



The Aragon Research Globe™ for Unified Communications and Collaboration, 2022

Leverage UC&C to Enhance Employee and Customer Experience

Author: Jim Lundy

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

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SUMMARY

Aragon Research releases its sixth Aragon Research Globe™ for Unified Communications and Collaboration (UC&C) that examines 15 major providers. The need to offer users seamless experiences for communications and collaboration is growing. Video meetings and text chat are challenging voice as workers need to use different modalities depending on the audience and the tasks at hand. However, the new race goes beyond omni-channel and is focused on intelligent capabilities to automate and provide insights to increase productivity.

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Introduction

Communication and collaboration platforms have continued to evolve in the post-COVID era. Video conferencing continues to be one of the most sought-after capabilities for business teams. Team collaboration is also poised to overtake e-mail as more and more enterprises realize that real-time messaging for remote workers is a winner. The key for enterprises is the need for an integrated UC&C stack that can work with and integrate with other enterprise applications.

Intelligent communications and collaboration continues to be the race in the market with intelligent video conferencing emerging as the lead story for 2022. This sixth Globe for UC&C platforms evaluates 15 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 Are Vital for Employee and Customer Engagement

The fundamental issue for keeping people interested in your company is communication. The channels that work for communications are changing, which is one of the reasons why UC&C providers have been making their platforms omni-channel over the last four years. Video and messaging are overtaking voice, but voice communications is the failsafe when other channels have issues. Making UC&C more automated and intelligent is one of the big themes for 2022 and beyond.

AI-Based Capabilities Are Coming to the Workplace and to Video Meetings

The most significant technology capability to impact these markets is the evolution and adoption of AI. Across technologies, businesses, and industries, we have found AI is becoming a pervasive technology. However, it is critical to recognize that not all capabilities marketed as AI are truly artificial intelligence, and AI capabilities differ dramatically by solution. Aragon has called the rise of AI in the workplace the shift to intelligent applications, and it is clearly one of the biggest trends over the last fifteen years.

In the case of the demand for integrated video, collaboration, and communication, AI is the technology that can be used to provide a more seamless, automated, and feature-rich engagement experience before, during, and after the meeting. It also can enable better participation by breaking down language barriers.

What Is Intelligent Video Conferencing?

Intelligent video conferencing changes all aspects of video meetings from set-up to the

live experience, to note taking and post meeting recording access. These platforms provide fundamental video meeting infrastructure in addition to communications, collaboration, and workplace capabilities that are AI-enabled to optimize knowledge from meetings. 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.

The Critical Need for Omnichannel UC&C Capabilities in the Enterprise

Every enterprise needs to communicate—it is the way that business gets done. In the past, enterprises have looked at UC&C tactically. Aragon is suggesting that this is a strategic play, and more thought needs to be put into decision-making when it comes to a full platform vs. best-of-breed capabilities (see Figure 1). The reason for the UC&C platform's demand is that providers can offer multiple means of communicating—calls, voice, video meetings, and enterprise-grade messaging. In particular, the need to contact people during emergencies often requires omnichannel communications 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 help to reduce costs.

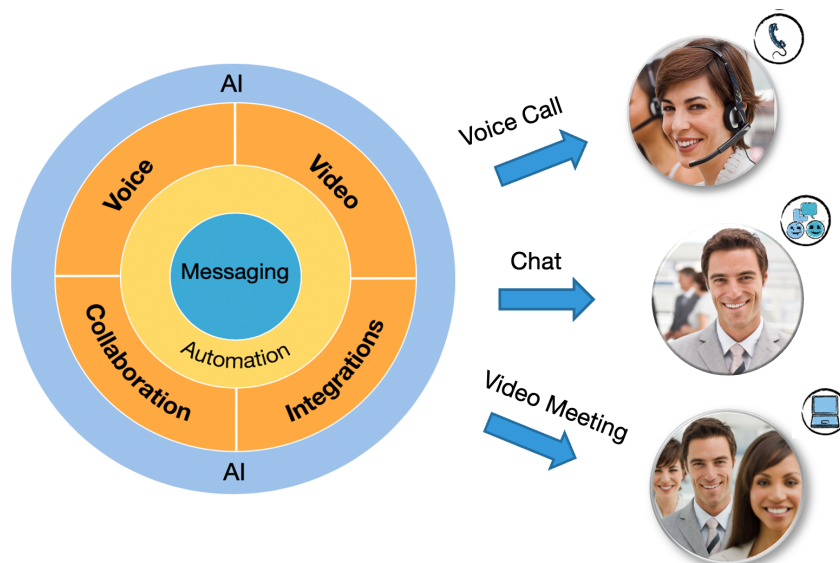


Figure 1: Best-of-breed applications are evolving to become complete UC&C platforms as enterprises want more options for communications and collaboration.

Team Collaboration Surges Past Email

Team collaboration, along with video conferencing, too came center stage during COVID. Team collaboration has become a must-have application for people to conduct hybrid work. Team collaboration allows people to collaborate remotely in real time.

Over the last two years, team collaboration has become integrated with both video conferencing as a form of a starter bundle. It also has become part of the UC&C stack and is now a vital way to communicate with people inside as well as outside of the enterprise. The days of standalone team collaboration are numbered, and that will put pressure on providers such as Salesforce's Slack offering.

However, one element of team collaboration is the need to have tight integration with other communications capabilities due to the fact that people need to switch modalities often. While team collaboration is actually now bundled with videoconferencing, we also see chat bots and team collaboration playing a more strategic role as different use cases emerge.

Most importantly, team collaboration is not just for knowledge workers. One of the biggest growth areas for team collaboration is for front line workers. Because of its mobile device footprint, team collaboration is the ideal app for workers who are never at a desk. On top of that team collaboration can now leverage digital workers, also referred to as chat bots or virtual agents.

For enterprises, it is important to examine email usage and contrast that with the use of team collaboration. Email is winding down as a work tool internally—it is more of a notification.

The Chat Bots Are Coming—Engaging Employees and Customers

There is certainly a surge occurring in the demand for chat bots, which are often referred to as virtual agents. Virtual agents are important for things such as employee engagement for IT help desk and HR help desk.

Chatbots are being used in websites for greeting and scheduling appointments. They are also being used for customers in the contact center. The enterprise needs to look at team collaboration strategically as mentioned above and evaluate the integration capabilities of the current platform that's installed versus team collaboration as part of a UC&C platform.

The UC&C Platform Gets Smarter

in June 2022, Aragon announced that video conferencing platforms are now fully intelligent. This is clearly extending into the UC&C platform area as well with video conferencing being the lead area for intelligence.

The same goes for conversational intelligence, which has the opportunity to assist in voice offerings, however, conversational intelligence is typically being used more in the contact center.

We are in a transition from analog features that merge together to true intelligent communications platforms. Combining the ability to communicate via multiple channels based on profiles is vital for situations such as emergencies. Outside exceptional circumstances, though, the ability to understand current and past communications can provide powerful insights. These are just some aspects of intelligent UC&C platforms.

Aragon is predicting that by 2025 a majority of the enterprise UC&C offerings will have significant intelligence capabilities. In the short term, conversational intelligence, also known as voice analytics, is increasingly becoming a key part of UC&C offerings.

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
Emergency Broadcast	Yes	Optional
Sound Management	Yes	Optional
Auto Transcription	Yes	Optional
Virtual Agent for Note-taking & 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
Chatbots/Virtual Agents	Advanced	Basic

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

The final part of the automation play is adding virtual agents or assistants to the mix. Conversational AI is starting to come online in many use cases, such as internal help desk and customer support. To date, Cisco is still one of the only vendors that has an integrated virtual assistant that will take commands from humans and do actions such as document action items and then distribute them.

Prediction: By YE 2021, 50% of UC&C providers will offer an AI-based digital assistant to enable a more seamless collaboration experience.

Unified Client –and the Shift to Use Cases

Nearly every provider now offers a unified client to deal with the different communications modalities (see Figure 2 below). This along with advanced API's means that the unified client can be adapted to meet unique use cases that clients desire.

At its core, people-centric collaboration is about enabling seamless communications and collaboration. It allows for calls that are both voice-based and video-based and it enables meetings with users and rooms.

Already, today you see some providers offer unique capabilities for business buyers that leverage their unified client. Microsoft now offers Viva for employee engagement. Zoom is now offering Zoom for sales teams, and Cisco offers Webex for legislators—Webex Legislate.

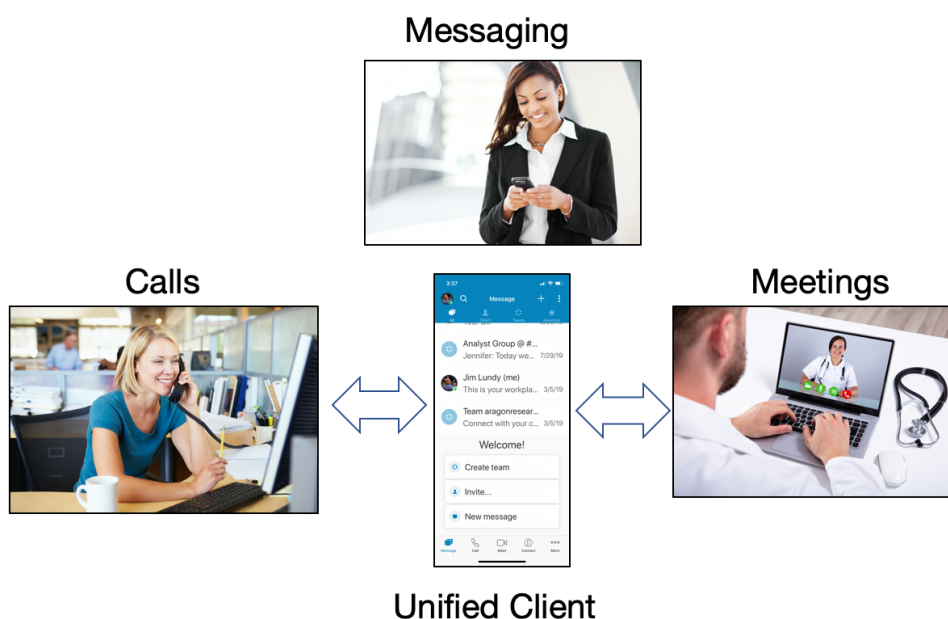


Figure 2: Unified clients make the communications and collaboration experience more seamless.

The UC&C and Intelligent Contact Center 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.

Aragon feels that the advantage falls to providers that have UCC platforms to start with and can offer the integrated bundle. This will put significant pressure on standalone contact center providers that must partner for these capabilities for new business. While the integrated bundle is not as big of a need for the large enterprise that has unique needs we see making a lot of sense for the SMB market.

Aragon covers the intelligent contact center market in a dedicated report. Having ICC capabilities was not a criterion for this Globe, but the integration does represent a growing trend. Integration of UC&C and ICC offerings will continue to expand as demand grows. Many providers in this report offer their own contact center solution or they partner.

The Key Elements of the UC&C Platform

UC&C platforms have become adept at multi-channel communications and collaboration. Each element of UC&C is important, and a common client that allows for seamless shifts between modalities is key. The demand for the key elements of the UC&C platform is being influenced by current shifts in the market. Communications (voice), video meetings and team collaboration, along with robust APIs are the key elements of a UC&C platform (see Note 1).

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.

The Race to Intelligent Video: Emerging Use Cases

It is about more than just meetings today. It is about intelligent meetings. However, the definition of a meeting is changing too. New use cases are emerging.

Today, telehealth is a use case for video meetings that can take place between a patient and a healthcare provider. This is one of the emerging use cases that Aragon estimates that 60% of video conferencing providers will add to their portfolio.

Video for support is also a use case that is coming online slowly. A big reason why new use cases are emerging is because of intelligence—what is referred to as computer vision or just video AI.

Video AI will enable the ability to do smart search to find scenes in meetings. It will also enable prediction algorithms to be developed to help people understand what has happened or to predict what might happen.

CPaaS and Use Cases—Marketplaces and No Code Enable Better Experiences

There is no doubt that UC&C providers that have full APIs offer enterprises more integration capabilities. CPaaS (APIs), or communications platform as a service, is enabling the integration of voice, video, and team collaboration with other applications. Many providers are making their CPaaS capabilities a core part of their platform, which powers their solution efforts.

A number of providers offer standalone CPaaS services so enterprises can build applications. Vonage is a good example of this. Cisco has allowed providers to leverage its full APIs to build new offerings, such as Webex Legislate.

More providers offer out-of-the-box integrations with third-party applications, and they are offering these integrations via a marketplace. These app integrations work through pre-configured connectors that leverage the APIs mentioned above.

Nearly every vendor in this report now offers a UC&C marketplace (see Table 2 below). Buyers will still need to validate that the connector they are interested in actually works.

Standalone IVC Vs. Buying as Part of a UC&C Offering

Video conferencing can be purchased as a standalone best-of-breed offering, it can be purchased bundled with team collaboration, or it can be part of an integrated unified communications and collaboration suite.

Today, many small enterprises buy each of these capabilities as a best-of-breed capability, and this is promoted by many VC firms, but the value of an integrated UC&C platform is that communication channels can be switched more seamlessly, which becomes important during times of remote work or pandemic.

Given that videoconferencing is now intelligent, selecting providers that are investing in their videoconferencing platform with intelligence and automation features is just as important as selecting a best-of-breed product versus a platform.

UC&C Platforms as Digital Work Hubs

One thing is clear, business buyers want productivity, and they realize that there are too many best-of-breed applications. They also are looking for solutions and don't always think in terms of technology platforms such as UC&C. Aragon looks at UC&C offerings as a form of a work hub and a number of providers are headed in this direction.

Digital work hubs are a different way of buying technology. Instead of a stack of one type of technology, business buyers are looking to solve the problem of getting work done. Video conferencing and chat are a key part of a digital work environment. Avaya, Cisco, Google, Microsoft, and RingCentral are all offering collaboration-led work hubs.

There is no doubt that work hubs have come of age and that enterprises are looking for more of these tools to help individual teams get their work done. We are seeing more adoption at the team level than at the enterprise level, however, and some enterprises have started to standardize on the basis of a specific type of work across multiple divisions.

Due to entrenched work processes, we expect there to be multiple work hubs in the enterprise. The ability to integrate third-party apps and third-party processes as well as content is one of the deciding factors when selecting a provider.

The full set of capabilities required for such a platform is dictated by the use case, and may differ by industry, role, or business function. The core capabilities outlined in this report may be augmented by use case specific add-ons that integrate with the platform via APIs.

As shown in Figure 3 below, a digital work hub should be able to consolidate two or more best-of-breed capabilities. The benefit is increased productivity and less app switching.

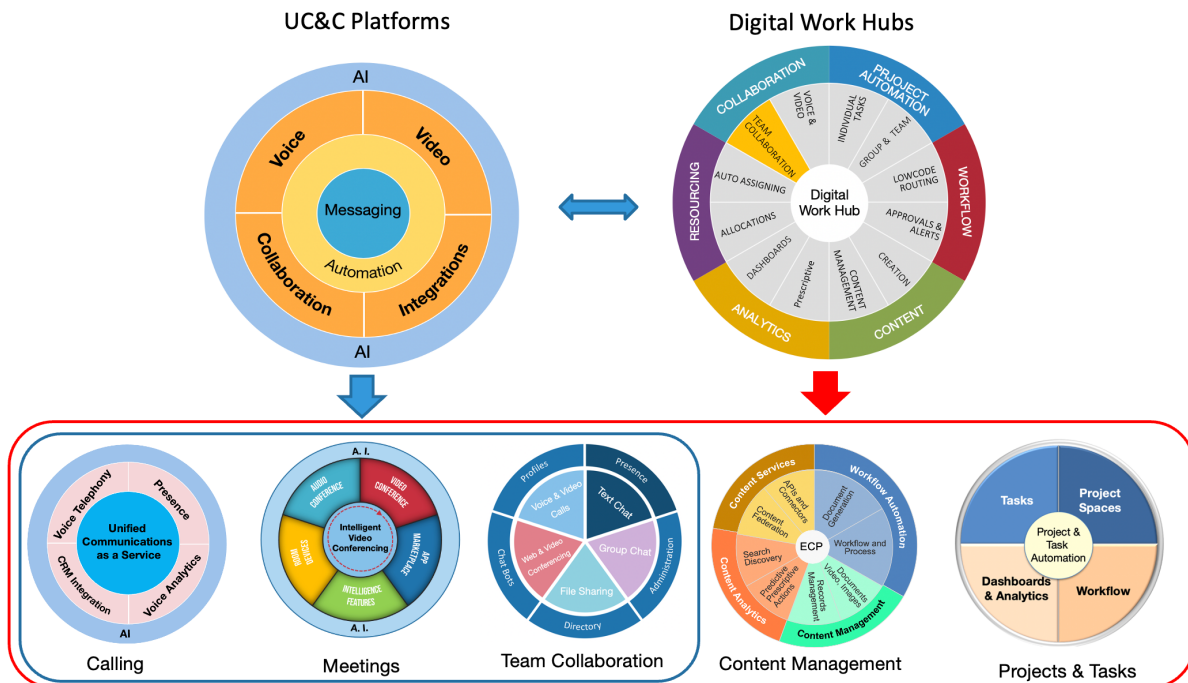


Figure 3: UC&C platform capabilities may increasingly be bundled as part of a digital work hub.

Many of the providers evaluated in this Globe report are at different stages of an integrated UC&C offering—all have different strengths across their portfolios. Partnerships and integrations are an area to watch for enterprise buyers.

How to Use This Globe

With the features of UC&C well-established, now begins the race to differentiate offerings through better analytics and national and global availability. Seamless switching between modalities is a given. Aragon recommends that all modalities—calling, meetings, and messaging—be full UC&C capabilities when it comes to functionality. Team collaboration is key here, and comparisons should be made with current tools in use to make sure that they can deliver the desired functionality. Video conferencing is also much more intelligent than just two years ago.

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:

Vendor	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		✓	✓	✓	✓	✓
Unify	✓	✓	✓	✓	✓	✓
Vonage		✓	✓	✓	✓	✓
Zoom		✓	✓	✓	✓	✓

Table 2: Comparing the capabilities of the different providers.

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 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.

The Aragon Research Globe™ for Unified Communications and Collaboration, 2022
(As of 9/20/22)

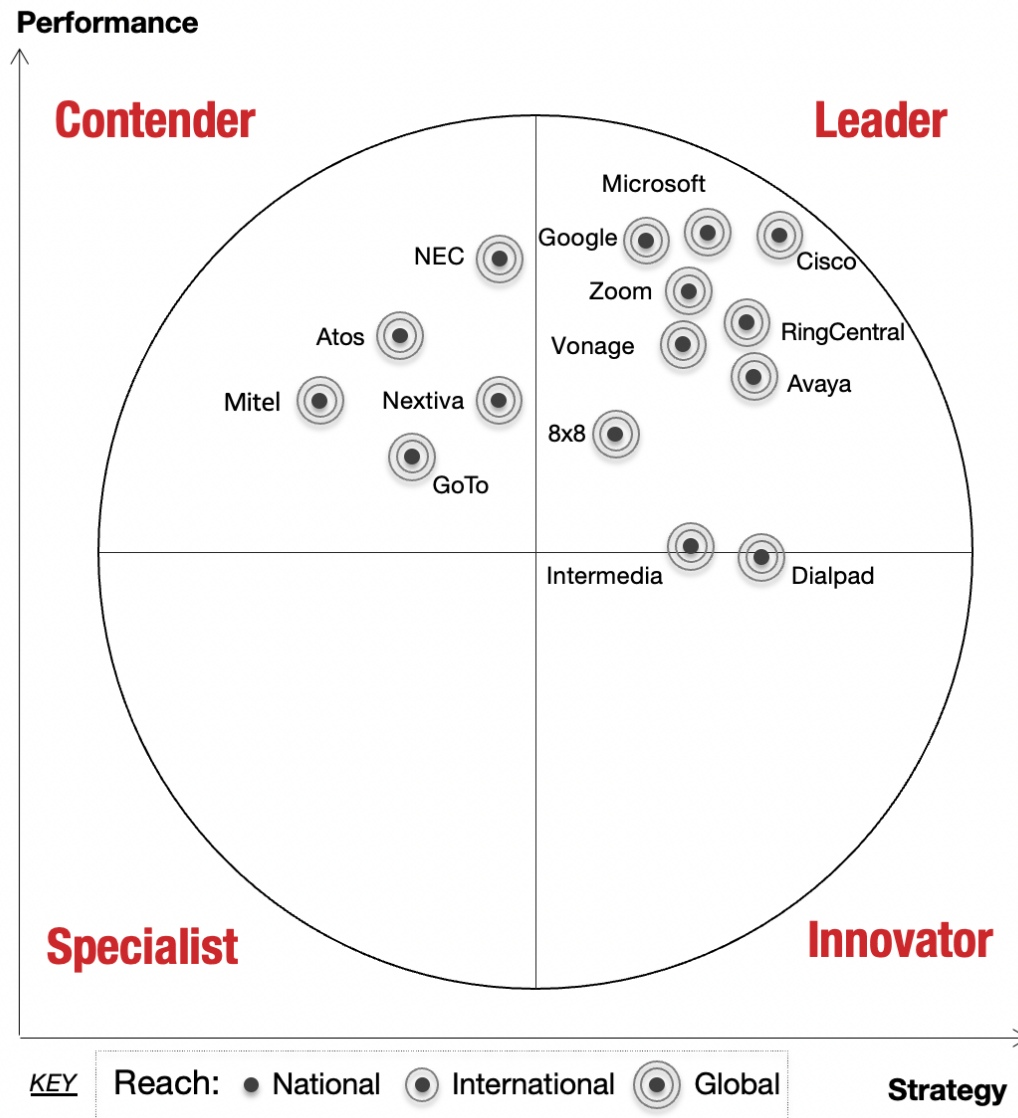


Figure 4: The Aragon Research Globe for Unified Communications and Collaboration, 2022.

Leaders

8x8

8x8, led by CEO David Sipes, offers a single-vendor UC&C and contact center platform that it calls XCaaS or eXperience Communications as a Service. The 8x8 eXperience Communications platform includes calling, messaging, video meetings, contact center, and CPaaS. The primary interface for UC&C capabilities is called 8x8 Work, 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 browser. 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 offers an integration framework and out-of-the-box integrations with over 50 business and productivity apps, such as Microsoft Dynamics, Salesforce, and Slack. 8x8 Voice for Microsoft Teams seamlessly integrates into the Microsoft ecosystem through a Direct Routing as a Service solution and a Teams-certified cloud contact center.

8x8 provides full cloud voice calling in over 50 countries and has an extensive global cloud footprint with data centers in North America, the UK, Amsterdam, Africa, APAC, and Brazil. It is also the only vendor in the industry to offer a platform-wide, financially-backed 99.999% uptime SLA.

In January 2022, 8x8 closed its acquisition of Fuze, known for its large customer base of enterprise-size organizations.

Strengths

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

Challenges

- Overall focus on team collaboration

Avaya

Avaya announced a new CEO Alan Masarek, who has significant experience in the UC&C market. Prior to Alan's announcement, the company secured \$600M in financing commitments. Avaya, which offers a full UCC Platform, has continued to innovate with Avaya Spaces and Avaya Cloud Office, powered by RingCentral. With Avaya OneCloud UCaaS, it offers a broad portfolio of UC&C offerings available in the cloud, on-premise, and by hybrid cloud.

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, safety features such as lock down, along with enhanced country availability. Avaya continues to enhance its Spaces offering with a partnership with NVIDIA that features innovative AI-powered capabilities, including noise removal, and video for both low bandwidth and high-quality, more engaging meetings. Avaya is first to market with these upgraded capabilities and offers a smoother, immersive video experience that is noticeable to users.

Avaya's contact center offering, Avaya OneCloud CCaaS, is now being offered in conjunction with Microsoft. In May 2022, Avaya announced that OneCloud will run on Microsoft Azure and also integrate with Microsoft's Nuance AI capabilities. With Avaya's ability to deliver cloud, on-premise, and hybrid cloud offerings, enterprises have significant choices to meet their needs. With the shift to a focus on video meetings, Avaya is well-positioned to meet the needs of enterprises with its enhanced portfolio of intelligent video offerings.

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

- Balancing cloud and on-premise offerings

Cisco

Cisco under the leadership of Jeetu Patel and GM Javed Khan, has doubled down on its Webex business unit, with a complete pivot to make its overall Webex platform intelligent. Cisco offers an integrated UC&C portfolio with support for both on-premise and cloud offerings that has a significant focus on AI and automation. One of the highlights that works across the Cisco UC&C Platform is the Webex Assistant, which can take notes and assign action items. Other capabilities include real-time translations, background noise removal, voice optimization, and People Focus providing inclusive experiences for all hybrid meetings participants.

Cisco's native cloud calling solution—Webex Calling—is powered by Cisco's Webex cloud and is integrated with Webex Meetings, messaging, and team collaboration globally. Cisco also offers Webex Contact Center—a cloud contact center service integrated with the Webex UC&C suite.

Cisco also offers an extensive range of collaboration devices, including room and personal video endpoints, desk and wireless phones, USB webcams, and professional headsets. These devices are tightly integrated with the Webex App and Control Hub management experience, but also work with third-party meetings and cloud calling services.

Cisco has made significant investments in its hardware portfolio, with recent new products including the 8875 Video Phone, Webex Room Bar, and Webex Desk Mini. All now support integrated collaboration including enterprise calling and cloud meetings.

The Webex App also offers native integration of Webex with Apple iOS, iPadOS and MacOS to take advantage of capabilities like Picture-in-Picture, the Apple Pencil, and connecting Apple and Webex devices with AirPlay, and CarPlay.

The Webex Platform also focuses extensively on security including support for privacy, encryption, data loss prevention, mobile security, and regulatory and legal compliance. With 47 data centers, it also supports data residency and sovereignty requirements globally. Cisco offers one of the most complete voice and video collaboration platforms, now fully integrated within the Webex app, its integrated cloud-based collaboration experience.

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
- Flexible 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

Dialpad

Dialpad, based in San Ramon, California, and led by Founder and CEO Craig Walker, has continued to focus on product innovation. Dialpad raised its Series F round of \$170 Million in December 2021 at a \$2.2 Billion valuation, bringing its total funding raised to \$418 Million.

In 2021, Dialpad launched its TrueCaaS platform, integrating onto a single AI-powered platform Dialpad Talk, Dialpad Meetings, Dialpad AI Contact Center, and Dialpad AI Sales. All UCaaS and CCaaS portfolios are fully integrated with Dialpad AI.

Dialpad Talk offers an enterprise grade cloud-PBX system with native PSTN coverage in 46 countries globally, HD audio and HD video conferencing meetings (Dialpad Meetings), and enterprise messaging (Dialpad Channels) all in one fully unified app. Dialpad Talk has evolved into a digital work hub due to its fully integrated Dialpad AI voice intelligence that is powered by proprietary NLP / NLU technology and its ability to provide live call transcriptions, automatically take notes, and capture reminders during a call or video conference and provide post-call summaries with highlights across sentiment analysis, custom moments, action items, and more.

Dialpad Meetings continues to be updated with AI innovative 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.

The Dialpad app for Microsoft Teams is a fully embedded Dialpad experience accessible from within the MS Teams environment. License-Free Routing provides outbound PSTN calling from MS Teams through Dialpad but without having to purchase an E5 license or MSFT Teams Phone license or use a second app to complete the call. Users will also benefit from Dialpad's advanced, native AI engine for business communications and collaboration and all of the unique Dialpad Talk also integrates with Google, Salesforce, among others.

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

Google

Google has continued to evolve Google Workspace, including its flagship Google Meet video conferencing platform. The Google Meet platform, which works in conjunction with Google Chat has had a complete makeover. Now, Google Meet offers backgrounds, auto transcription, and more recently, picture-in-picture capabilities. Google Meet, when combined with Google Chat and Google Voice globally, makes Google a complete UCC platform provider.

Google Meet continues to have one of the most seamless join experiences—accessible from any major browser without download, or from its mobile apps. Google Meet is also seamlessly integrated with the broader family of Google Workspace collaboration offerings, which allow users to launch straight into a full Meet video call from Calendar, Gmail, and Chat. The tight integration with calendar means that meetings can be scheduled that fit users' calendars domestically and internationally

In March 2022 Google announced that it was adding its own contact center offering, which will help Google particularly in SMB accounts. Google has made significant investments into Google Workspace, and much of that has been for its UC&C portfolio. Google Voice is available globally, and calling plans range from \$10 to \$30 per user per month, which is in addition to regular Google Workspace licensing.

Google has made a significant push in its overall UC&C offerings to make them intelligent. Google Meet has full intelligence and Google Chat now enables more of its conversational AI capabilities (Google Dialogflow) to be integrated inside of Google Chat. In addition to its UC&C platform, since Google has so many capabilities inside Google Workspace. The flexibility that Google workspace offers allows enterprises to adapt it to many business focused use cases.

Strengths

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

Challenges

- Market awareness of its Voice offering

Intermedia

Intermedia, led by CEO Michael Gold, has continued to grow and appears poised for an IPO in 2022. Intermedia offers its flagship AnyMeeting service that is part of its Intermedia Unite, its full UCC platform. Intermedia AnyMeeting supports 720P resolution, meeting recordings, custom branding, and Notes. It also offers an optional Webinar option. One of the newer capabilities is the ability to provide end-to-end encryption.

Intermedia Unite offers cloud-based telephony, messaging, and meetings. In November 2021, Intermedia announced that Intermedia Unite now has integrated contact center capabilities, which is a growing demand in the SMB space.

Intermedia continues to leverage its partnership with NEC, in which NEC resells Intermedia Unite as the NEC UNIVERGE BLUE CONNECT and ENGAGE. The services have been rolling out since the announcement. The NEC partnership provided Intermedia a major OEM partner and a large upgrade install base of NEC on-premise PBXs.

Intermedia offers integrations for Google Workspace, Microsoft Teams, and Slack. Intermedia Unite with Microsoft Teams offers bundled telephony, powered by Intermedia. Intermedia sells Unite and AnyMeeting via resellers, some of whom white label the offering with their brand. With focus on collaboration and communications offerings, its NEC OEM relationship allowing Intermedia to expand its global footprint, and a growing partner base through its differentiated CORE reseller program, Intermedia is well-positioned for the SMB and mid-market.

Also, in May 2021, Intermedia announced new integrations for Microsoft Teams. Intermedia Unite with Microsoft Teams offers bundled telephony, powered by Intermedia tailored for the Teams collaboration user. Intermedia sells Unite, Contact Center and AnyMeeting via resellers, some of whom white label the offering with their brand. With its UC&C, contact center, other collaboration offerings, and its NEC OEM relationship, Intermedia is well-positioned for the SMB market.

Strengths

- Cloud PBX
- Call center
- Mobile app
- Native CRM integrations
- Channel focus

Challenges

- Market awareness

Microsoft

Microsoft has continued to enhance Microsoft Teams as its core collaboration platform for meetings and team collaboration. Video meetings has become the new dial tone for Microsoft Teams. Besides Meetings, Microsoft Teams is the primary work hub for all voice and messaging-based communications. As part of the Microsoft 365 and Office 365 bundles, Microsoft Teams has become the lead interface for collaboration, overtaking Outlook, which now can run as a tab inside Teams. Microsoft 365 adoption has been growing, because it is a full digital work hub with a set of independent applications that increasingly are integrated together. In 2022, Microsoft added the ability to remove background noise from meetings and calls. Microsoft Teams webinars has also been available for a year.

One of the areas of innovation for Microsoft Teams has been Together Mode. Popularized first on NBA basketball game televised events, Together Mode allows users to interact in different view modes than a traditional panel of video conferencing users. In 2022, Microsoft launched touch-enabled display offerings from Neat and Yealink. Microsoft Teams Room Systems also continues to partner with certified providers include Crestron, Lenovo, Logitech, HP, Yealink, and Poly.

Microsoft Office has calling plans for Teams. For it to be a full UC&C offering, enterprises must license Teams Phone with Calling Plan license. This is in addition to the Teams licensing that is part of the E1, Microsoft 365. Microsoft Teams has continued to focus on front-line workers, which has helped to position Teams as both a communications platform and a digital work hub. With all of the enhancements to Microsoft Teams, it has become a first-class video meeting experience. Existing Microsoft customers can take advantage of this since many have had the licenses for teams and have now started to use them.

Strengths

- Microsoft brand
- 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

- Making all SfB server capabilities available in Teams

RingCentral

RingCentral announced a new President Mo Katibeh in May 2022, as well as a new CFO Sonalee Parekh. Ring Central offers its Message Video Phone™(MVP®) global platform that features an enhanced focus on videoconferencing. RingCentral also introduced smart video conferencing features in March 2022 that include live meeting summarizations, short form summaries, video highlights, hot-linked keywords, and a new white boarding capability. The RingCentral UCC platform is now available in 41 countries with its full set of capabilities—high-quality voice, video conferencing, mobile messaging, and cloud contact center.

RingCentral leveraged Voice and Messaging to power its strong growth over the last several years. With the partnership with Zoom winding down, RingCentral Video is now center stage. RingCentral Video is included in the overall unified communications digital work hub called RingCentral MVP, which features messaging, video, and phone. In addition, RingCentral has a freemium version of its video conferencing offer, which features both video and messaging and focuses on pre-, during, and after meeting collaboration. RingCentral also announced that users from Cisco Webex and Zoom can join a RingCentral MVP meeting.

In March 2022, RingCentral formed a strategic partnership with Frontier Communications that included RingCentral MVP combined with Frontier symmetrical high-speed fiber internet with capabilities up to 2 Gig. RingCentral has continued to leverage its other reseller partnerships Avaya, Atos, Alcatel Lucent, and Mitel.

The RingCentral UC&C platform is now available in 44 countries with its full set of capabilities—high-quality voice, video conferencing, mobile messaging, and cloud contact center capabilities.

The RingCentral Open Platform is also a strong contributor to its growth—it now has over 50,000 registered developers and supports over 5,000 integrations, including Microsoft Teams, Google G Suite, NetSuite, and Salesforce. RingCentral is also fairly easy to deploy, which gives it an advantage over others, though it also offers an expanded services portfolio for full implementation support. Recent platform innovations include RingCentral's high-volume SMS, which delivers CPaaS style capabilities, along with RingCentral Embeddable, which enables developers to quickly embed message, video, and phone into their web applications.

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 channels

Vonage

Vonage, led by CEO Rory Read, is now a wholly-owned subsidiary of Ericsson as of July 2022. This marks Ericsson's re-entry into the communications market due to the growing demand for applications that will be powered by 5G wireless networks. Built on top of the Vonage Communications Platform (VCP), the Vonage Business Communications (VBC) unified communications solution integrates with the Vonage Contact Center through a single pane of glass and leverages Vonage's CPaaS/Communications APIs, along with integrated AI capabilities. This leads to enhanced engagement and better employee and customer experiences. Vonage continues to do well with its Vonage Communications Platform—both in the sale of pre-packaged applications but also by leveraging its APIs that power many applications for partners.

Vonage Meetings, built into VBC, 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 giving users the ability to collaborate via online meetings with whiteboarding and chat capabilities. In Voice, Vonage has seen success with its VBC for Microsoft Teams offering. The VBC for Teams offering includes premium calling (direct routing), as well as SMS, MMS embedded directly into the Teams app.

Vonage also offers Vonage Contact Center, which has integrations with VBC, Salesforce CRM, ServiceNow, Microsoft Dynamics, Zendesk, and Microsoft Teams for improved collaboration between front office and back office. Part of the way that Vonage offers integration across its UC&C platform is via the Vonage App Center, which has pre-built integrations with applications such as Google G Suite, Microsoft Office 365, Slack, Oracle, Salesforce, and Zendesk for desktop and mobile users.

Vonage Meetings video conferencing has been seeing solid adoption, as has Vonage's integrated team collaboration solution. Vonage uses its own Video, Voice, and Messaging APIs from the Vonage Communications Platform to enhance VBC, and these APIs are also available to VBC customers for their own applications in areas such as Healthcare, Education eCommerce, Finance, and Business Services. With its full UC&C platform and a growing international presence, Vonage is well-positioned in the UC&C landscape.

Strengths

- UC&C platform
- UCaaS offering
- 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, under the leadership of CEO Eric Yuan, has seen significant growth with annual revenues now over \$4 Billion. On June 6, 2022, Zoom announced that it had hired Greg Tomb as its new President. In June 2022 it announced a new Platform offering, Zoom One, which is a UCC bundle that includes Team Chat, phone, and meetings along with whiteboarding. In addition, Zoom's event and webinar products have seen a surge in demand. Its new virtual Zoom Events offering is priced aggressively.

Zoom One is positioned to offer existing customers an upgrade path from Meetings. Additionally, the growing Zoom marketplace offers customers the ability to add new capabilities to the platform. While Zoom leads with its flagship video meetings offering, it has made a significant push around both Zoom Phone and Zoom Team Chat. Zoom Phone has seen the most adoption with over 4M seats.

Zoom has also invested in conversational intelligence, which provides insights into what is discussed during a call. Zoom continues to leverage its growing app marketplace (over 2,000 apps) to allow enterprises to add the integrations they want for their different user populations.

Zoom also offers Zoom Team Chat for team collaboration. It is tightly integrated as part of the Zoom Platform and provides both persistent personal and channelized team messaging. Zoom has made breakout rooms a must-have capability. In addition, the company continues to make significant investments in security and now offers end-to-end encryption on all free and paid accounts. Zoom is now a multi-product enterprise and with its bundles for the enterprise, it is one to watch.

Strengths

- 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

GoTo

In February 2022, LogMeIn rebranded the company as GoTo to focus more on its UCC platform and video conferencing offerings. In August 2022, GoTo appointed a new CEO, Paddy Srinivasan, the company's former Chief Product and Technology Officer. GoTo Connect is a complete UC&C platform incorporating Jive's cloud-based voice PBX and video conferencing powered by GoTo Meeting, messaging, and more.

GoTo also offers a full contact center, with GoTo's Contact Center. It was relaunched this year with configurable permissions and customizable dashboards across several communication channels. The revamped Contact Center includes outbound capabilities to automate and accelerate sales calls. GoTo is a complete UC&C provider due to its expanded footprint with GoTo Connect.

The GoTo Product family for collaboration includes its flagship GoTo Meeting, which includes its related offerings GoTo Room and GoTo Webinar. GoTo Meeting also features Smart Assistant that has built-in note taking, transcription, and action items. For webinars, GoTo Webinar is easy to configure and easy to operate and is often ideal for SMBs that have limited staff.

One of the shifts in go to market has been more focus on industries. GoTo now focuses on five industry markets, including automotive, education, healthcare, legal and professional services. Besides GoTo Meeting the GoTo family of products includes GoTo Connect, GoTo Room, GoTo Training, GoTo Webinar, and GoTo Contact Center.

Strengths

- UCaaS offering
- Brand awareness
- Web and video conferencing install base
- Integrations
- Analytics
- Ease of use

Challenges

- Focus on team collaboration

Mitel

Mitel named a new President and CEO, Tarun Loomba, in November 2021. At nearly the same time, Mitel announced a major new UCaaS partnership with RingCentral. The Mitel portfolio of offerings now includes applications, collaboration, contact center, unified communications platforms and solutions + cloud UCaaS via the RingCentral partnership. Mitel is focused on providing an extensive range of unified communications choices to customers who require a “dedicated instance” (vs. multi-tenant) for their unified communications platforms and applications. To serve different customers, Mitel offers depth and breadth in deployment options: public cloud (AWS, Azure, Nutanix), private cloud (partner or customer datacenters) and of course on-premise for all its Unified Communications solutions. It also offers flexible CapEx and OpEx/Subscription commercial models for every solution to serve every company’s unique needs.

This positions Mitel well to take advantage of the growing demand for hybrid cloud needs of enterprises that want to take advantage of both cloud and on-premise offerings.

As of June 2022, Mitel stopped offering new contracts for its UCaaS product, MiCloud Connect. Mitel will continue to support MiCloud Connect for existing customers. Mitel offers its in-house MiCloud Connect Contact Center CCaaS solution as well as RingCentral’s CCaaS for customers migrating to RingCentral MVP as well as MiContact Center Business and Enterprise for its UC platforms.

Mitel launched a new Developer Program that provides its open communication and collaboration APIs to technology partners, channel partners and customers who choose to develop upon them to build enhanced and tailored comms and collaboration applications and integrations.

Mitel leverages its growing partner network to offer a variety of solutions in education, government healthcare, and hospitality. The new UCaaS partnership with RingCentral in combination with Mitel’s UC&C, as well as public, private, and hybrid cloud deployment options makes Mitel a provider to watch.

Strengths

- Cloud and on-premise voice support
- Global cloud infrastructure
- Hybrid cloud API marketplace accessible to on-site customers
- Endpoints
- Global partner ecosystem

Challenges

- Overall focus on video

NEC

NEC, one of the largest multi-national providers of IT infrastructure and communications continues to win in the SMB segment with its UNIVERGE communications portfolio. NEC offers a hybrid set of offerings, including its SL, SV and 3C premise-based offerings, as well as its UNIVERGE BLUE Cloud offering, which is powered by its partner Intermedia. UNIVERGE BLUE CONNECT offers a full set of capabilities, including cloud communications (UCaaS), messaging, and meetings. UNIVERGE BLUE ENGAGE is a complete cloud-based contact center.

NEC focuses on a number of vertical industries, including education, government, healthcare, and retail. Besides its UC&C platform, NEC continues to offer a full set of handsets for large and small enterprises. Additionally, NEC has been investing in computer vision and offers its NeoFace analytics NeoFace Welcome and NeoFace Watch for facial recognition. Combined with UNIVERGE BLUE CONNECT, these offerings will help NEC expand its solution portfolio in its vertical markets, especially government, healthcare, and retail.

The demand for hybrid cloud-based UC&C offerings continues to grow. NEC is well positioned to continue to win in the SMB market. Aragon expects to see many NEC on-premise customers opt in for the UNIVERGE BLUE CONNECT 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, led by CEO Thomas Gorny, has seen solid growth due to its focus on the UC&C market and has gotten additional Investment to enable that. In November 2021, Nextiva announced a funding round of \$200 Million from Goldman Sachs to help power the next round of growth. In July 2022, Nextiva announced its new work hub offering that consolidates all forms of communication in a single place to one unique experience for cloud-based telephony and complete communications platforms that focus on customer engagement. Nextiva has grown organically to over \$200 Million in revenue, in part due to its experienced management team.

The Nextiva Digital Work Hub is focused on reducing the number of applications users have to deal with on a daily basis. It includes Voice, Text, Email, Video meetings and rooms all in one platform. Nextiva's overall growth has been powered by its UCaaS-based business phone service, including cloud PBX and SIP trunking, as well as chat and CRM. Finally, Nextiva is offering its cloud-based contact center offering with attractive pricing.

The Nextiva Digital Work Hub still offers individual products such as its flagship phone system, but increasingly focuses on Sales, Service, Customer Experience and Contact Center use cases.

Strengths

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

Challenges

- Focus on video use cases

Atos/Unify

Atos announced its intent to split into two operating units in the next fiscal year. It named two Deputy CEOs in the process. Nourdine Bihmane was named as CEO of Tech Foundations and Philippe Oliva is CEO of SpinCo, which will focus on transformation, big data, and cybersecurity. Atos Unify, which is a wholly owned subsidiary of Atos, is providing remote and distributed work solutions, connecting the entire workforce. Unify Office, which is powered by its partnership with RingCentral is the flagship cloud offering, including Unify Video, which is the sub-offering that works in conjunction with the Atos Unify OpenScape hardware and software hybrid cloud options.

One of the key focus areas of Atos Unify is industry verticals, including Financial Services and Insurance, Healthcare and Life Sciences, Public Sector and Defense, Telecom, Media and Entertainment, Manufacturing, Energy and Utilities, as well as Transport, Logistics and Retail. The overall shift by Atos to focus on industries will help Atos offer more tailored solutions to business buyers that are more focused on results versus just the technology. The Atos Unify historical strengths in Healthcare and Government bodes well for the other industry verticals.

One of the other strengths of Atos Unify is its ability to support resilient communications, which is important for large enterprises, governments, and higher education. Being able to react to incidents with alarms and alerts is becoming a more important set of criteria that not all providers can meet. With security becoming more important overall, Atos Unify hybrid capabilities (cloud and on-premise) makes it one to watch in an era of heightened risks tied to cyber-attacks.

Strengths

- UC&C expertise with OpenScape
- Global Partnerships
- Messaging capabilities
- Mission-critical and vertical industry solutions
- PaaS platform (AOP) and integration capabilities with the wider ecosystems
- Cloud deployment options

Challenges

- Overall focus on video

UC&C and the Digital Enterprise—Communications for Hybrid Work

With an urgent need for remote work support around the globe today, one of the best ways enterprises can enable their remote teams is through the communication modalities of a UC&C platform. As providers shift from feature focus to a customer needs focus, not all offerings will necessarily be called a UC&C platform. However, the best of breed era is winding down and platforms that deliver omni-channel communication and collaboration are positioned well for the future.

In some industries, some providers will be a better fit due to their expertise and unique requirements. At the same time, buyers need to realize that not every UC&C suite can deliver a perfect people-centric collaboration experience, though most are well on their way.

Aragon Advisory

- Enterprises should look to eliminate as many siloed communication and collaboration experiences as possible—opting for vendors that can offer great experiences across voice, chat, video and more.
- Enterprises should evaluate UC&C providers for their current and their extended roadmap, including global availability and advanced AI capabilities.
- The shift to digital work hubs means that UC&C providers may be better suited to meet the needs of a business unit or an entire enterprise, particularly as industry clouds come online.

Bottom Line

The hybrid work era we are in now means that communications and collaboration capabilities are more vital than ever. While video and chat continue to challenge voice and email for the most used modality, the key focus needs to be on the ability to offer multiple communication capabilities and not force users to switch apps constantly. Enterprises should look to standardize around 1-2 key UC&C providers to ensure both redundancy and global availability.

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).
 - 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.