The Aragon Research Globe™ for the Intelligent Contact Center, 2026

The Race to AI-based Agents and Next-Generation CX Experiences

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Topic: Intelligent contact center

Issue: Who are the intelligent contact center providers and how will they evolve?

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SUMMARY

Aragon Research releases its seventh Aragon Research Globe™ for intelligent contact centers (ICCs). The ICC market has shifted, and now virtual agents are coming online, ready to work with and help human agents and customers. As digital labor continues to grow, the 14 major vendors in this report are amid some of the biggest changes since this market came to fruition 25 years ago.

Key Findings:

Prediction: By YE 2024, 70% of ICC providers will use third party LLMs that they train on their own product and service information (80% probability).

Prediction: By YE 2025, to keep up with the need for self-service support, 60% of enterprises will offer virtual agents that are trained to answer common questions (70% probability).

Prediction: By YE 2026, 50% of contact center providers will leverage knowledge lakes to increase the accuracy of their AI Agents (60% probability).

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Introduction: The Race to Become an AI-First Enterprise

The intelligent contact center (ICC) market enters 2026 on the cusp of an accelerated transformation, fundamentally driven by the operational integration of generative AI and digital workers. The emergence of agents and assistants has formalized digital labor as a critical element of modern customer support. While large enterprises have moved rapidly to adopt these new technologies, many small and midsize firms have proceeded with caution. This Research Note evaluates the trends shaping the market and identifies key providers that are making a difference in intelligent contact centers.

The immediate operational benefits of AI have centered on workforce management and agent enablement. Key technologies like Agent Assist and Automated Quality Management, the latter using Conversational Intelligence to analyze and understand discussion patterns, are now actively being deployed to improve agent proficiency and streamline operations. This focus allows contact centers to not only handle basic inquiries more efficiently but also prepare human agents to manage the increasingly complex interactions being passed to them.

The transformation of the contact center is expanding its scope far beyond traditional support desks, ushering in new applications that leverage ICC technology. Examples include advanced, conversational applications for prescription refills and the growing demand for telehealth solutions, which require sophisticated, ICC-based video routing. This pressure to modernize is forcing contact center management teams to prioritize investments that deliver quick, accurate answers across all channels and help employees succeed. This Research Note evaluates the trends in the market and identifies 14 key providers that are making a difference in intelligent contact centers.

Digital Labor: The New Equilibrium

The shift to digital labor means that enterprises must focus on the best ways to support both customers and employees, recognizing that for many basic tasks, a virtual agent may be a superior solution. Providers are now under pressure to demonstrate genuine return on investment by showing that their product is smarter and can react faster to a growing number of use cases. Given the speed of innovation, enterprises must determine if their incumbent provider can deliver these AI-based virtual agents or if new vendors need to be evaluated. The need for education on AI-based agents remains a high priority, rivaling vendor selection in its importance.

From Agent Assist to the AI Assistant: A New Era for Frontline Service

The corporate service landscape is rapidly shifting from providing simple Agent Assist features to deploying a powerful, overall AI Assistant (e.g., Copilot) to help human agents manage their day. This fundamental change is driven by the maturation of Generative AI (GenAI) and its ability

to act as a real-time, context-aware digital coach that can instantly access and apply enterprise-specific knowledge. The proliferation of low-code platforms and advanced reasoning engines further accelerates this trend, enabling the rapid configuration, deployment, and adaptation of these intelligent systems. The primary benefit is not merely automation but the empowerment and upskilling of the human workforce, particularly new or low-skilled agents. Here are some key micro trends we are seeing of why an AI Assistant matters:

- **Elevated Agent Performance and Faster Onboarding:** The AI Co-Pilot acts as a real-time guide, providing instant suggestions, summarizing customer history, and drafting replies, which significantly boosts agent productivity, especially for new hires. This real-time coaching allows new human agents to become proficient much faster and avoid rookie mistakes, directly addressing the challenge of agent turnover and remote onboarding.

- **A Shift in Agent Focus:** As the AI handles routine inquiries, data entry, and basic troubleshooting, the human agent's role evolves from a task executor to an "experience orchestrator". This transition requires agents to focus on strategic thinking, high-stakes issues, and emotional intelligence—areas where human empathy and critical thinking remain vital.

- **Foundational Requirement for Competitive Service:** Agent Assist is now considered foundational for competitive service. Enterprises should plan to have a robust, AI-powered assistant in production by the end of 2025 to keep pace with customer expectations for faster, more personalized service and to realize significant cost reductions through increased efficiency. An AI that can learn and be rapidly configured to the enterprise's specific information is essential for this new generation of service delivery.

- **The Need for a Knowledge Lake:** To ensure the AI Co-Pilot provides accurate and consistent guidance, it must be trained on a validated, single source of truth—the enterprise's knowledge base. This necessity for a centralized data repository forces enterprises to move beyond siloed data systems, streamlining both agent training and content updates simultaneously.

Omnichannel Communications: AI Agents Lead with Chat, Voice Follows, and Video Emerges

The modern contact center is experiencing a significant channel shift as AI-driven agents mature. Virtual agents demonstrate high skill levels in text-based communication, positioning chat as the primary channel for their deployment, largely because it is faster and easier for enterprises to implement. While voice remains the dominant channel due to customer preference for human interaction, the technology for live conversational

voice agents is rapidly improving, and we expect higher-skilled voice agents to come online.

Video remains a clear opportunity for many vendors, as a majority do not currently offer native video capabilities. However, this is expected to change in the next three years, driven by the growing need for telehealth and support for tasks like product installation. Providers like Vonage, utilizing their API flexibility, are enabling video connectivity to address this emerging demand. Email continues its foundational role, primarily serving as validation that a ticket has been logged and closed, and acting as a necessary component of the transaction record.

Generative AI and the Rise of Configurable Intelligent Agents

The next era of intelligent contact centers is being defined by a race to create more intelligent virtual agents capable of advanced reasoning and memory recall. The core technologies enabling this shift are generative AI, specifically Large Language Models (LLMs), which are moving beyond simple cloud execution to also run cost-effectively on local devices like smartphones and tablets. The emergence of reasoning engines, offered by major providers, signifies a new horizon where LLMs can understand the full context before providing an answer, thus delivering significantly better and more accurate responses.

This technological foundation is driving two key market trends: configurable agents and the proliferation of low-code agent builders. Agent Assist is the primary example of a configurable agent, designed to be adapted rapidly to an organization's specific information and needs. A critical implication of this trend is that multiple vendors, including specialized third-party providers, are now vying for the virtual agent business, ensuring that enterprises are not limited to the offerings of their incumbent contact center platform alone.

The New Agent Builders

The ability to quickly and effectively build and update virtual agents is becoming increasingly robust. This is primarily due to the rise of low-code agent builders, which are shifting the agent creation process from a complex coding exercise to a simple configuration and training process accessible even to business users. New market entrants, notably OpenAI, are now putting significant pressure on incumbent Intelligent Contact Center (ICC) providers by offering powerful, sophisticated tools that bypass traditional platform limitations. This trend provides enterprises with greater flexibility and a clearer path to rapidly deploy highly skilled digital workers, starting with simple Q&A and scaling to more complex use cases.

Omnichannel Security: Identity and Assurance for the Age of AI

The expansion of intelligent contact center (ICC) operations across voice, video, and chat channels introduces significant new vectors for security and compliance risks. As digital labor entities—virtual agents and assistants—gain access to confidential customer profiles and sensitive company data, the threat landscape expands beyond human intrusion to include algorithmic and autonomous risks. Consequently, a paramount concern for enterprises is ensuring the security of all omnichannel interactions.

The market must rapidly move toward establishing Agentic Identity and Security Principles (AISP) for agents and assistants. This involves verifying that the AI worker accessing or processing data is legitimate, has the correct permissions, and is not being manipulated for espionage or unwanted intrusion. Aragon Research expects all enterprise software providers to offer clear assurances and demonstrable capabilities to prevent unauthorized actions by AI agents and assistants, not just human employees. The need for this robust identity assurance is critical, as it secures the data housed within the knowledge lakes that power these agents, ensuring the confidentiality and integrity of customer and corporate knowledge.

Obviously, email is still here and will be here for a long time. In many cases, email is the validation or confirmation that a ticket has been logged, but it is not the communication channel. Still, it plays a role because it's proof that a transaction or ticket was registered, and it is a defense mechanism because providers use email as a way to communicate that they have not responded and closed the ticket.

The Bifurcation of Adoption: Large vs. Midsize Firms

The market is currently characterized by a distinct split in the adoption of AI-driven tools, largely dictated by enterprise size and resource availability. Large enterprises are leveraging greater capital and internal technical teams to accelerate their shift toward digital labor. For these market leaders, Agent Assist and Automated Quality Management have quickly moved from pilot projects to foundational technologies. Conversely, small and midsize enterprises (SMEs) are moving at a slower, more cautious pace, often due to constraints in budget and a lack of highly specialized staff to implement and manage sophisticated AI solutions.

This disparity creates a new challenge for providers: delivering solutions that offer enterprise-grade capabilities with the simplicity and cost-efficiency required for the midmarket. The implication is that providers must focus on highly packaged, easily configurable AI solutions to enable SMEs to catch up, mitigating the risk of being left behind the larger, faster-moving competitors.

Agent Assist and Automated Quality Management: Foundational AI

Agent Assist and Automated Quality Management (AQM) represent two of the most critical and widely adopted AI technologies across the intelligent contact center.

- **Agent Assist:** This AI-powered tool serves as an agent's real-time copilot. It utilizes conversational AI, including Natural Language Processing (NLP) and Natural Language Understanding (NLU), to analyze customer interactions in real-time. As the conversation unfolds, Agent Assist provides instant guidance, suggests pre-approved responses, surfaces relevant knowledge base articles, and automates repetitive tasks such as post-call summarization and data entry into CRM systems. Its primary benefit is boosting agent efficiency, reducing handle time, and improving service consistency across channels like voice, chat, and messaging.

- **Automated Quality Management (AQM):** This solution uses Conversational Intelligence and AI to analyze and evaluate customer-agent interactions, a task traditionally limited by manual review of only 1–5% of calls. AQM automatically scores up to 100% of interactions against customized quality, compliance, and sentiment criteria. By identifying discussion patterns, emotional cues, and compliance risks in every interaction, AQM provides supervisors with objective, consistent metrics and actionable insights. This frees supervisors to focus on targeted coaching and development, which helps improve agent trust in the evaluation process, boosts agent satisfaction, and leads to lower agent turnover.

Advanced Communications and the Strategic ICC

The intelligent contact center (ICC) is rapidly evolving from a dedicated customer support function into a strategic, advanced communications platform. This shift is fueled by a growing demand to integrate contact center and communications capabilities directly into critical enterprise workflows and business processes. As new applications emerge that require significant back-and-forth communication to complete a transaction or solve a complex problem, two formerly distinct technology categories–ICC and Unified Communications and Collaboration (UC&C)–are being bundled into one advanced communications stack.

This integration is making the contact center more strategic by allowing it to handle advanced applications that go beyond human and AI agents merely taking calls. Examples such as customer onboarding, healthcare admittance, and prescription refills all demonstrate the need for this bundled solution. The growth of Telehealth and advanced Prescription Refill applications highlights this trend, requiring conversational

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automation and sophisticated routing that traditional systems, like touch-tone IVR, cannot provide.

The demand for an integrated UC&C and ICC stack is particularly strong in the small and midsize enterprise space, where business owners often seek a single, comprehensive communications solution. Furthermore, sales organizations increasingly need contact center-like power, underscoring the necessity for providers to offer a combined offering. Several major providers are responding by offering a combined UC&C and contact center solution, including 8x8, Avaya, Cisco, Dialpad, Mitel, Nice, RingCentral, and Vonage. The fusion of an integrated client with increasing intelligence capabilities is what brings new levels of automation and power to this combined offering.
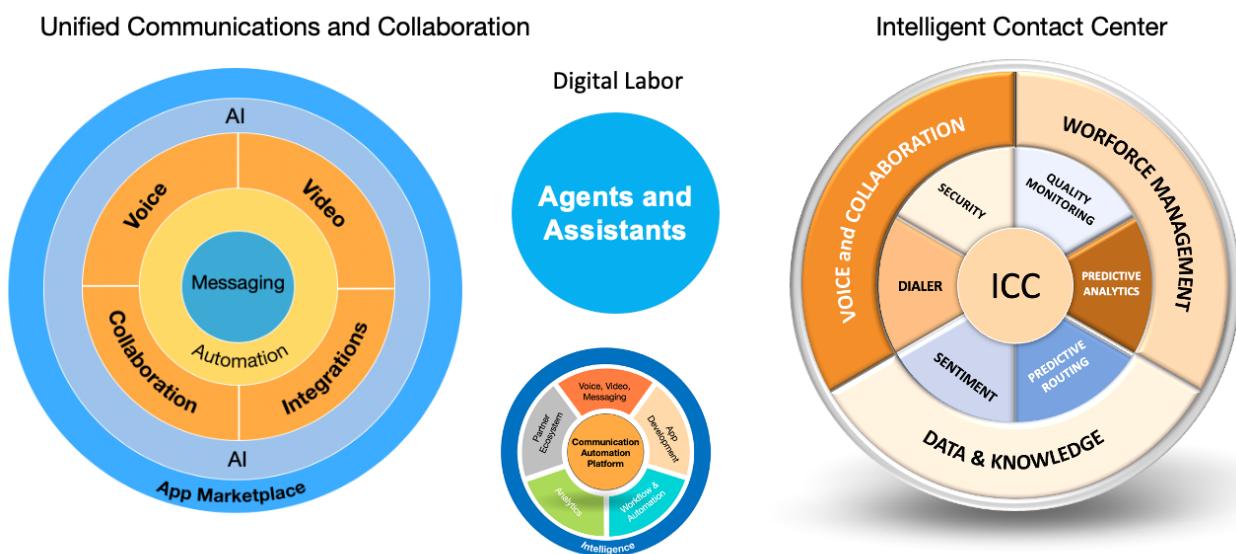
Figure 1: Enterprises are increasingly looking for an integrated communications stack that can blend UC&C with intelligent contact centers and virtual agents.

That has an ICC as the engine for handling patient telehealth sessions.

Virtual Agents and the Rise of Agentic Systems

The next critical evolution in digital labor is the maturation of Agentic Systems, where virtual agents are designed not to operate in isolation, but to work collaboratively both with one another and with human agents. While the capability for one virtual agent to hand off tasks to another has existed within conversational AI platforms, it is now moving rapidly from a development concept to an essential component of production environments.

Aragon Research envisions the idea of specialized, role-based agents that are highly skilled in a small set of tasks or a narrow knowledge domain. These mini-agents can handle specific duties and then seamlessly hand off tasks to another agent—human or virtual—that is better equipped to handle the subsequent requirement. This architecture enables the deployment of highly efficient, dynamic workflows. Enterprises must therefore adopt a strategy of implementing role-based agents with formalized workflow rules that allow for these handoffs, making them a core part of next-generation virtual agent implementations. This multi-agent system, grounded in intelligence, increases the complexity of problems that can be solved autonomously and provides a seamless, uninterrupted customer experience.
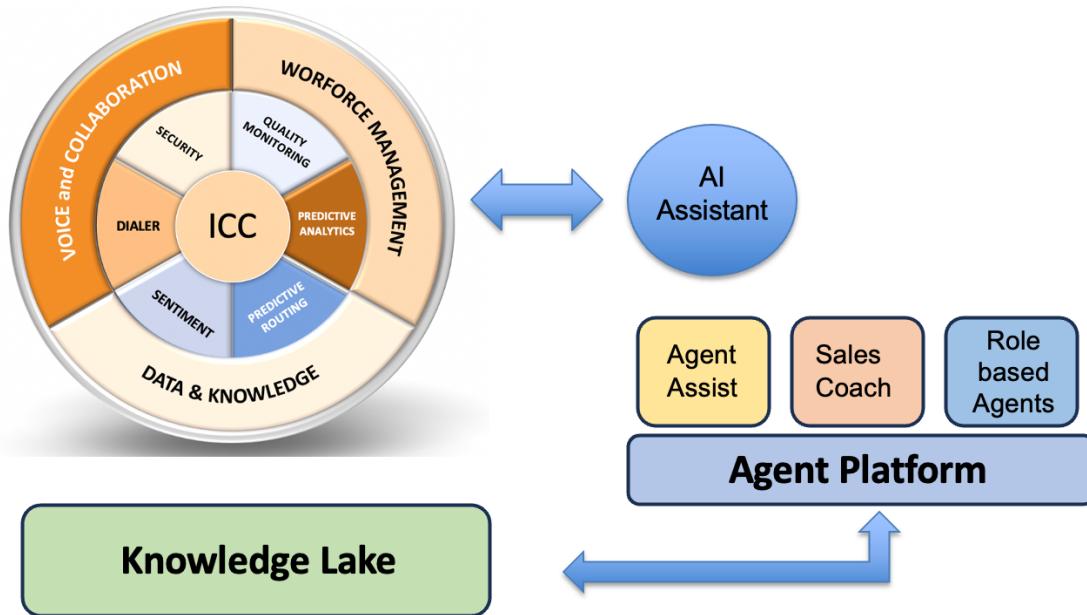
Figure 2: The ICC will leverage AI Assistants for general productivity and more role-based AI Agents.

Knowledge Lakes: The Single Source of Truth for Humans and AI

The integration of advanced AI and agentic systems into the contact center is driving a critical architectural requirement: the unification of enterprise knowledge into a centralized repository, which Aragon Research defines as a **knowledge lake**. This is a strategic imperative because sophisticated AI agents, much like their human counterparts, require a consistent, validated information base—a **single source of truth**—to ensure operational coherence and deliver accurate answers.

A knowledge lake differs from a traditional data lake in its purpose: it is a collection of curated knowledge objects that generative AI can use to formulate intelligent answers to simple and increasingly complex questions. This repository concurrently trains human

employees, feeds the corporate learning platform, and provides the authoritative knowledge base for all connected AI agents and virtual assistants.

Implications for Enterprise Architecture

The rise of the knowledge lake forces enterprises to move beyond siloed training and data systems.

- **Consistency and Integrity:** A unified knowledge lake ensures that both a customer interacting with a chatbot and an employee talking to a human representative receive identical and correct information, which is fundamental to reliable customer service and internal process integrity.
- **Strategic Battles for Ownership:** The need for a unified knowledge base is fueling battles between contact center providers, CRM vendors, and other enterprise application providers, all of whom are vying to own the knowledge repository.
- **Architectural Decision:** Enterprises must treat the knowledge lake as an **architectural decision**, determining where their mission-critical knowledge will reside and how it will be governed. This includes integrating knowledge from application-specific data sources, such as CRM, with enterprise content repositories.

Developing a comprehensive knowledge lake is no longer merely a data management strategy; it is a foundational element for future enterprise success in the age of AI.

Prediction: By YE 2026, 50% of contact center providers will leverage knowledge lakes to increase the accuracy of their AI Agents (60% probability).

Automated Quality Management Can Speed Up Coaching and Feedback

Automated Quality Management will enable much higher levels of productivity for both Agents and Agent Managers.

Configurable Agent Coaches will operate after a call and sometimes in conjunction with Agent Assist during a call. Agent coaches can help with skills and with dealing with customer inquiries. Some providers offer both Agent Assist and Agent Coaching, and part of this is what we call Automated Quality Management.

AQM will enable the complete documentation of the entire conversation. It will also enable complete call analysis, and it will quickly identify specific areas where the agent excelled or may be able to improve. This information can be provided to the agent as real-time or summary feedback and provides supervisors with information to accurately assess their agents' performance. Enterprises should explore many types of virtual agents. See Note 1 for an overview.

Agent Coaches and Supervisor Coaches

While most ICC providers will offer Automated Quality Management, not all will offer Agent Coaches. Think of an Agent Coach as offering conversational insights into the AQM results. Agent Coaches can help the agents themselves by quickly suggesting changes in behavior.

For managers and Supervisors, a higher-level agent can quickly pinpoint areas where individual Agents need guidance. Note that there is a growing set of providers that offer Agent Coaches, and some focus on Sales as well as Contact Center.

Professional Services and the Knowledge Gap
The transition to an AI-first contact center has amplified the crucial role of professional services, particularly in the domain of knowledge transfer. While the new generation of low-code agent builders and reasoning engines has

Note 1: The Different Types of AI Agents

There are a number of different virtual agents that should be evaluated for development and deployment in an ICC.

Greeting Agents
Client greeting and issue identification.

Agent Assist
These agents guide the agent towards a successful outcome with suggestions on what the human agent should say in a given situation.

Questions and Answer Virtual Agents

Virtual agents are ideal at handling basic questions and answers, and they can do it very quickly.

Prescription Refill

Replacing or Augmenting an IVR, Refill agents are similar to Rebooking agents in that they can confirm a refill and notify the customer when it is ready. Increased levels of personalization can increase customer satisfaction.

Refund Agents

Refund agents are trained to be able to look up a customer account and determine if the customer is owed a refund or not. There are a growing number of examples of Refund Agents in production.

Rebooking Agents
Agents that are tied into reservation systems and can process a flight change faster than humans can.

democratized the *tool* for creating virtual agents, a massive bottleneck exists in providing the *knowledge* to make them effective. Deployments are increasingly challenged by a pervasive **lack of internal resources** with the right skills to curate, structure, and govern the enterprise's domain-specific content—the essential fuel for AI agents.

The core challenge for enterprises is codifying the tacit, experience-based expertise held by human agents and subject matter experts into a structured format that AI can utilize. Simply connecting a Large Language Model to a poorly organized data source, often referred to as a "data swamp," leads to vague, inconsistent, or inaccurate answers that frustrate both customers and human agents.

Consequently, the most successful deployments require strong partnerships with service providers—whether from the core ICC vendor or specialized consulting firms— to perform a critical set of tasks:

- **Data Strategy and Curation:** Helping organizations organize their fragmented data to make it AI-compatible, ensuring the quality and integrity of the source material that trains the agents.
- **Workflow Transformation:** Focusing not just on deploying the agent, but on fundamentally reimagining entire workflows to effectively integrate human and AI collaboration.
- **Ethical and Compliance Oversight:** Establishing ethical standards and ensuring AI-generated outputs align with internal policies is a process that requires careful human oversight.

Until enterprises staff up with the necessary data scientists and domain experts, the reliance on professional services to bridge this knowledge gap and scale human expertise through AI agents will continue to define the pace of ICC deployments.

The Roadmap to Leverage the Broken-Down ICC Maturity Model

The Aragon ICC Maturity Model continues to evolve, but one thing is clear. Enterprises need to act. Today, Agent Assist and Agent Coaches offer help to both Agents and their managers. It is important to learn, plan, and act. (see Figure 4 below). One item to note is that AI Agents are often not sourced directly from your primary contact center provider. That said, Agent Assist may be quicker to deploy from your ICC Provider.

The time to start with AI Agents is now – and it starts with testing and then doing a full rollout of Agent Assist. Enterprises may find that in evaluating where they are in the ICC maturity model, the conclusion may be to switch ICC providers or to pilot virtual agents from more than one provider.
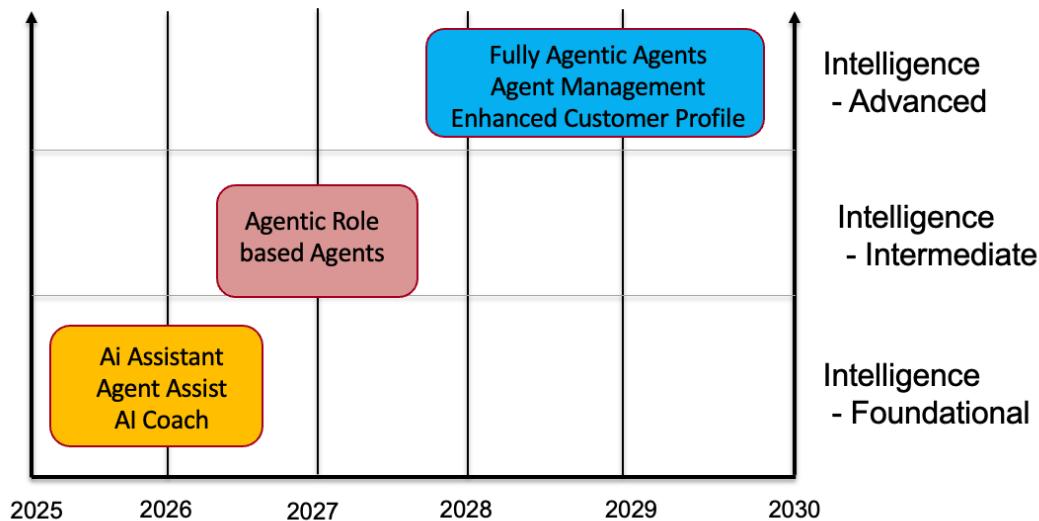
Figure 3: The ICC Maturity Model 2025-2030.

The Time to Act Is Now—AI Agents Will Increase Productivity

While most of the ICC Providers in this report offer AI Agents, including foundational AI Agent Assist, many firms have waited to deploy. In fact, many admit they have waited too long – so the time is now.

Business and IT leaders realize that AI Agents do work, but it is important for operations managers in the Contact Center to develop partnerships and deployment plans for Agents that can help with knowledge automation – answering questions that come in over and over again.

Enterprises that start now will gain an edge – a level of comfort that will propel them into full Agentic Operations. On top of that, while documents and conversations are primary information sources for today's AI agents, in the next 18 months, images and videos will be used as critical knowledge sources.

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(As of 12/10/2025)
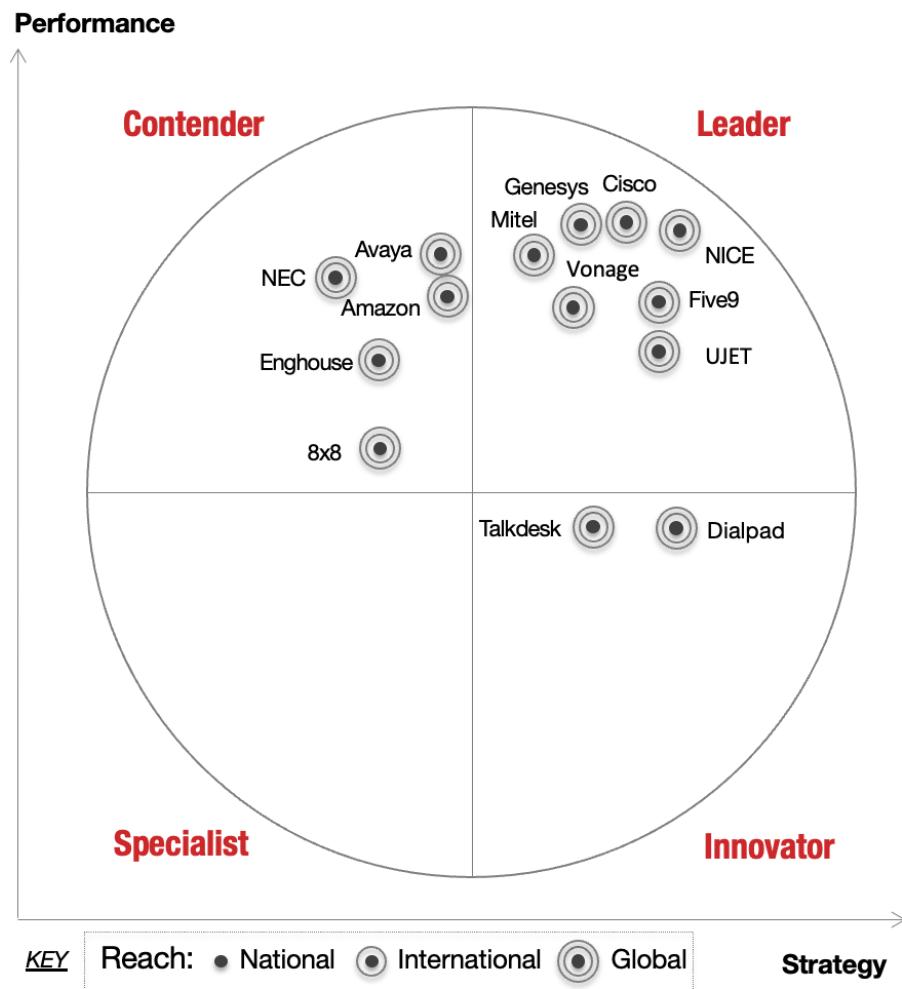
Figure 4: The Aragon Research Globe for Intelligent Contact Center, 2026.

Leaders

Webex by Cisco

Cisco, based in San Jose, California, operates its Webex Business Unit under the leadership of Anurag Dhingra, Senior Vice President and General Manager of Cisco Collaboration. In a broader executive change at Cisco, Jeetu Patel was promoted to President and Chief Product Officer in 2025, and Mark Patterson was appointed Chief Financial Officer, effective July 2025. The company has not announced any new external funding within the last year, relying on its operating capital. Cisco offers the Webex Contact Center and its core unified communications products: Webex Meetings, Webex Calls, and Webex Messaging, all integrated within the Webex suite.

Cisco continues to advance its AI offerings, with a central development in 2024 being the introduction of Webex AI Agent and AI Assistant for Contact Center. These offerings move beyond basic conversational AI to provide agents with real-time assistance during customer interactions. The AI Assistant uses Generative AI to deliver functions such as automated dropped-call summaries, suggested responses and actions, and the surfacing of relevant knowledge base articles. Additionally, Webex AI Quality Management (QM), a new AI-powered solution that evaluates the interactions of both AI agents and human agents for leaders to better understand customer experiences, was announced in late 2025.

Cisco integrated Webex Experience Management into its contact center offering, which includes advanced customer profiles, predictive analytics on customer experience impact, and sentiment analysis. Webex Workforce Optimization remains an embedded capability. All administrative functions for the platform are centralized within the Webex Control Hub, streamlining management. New AI-powered agents for the broader Webex Suite, such as Task Agent, Notetaker Agent, and Polling Agent, were announced in late 2025, with controlled and general availability releases scheduled for Q1 2026. The company also enhanced its multi-agent collaboration and Model Context Protocol (MCP) interoperability for the Webex AI Agent, enabling AI agents to access external data and systems to handle complex tasks more autonomously.

Webex Contact Center serves a diverse range of industries globally. The platform's flexibility and security features cater to businesses with complex operational and compliance needs. Major target industries include financial services, healthcare, retail, and technology. The platform's support for data residency across 47 global data centers, coupled with a strong emphasis on security, privacy, and regulatory compliance, supports its focus on these demanding sectors.

Cisco Webex Contact Center features deep integrations with key Customer Relationship Management (CRM) solutions, including native integration with Salesforce Service Cloud, Microsoft Dynamics, and Zendesk as part of its subscription license. Cisco's continuous innovation in AI and intelligence, combined with its unified platform approach and commitment to security, positions the Webex Contact Center for continued growth within the enterprise communications landscape.

Strengths	Challenges
• Cisco brand	• Balancing multiple CC offerings
• Contact center install base	
• Focus on AI, including Generative AI	
• Flexible cloud, premises, and hybrid deployment options	
• End-to-end encryption	
• Overall UCC capabilities	

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Five9

Five9, headquartered in San Ramon, California, is led by Chairman and CEO Mike Burkland. In late 2025, the company announced that Mike Burkland plans to retire from the CEO role and transition to Executive Chairman, with a search for a successor underway. New executive appointments in 2025 included the addition of Sudhakar Ramakrishna to the Board of Directors. In early 2024, Five9 secured $747.5 million in post-IPO debt financing. Five9 offers a comprehensive suite of contact center solutions, including the Intelligent CX Platform, Intelligent Virtual Agent (IVA), AI Agent Assist, Global Voice, Agent Desktop Plus, Supervisor Plus, and Engagement Workflow, along with internal Workforce Engagement Management (WEM) capabilities.

The company continues to advance its Artificial Intelligence (AI) offerings. A key introduction in 2024 was GenAI Studio, which provides a low-code environment for enterprises to customize and manage their generative AI models and prompts. This capability allows organizations to tailor AI-driven interactions to specific business needs and objectives. Five9's core AI products were also updated; Agent Assist 2.0, powered by OpenAI, provides agents with real-time insights and AI Summaries during customer interactions. The Five9 IVA remains a solution for automating routine tasks and delivering efficient self-service. Further advancements in 2025 included the launch of Agentic CX with AI Agents that are designed to reason, decide, and take action autonomously, representing a step toward more complex AI-driven customer service.

In 2024, Five9 acquired Acqueon, a real-time revenue execution platform. This acquisition enhances Five9's outbound capabilities, allowing for proactive, AI-driven customer engagement across marketing, sales, and service functions. The integration of Acqueon helps orchestrate personalized interactions across the complete customer journey. In 2025, Five9 announced Five9 Fusion for ServiceNow, a turnkey AI-powered integration that unifies voice and digital interactions within the ServiceNow platform, incorporating real-time transcription and unified routing.

Five9 primarily targets mid-market and large enterprises seeking cloud transformation and advanced customer experience solutions. Its platform is designed to support the complex requirements of various sectors, including financial services, healthcare, retail, and technology.

Five9 maintains a strategy of an open platform, evidenced by its library of over 300 APIs and SDKs. New integrations announced in 2025 include Five9 Fusion for Salesforce to deepen their combined AI-powered CX capabilities and the Five9 Fusion for ServiceNow integration. The company also deepened its partnership with Verint in 2024 through a new cloud-to-cloud platform integration to streamline the deployment of AI-driven Customer Experience (CX) automation solutions. With a sustained focus on integrating Generative AI across its Intelligent CX Platform and continued strategic acquisitions to broaden its solution suite, Five9 is positioned to accelerate its growth within the evolving ICC market.

Strengths	**Challenges**
• Integrated Virtual Agent and Agent Assist	• Awareness outside of North America
• Cloud offering	
• Inbound and outbound focus	
• Omnichannel features	
• Salesforce integration	
• Customer support	

Genesys

Genesys, headquartered in Menlo Park, California, is led by Chief Executive Officer and Chairman Tony Bates.   Genesys' core offering is the Genesys Cloud CX platform, which serves as the foundation for its AI-Powered Experience Orchestration strategy. In February 2024, Genesys acquired Radarr Technologies to expand its public social media capabilities, including listening, analytics, and consumer engagement.

Genesys continues its significant investment in Artificial Intelligence (AI) to advance toward semi-autonomous customer engagement. In June 2025, Genesys announced Genesys Cloud AI Studio, a centralized hub for building, managing, and scaling AI. The first capability released within the studio is Genesys Cloud AI Guides, which enables organizations to deploy virtual agents that operate with autonomy and reason within configurable guardrails defined by the business. Further AI enhancements were announced in September 2025, including advanced Agentic AI agents for Genesys CloudCopilot and Virtual Agents. These agents will support greater autonomy, contextual awareness, and native interoperability for Agent2Agent Collaboration (A2A) and Model Context Protocol (MCP), accelerating readiness for agentic orchestration at scale. In 2025, new AI Agents, such as Analytics Data Explorer, were introduced for Genesys Cloud Copilots to provide role-based AI assistance to employees.

Genesys supports organizations of all sizes across a wide range of industries globally. Major target industries include financial services, healthcare, retail, and technology. The company's achievement of FedRAMP authorization at the Moderate Impact level in 2023 further expanded its reach and commitment to the public sector and government organizations with stringent security and compliance requirements.

The Genesys Cloud CX platform is designed for extensibility and open integration. In addition to its deeper partnership with Salesforce, Genesys continues to strengthen its unified communications capabilities through strategic partnerships with major providers such as Microsoft, 8x8, ServiceNow, and Zoom.

The platform's model-agnostic architecture within Genesys Cloud AI Studio allows for flexibility in integrating proprietary, open-source, and frontier models, including those available through Amazon Bedrock. This extensibility is built on the Genesys Event Data Platform (EDP), which fuels smarter orchestration and model training. With a robust product portfolio, significant dedicated investment in Agentic AI with embedded governance, and strategic partnerships across the enterprise ecosystem, Genesys is positioned to maintain a leadership role in the global cloud contact center and experience orchestration market.

Strengths	**Challenges**
• Broad ICC platform capabilities	• Maintaining and enhancing multiple product offerings
• Management team experience	
• Install base	
• Native Conversational and Agentic AI	
• Large enterprise deployments	
• Strong partnerships	
• Usage-based pricing	
• FedRAMP Authorized	
• Unified native WEM	

Mitel

Mitel is a global provider of business communications headquartered in Ottawa, Canada. In September 2025, Mike Robinson was appointed Chief Executive Officer, succeeding Tarun Loomba. Robinson brings experience in post-restructuring leadership and business transformation to the role. Other key executives include Janine Yetter as Chief Financial Officer and Eric Hanson as Chief Marketing Officer. Following its 2023 acquisition of Unify, Mitel is now one of the largest global providers of communications, collaboration, and contact center offerings. Its portfolio includes the new Mitel CX platform, MiVoice and OpenScape unified communications platforms, and hybrid cloud solutions, including its partnership with Zoom.

Mitel continues to advance its Artificial Intelligence (AI) offerings, with a major product announcement in 2025 being the general availability of the Mitel CX platform in April. Mitel CX is an AI-powered customer experience management platform designed as a hybrid solution deployable as on-premise, private/public cloud hosted by customers, partners, or by Mitel in a private cloud Software-as-a-Service (SaaS) model. It utilizes Generative AI for virtual agents, agent assistance (such as real-time prompts and suggested responses), and real-time analytics. The platform includes customizable workflow automation via a low-code/no-code Workflow Studio and a Chatbot Builder. Mitel CX is designed to modernize customer experience by blending AI-driven efficiency with omnichannel engagement capabilities.

Two recent introductions include the Common Communications Framework and the launch of Mitel Secure Cloud, which offers Hosted, Trusted, and Sovereign Cloud options to address data residency requirements. The company also announced a strategic partnership with Zoom in September 2024. This partnership allows Mitel to offer the full Zoom Workplace portfolio as part of its Hybrid Cloud solutions, leveraging existing Mitel MiVoice and OpenScape phone systems and devices. Throughout 2024 and 2025, Mitel focused on the integration of Unify assets, incorporating expertise and products such as Mitel Critical Event Management and Mitel OpenScape Virtual Care Collaboration Service (VCCS) into the broader portfolio.

Mitel focuses on delivering hybrid communications solutions to large enterprises and medium-sized businesses across more than 100 countries. Key vertical industries targeted by the expanded portfolio include healthcare, hospitality, financial services, government/education, retail, and manufacturing. The company's specialized solutions address the unique requirements for organizational resilience, security, and compliance found in these demanding sectors. Mitel stands out by uniquely bridging the market needs of the 80% frontline workforce and the 20% desk-based staff with seamless, strategic solutions and workflow integrations—something few vendors can deliver at scale."

Mitel maintains an open ecosystem and offers flexible integrations with a broad range of best-of-breed vendors and applications, including pre-built integrations with major CRM platforms and specific integrations for industry applications like Epic, Fiserv, and Jack Henry. Its strategic partnership with Zoom enables a deeply integrated hybrid offering with bi-directional capabilities between Zoom Workplace and Mitel's communications platforms. The new Mitel CX customer experience platform *unites AI-powered automation, flexibility, and control to elevate every touchpoint while ensuring security and data sovereignty. Additionally, it* features flexible integrations through open APIs, allowing it to be tailored and embedded into various business processes. With a strengthened financial structure, a new CEO experienced in post-restructuring growth, and a focus on hybrid cloud and AI-powered customer experience solutions, Mitel is well-positioned to accelerate its growth in the evolving enterprise communications, collaboration, and Contact Center markets.

Strengths

- Private/Public Cloud (dedicated instance) and on-premise deployment options
- Hybrid cloud capabilities globally
- End-to-end offerings
- Large Enterprise and Mid-market expertise
- Flexible CapEx,OpEx, (subscription) purchasing and deployment models
- Global partner ecosystem
- Strong vertical expertise and offering

Challenges

- Simplifying its portfolio of offerings to easy to understand / adoption framework.

NICE CXone

NICE, headquartered in Hoboken, New Jersey, is led by Scott Russell, who assumed the role of Chief Executive Officer on January 1, 2025. Other recent executive appointments include Jeff Comstock as President, CX Product & Technology, effective October 1, 2025. The company did not announce new external funding within the last year, relying on its operating capital. NICE's central offering is the CXone platform, which includes Enlighten AI, self-service options, journey orchestration, CX analytics, workforce engagement, and its new unified hyper-platform, CXone Mpower.

NICE's core AI platform, Enlighten AI, is deeply integrated across CXone. A significant advancement occurred with the successful closing of the acquisition of Cognigy on September 8, 2025, in a transaction valued at approximately $955 million. Cognigy is a leader in enterprise-grade conversational and agentic AI. This strategic acquisition unites NICE's purpose-built CX AI platform, CXone Mpower, with Cognigy's advanced AI capabilities, accelerating the global adoption of AI-first customer service delivery. The combined entity is positioned to orchestrate AI agents seamlessly across front and back-office workflows, leveraging decades of purpose-built CX data. Former Cognigy CEO Philipp Heltewig now serves as General Manager of NICE Cognigy and Chief AI Officer.

In addition to the Cognigy acquisition, the company introduced CXone Mpower as a new unified hyper-platform in 2024, built on a single, secure cloud architecture to centralize advanced AI capabilities. Further product announcements in 2025 include Orchestrator, a component of CXone designed to unify and optimize entire customer service workflows. The company also introduced Automated Insights, a capability that synthesizes customer conversations to identify high-value automation opportunities.

The successful acquisition and integration of LiveVox in early 2024 strengthens NICE's ability to serve the small and mid-sized business (SMB) market and enhance proactive outbound engagement capabilities.

NICE's cloud platform is based on the NICE Open Cloud Platform, which leverages multiple cloud providers like Microsoft Azure. The platform offers extensive integrations via its Integration Hub, a low-code interface that simplifies connections with over 170 pre-integrated applications in its CXexchange marketplace. Key pre-built integrations include those for major CRM solutions such as Salesforce, Microsoft Dynamics, and Zendesk. In August 2025, NICE and RingCentral extended their partnership to continue offering RingCentral Contact Center, powered by NICE's CXone Mpower. With a new CEO, the significant acquisition of Cognigy, and a sustained focus on integrating domain-trained Generative and Agentic AI into its core platform, NICE is positioned to maintain its leadership in the rapidly evolving intelligent customer experience market.

Strengths	Challenges
• Cloud offering	• Balancing between direct and third-party partners for implementation
• Integrations	
• AI focus	
• Partner network	
• Growing Industry focus	
• Endpoints	
• Global partner ecosystem	

UJET

UJET, headquartered in San Francisco, California, is led by Vasili Triant, who was appointed Chief Executive Officer in April 2025. Triant succeeded founder Anand Janefalkar, who transitioned to Chairman of the Board and Chief Evangelist. The company secured a $76 million Series D funding round in September 2024, led by Sapphire Ventures. UJET's main products include voice and digital channels, Intelligent Virtual Agent (IVA), agent assist, UJET WFM, and the UJET Agent Mobile app, all built on a mobile-first, CRM-first approach.

The company continues to focus on advancing its Artificial Intelligence (AI) capabilities, leveraging its native architecture on the Google Cloud Platform (GCP). This foundation allows UJET to utilize the full range of Google's Vertex AI capabilities, including low-code Agent Builder offerings for both virtual agents and agent assist tools. New product developments in 2025 included the introduction of Headless SDKs for web and mobile, enabling enterprises to fully customize the in-app customer support user experience while utilizing UJET's reliable backend functionality. UJET also offers AI-Modeled Interaction Design, which leverages Conversational AI and machine learning to analyze customer interactions, identify optimization opportunities, and guide the deployment of virtual agents.

A major strategic change in 2025 was the announcement of an exclusive channel partnership model with technology service distributors (TSDs) like Intelisys, Avant, and Telarus, signaling a scaled focus on the partner ecosystem for go-to-market. In July 2025, UJET sold its professional services unit to Onix, a Google Cloud partner, establishing Onix as a preferred implementation partner for the UJET platform and strengthening the delivery of AI-driven Customer Engagement Suite (CES) solutions. This move was intended to allow UJET to concentrate resources on its core software innovation roadmap. The company continues to offer "smart actions" features, such as biometric authentication and media sharing, designed for modern, mobile-centric support.

UJET's platform caters to a wide range of industries, with a particular focus on those that prioritize secure, personalized, and seamless mobile engagement. Major target industries include financial services, healthcare, retail, and travel and hospitality. The platform is designed to scale to meet the needs of both mid-sized businesses and large enterprises, offering flexible deployment options and a unique security model where no Personally Identifiable Information (PII) is stored on the UJET platform itself.

UJET's open, CRM-first architecture ensures seamless integrations with critical business applications. In addition to its long-standing relationship with Google Cloud, UJET maintains extensive pre-built integrations with CRM providers such as Salesforce, Microsoft Dynamics 365, Zendesk, Kustomer, and Freshdesk. The company continues to expand its technology partner ecosystem, including partners for Workforce Management (WFM) and Quality Management (QM). With new executive leadership and a dedicated funding stream focused on Generative AI, alongside a reinforced channel-centric and Google Cloud partnership strategy, UJET is positioned for accelerated market adoption and growth in the intelligent contact center market.

Strengths	**Challenges**
• AI Contact center offering	• Brand recognition outside of North America
• Virtual Agents and Agent Assist	
• Deep integration with CRM providers	
• Google partnership	
• SMB and Enterprise focus	
• Modern Architecture and Mobile Capabilities	

Vonage

Vonage, headquartered in Holmdel, New Jersey, operates as a wholly owned subsidiary of Ericsson under the leadership of CEO Niklas Heuveldop, who was appointed in February 2024. New executive appointments in 2025 included Reggie Scales, President and Head of Applications, and Christophe Van de Weyer as President and Head of the API Business Unit. a. Vonage provides a comprehensive suite of cloud communications solutions, including Unified Communications as a Service (UCaaS), Contact Center as a Service (CCaaS), and Communications Platform as a Service (CPaaS). Its core products are Vonage Business Communications (VBC), Vonage Contact Center (VCC), and the Vonage Communications APIs.

Vonage continues to leverage its strengths in Communications Platform as a Service (CPaaS) and the new Network APIs to advance its Artificial Intelligence (AI) portfolio. In 2024, Vonage integrated Generative AI into VCC's agent assist features to automate after-call work and sentiment analysis, building on its 5+ years of experience in Conversational Commerce. A key AI development in October 2025 was the launch of Vonage Agentforce Identity Insights and Fraud Detection. This solution uses AI and Network APIs, including SIM Swap checks, to provide agents with real-time fraud detection and customer verification, operating seamlessly within the contact center workflow. The company's Vonage AI Studio facilitates the development of custom virtual agents across various channels. The AI Virtual Assistant extends these capabilities to omnichannel environments, supporting both digital and voice interactions. It enables automated self-service experiences while maintaining seamless transition to live agents with full conversation transcripts, facilitating greater continuity and context in contact center operations.

Vonage provides a deep integration with Salesforce's Agentforce across voice and digital channels. This enables businesses to engage directly with customers on their channel of choice through the agentic and conversational power of Agentforce. Further, Agentforce can assist human agents handling the channels that voice supports natively within Salesforce.

In 2024, Vonage announced its integration into Salesforce's Bring Your Own Channel (BYOC) for CCaaS. In October 2025, Vonage unveiled its Contact Center integrated Agentforce voice and BYOC-CCaaS, which is further enhanced with Vonage network APIs.

In October 2024, Vonage announced a new interface into the VCC family - Intelligent Workspace, an AI-Powered omnichannel platform—including voice, WhatsApp, SMS, Messenger, Web Chat, and email—within a single experience. The platform integrates real-time transcription and summarization with generative AI, and includes advanced Agent Assist capabilities such as real-time sentiment analysis and real-time coaching. Vonage's Customer 360 is a core component, deeply integrating with major CRMs and productivity tools like Zoho, Google Workspace, Microsoft 365, Dynamics, and Salesforce. Customers can easily bring in any data sources via click-to-configure, consolidating information in real-time for a unified customer 360 view displayed in the insights panel. The workspace enables building complex, context-rich customer views tailored to diverse use cases, proactively surfacing and summarizing relevant data to provide agents with actionable intelligence at the right time. These capabilities are designed to drive agent efficiency, adaptability, and superior customer experiences.

Vonage focuses on enterprises globally, targeting customers that require tightly integrated communications within business processes. The company's solutions cater to the specific needs of businesses in financial services, healthcare, retail, and manufacturing, particularly where fraud detection, seamless customer journeys, and developer programmability are essential. The platform is used by companies requiring advanced communication and collaboration tools that scale across the organization, often leveraging the Communications Platform for customization.

Vonage maintains deep, strategic integrations, most notably with Salesforce, where its VCC is a top-rated partner on the AppExchange, offering native functionality and recently integrating Network APIs into the

Agentforce platform. Further integrations include its UCaaS and CCaaS products with Microsoft Teams, as well as pre-built integrations with other business applications such as Slack, Zendesk, and NetSuite. With new executive leadership and a continued focus on embedding Network API intelligence and Generative AI into its core offerings, particularly through its strategic partnership with Salesforce, Vonage is positioned to continue evolving its role in the digital transformation of enterprise customer and business interactions.

<table>
<tr><td><u>**Strengths**</u></td><td><u>**Challenges**</u></td></tr>
<tr><td>

- Contact center offering
- Fully integrated UCaaS and CCaaS
- Growing focus on AI
- Deep integration and focus on Salesforce
- Vonage brand recognition
- Integration extended to ServiceNow and Microsoft Dynamics, Microsoft Teams, and Zendesk
- CPaaS API flexibility

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- Balancing focus on UC&C and contact center

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Contenders

Amazon

Amazon Connect, a service of Amazon Web Services (AWS), is headquartered in Seattle, Washington. While Amazon's overall CEO is Andy Jassy, the AWS business is led by CEO Matt Garman, appointed in June 2024. The Amazon Connect product line is led by Pasquale DeMaio, Vice President & General Manager. The company, as a subsidiary of Amazon, does not raise external funding. Amazon Connect's products include its core omnichannel contact center solution with native Artificial Intelligence (AI) capabilities across self-service and agent assistance, and a comprehensive suite of workforce engagement management tools.

Amazon Connect introduced the "next generation" of its platform in March 2025, defining its strategy as providing first-party AI across all channels with simplified, channel-based pricing. This approach eliminates per-use AI consumption charges, bundling capabilities for unlimited use into the underlying voice and chat usage rates. This is designed to remove the cost barrier for pervasive AI adoption. The platform natively leverages state-of-the-art models from Amazon Bedrock and services like Amazon Q in Connect for both customer self-service and real-time agent assistance.

New product capabilities announced in 2025 focus on embedding AI across the entire contact center experience. This includes a comprehensive set of features such as AI-powered post-call summaries to reduce after-call work, automated Performance evaluations for supervisors to review 100% of interactions, and AI-powered Forecasting, capacity planning, and scheduling to automate workforce management (WFM). Other enhancements include Conversational analytics for sentiment and trend analysis, Screen recording integrated with quality management, and the ability to simplify conversational AI bot creation with Amazon Q in Connect.

Amazon Connect caters to a broad customer base, ranging from small organizations to large multinational enterprises, leveraging the global scale of AWS. It has a strong presence across industries with complex compliance and high-volume requirements. Major target sectors include Financial Services, Travel and Hospitality, Healthcare, and Telecommunications. Its cloud architecture and built-in security features support the needs of large Business Process Outsourcers (BPOs), as evidenced by large deployments with partners like Fujitsu and Genpact.

Amazon Connect is built to integrate natively with the wider AWS ecosystem, including Amazon Lex, Amazon Transcribe, and Amazon Kendra. Beyond the AWS services, a key integration focus is the deepening partnership with Salesforce, which now includes the native integration of Amazon Connect's digital channels and unified routing within the Salesforce CRM system. The platform maintains a large ecosystem of technology partners like ServiceNow and AmplifAI through the AWS Partner Network (APN), often leveraging APIs to facilitate seamless data exchange. By delivering a unified, AI-native platform with predictable pricing and a continuous feature release cadence, Amazon Connect is positioned to disrupt traditional contact center economics and accelerate enterprise AI adoption in the customer experience market.

Strengths	Challenges
• AWS breadth and depth of Cloud Services • Large deployment and cloud migration expertise • Native AI expertise and AI partner network • Extensive technology and alliance partner network and ecosystem	• Meeting the needs of Contact Center organizations that lack development skills.

- Leveraging AWS AI expertise

8x8

8x8, which focuses on unified communications (UCaaS), intelligent contact center (CCaaS), and communications APIs (CPaaS), is headquartered in Campbell, California, and led by Chief Executive Officer Samuel Wilson. In February 2025, the company made key executive appointments, including Joel Neeb as Chief Transformation and Business Operations Officer. The company operates on its existing capital, having delivered its 16th consecutive quarter of positive cash flow from operations in Q3 Fiscal Year 2025 and having no new external funding within the last year. 8x8 offers contact center, voice, video, chat, and API solutions, all unified within the 8x8 Platform for CX.

8x8 continues to accelerate the integration of intelligence across its portfolio. A major announcement in November 2025 was making Workforce Management (WFM) a native, standard capability in every Contact Center seat at no extra cost. This built-in WFM feature is designed to simplify forecasting and scheduling across voice and digital channels without the need for professional services. Other AI enhancements in 2025 included 8x8 Smart Assist combined with 8x8 Conversation Intelligence to analyze all customer interactions, providing real-time AI coaching to agents based on post-call analysis, and enabling automated quality assurance.

In August 2025, 8x8 introduced JourneyIQ, which allows organizations to track the full customer journey by pulling related interactions across transfers and queues into a single view. The company also announced the 8x8 Contact Center integration with MNET CoreAccess+ for Financial Services, which connects the contact center directly to core systems like Jack Henry and Fiserv for secure data access and user authentication. 8x8 offers tailored industry solutions, such as its Active Assessor offering announced in July 2024, which uses AI to streamline property evaluations for UK housing associations. More broadly, 8x8 targets organizations needing a fully integrated UCaaS and CCaaS platform that supports global operations.

The 8x8 Platform for CX unites Contact Center, Unified Communications, and CPaaS APIs. 8x8 offers the industry's most complete Microsoft Teams integration portfolio, including 8x8 Voice for Microsoft Teams (a Direct Routing solution supporting PSTN calling in 50+ countries), 8x8 Operator Connect for Microsoft Teams, a Microsoft-certified Contact Center for Microsoft Teams, and a cost-effective option to enable external calling for users without Teams Phone licenses via the 8x8 for Microsoft Teams app. 8x8 is the only global UCaaS provider that offers both a Microsoft-certified Contact Center and Operator Connect solution, and has sold over 550,000 8x8 for Microsoft Teams licenses globally.). In 2025, new CRM Integration Profiles were introduced, allowing administrators to customize workflows across platforms like Salesforce, Microsoft Dynamics, Zendesk, and Zoho by team or region without custom code. The new native WFM feature further simplifies its all-in-one approach. With a renewed focus on embedding AI-powered WFM and compliance tools directly into its integrated platform, 8x8 is positioned to deliver a cost-effective, unified solution to global enterprises seeking operational simplicity and high reliability.

Strengths	**Challenges**
• 8x8 Voice for Microsoft Teams direct routing solution	• Slow to market with AI
• Agent Workspace	
• Single platform delivering cloud-native UCaaS, CCaaS and CPaaS	
• Remote/hybrid approach to QM/Coaching/Interaction Analytics	
• Customer support and satisfaction	

Aragon Research

- Integration friendly, either through APIs, pre-built or partner network
- Service Management options
- Brand awareness

Avaya

Avaya, based in Morristown, New Jersey, is led by CEO Patrick Dennis. The company continues to serve a large enterprise customer base with a focus on its unified communications and contact center portfolios. The company did not announce new funding within the last year, having completed a financial restructuring in 2023. Avaya's primary contact center offering is the Avaya Infinity platform.

The company introduced the Avaya Infinity platform in 2025 as a new core offering. This platform is designed to provide intelligent orchestration across customer and employee experiences, offering a modern architecture built on Kubernetes that is deployable across on-premises through hyperscaler edge computing, enabling 'SaaS on-prem' deployments, private cloud, and hybrid environments. The platform injects modern technology, including Artificial Intelligence (AI) and intelligent orchestration, into existing enterprise environments.

Avaya's product strategy includes modernizing its core platforms with artificial intelligence and deeper portfolio integration capabilities. The company provides Avaya AI Workflow, a capability that uses generative AI to build and deploy virtual agents. This allows for integration with various conversational AI technologies to automate and customize workflows. In 2025, the company also introduced the Avaya Infinity platform, designed to unify customer and employee experience elements for large enterprises. Avaya Aura integrates through a hybrid configuration with Avaya Infinity, allowing organizations to provide advanced orchestration, employee workflow automation, and AI-driven experiences; while support for Model Context Protocol (MCP) enables more intelligent and context-aware AI agents across employee and customer interactions.

Avaya primarily focuses on large enterprises and public sector organizations with complex and demanding communication requirements. The company maintains a presence in various regulated sectors where scalability and reliability are crucial. Major target industries include financial services, healthcare, and government. Avaya's solutions are engineered to address the specific needs of large-scale operations in these environments, often leveraging their established installed base.

Avaya maintains a strategic approach to integrations based on an open ecosystem, allowing customers flexibility with various cloud platforms and third-party applications. In 2025, the company also announced a partnership with Databricks to strengthen data governance and security for its AI solutions, with platform updates expected by year-end. Avaya and Verint have also deepened their partnership, focusing on unlocking AI capabilities by integrating Verint's solutions and AI-powered bots seamlessly into the Avaya portfolio. With new leadership and the introduction of the Avaya Infinity Platform, the company is positioned to continue evolving its customer experience and collaboration offerings through a hybrid, open-ecosystem strategy.

Strengths	**Challenges**
• Avaya portfolio that includes CX and EX focused solutions across public cloud, private cloud and on-premises solutions.	• Balancing its on-premise and cloud offerings
• Large deployment and cloud migration expertise	
• Native AI expertise and AI partner network	
• Extensive technology and alliance partner network and ecosystem	
• Global channel partner network with service expertise at all levels through all major markets	
• Path to cloud for every customer to minimize cost and risk	

- Composable communications platform architecture focused around CCaaS to provide agility, speed & value

Enghouse

Enghouse, headquartered in Toronto, Canada, is led by Chairman and Chief Executive Officer Stephen Sadler. The executive management team includes Sam Anidjar, Vice President of Corporate Development, and Rob Medved, Chief Financial Officer. The company operates without external debt. Enghouse offers a comprehensive suite of contact center and customer experience solutions, including the Enghouse CCaaS platform, CxEngage, and solutions from acquired companies such as Altitude and Lifesize.

Enghouse continues to leverage its acquisition strategy to expand its portfolio, particularly in Artificial Intelligence (AI) and Communications Platform as a Service (CPaaS). A key development in December 2024 was the acquisition of Aculab PLC, a provider of on-premise and cloud-based communications and AI software solutions. This acquisition adds a CPaaS solution, AI-driven answering machine detection, and advanced voice and face biometrics technologies to the Enghouse Interactive product portfolio. This augments the internally developed EnghouseAI suite, which was announced in March 2024 to enhance performance and deliver customer insights using Natural Language Processing (NLP) and Machine Learning (ML).

Throughout 2024 and 2025, Enghouse focused on enhancing its cloud contact center capabilities. This included significant improvements to its Enghouse CCaaS platform and the CxEngage solution, increasing scalability, resilience, and security features. In March 2025, Enghouse Interactive announced support for Microsoft Teams Phone extensibility in its contact center solutions. This integration enables businesses to use Microsoft's latest communication technology within their contact centers for improved agent collaboration and efficiency. The integration offers seamless connectivity using Azure Communication Services (ACS) and provides AI-enabled agent productivity features like real-time transcription, interaction summarization, and customer insights.

The Aculab acquisition in late 2024 expanded the company's gateway business and provided new media processing and signaling products. In November 2025, Enghouse acquired the telecommunications division of Sixbell, which added solutions for converged charging, intelligent routing, and signaling management, expanding its presence in Latin America.

Enghouse maintains an open integration strategy, enabling businesses to connect their contact center with existing technology investments, including popular Customer Relationship Management (CRM) and communications platforms. The addition of Aculab's CPaaS solution provides customers with new self-service and security APIs for embedding communication capabilities into existing workflows. The new support for Microsoft Teams Phone extensibility allows organizations to optimize operations by integrating the contact center telephony platform with their existing Microsoft Teams investments. Enghouse continues to expand integrations for solutions like CxEngage, which is designed to integrate with platforms businesses already use. With a sustained, disciplined acquisition strategy focused on expanding its AI, CPaaS, and cloud capabilities, Enghouse is positioned to meet the evolving needs of businesses seeking comprehensive, customizable customer service operations.

Strengths	**Challenges**
• Broad ICC platform capabilities	• Maintaining and enhancing multiple product offerings
• Partnerships	
• Install base	
• Conversational AI	
• Large enterprise deployments	
• Integrated workforce optimization	

NEC

NEC Corporation is headquartered in Tokyo, Japan, and is led by President and CEO Takayuki Morita. The company has not announced any new external funding within the last year, relying on its operating capital. Outside of Japan, the sales and operations for NEC's cloud Unified Communications as a Service (UCaaS) and Contact Center as a Service (CCaaS) offerings are largely managed by Intermedia Cloud Communications.

In late 2024, Intermedia assumed direct responsibility for NEC's UNIVERGE BLUE UCaaS and CCaaS operations and partner relationships in North America and Europe, formalizing Intermedia's role as the primary driver for these cloud solutions outside of NEC's largest market, Japan.

NEC continues to develop and launch proprietary Artificial Intelligence (AI) solutions that complement its portfolio and traditional Private Branch Exchange (PBX) systems. In May 2025, NEC launched its new AI-powered solution, NEC Communication Agent. This tool is the company's second AI offering for contact centers, following the NEC Speech Analysis Platform, which launched in 2024.

The Communication Agent combines a voicebot and chatbot, both utilizing large language models (LLMs) to provide 24/7 support across various channels, including phone, web chat, Social Networking Services (SNS), Microsoft Teams, Slack, and LINE. A technical differentiator is the solution's focus on reducing Generative AI errors, or hallucinations, through unique dialogue control mechanisms to improve response accuracy. Users can choose between NEC's own LLM, "cotomi," or integrate with Microsoft's Azure OpenAI Service based on their specific requirements.

The core of NEC's business remains centered around providing integrated IT, communications, and networking solutions, with a strong focus on cloud migration for its vast installed base of on-premises telephony customers. NEC has announced the phasing out of its on-premises PBX systems in regions like the United States by March 2026, shifting its focus entirely to cloud-based solutions. This transition is heavily facilitated by its partnership with Intermedia, which provides the underlying CCaaS technology marketed as UNIVERGE BLUE.

The NEC contact center offerings, particularly the cloud-based UNIVERGE BLUE ENGAGE, are fundamentally based on Intermedia's proprietary platform, which offers comprehensive omnichannel capabilities, advanced video conferencing, and analytics. NEC's new AI products, such as the NEC Communication Agent and Speech Analysis Platform, are designed to integrate with existing telephony and CRM systems, including Genesys Cloud and NEC's PBX infrastructure. The company's strategic reliance on Intermedia for cloud CCaaS delivery outside of Japan, combined with its internal development of highly specialized, secure AI tools, positions NEC to manage the large-scale transition of its legacy customer base to modern, AI-enhanced communication platforms.

Strengths	**Challenges**
● Cloud and on-premise voice support	● Overall focus on video meetings
● Global cloud infrastructure	
● Industry solutions focus	
● Computer vision, including video analytics	
● Endpoints	

Innovators

Dialpad

Dialpad, headquartered in San Ramon, California, is led by Founder and CEO Craig Walker. Recent executive appointments in 2025 include David Sudbey as Chief Customer Officer and the promotion of Nick Slater to Chief Revenue Officer. The company operates on its existing capital. Dialpad's core offering is its AI-Powered Customer Intelligence Platform, which provides a unified solution spanning Ai Contact Center, Ai Sales Center, Ai Messaging, Ai Meetings, and Ai Voice.

Dialpad continues its aggressive focus on Artificial Intelligence (AI) innovation. In October 2025, Dialpad announced the launch of its new Agentic AI Platform. This platform is designed to move beyond traditional chatbots by enabling autonomous voice- and text-based AI agents that can reason through multi-step tasks and execute them end-to-end across enterprise systems via secure connectors. The agents are powered by reusable Skills and Workflows and are claimed to resolve up to 70% of customer requests autonomously, with a seamless escalation path to human agents when required. This builds on their existing AI capabilities, including DialpadGPT, their domain-specific large language model, which provides features like Ai Recap for summaries, Ai Playbooks for agent guidance, and Ai Scorecards.

In October 2025, Dialpad and Verint announced a reseller partnership to bring enterprise-grade workforce management (WFM) to customers. Under the agreement, Dialpad offers its native Dialpad WFM for small-to-mid-size contact centers and resells Verint's Open Platform for larger, more complex operations.

Dialpad focuses on providing its unified platform to organizations seeking to enhance both sales and customer experience. Major customer segments include the mid-market and enterprise sectors. The platform caters to various functions, including contact center, sales organizations, and HR/Talent Acquisition teams. Early adopters of the Agentic AI Platform span industries such as healthcare, retail, real estate, and legal services.

Dialpad maintains an open ecosystem for integrations. The company continues to strengthen its strategic partnership with Google, leveraging the Google Cloud Platform for scalability and reliability. In 2024, it expanded integrations with Salesforce for data synchronization and workflow automation. Key pre-built integrations include those for CRMs like HubSpot, Zoho, and Freshdesk, as well as collaboration tools like Microsoft 365 and Teams. The new reseller partnership with Verint for WFM further enhances its enterprise-readiness and compliance capabilities. With the architectural transformation offered by the Agentic AI Platform and expanded strategic partnerships, Dialpad is positioned to drive the next phase of autonomous, AI-driven customer service.

Strengths	**Challenges**
● Natively integrated AI capabilities	● Focus on team collaboration
● Real-time analytics and transcription	
● Integrated Contact Center with Collaboration and Sales	
● Automated workflows	
● Visual bot builder	
● HD-Quality Voice and Video	
● Pre-built integrations, including CRM	
● Sales and Recruiting use case	

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Talkdesk

Talkdesk, headquartered in Palo Alto and led by Founder and CEO Tiago Paiva, continues to evolve its platform strategy around Customer Experience Automation (CXA). In 2024, the company strengthened its executive team with the appointment of Munil Shah as Chief Technology Officer. No new external funding has been announced within the past year.

Talkdesk® is defining a new category in the contact center market with Customer Experience Automation (CXA)—an automation platform designed to handle the full complexity of modern customer journeys. CXA replaces fragmented, human-coordinated workflows with autonomous, multi-agent AI orchestration capable of scaling across service, sales, and support operations.

At the core of the CXA platform is the Talkdesk Data Cloud, which unifies structured and unstructured data—CRM objects, tickets, call transcripts, emails, and agent notes—into a real-time, contextual knowledge layer. This provides the foundation for AI Agents that can reason across systems, take action, and continuously improve through feedback and learning. Talkdesk offers both cross-industry workflows and vertical-specific solutions for healthcare, financial services, retail, utilities, travel, and government. The company also provides Talkdesk CXA for On-Premises, enabling organizations to bring Talkdesk AI agents and orchestration into legacy contact center environments without a full migration.

In 2025, Talkdesk expanded its agentic AI portfolio significantly.

- October 2025: The company released a major upgrade to Talkdesk Copilot, introducing agentic reasoning that synthesizes data across knowledge sources and enterprise systems to deliver contextual recommendations and actions to human agents.

- May 2025: Talkdesk launched the Utilities Experience Cloud, a purpose-built CX platform for utility providers with pre-trained AI models and integrations into core utility systems.

The Talkdesk Workspace continues to offer a customizable experience through Talkdesk Builder, a low-code/no-code environment for adapting routing, reporting, and automation to specific operational requirements. Talkdesk maintains a strong commitment to industry-specific GTM through its portfolio of Industry Experience Clouds, which offer deep integrations with systems of record and preconfigured workflows aligned to sector-specific use cases. While the company's core focus remains financial services, healthcare, and retail, utilities has become a strategic area of expansion. The flexibility of the underlying CXA platform also supports broader enterprise deployments for organizations pursuing AI-first customer experience strategies.

The platform's open architecture and partner ecosystem remain differentiators. Through Talkdesk AppConnect, customers can extend capabilities via more than 80 pre-integrated applications. Combined with its AI-driven automation strategy, multi-agent orchestration capabilities, and verticalized GTM motion, Talkdesk is positioned to continue expanding its presence in the global intelligent contact center market.

Strengths	**Challenges**
● Cloud contact center	● Brand awareness outside of the U.S.
● APIs	
● Focus on AI	
● Industry products & solutions	
● Workforce management	

Aragon Research

- Partner ecosystem
- Analytics

Aragon Advisory

- Pilot and Deploy Agentic Systems: Enterprises must move beyond single-task virtual agents and pilot Agentic Systems where specialized, role-based agents collaborate and seamlessly hand off tasks to both humans and other AI workers.
- Establish the Knowledge Lake: The knowledge lake is a non-negotiable architectural decision. Enterprises must invest in curating and structuring domain-specific knowledge to serve as the unified, validated source of truth for all AI agents and human staff.
- Invest in AI Upskilling: Given the lack of internal resources with the skills to train AI agents, enterprises must partner with professional services to bridge the knowledge gap by codifying institutional expertise and ensuring the ethical deployment of AI in customer-facing roles.
- Mandate Agentic Security (AISP): Prioritize security across all channels. Implement Agentic Identity and Security Principles (AISP) to verify and secure AI agents against misuse and unauthorized access to customer data.

Bottom Line

As AI Agents become real, AI based automation of the Contact Center is underway. Many enterprises are going beyond Agent Assist with role-based AI Agents. However, many enterprises have delayed rollouts, which put them behind on the automation race. With low code Agent development becoming faster and easier than ever, the new race is on automation and sourcing accurate knowledge for both human agents and the growing pool of AI Agents.

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 a 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 strategy 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

The inclusion criteria for this Aragon Research Globe is
- a minimum of $6 million in primary revenue for contact center or a minimum of $8 million in revenue in a related market (voice, video conferencing, collaboration, and team collaboration/messaging).
- **Shipping product**. Product must be announced and available.
- Customer References. **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. This determination was not applied to this report as all vendors participated in the Globe process.

New vendors included in this report:

- *Enghouse – which acquired Altitude and Lifesize*

Noteworthy vendors not included in this report:

The following vendors were not included in the report but are notable:

- *Nextiva*
  - Nextiva will be included in our ICC Globe for SMB.