Vendor	Intelligent Assistants	On-Premise Offering	Cloud Voice PBX	Video Meetings	Team Collaboration	Unified Client	Marketplace
8x8	✓		✓	✓	✓	✓	✓
Avaya	✓	✓	✓	✓	✓	✓	✓
Cisco	✓	✓	✓	✓	✓	✓	✓
Dialpad	✓		✓	✓	✓	✓	✓
Google	✓		✓	✓	✓	✓	✓
Intermedia	✓		✓	✓	✓	✓	
GoTo	✓		✓	✓	✓	✓	✓
Microsoft	✓	✓	✓	✓	✓	✓	✓
Mitel	✓	✓	✓	✓	✓	✓	✓
NEC	✓		✓	✓	✓	✓	✓
Nextiva	✓		✓	✓	✓	✓	✓
RingCentral	✓		✓	✓	✓	✓	✓
Vonage	✓		✓	✓	✓	✓	✓
Zoom	✓		✓	✓	✓	✓	✓

Table 2: Comparing the capabilities of the different providers.

The Aragon Research Globe™ for Unified Communications and Collaboration, 2025
(As of 10/02/24)

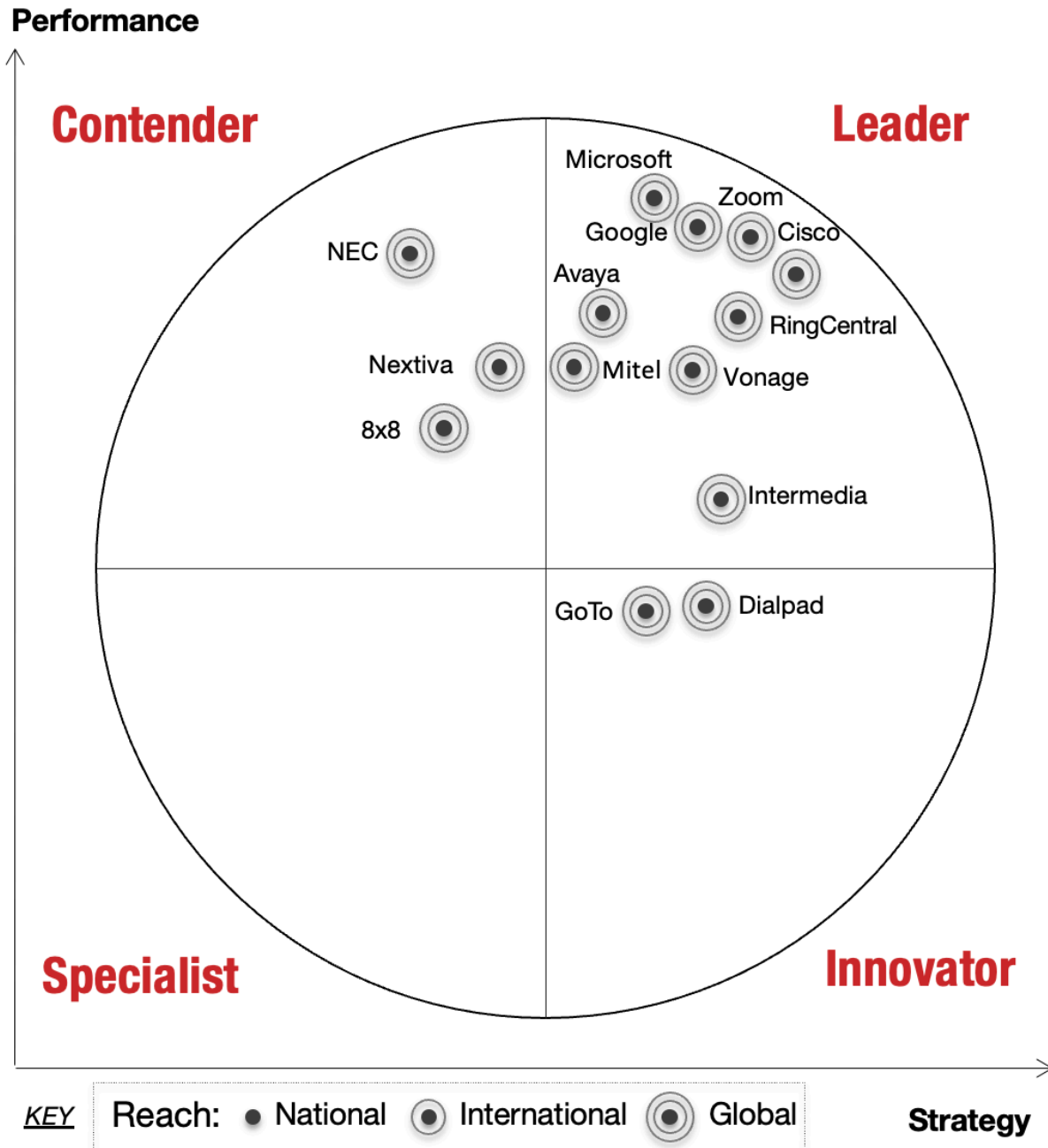


Figure 3: The Aragon Research Globe for Unified Communications and Collaboration, 2025.

Leaders

Avaya

Avaya, based in New Jersey, announced that Avaya Chairman of the Board, Patrick Dennis, was taking over as CEO on September 1, 2024. After Alan Masarek announced his retirement. The management change comes after Avaya made significant hires in its executive ranks over the last year, including the appointment of Kamilah Thomas as Chief People Officer in July 2024. Avaya has a large portfolio of product offerings that focus on both its large base of on-premise UC Offerings, its growing hybrid cloud capabilities, strategic partnerships with RingCentral, and a new partnership with Zoom, which was announced in March 2024. Avaya has continued to focus on growing its large install base in Unified Communications and Collaboration and Intelligent Contact Centers.

The Avaya portfolio now includes Avaya Cloud Office powered by RingCentral, Avaya Spaces, Avaya Enterprise Cloud, Avaya Experience Platform, and Avaya Communication APIs. Avaya also offers its on-premise offerings, including Avaya Call Center Elite, Avaya Aura, and Avaya IP Office. Avaya continues to have one of the largest contact center install bases, partially due to its focus on large, complex environments that require platform scalability. Avaya OneCloud provides a complete UCC solution with meetings, messaging, and telephony backed by both its enterprise and midmarket platforms. Avaya Cloud Office, in partnership with RingCentral, has delivered new capabilities, including enhanced hybrid meetings, simplified administration, and safety features such as lockdown, along with enhanced country availability. The new partnership with Zoom allows Zoom capabilities to be fully integrated with Avaya Collaboration and Communication capabilities, including meetings, team chat, scheduler, whiteboard, and spaces. With this move, we expect Avaya Spaces to be less strategic over time.

As part of its expanded partnership with RingCentral, RingCentral RingSense AI will now power the Avaya Aura Avaya offering, which will now provide Avaya Aura customers with access to live transcriptions, closed captioning, video summaries, and video highlights. The Avaya AI Workflow capability, combined with Generative AI, enables the building of new virtual agents that can integrate Google, IBM Watson, Nuance, and other conversational AI offerings into custom or pre-built solution virtual agents.

The Avaya Enterprise Cloud is powered by Microsoft Azure. While it is clear that Avaya has focused on Microsoft Azure as its go-forward Cloud Partner, Avaya continues to support a multi-cloud application ecosystem, leveraging its product lines on a variety of cloud platforms, including Amazon Web Services, Google Cloud, and IBM.

Avaya is also well positioned to help customers leverage its communications and contact center needs—and due to its multi-cloud approach, enterprises can pick a deployment model that supports data sovereignty and data privacy. Avaya's reinvigorated leadership team refreshed products, and cloud flexibility and overall scalability make it one to watch.

Strengths

- UC&C platform
- Cloud, on-premise, and hybrid capabilities
- Overall user experience
- AI-powered contact center
- Highly reliable telephony and UC
- Partner network and ecosystem

Challenges

- Focus on Video

Cisco

The Cisco Webex Business announced a new GM, Anurag Dhingra, and has continued to push its focus on AI in both its Webex UC&C Platform and the Intelligent Contact Center and now claims 15M calling users worldwide. Cisco helped to pioneer the use of Intelligent Assistants in Webex, and in 2024, they added more capabilities. Given the success of the Webex Assistant, Cisco is rolling out an Assistant in its other business units, including Networking and Security. The Cisco Webex Suite platform includes the updated Intelligent Assistant, meetings, messaging, voice calls, webinars, events, polling, video messaging, and APIs.

The Cisco AI Assistant will now work with the Webex Contact Center—and with Control Hub, making it one of the few providers that has an assistant to manage platform settings. In Webex Messaging, Cisco announced that its AI Assistant can reword, translate, and change the tone of a message to make it more appealing to the reader. Webex AI Assistant in Meetings catches users up on the conversation with highlights and action items. Users can ask questions such as “Was my name mentioned?” and the AI Assistant will provide the information. Cisco has focused on the ability to deliver fleets of equipment with a consistent OS – RoomOS, which can control all Webex devices. In addition, all Cisco Webex hardware is now NVIDIA-enabled so that AI can run on the edge within these devices.

Cisco has upgraded calling experiences with its Webex AI Codec and meeting experiences with its super-resolution video codec, resulting in its ability to deliver cinematic meeting experiences. With its Cisco Webex, the new Super Resolution for video compression can deliver over low bandwidth to users. Webex Calling announced numerous innovations, including strong market growth to 15M+ worldwide users, Webex Customer Experience Basic and new Essentials offer, and Webex Go with AT&T mobility solution, which is now available in the US.

Cisco has a growing partnership with Microsoft, which means Cisco room and personal video endpoints, desk and wireless phones, USB webcams, and professional headsets work with Microsoft Teams. This new Room Kit EQX supports Microsoft Teams, and Cisco continues to offer extensive integration with Apple, including Apple iOS, iPadOS, and MacOS.

The Webex Platform also focuses extensively on security, including support for privacy, encryption, data loss prevention, mobile security, and regulatory and legal compliance. With innovation in its products, including its Webex AI Codec and all its AI-enabled meeting and calling devices, Cisco is well positioned for the intelligent enterprise.

Strengths

- The Cisco and Webex brands
- High-quality video and voice across devices, including mobile
- Advanced intelligence
- Collaboration video devices for rooms, groups, and personal desk endpoints
- A range of intelligent professional headsets
- Cloud, on-premise, and hybrid deployment options
- Built-in security, including end-to-end encryption—in transit, at rest, and in-use
- Webex mobile collaboration capabilities

Challenges

- Balancing focus on hardware and software

Google

Google, based in Mountain View, CA, and led by Google Cloud President Thomas Kurian, has been innovating with a strong push on AI innovation featuring its Google Gemini Assistant, which has evolved significantly in just 12 months. It has continued to evolve Google Workspace and Google Cloud Platform with substantial investments in AI. Google's Google Workspace is now powered by the Google Gemini Assistant, which interoperates with the Workspace UC&C offerings. This includes Google Meet, Google Chat, Google Drive, Docs, Slides, Sheets, and optional Google Voice calling plans—all work together and are fully integrated with Google Gmail and Calendar.

Google Meet now has an add-on for Gemini that allows Gemini to attend meetings on a user's behalf. If the user is in a meeting, Gemini can take notes and action items and summarize the meeting, including using video snippets. Note that for non-enterprise Gemini subscribers, there is an optional license to enable these features. Google Voice, its Business Phone System, is available globally, and Google makes it relatively easy to place calls across geographies.

Google Gemini also helps users write documents, summarize documents and emails, generate images for Google Meet, enhance meeting summarization, and generate custom backgrounds. The recent addition of Google Gemini Gems means that Prompts for creating content can be pre-programmed and saved for reuse. We anticipate that others will follow this move.

Google Chat, which has had a complete makeover in 2023, continues to grow in capabilities. Google Chat is integrated with Meet and with email, giving users a seamless way to switch modalities. Google continues to offer its own contact center offering, and via Vertex and Google, CCAI offers some low code ways to build multi-threaded agents that can work with Google Workspace and many other enterprise applications, including marketing automation, contact center, CRM, and Websites.

Via its Gemini Assistant, Google Meet and Google Chat both have intelligence. Google Chat now enables more of its conversational AI capabilities (Google Vertex and Dialogflow) to be integrated inside Google Chat. With Google Workspace and Google Gemini, as well as its UC&C capabilities, Google allows enterprises flexibility to adapt it to many business-focused use cases.

Strengths

- Enterprise penetration with Google Workspace
- Google Gemini AI Assistant
- Global cloud infrastructure
- Partner ecosystem
- Team collaboration
- Video meetings
- Cloud-native collaboration applications
- Ease of use

Challenges

- Market awareness of its Voice offering

Microsoft

Microsoft, based in Redmond, WA, and led by Chairman and CEO Satya Nadella, continues to lead with Microsoft Teams, its UC&C offering, and over the last year, has made a complete pivot as a firm that embraces AI and offers Microsoft CoPilot for the entire Microsoft 365 Product family. Microsoft Teams offers video, voice, and messaging-based communications, and now enterprises can license the optional Microsoft CoPilot. Microsoft 365 has added a number of new capabilities to Microsoft 365 subscriptions that include Clipchamp for video creation and Microsoft Designer for graphics creation.

Microsoft CoPilot for 365 works across the Microsoft Family and will run on devices in Teams, Word, Excel, PowerPoint, and Outlook. Copilot offers features that streamline tasks, automate workflows, and enhance collaboration. Microsoft Teams can take notes, summarize discussions, including whether people are aligned, and suggest action items. Copilot also offers a catch-up mode, where someone who joins a meeting late can get caught up.

In 2024, given issues with the European Union, Microsoft decided to unbundle Microsoft Teams from Microsoft 365 subscriptions, which, while meeting the regulator's requirements, creates extra work for enterprises to license bundles. Microsoft Teams Room Systems also continues to partner with certified providers, including Crestron, Lenovo, Logitech, HP, MAXHUB, Yealink, and Poly. In 2023, Microsoft announced that Cisco Endpoints and Room Kits would fully support Microsoft Teams users.

Microsoft Teams Calling Plans are optional—and enterprises must license Teams Phone with Calling plans to use Teams as their phone system. Also, Microsoft is one of the few firms charging for CoPilot, and that needs to be taken into consideration. CoPilot for Microsoft 365 is a \$30 per user per month add-on to select Microsoft 365 licenses. With Microsoft Teams and the Microsoft CoPilot Assistant, Microsoft is well-positioned for the future.

Strengths

- Microsoft brand
- Microsoft Copilot AI Assistant
- Video meetings and webcasts
- Global PSTN conferencing coverage
- HD video quality on point-to-point calls
- Overall collaboration applications
- Global footprint
- Full hybrid scenarios enabling migrating strategies to the cloud

Challenges

- Price increases for Premium Teams features

Mitel

Mitel, US & Canada -based and founded, and led by President and CEO Tarun Loomba, added Eric Hanson as CMO in February. It spent much of 2024 integrating Unify, which it acquired in 2023. Mitel is now one of the largest global providers of communications and collaboration offerings. The Mitel portfolio of offerings now includes applications, collaboration, intelligent contact center, unified communications platforms, and solutions + cloud UCaaS via a new Zoom partnership, which came about after it ended its relationship with RingCentral.

On Innovation in September 2024, it announced The Mitel Common Communications Framework and the launch of Mitel Secure Cloud, which includes Hybrid and Sovereign Cloud options. Hybrid Cloud positions Mitel well for the future of intelligent work since many large enterprises do not want to run in a distant public cloud.

In September 2024, Mitel announced a new strategic partnership with Zoom that includes the ability to offer the full Zoom Workplace portfolio as part of the Mitel Hybrid Cloud offerings. This will also allow both Mitel and Zoom customers the opportunity to leverage the battle-tested Mitel MiVoice and OpenScape phone systems, including the Mitel phone hardware and the 700 series of Digital Enhanced Cordless Telecommunications (DECT) handsets. The 700 series includes the 712dt, 722dt, 732d, and 742d handsets, which are hardened and ready for the Frontline workers that use them.

Mitel continues to offer collaboration with Mitel MiVoice and OpenScape solutions, which includes video meetings and team collaboration. These solutions now support integration with Microsoft Teams, RingCentral Video, Zoom, and others. Mitel continues to be a strong player in the Intelligent Customer Experience space with AI-infused solutions for contact agent frontline workers. It highlights a strong, complete omnichannel CX portfolio packed with integration capabilities from its strong Mitel Technology Partner Network to deliver a depth of business-driving customer experience capabilities.

Mitel has a large partner network and offers a growing set of hybrid cloud industry solutions in Financial Services and Insurance, Healthcare and Life Sciences, Public Sector, Education and Defense, Telecom, Media and Entertainment, Manufacturing, Energy, and Utilities, as well as Transport, Logistics, and Retail. Given all the focus on its product portfolio, its industrial industry solutions, and go-to-market efforts that now leverage Zoom Workplace, Mitel is ready for the growing demand for Intelligent UC&C.

Strengths

- Cloud and on-premise voice support
- Growing AI capabilities
- Global cloud infrastructure
- Hybrid and Secure Cloud focus
- Endpoints
- Global partner ecosystem

Challenges

- Migrating its customer base to new offerings

RingCentral

RingCentral, based in Belmont, CA, and led by founder and CEO Vlad Shmunis, has continued to focus on enhancing its product portfolio and has made a significant investment in AI. The Ring Central product line includes Intelligent Phone Solutions, Intelligent Meetings and Messaging, Webinars/Events, and its new Contact Center offering. RingCentral has leveraged partnerships, organized development and acquisitions to build out its growing product portfolio.

The RingCentral UCC platform offers all Omni-channel capabilities, including Phone, Messaging, and Video. It now includes Meetings, Rooms, webinars, and Events, complemented by AI capabilities that deliver meeting insights and summaries. RingCentral Video features messaging, video, and phone and is available in 46 countries.

The RingCentral RingSense AI Platform has seen adoption by customers and partners, including Avaya. RingSense includes Conversational Intelligence and generative AI capabilities that it can leverage from multiple providers. As part of the announcement, RingCentral announced RingSense for Sales, which includes automated follow-ups, AI-generated call summary scoring, and the ability to track keywords and phrases. RingCX and MVP are powerful combinations that offer all communication modalities, including voice calling and messaging and RingCentral intelligent video.

With RingCentral Events, it can offer both video meetings and Webinars and Events, which more buyers want to purchase from one provider. The RingCentral Intelligent Contact Center, launched in 2023, saw 10% growth in just one quarter. This offering leverages RingSense and past acquisitions, such as Dimello, for omnichannel customer engagement.

RingCentral has continued its major partnerships to help drive revenue. This includes resale relationships for RingCentral Office with Alcatel Lucent, Avaya, Unify, Vodaphone, and others. The RingCentral Open Platform now has over 85,000 registered developers and supports over 9,000 applications and 500+ APIs, including Microsoft Teams, Google G Suite, NetSuite, and Salesforce. With RingCentral's continued product innovation, they are well-positioned for the shift to AI. The RingCentral MVP Platform, along with the RingCentral Contact Center, is a powerful combination for the SMB market.

Strengths

- UC cloud capabilities
- RingCentral brand
- Team messaging and collaboration functionality
- Unified client
- Ease of configuration and deployment
- Open platform
- UC&C marketplace

Challenges

- Managing its growing set of partner and OEM channels

Vonage

Vonage, wholly owned by Ericsson, announced Ericsson Executive Nicklas Heuvelodop as CEO in March 2024. Vonage has been investing in its product portfolio, including a growing focus on AI with its AI Studio. The Vonage product portfolio now includes Vonage Contact Center (VCC), Vonage Business Communications (VBC), Vonage Meetings, Vonage AI Studio, Vonage Conversational Commerce (Jumper.ai), Vonage Protection Suite and Vonage Communication and Network APIs.

Vonage now offers Vonage Fusion, which brings together Vonage Business Communications (VBC) unified with Vonage Contact Center and makes the experience seamless via a common user interface. Connectivity is enabled via the Vonage Communication and Network APIs. In Voice, Vonage has seen success with its VBC for Microsoft Teams offering, which includes premium calling (direct routing), as well as SMS and MMS embedded directly into the Teams app. In September 2024, Vonage announced an updated Vonage Premier for Salesforce Service Cloud Voice solution that supports omni-channel options, including voice and SMS chat APIs to enable SMS, MMS, web chat, and WhatsApp conversations.

In AI, Vonage continues to offer Vonage AI Studio, it's no/low-code AI platform that enables virtual agents to be built and can leverage all channels for conversations, including chat, voice, and SMS applications, as well as WhatsApp. Vonage also offers visual engagement features that work inside Salesforce, Microsoft Dynamics, and ServiceNow. Agents can escalate any call into a video session on the fly.

Vonage Meetings is comprehensive video conferencing and has experienced solid adoption, as has VBC's integrated team collaboration solution that offers team messaging, file sharing, SMS, voice, and video across any device. Vonage can also leverage its leading Video APIs for enterprises needing advanced meeting and video integration capabilities. The Vonage Protection Suite includes Fraud Defender, which is an alerting and blocking solution, Vonage Verify API, and Vonage Number Insight, which adds real-time alerts based on the Vonage Fraud Score capability.

With growing demand for advanced applications such as Telehealth, Vonage is well positioned for these new application needs due to its strong Communications Automation and networking capabilities, the Vonage Contact Center, and Vonage Business Communications. These capabilities, combined with a growing focus on AI, make Vonage well-positioned for the growing demand for intelligent communications and collaboration.

Strengths

- UC&C platform
- UCaaS and CCaaS offering
- Conversational AI and AI Studio offerings
- Conversational Commerce platform
- Brand recognition
- CPaaS API flexibility and portfolio (voice, SMS, messages, video, 2FA)
- Integrations

Challenges

- Building awareness for its full portfolio

Zoom

Zoom, based in San Jose, CA, and led by CEO Eric Yuan, continues to broaden its product portfolio and invest in AI. Zoom Workplace is its flagship UC&C Platform that includes Team Chat, phone, and meetings along with whiteboarding, and AI Companion, its Intelligent Digital Assistant, launched in September 2023. Zoom Workplace replaces Zoom One and over the last year, Zoom has added Zoom Calendar and Zoom Docs, both of which work with Zoom Companion.

Zoom AI Companion works across Zoom Meetings, Zoom Team Chat, Zoom Email, Zoom Voice, and Zoom Docs. Zoom Docs positions Zoom as more than just a UC&C Platform, and it makes sense because it is doing so much with the Zoom AI Companion. For Zoom Meetings, Zoom Companion includes review summaries, next steps video meeting highlights, and smart chapters. Zoom AI Summary offers a concise 2-page or less summary of a meeting, and recording does not need to be on for it to work. Customer feedback on this feature has been very positive.

Zoom Companion also includes other generative AI capabilities, such as the ability to answer questions during a meeting, help attendees catch up, or provide insights on what is going on in the meeting. For Zoom Chat, users can create messages and change tone. AI Companion can help create messages in Zoom Chat and change tone. Zoom Team Chat offers persistent, personal, and channelized team messaging.

Zoom has essentially upgraded customers to Zoom Workplace with offers to sign up for additional features. Given that Zoom is not charging for AI companions—it has seen strong adoption and positive reviews. The Zoom marketplace continues to be popular with customers, and more applications are being added each quarter.

Zoom has added partnerships in 2024, including Avaya, where Zoom will work in conjunction with Avaya Aura UC, and Mitel, where it will work with the Mitel Hybrid Cloud offerings. In addition, the company continues to make significant investments in security and now offers end-to-end encryption on all free and paid accounts. With Zoom's investments in AI and in innovating its products, many enterprises may want to look beyond their initial investments in Video meetings.

Strengths

- AI Companion
- Scalable HD video conferencing and webinars
- Webinars and live events
- Software-based video room systems
- Mobile app
- Webinars
- App marketplace
- UCaaS offering
- Innovation

Challenges

- Balancing focus on meetings vs. full UC&C platform

Contenders

8x8

8x8, based in Sunnyvale and led by CEO Samuel Wilson, continues to focus on its UC&C and intelligent contact center offerings. In July 2024, 8x8 announced that it had signed a \$200M term loan to help it deal with some debt payments coming due. The 8x8 Experience Communications as a Service (XCaaS) platform includes a contact center, voice, video, chat, and API solutions. It is offered with a number of different subscription plans based on need.

8x8 has been investing in intelligence for its UC&C and Contact Center offerings. In January 2024, 8x8 announced AI capabilities that include smart summaries and action items for Meetings. In the contact center, it added improved speech analytics and call summarization. Those summaries can also be automatically pushed to a Customer Relationship Management (CRM) offering, such as Salesforce.

8x8 Work is a cloud-based app that brings together voice communications, business SMS, fax, voicemail, call routing, video meetings, and team messaging via desktop and mobile apps or web browsers. It also offers the ability to manage the system from a single administration interface for user provisioning and management. 8x8 Work includes performance and usage dashboards, plus reporting options for insights and sentiments. 8x8 continues to offer the AV1 Codec, which enables high-quality video meetings.

In April 2024, 8x8 announced 8 by 8 Operator Connect, a native PSTN calling solution for Microsoft Teams. 8x8 Operator Connect for Microsoft Teams supports high-quality voice calling to Teams users in 59 countries via an expanded list of global carriers.

In July 2024, 8x8 shifted to offering more tailored Industry Solutions. It announced its Active Assessor offering, which is a solution specifically designed for UK housing associations. It utilizes 8x8's AI capabilities to streamline property evaluations. The platform enables proactive tenant engagement through SMS messaging and video technology, facilitating faster identification and resolution of potential issues. It also automates data collection and reporting, ensuring compliance with social housing regulations while minimizing agent intervention.

8x8 now offers the Technology Partner Ecosystem, which includes an integration framework and out-of-the-box integrations with over 50 business and productivity apps, such as conversational AI vendors, Microsoft Dynamics, Salesforce, and Slack. The pivot into more industry applications that leverage the 8x8 UC&C and Contact Center capabilities signals a peek into the future where use cases may be more important than just the technology.

Strengths

- Cloud-based PBX
- Video meetings
- UC&C and contact center integration
- Contact Center
- Partner integrations
- CRM integration

Challenges

- Overall focus on team collaboration

NEC

NEC has been a long-time provider of Communications and Contact Center offerings for the SMB and Large Enterprise Segments. In March 2024, they announced they were exiting the on-premise UC market and that the path forward is with UNIVERGE BLUE CLOUD SERVICES. They are also one of the largest multi-national providers of IT infrastructure and communications. Through its UNIVERGE communications portfolio, NEC offers its customers the power of choice. UNIVERGE BLUE ENGAGE, powered by Intermedia, is a complete cloud-based contact center solution that can be fully integrated with UNIVERGE BLUE CONNECT (UCaaS) and accessed through a single pane of glass or can be used as a standalone solution.

Besides UNIVERGE BLUE ENGAGE, its portfolio of contact center offerings includes UNIVERGE Business ConneCT and the UNIVERGE SV9100 Contact Center. NEC segments its offerings for small (five agents) and medium/large (up to 2,000 agents). NEC offers a full set of capabilities, including on-premises and cloud communications (UCaaS), messaging, meetings, and a contact center. NEC partners with DVSA Analytics for workforce optimization (WFO). Its WFO includes forecasting, scheduling, recording, speech analytics, and live monitoring.

NEC also offers its UNIVERGE BLUE PULSE artificial intelligence, and its cutting-edge AI technology engine thoughtfully and responsibly integrated into its UNIVERGE BLUE Intelligent Communications Platform. It plays a pivotal role in both UNIVERGE BLUE CONNECT and ENGAGE and helps to empower businesses by enhancing intelligence, productivity, efficiency, and customer care capabilities.

UNIVERGE BLUE PULSE features are designed to protect businesses and the customers they serve. For instance, no voice or meeting data is stored with third parties for transcription and analysis, and transcription redaction is on by default on voice queues with transcription enabled.

NEC focuses on a number of vertical industries, including education, government, healthcare, and retail. Besides its UC&C platforms, NEC continues to offer a full set of handsets for large and small enterprises. Additionally, NEC has been investing in computer vision and offers biometrics solutions (facial recognition, finger and palm print identification, intelligent perimeter intrusion detection system, digital ID, etc.). Reveal, Combined with UNIVERGE BLUE CLOUD SERVICES, will help NEC expand its solution portfolio in its vertical markets, especially education, government, healthcare, and retail.

The demand for hybrid cloud-based UC&C offerings continues to grow. NEC, with its growing focus on AI, is well-positioned to continue to win in the SMB and large enterprise markets. Aragon expects to see many NEC on-premises customers opt in for the UNIVERGE BLUE CLOUD SERVICES offerings.

Strengths

- Cloud and on-premise voice support
- Global cloud infrastructure
- Industry solutions focus
- Computer vision, including video analytics
- Endpoints

Challenges

- Overall focus on video meetings

Nextiva

Nextiva, a company based in Scottsdale, Arizona, and led by CEO Tomas Gorny, helps businesses of all sizes to develop deeper, more meaningful relationships with customers to drive growth. Nextiva achieves this through a Unified Customer Experience Management platform (UCXM) that includes voice, video, chat, email, CRM, and Artificial Intelligence to support comprehensive customer journeys.

In January 2024, Nextiva acquired Thrio, a cloud-native contact center software provider. The platform enables end-to-end journey orchestration capability, as well as omnichannel communications, workforce engagement management, process automation, and AI-driven interactions. It is 100% API-driven and highly flexible for integration.

In April 2023, Nextiva acquired Simplify360, an AI-based reputation and social media management platform. These acquisitions were highly strategic in that both companies helped Nextiva transform the company into a true Unified Customer Experience Platform. The product vision is decidedly CX-first, strongly emphasizing a flexible, data-driven model. Nextiva has early adopters of its new Generative AI-based Knowledge Base and SDKs. This platform-based approach allows companies of all sizes and types to mix and match a broad array of capabilities that meet their particular needs.

Nextiva's journey orchestration and AI strategy delivers the most comprehensive Customer Experience Management available today. This includes chatbots that support AI-based conversational commerce, real-time transcription and summarization, and agent-assist technologies leveraging Nextiva-built large language models.

The company also partners with third parties for AI enrichment. Nextiva's Contact Center is being integrated with the company's CRM, ticketing, and social engagement tools in a new interface that unifies all functions under one hood. This, combined with a comprehensive CX data model, demonstrates a forward-looking strategy for true Unified Customer Experience Management. No other company has demonstrated, beyond loosely coupled integrations, an appetite for bringing all these CX functions together in a single platform. This combination of capabilities offers a versatile and scalable solution to drive business growth across industries and company sizes.

Strengths

- Cloud PBX
- Call center
- Mobile app
- Analytics
- Native CRM capabilities
- NextOS Business Communications Suite

Challenges

- Focus on AI

Innovators

Dialpad

Dialpad, led by Founder and CEO Craig Walker, and based in San Ramon, has continued to focus on Innovation in its growing Product family, its investment in AI, and its overall market execution. In April 2023, Dialpad announced that its annual recurring revenue is over \$200M a year. Dialpad offers its AI-powered workspace, which features AI Voice Calling, AI Messaging, and AI Meetings. It also offers its AI-powered customer Intelligence Platform, which offers both its AI Contact Center and its AI Sales Center.

Dialpad has made investments in AI one of its strategic initiatives. In August 2023, it launched its DialpadGPT. It is one of the first LLMs for business communications, and it can be customized for an enterprise's needs.

Dialpad's Business Phone System includes AI Calling and offers built-in Messaging and Meetings. Dialpad AI Meetings offers innovative AI features such as advanced real-time voice transcription with speaker attribution, keyword and action item capture, and automatic call and meeting summaries for post-meeting follow-up.

Dialpad's new AI capabilities include AI recaps, AI Assist, and the ability to determine which customer support staff instantly access the right answers to resolve customer issues on-demand. AI Agent Assist searches through all unstructured data, including web pages, support docs, knowledge bases, ticketing systems, and transcripts. Additionally, its new AI playbooks, which were announced in September 2023, allow reps, agents, and managers to know if individuals are conforming to script adherence during calls.

Dialpad continues to offer its API capabilities and is one of the leading ICC providers that partner with Google and leverages Google GCP data centers around the world. Dialpad also supports both Google Chrome and Google Workspace. The Dialpad app for Microsoft Teams is a fully embedded Dialpad experience accessible from within the MS Teams environment and includes License-Free Routing.

Strengths

- Cloud-based, real-time syncing across devices
- Integrated Contact center
- Ease of deployment
- Voice Intelligence AI Capabilities
- Simplified User Management
- Pricing Simplicity
- HD-Quality Voice and Video
- CRM integration
- Sales use case

Challenges

- Focus on team collaboration

GoTo

GoTo announced that its CFO, Rich Veldran, would replace Paddy Srinivasan as CEO. The privately held company has continued to focus on its Communications, Collaboration, and Contact Center offerings, as well as its customer support offerings. GoTo offers its GoTo Connect Platform, which features Voice Calling, Meetings, and Chat. It also offers additional offerings, including GoTo Resolve and LogMeIn Rescue.

In March 2024, GoTo announced GoPilot Admin in GoTo Connect for streamlined IT operations, an AI optimization add-on for GoTo Contact Center to boost agent productivity and insights, and an AI Meeting Summary in GoTo Meeting to enhance post-meeting efficiency.

In September 2024, GoTo announced GoTo Connect CX, an AI-powered suite that combines the best of GoTo Connect's communication tools, its phone system, and advanced AI enhancements to streamline customer interactions and enable businesses to deliver exceptional customer experiences. GoTo Connect was enhanced this year with its new central hub for operators to view caller details, manage call queues, and efficiently route calls using features like hold, forwarding, and parking. For webinars, GoTo Webinar is easy to configure and operate and is often ideal for SMBs that have limited staff.

GoTo Contact Center, which focuses on the SMB market, has now been enhanced to include GoTo Contact Center Pro. GoTo Contact Center Pro includes outbound capabilities to automate and accelerate sales calls and is designed for medium and large enterprises. GoTo now focuses on five industry markets, including automotive, education, healthcare, legal, and professional services. With a management team that is now focused on innovation and AI, GoTo is well-positioned for the future.

Strengths

- UC&C offering
- Contact Center offering
- Brand awareness
- Web and video conferencing install base
- Integrations
- Growing AI capabilities
- Ease of use

Challenges

- Focus on team collaboration

Intermedia

Intermedia, led by CEO Michael Gold, made a significant pivot over the last few years to focus on intelligence in its products and services. Intermedia offers Intermedia Unite, its full UC&C Platform, and its Intermedia Contact Center, both of which are powered by Spark AI. In September of 2024, Intermedia announced that the company entered into an agreement with NEC to assume NEC's UCaaS & CCaaS business in North America and Europe. Prior to this arrangement, NEC offered a rebranded version of Intermedia Unite under the brand name NEC UNIVERGE BLUE.

Intermedia Unite offers cloud-based telephony, messaging, file storage, and meetings. It also offers AnyMeeting Video Conferencing and AnyMeeting Webinars. Intermedia AnyMeeting supports 720P resolution, meeting recordings, custom branding, and AI meeting notes and actions. Intermedia has integrated its proprietary Archiving service into its UC and CC services. This provides enterprises the ability to archive content and calls to meet compliance needs, assist with legal and dispute resolution matters, and will ultimately serve as the data lake AI needs to access relevant business knowledge.

In December 2023, Intermedia announced the Intermedia AI Assistant, which is built on the Spark AI Platform. The Intermedia AI Assistant can write content, summarize information, and even write and review code. For their contact center, AI Evaluator, AI Interaction Summary, AI Call Transcription, and AI Sentiment Analysis use Generative AI and are designed to increase agent and supervisor productivity and better customer experience. Intermedia also offers AI Transaction Redaction, which removes sensitive information, such as credit card numbers, from a call transcription.

In August 2024, Intermedia announced its Intermedia for Microsoft Teams Advanced, which offers enterprise-grade phone systems capabilities and SMS inside of the MS Teams app without the need for the enterprise to have calling licenses from Microsoft. Included with this solution are integrations into popular CRMs such as Salesforce and NetSuite. Intermedia also offers a full API library for custom integrations. With a growing focus on intelligence in its collaboration and communications offerings and with its acquisition of NEC's UCaaS and CCaaS business outside of Japan and Australia, Intermedia is well-positioned for the future.

Strengths

- Cloud PBX
- Spark AI and AI Assistant
- Call center
- Mobile app
- Native CRM integrations
- Channel focus

Challenges

- Market awareness

Communications, Security, and the Digital Enterprise

In a digital world with around-the-clock operations at many enterprises, collaboration, and communications are essential, as is security in all aspects of platforms and integrations. Enterprises need secure, robust, and intelligent UC&C platforms to power their internal and external communications and collaboration needs.

Integration and Intelligence will be the battle cries going forward, and new use cases, including Telehealth, will emerge. While most enterprises have more than one UC&C provider, careful examination of provider roadmaps will prove to be essential.

Aragon Advisory

- Enterprises should look at robust UC&C offerings that leverage AI Assistants to power productivity.
- Enterprises should look to eliminate best-of-breed providers unless there is a clear-cut justification.
- Enterprises should evaluate each provider's AI capabilities and examine each set of offerings' roadmap and price performance.
- Communication Automation is also here and the need for UC&C providers to integrate seamlessly with mission-critical applications is here. Enterprises should evaluate the integration capabilities and the partner marketplaces of each provider.

Bottom Line

The Intelligent UC&C era has arrived, and with it the promise of more automation and productivity. The enterprise should look to understand the need to offer robust and secure communications and collaboration. Providers that tend to only focus on voice or video may need to be replaced with ones that offer the full stack, including a roadmap for AI. Enterprises should look to standardize around 1-2 key UC&C providers to ensure both redundancy and global availability.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in the given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is, relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategies and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer Experience:** Feedback on the product, installs, upgrades, and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.

- **Pricing and Packaging:** Is the offering priced and packaged competitively?
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development, as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international*, or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East, and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

- A minimum of \$6 million in primary revenue for unified communications and collaboration or a minimum of \$8 million in revenue in a related market (voice, video conferencing, collaboration, and mobile collaboration/messaging).
 - o UC&C, as defined by Aragon, is an evolving market. A vendor needs to have at least two modules to be evaluated. UC&C modules include voice, video conferencing, collaboration, and mobile collaboration/messaging.
- Shipping Product: the product must be announced and available.
- Customer References: the vendor must produce customer references in each hemisphere that the vendor participates in.

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process.

Inclusions and Exclusions

No technology providers were removed this year, and no new providers were added.